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

COMMANDING OFFICER
U. S. COAST GUARD
PERSONNEL SERVICE CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: P&D
Phone: 785 339-2214

PSCNOTE 1000
14 June 2007

CANCELLED:
13 June 2008

PERSONNEL SERVICE CENTER NOTICE 1000

Subj: CH-13 TO PSCINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose

This notice publishes changes to PSCINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action

Addressees shall enter page changes as indicated in the Procedure section of this Notice. No paper distribution will be made of this Notice. Official distribution will be via the Coast Guard Personnel Service Center's web site: http://www.uscg.mil/hq/psc/3pm.asp.

3. Directives Affected

E-Mail ALSPO Message G/06, PCS Entitlements and SPO Instructions for Personnel Reporting to Patrol Forces Southwest Asia and Cutters Supporting Operation Iraqi Freedom, is cancelled. The contents of the message are now in Chapter 2-F of the Personnel and Pay Procedures Manual.

4. Summary of Changes

A side bar in the margin marks the significant changes. Significant changes include:

Chapter 1: Added procedures for contacting PSC Customer Care. Refined procedures for authorizing Direct-Access Command, HRS (SPO), and HRSUP (SPO Supervisor/Auditor) role users. Updated list of directives referenced in the PPPM. Added CG PSC worksheets to list of forms referenced in the PPPM. Added "*Worksheets*" to section title beginning on page 1-20.

Continued on next page

DISTRIBUTION - SDL No. 146 (Note: This notice distributed electronically only, see paragraph 7 for ordering reprints)

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	3		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION:

4. Summary of Changes (cont'd)

Chapter 2-A: Incorporated policies and procedures for obtaining Official Passports as promulgated in ALCOAST 113/07. Added new step, on PCS Departing Checklist, to notify ESU when member departs, IAW ALCOAST 389/06. Added note on the PCS Reporting Checklist to notify CGPC (OPM-2) when a PHS Officer reports, they are the SPO for PHS Officers. Updated Overseas Departing Checklist with input provided by the Overseas Work Group and per CG Personnel Manual 4-H-2. Corrected list of auto-stops of pay entitlements on page 2-A-8, adding: Diving Duty Pay, Foreign Language Proficiency Pay, Hazardous Duty Incentive Pay for Visit, Board, Search & Seizure, Flight Deck Hazardous Incentive Pay and State Income Tax Withholding exclusion. Added members may check the status of their advance of funds requests and payment summaries in T-PAX on page 2-A-12.

Chapter 2-B: Added a note to the TDY Checklists to show that only a copy of the amended/annotated orders needs to be sent to the SPO. Updated reference in Step 4 of TDY Return checklist. Updated reference in Step 2 of TDY Duty Site checklist.

Chapter 2-D: Changed definition for term for long-term ADSW to reflect 181 days. Updated accounting data examples.

Chapter 2-E: Corrected process block, on page 2-E-2, to show that ISCs, not CGPC will release message traffic with timeline and deadlines.

Chapter 2-F: Incorporates the contents of E-Mail ALSPO Message G/06, PCS Entitlements for Members Ordered to Patrol Forces Southwest Asia

Chapter 3-A: Added, on the Responsibility table for Types of Accessions, page 3-A-4, that the unit's SPO shall input the accession when an officer comes from the civilian sector or other military service and reports directly to their first unit prior to attending the DCO course.

Chapter 3-B: Updated hyperlinks to Direct Access Online Manual and other directives. Updated e-mail address for PSC (ses) (PSC-PF-SES@uscg.mil). Removed e-mail address from Exhibit 3-B-2. Cancellation of separation orders are to be reported by message, not e-mail. Removed requirement to complete CG Form 5507 (PMIS/JUMPS Entitlement Validation) from Checklist for Separations (#17). Form is obsolete. Added "*Counsel member on Assignment to the IRR*" to the Checklist for RELAD.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 5-A: Added change to the amount for combat SGLI and changed requirement from witness to sign and date SGLV-8286 to unit representative requirement to sign and date upon receipt.

Chapter 5-B: Added SGLV-8286A, Family Coverage Election (SGLI), to list of forms required to be reviewed or submitted when a member reports a change in dependency. Updated references to forms and worksheets (5-B-3) to include COMDTINST M5512.1 (series) (ID Card Inst.). Introduction rewritten to clarify that documentation is required when there is a need to verify dependency (e. g. When a child turns 21) in addition to the need for documentation when adding a new dependent. Added documentation requirements for applying for an ID card for a child age 21 or 22 who is a full-time student and dependent on the member for over one-half support.

Chapter 5-C: Added requirement for single members with dependents and member married to member with dependents to annually certify availability for worldwide assignment IAW CG Personnel Manual 4.A.6.g, to annual validation procedures. Added information about unit/command access to SWE PDEs in Direct Access to the PDE instructions on page 5-C-9. Updated filing location of forms SF-312 and CG-5588 to the information on Security Clearances on page 5-C-10.

Chapter 5-D: Added section on Common Access Cards (CAC). Preserved instructions for manual preparation of the DD Form 2 CG (Active ID Card) for afloat unit to use when an ID card is needed a no RAPIDS facility is available. Removed section on Personal Clothing and Equipment Record (AF Form 538). Chapter 3-B of COMDTINST 10470.10(series), Rescue and Survival Systems Manual, provides policies and procedures for the use of this form. Added section on Issuance of Official Passports.

Chapter 6-A: Changed PSC point of contact for non-receipt of LESs and request for NPAMs to Customer Care.

Chapter 6-B: Changed PSC point of contact for requests for special payments to Customer Care. Removed page 6-B-9, Retired Pay Projection Request, members may use online calculators to obtain retirement estimates.

Chapter 6-C: Changed PSC point of contact for off-line payment requests to Customer Care.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 6-D: Updated discussion section of Annual Reserve Retirement Points Statement (CG-4175A) to reflect that forms are no longer sent to the SPO for filing in the PDR.
Chapter 7-A: Added procedures for Combat-Related Injury Rehabilitation Pay (CIP) and Foreign Language Proficiency Pay (FLPP).

Chapter 7-B: Added procedures for Family Separation Housing and Combat SGLI Allowance.

Chapter 8-A: Changed PSC point of contact for reporting non-receipt of an allotment from PSC (MAS) to PSC (CCB).

Chapter 8-B: Verified and updated hyperlinks in the State Tax Listing to state revenue departments. Added link to Puerto Rico website. Changed form number for California state tax withholding request to Sate Form EDD DE4. Added Ohio as a state the exempts active duty military pay from tax if member is not stationed in the state. Added reference to Combat SGLI Allowance to procedures for Combat Tax Exclusion. Corrected W-2 Block reference for Adoption Assistance Benefits from 13.T to 12.T.

Chapter 8-C: Updated TSP contribution limits with 2007 amounts.

Chapter 9-A: Changed collection rules to reflect 20% of available pay per Public Law 109-364.

Chapter 9-B: Removed "*…temporary officers holding a permanent enlisted status…*" from "Who Can Apply [for Remissions]. Changed PSC point of contact to PSC (CCB). Eliminated SPO Endorsement requirement for both Remissions and Waivers. Form CG-5489A, Waiver/Remissions Application, SPO Endorsement, is hereby cancelled.

Chapter 10-B: Added section on confinement processing. Updated staff symbol for distribution of CG-5588 to COMDT (CG-862).

Chapter 11: Updated duration of Title 14 orders from 30 days per four-month period to 60 days and from 60 days per two year period to 120 days. Replaced "BAH II" with "BAH-RC". Added OHA as an entitlement for Title 14 orders. Updated BAH-RC entitlement from 31 days to 60 days or less. Added Combat SGLI Allowance as an entitlement. Added PSC form 5150 to section on Civilian Clothing Monetary Allowance. Changed references to UTS to T-PAX. Added TRICARE Early ID Program and Reserve Income Replacement Program.

Continued on next page

4. Summary of Changes (cont'd)

Enclosure 4: Updated phone numbers for PSC (CCB) and (RAS) and Coast Guard Personnel Command (RPM). Added additional information on member responsibilities to the Standard Separation Letter for members released from active duty and transferred to the Coast Guard Reserve (IRR).

Enclosure 6: Added new CG-3307 example entries for Performance and Discipline (P&D-1A, P&D-1B and P&D-1C) and removed option for transfer to the IRR on P&D2, per the new weight policy COMDTINST M1020.8F. Removed CG-3307 example entries ACC-9, ACC-12, ACC-13 and ACC-15, which are no longer needed per the new Recruiting Manual, COMDTINST M1100.2E. Removed "Command request for failure to meet SELRES satisfactory participation" from A&T10 (Transfer to the IRR). Per Reserve Policy Manual, COMDTINST M1000.28(series), chapter 5.B.2, members are not authorized to transfer to the IRR for failure to meet SELRES satisfactory participation standards. Added requirements to document counseling members who are released from active duty and transferred to the IRR on their responsibilities while assigned to the IRR to the SEP-10 example entry.

Appendix C: Corrected page numbers on contents page and shortened steps to determine Expiration of Enlistment for computation of service.

Appendix F: Changed process for special leave accrual to show these adjustments will not be made until after the **March** end-month compute cycle, and will be reflected on the **April** LES of qualifying members.

5. Procedure

Remove and insert the following pages.

Remove	Insert
Table of Contents i thru viii	Table of Contents i thru viii
Pages 1-1 thru 1-21	Pages 1-1 thru 1-29
Pages 2-A-1 thru 2-A-11	Pages 2-A-1 thru 2-A-12
Pages 2-B-19 thru 2-B-20	Pages 2-B-19 thru 2-B-20
Pages 2-B-35 thru 2-B-36	Pages 2-B-35 thru 2-B-36
Pages 2-B-43 thru 2-B-44	Pages 2-B-43 thru 2-B-44
Pages 2-D-1 thru 2-D-9	Pages 2-D-1 thru 2-D-9
Pages 2-E-1 thru 2-E-2	Pages 2-E-1 thru 2-E-2
N/A (New section added)	Pages 2-F-1 thru 2-F-16
Pages 3-A-3 thru 3-A-4	Pages 3-A-3 thru 3-A-4
Pages 3-B-1 thru 3-B-28	Pages 3-B-1 thru 3-B-28

Continued on next page

5. Procedure **(continued)**

Remove	Insert
Pages 4-C-1 thru 4-C-2	Pages 4-C-1 thru 4-C-2
Pages 4-C-5 thru 4-C-6	Pages 4-C-5 thru 4-C-6
Pages 5-A-3 thru 5-A-4	Pages 5-A-3 thru 5-A-4
Pages 5-A-7 thru 5-A-10	Pages 5-A-7 thru 5-A-10
Pages 5-B-1 thru 5-B-10	Pages 5-B-1 thru 5-B-10
Page 5-B-17 (Reverse blank)	Page 5-B-17 (Reverse blank)
Pages 5-C-3 thru 5-C- 4	Page 5-C-3 thru 5-C-4
Pages 5-C-9 thru 5-C-10	Pages 5-C-9 thru 5-C-10
Pages 5-D-1 thru 5-D-10	Pages 5-D-1 thru 5-D-10
N/A (New section added)	Page 5-D-21
Pages 6-A-3 thru 6-A-5 (Reverse blank)	Pages 6-A-3 thru 6-A-5 (Reverse blank)
Pages 6-B-1 thru 6-B-9	Pages 6-B-1 thru 6-B-8
Pages 6-C-3 thru 6-C-4	Pages 6-C-3 thru 6-C-4
Pages 6-D-13 thru 6-D-14	Pages 6-D-13 thru 6-D-14
Pages 7-A-1 thru 7-A-10	Pages 7-A-1 thru 7-A-15
Pages 7-B-1-thru 7-B-4	Pages 7-B-1 thru 7-B-4
Pages 7-B-7-thru 7-B-8	Pages 7-B-7 thru 7-B-8
Page 7-B-9 (Reverse blank)	Pages 7-B-9 thru 7-B-13
Pages 8-A-5 thru 8-A-6	Pages 8-A-5 thru 8-A-6
Pages 8-B-3 thru 8-B-8	Pages 8-B-3 thru 8-B-8
Pages 8-B-11 thru 8-B-14	Pages 8-B-11 thru 8-B-14
Pages 8-C-3 thru 8-C-6	Pages 8-C-3 thru 8-C-6
Pages 9-A-1 thru 9-A-4	Pages 9-A-1 thru 9-A-4
Pages 9-B-1 thru 9-B-3	Pages 9-B-1 thru 9-B-3
Pages 10-B-1 thru 10-B-4	Pages 10-B-1 thru 10-B-4d
Pages 10-B-13 thru 10-B-16	Pages 10-B-13 thru 10-B-16
Pages 11-1 thru 11-54	Pages 11-1 thru 11-54
Enclosure (4), pages E-4-1 thru E-4-10	Enclosure (4), pages E-4-1 thru E-4-11
Enclosure (6), pages E-6-1 thru E-6-51	Enclosure (6), pages E-6-1 thru E-6-51
Enclosure (7), pages E-7-1 thru E-7-2	Enclosure (7), pages E-7-1 thru E-7-2
Appendix (c), pages C-1 thru C-2	Appendix (c), pages C-1 thru C-2
Appendix (c), pages C-35 thru C-36	Appendix (c), pages C-35 thru C-36
Appendix (f), pages 15 thru 16	Appendix (f), pages 15 thru 16
Index, pages I-1 thru I-8	Index, pages I-1 thru I-8

Continued on next page

6. Environmental aspect and impact considerations

Environmental considerations were examined in the development of this notice and have been determined to be not applicable.

7. Forms and Reports

CG PSC forms and worksheets are available on the internet at http://www.uscg.mil/hq/psc/forms/. PSC forms and worksheets are no longer published or maintained in enclosure (1) of the PPPM.

Other forms referenced in this Manual are available in USCG Adobe Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

8. Printed Copies

Printed copies of the PPPM are not available. Official distribution is through the PSC web site at http://www.uscg.mil/hq/psc/3pm.asp. The manual is available on compact disk (CD) to deployable units and others with limited connectivity to the Coast Guard Data Network. Submit requests for CDs, via mail, phone, e-mail or fax, to:

Commanding Officer (P&D)
U. S. Coast Guard Personnel Service Center
444 S E Quincy St.
Topeka, KS 66683-3591
E-Mail: PSC-PF-PD@uscg.mil
Fax: 785/339-3772
Tel: 785/339-2200

9. Comments and Recommendations

The next change to the PPPM is expected to be completed by 1 May 2008. **PSC encourages user recommended revisions and corrections to the Personnel and Pay Procedures Manual**. Comments or recommendations may be submitted by returning the comment form in Enclosure (11) of the manual or by sending an e-mail to PSC (P&D) at PSC-PF-PD@uscg.mil. Items received by 1 February 2008 will be considered for inclusion in the next change.

/s/
V. M. WEBER

This page blank

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

COMMANDING OFFICER
U. S. COAST GUARD
PERSONNEL SERVICE CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: P&D
Phone: 785 339-2214

PSCNOTE 1000
29 March 2006

CANCELLED:
28 March 2007

PERSONNEL SERVICE CENTER NOTICE 1000

Subj: CH-12 TO PSCINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose

This notice publishes changes to PSCINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action

Addressees shall enter page changes as indicated in the Procedure section of this Notice. No paper distribution will be made of this Notice. Official distribution will be via the Coast Guard Personnel Service Center's web site: http://www.uscg.mil/hq/psc/3pm.htm.

3. Directives Affected

None.

4. Summary of Changes

A side bar in the margin marks the significant changes. Significant changes are summarized as follows.

Section 2-A; Updated references and links on PCS Checklists. Added procedure for requesting advance PCS travel funds via FAX.

Section 2-B; Replaced references to *Unit Travel System (UTS)* with *Travel Preparation and Examination System (T-PAX).* Updated audit procedures and added sample statements to use when original orders or receipts are lost or missing.

Section 2-E; Added section on Selected Reserve Assignments and Transfers.

Page 3-B-18; Added a link to Preseparation Counseling Checklist (DD-2648-1) for Reserve members demobilizing or separating from active duty of 140 or more days.

Continued on next page

DISTRIBUTION - SDL No. 143 (Note: This notice distributed electronically only, see paragraph 7 for ordering reprints)

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	3		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION:

4. Summary of Changes (cont'd)

Page 3-B-19; Added a reference to DD-2648-1.
Page 3-C-3; Added line to verify U.S. citizenship prior to allowing reenlistment or extension of enlistment.
Page 5-A-4; Increased SGLI coverage from $250,000 to $400,000
Page 5-A-6; Updated SGLI distributions.
Pages 5-A-9 and 5-A-10; Updated SGLI distributions. Added Spousal Notification requirement and sample letter.
Page 5-C-2; Changed begin date for Annual Validation of BAH/Dependency/ Emergency Data to 1 October.
Page 5-C-7; Added Privacy Act Release Statement format to use when requesting a Statement of Creditable Service.
Page 5-D-14; Changed notification time from 48 to 24 hours. Removed overpayment statistic.
Page 5-D-15; Changed wording in Step 2 of Notifying the SPO from "Applicable BAH code description" to "Exact BAH code description", with example. Removed sentence regarding agreement between housing officials and servicing SPO.
Page 6-B-3 thru 6-B-5; Updated criteria, and added format template, for requesting Special Payments.
Page 6-D-15; Updated procedure for SPO to generate a copy of the CG-4175A.
Page 8-B-10; Updated Combat Tax Exclusion rules.
Section 8-C: Rewritten to incorporate elimination of TSP open seasons and other program improvements.
Pages 9-B-2 and 9-B-3; Updated forms and procedures used for Waivers and Remissions.
Page 10-A-3 and 10-A-4; Added a reference to the Award Codes in an Excel spreadsheet. Added hyperlinks to Enlisted Employee Review Worksheets.
Page 10-A-8; Updated EERW guidelines for reservists to reflect information in CG Personnel Manual.
Page 10-B-8; Updated DD-553 distributions.
Page 11-12; Corrected requirements for entitlement to lump sum leave.
Page 11-21; Added Educational Assistance to entitlements table.
Page 11-24; Added Tricare Reserve Select Program and Educational Assistance counseling to the Mobilization checklist.
Page 11-49; Added Tricare Reserve Select Program counseling to the Demobilization checklist.
Enclosure 6; Updated P&D-1 thru P&D-4 with correct reference.
Enclosure 6; Pages 45 and 46: Updated ALCOAST reference.

Continued on next page

5. Procedure Remove and insert the following pages.

Remove	Insert
Table of Contents i thru viii	Table of Contents i thru viii
Page 2-1 (reverse blank)	Page 2-1 (reverse blank)
Pages 2-A-1 thru 2-A-6	Pages 2-A-1 and 2-A-6
N/A (New page added)	Page 2-A-11 (reverse blank)
Pages 2-B-1 and 2-B-2	Pages 2-B-1 and 2-B-2
Pages 2-B-5 thru 2-B-47	Pages 2-B-5 thru 2-B-47
Pages 2-D-5 thru 2-D-6	Pages 2-D-5 thru 2-D-6
N/A (New section added)	Pages 2-E-1 thru 2-E-17
3-A-5 (reverse blank)	3-A-5 (reverse blank)
Pages 3-B-11 and 3-B-12	Pages 3-B-11 and 3-B-12
Pages 3-B-17 thru 3-B-20	Pages 3-B-17 thru 3-B-20
Pages 3-C-3 and 3-C-4	Pages 3-C-3 and 3-C-4
Pages 4-C-3 and 4-C-4	Pages 4-C-3 and 4-C-4
Pages 5-A-1 thru 5-A-14	Pages 5-A-1 thru 5-A-15
Page 5-B-17 (reverse blank)	Page 5-B-17 (reverse blank)
Pages 5-C-1 thru 5-C-8	Pages 5-C-1 thru 5-C-8
Pages 5-D-3 thru 5-D-6	Pages 5-D-3 thru 5-D-6
Pages 5-D-13 thru 5-D-16	Pages 5-D-13 thru 5-D-16
Pages 6-B-1 thru 6-B-8	Pages 6-B-1 thru 6-B-9
Pages 6-D-15 and 6-D-16	Pages 6-D-15 and 6-D-16
Pages 7-A-7 and 7-A-8	Pages 7-A-7 and 7-A-8
Pages 8-B-9 and 8-B-10	Pages 8-B-9 and 8-B-10
Pages 8-C-1 thru 8-C-4	Pages 8-C-1 thru 8-C-9
Pages 9-B-1 thru 9-B-4	Pages 9-B-1 thru 9-B-4
Pages 10-A-3 and 10-A-4	Pages 10-A-3 thru 10-A-9
Pages 10-B-7 and 10-B-8	Pages 10-B-7 and 10-B-8
Pages 11-5 and 11-6	Pages 11-5 and 11-6
Pages 11-11 and 11-12	Pages 11-11 and 11-12
Pages 11-21 thru 11-24	Pages 11-21 thru 11-24
Pages 11-49 and 11-50	Pages 11-49 and 11-50
Enclosure (1), Pages E-1-1 and E-1-2	Enclosure (1), Pages E-1-1 and E-1-2
Enclosure (6), Pages E-6-1 and E-6-2	Enclosure (6), Pages E-6-1 and E-6-2
Enclosure (6), Pages E-6-15 thru E-6-48	Enclosure (6), Pages E-6-15 thru E-6-51
Appendix (F), Pages F-15 and F-16	Appendix (F), Pages F-15 and F-16
Index, Pages I-1 thru I-8	Index, Pages I-1 thru I-8

6. Forms and Reports

CG PSC forms and worksheets are available on the internet at http://www.uscg.mil/hq/psc/forms/. PSC forms and worksheets are no longer published or maintained in enclosure (1) of the PPPM.

Other forms referenced in this Manual are available in USCG Adobe Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

7. Printed Copies

Printed copies of the PPPM are not available. Official distribution is through the PSC web site at http://www.uscg.mil/hq/psc/3pm.htm and CG Central (http://cgcentral.uscg.mil). The manual is available on compact disk (CD) to deployable units and others with limited connectivity to the Coast Guard Data Network. Submit requests for CDs, via mail, phone, e-mail or fax, to:

Commanding Officer (P&D)
U. S. Coast Guard Personnel Service Center
444 S E Quincy St.
Topeka, KS 66683-3591
E-Mail: PSC-PF-PD@uscg.mil
Fax: 785/339-3772
Tel: 785/339-2200

8. Comments and Recommendations

Comments or recommendations may be submitted by returning the comment form in Enclosure (11) of the manual.

V. M. Weber

V. M. WEBER

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

COMMANDING OFFICER
U. S. COAST GUARD
PERSONNEL SERVICE CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: P&D
Phone: 785 339-2214

PSCNOTE 1000
15 April 2005

CANCELLED:
14 October 2005

PERSONNEL SERVICE CENTER NOTICE 1000

Subj: CH-11 TO PSCINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose

This notice publishes changes to PSCINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action

Addressees shall enter page changes as indicated in the Procedure section of this Notice. No paper distribution will be made of this Notice. Official distribution will be via the Coast Guard Personnel Service Center's web site: http://www.uscg.mil/hq/psc/3pm.htm.

3. Directives Affected

None.

4. Summary of Changes

A side bar in the margin marks the significant changes. Significant changes are summarized as follows.

Continued on next page

DISTRIBUTION - SDL No. 141 (Note: This notice distributed electronically only, see paragraph 7 for ordering reprints)

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	3		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION:

4. Summary of Changes (cont'd)

Pages 1-16 thru 1-18; Updated references to reflect the proper SSIC numbers.
Page 2-A-2 thru 2-A-3: Added Note: **"**Do not delete any notes appended by AOs to the orders. These notes should not be deleted without CGPC approval."
Page 2-A-4 thru 2-A-5; Added a step to the PCS departing/reporting checklists to update reservists Training/Pay Code if needed. Updated PSC Report step 15, when EERs are required upon PCS.
Page 2-A-6; Added the requirement and reference for the new Overseas Screening for Active Duty Dependents form.
Page 2-B-1; Updated section page numbers.
Page 2-B-9; Replaced Trouble Ticket Email address with www address.
Page 2-B-20; Added section on the UTS Audit Request Information Package.
Page 2-B-29; Added reference table.
Page 2-B-30; Added new required entry to block 12 of the TDY Travel orders.
Page 2-B-36 thru 2-B-40; Added reference table.
Page 2-B-42; Replaced Trouble Ticket Email address with www address.
Page 2-B-45; Added reference table.
Page 2-C-1; Section page numbers updated
Page 2-C-2 thru 2-C-5; Added references, hyperlinks, DA path and updated ADT Process to reflect procedures developed during the most recent reserve conference.
Page 2-C-7; Added hyperlinks and DA navigation. Deleted ASQ information that was obsolete.
Page 2-C-8; Updated ASQ procedures.
Page 2-D-1 thru 2-D-5; Updated references.
Page 2-D-6 thru 2-D-9; Updated ADSW-AC procedures.
Page 3-A-2; Added reference table and a note that these accession procedures are only used for direct enlistment personnel.
Page 3-A-3; Updated stage 3 to reflect Direct Access requirements.
Page 3-B-1; Updated table of contents page numbers.
Page 3-B-2; Requests for a later discharge date must go to CGPC (EPM-1 or OPM-1)
Page 3-B-5; Added a reference table and links. Deleted HRSIC-SES email description.
Page 3-B-15; Added a reference table and links and updated SBP election information.
Page 3-B-16; Added a reference table and links.
Page 3-B-20; Added Direct Access references.
Page 4-A-2; Added a reference table.
Page 4-B-3; Changed "promotion" to "appointment".
Page 4-B-5; Changed "promotion" to "appointment".

Continued on next page

4. Summary of Changes (cont'd)

Chapter 4-C; Deleted VEAP to MGIB conversion section. Program is no longer in effect.
Page 4-C-1; Section page numbers updated.
Page 4-C-4; Added a reference table, deleted small arms qualification table with instructions to now check the Small Arms Training Manual.
Page 4-C-6; VEAP refunds are sent to PSC (DC) vice PSC (MAS).
Page 4-C-7; Added Direct Access guide link and transaction path.
Page 4-C-8; Added reference table and Direct Access path table.
Page 5-A-1; Section page numbers updated.
Page 5-A-2; Added Direct Access reference and link.
Page 5-A-4; Updated SGLI references and coverage sections.
Page 5-A-5 thru 5-A-6; Updated SGLI procedures.
Page 5-A-7; Updated SGLI designation sections.
Page 5-A-9; Added Direct Access path.
Page 5-A-10; Added additional references.
Page 5-A-11; Deleted info quoted from the SGLI Handbook.
Chap 5-B; Deleted majority of the Tricare Dental section. Section was quoting info verbatim from the Tricare Handbook and Tricare Dental Handbook.
Page 5-B-1; Section page numbers updated.
Page 5-B-4; Added reference table.
Page 5-B-9; Added reference to COMDTINST M5512.1A.
Page 5-B-11; Added reference table.
Page 5-B-12; Deleted 1173-1 preparation instructions and directed to use COMDTINST M5512.1A, Identification cards for members of the uniformed services, their eligible family members, and other personnel.
Page 5-B-13; Expanded reference table.
Page 5-B-14; Deleted Privileges Authorized table and directed to use COMDTINST M5512.1A, Identification cards for members of the uniformed services, their eligible family members, and other personnel.
Page 5-C-2; Added Direct Access to the reference table.
Page 5-C-6; Added Direct Access navigation to the Statement of Creditable Service.
Page 5-C-8; Added Direct Access reference and navigation.
Page 5-C-9; Added Direct Access navigation and updated note to reflect it is the member's responsibility to ensure PDEs are correct.

Continued on next page

4. Summary of Changes (cont'd)

Page 5-D-11; Deleted step-by-step instructions for mailing addresses and add a link to the DA guide.
Page 5-D-13; Added Direct Access reference and included hyperlinks.
Page 6-A-2; Added reference table and DA navigation.
Page 6-A-3; Hyperlinked references and added DA navigation.
Page 6-B-1; Section page numbers updated.
Page 6-B-3; Added reference table.
Page 6-B-5; Deleted allowance table and amounts payable.
Page 6-C-2; Deleted majority of the Sea Pay information repeated from the Payman.
Page 6-D-1; Section page numbers updated.
Page 6-D-4 thru 6-D-5; Extensive updates to the IDT Process table.
Page 6-D-7; Deleted sample drill order info.
Page 6-D-9; Formatting correction to the Supervisor Endorsement on IDT Orders sample.
Page 7-A-2 thru 7-A-6; Updated references and added DA navigation table.
Page 7-A-8; Updated references.
Page 7-A-9; Hyperlinked references and added DA navigation table.
Page 7-B-1; Section page numbers updated.
Page 7-B-2; Updated references and added DA navigation table.
Page 7-B-3; Updated references and added DA navigation table. Changed "Types of FSA" description and "Eligibility of FSA Entitlement" description.
Page 7-B-7; Updated references and added DA navigation table.
Page 7-B-8; Updated references and added DA navigation table. Deleted "Background" and "Limitations" fields.
Page 7-B-9; Added hyperlinks and deleted the "Step/Action" table.
Page 7-C-2; Hyperlinked refs. Changed "Rules" field. Updated references and added DA navigation table.
Page 7-D-2 thru 7-D-6; Added hyperlinks. Deleted all information fields up to the Procedures field.
Page 8-A-2; Updated references, added hyperlinks and added DA navigation table.
Page 8-A-4; Added hyperlinks and added DA navigation table.
Page 8-B-11; Updated the maximum amount of Income Tax Exclusion for Duty in Combat Zone for officers to $6529.20.
Chapter 8-C; Removed a majority of the Thrift Savings Plan text that was simply repeating information contained in the PAYMAN.
Page 9-B-2 thru 9-B-3: Updated references.

Continued on next page

4. Summary of Changes (cont'd)

Page 10-A-2: Updated references.
Page 10-A-3: Added reference table and DA path for awards.
Page 10-B-2 thru 10-B-3: Added additional references.
Page 10-B-14 thru 10-B-15: Hyperlinked references. Changed CG-5588 form location to Adobe Forms. Added additional references to the Civil Arrest/Conviction section.
Page 11-1: Chapter overview pages renumbered. Added a new TRICARE benefits section.
Page 11-2 thru 11-4; Mobilization process updated to reflect Direct Access procedures.
Page 11-22: Updated references.
Page 11-26: Condensed the Reserve Orders cell. Detailed instructions are already documented in the Direct Access Guide.
Page 11-28: Condensed the Reserve Orders cell. Detailed instructions are already documented in the Direct Access Guide.
Page 11-32: Updated the page numbers of the reserve orders reference.
Page 11-38: Updated the page numbers of the reserve sample orders reference.
Pages 11-45 thru 11-48: Updated the page numbers of the reserve sample orders reference.
Page 11-48: Updated the page numbers of the Separation Transaction reference.
Page 11-49: Ensure member completes a Career Intentions Worksheet at least 45 days prior to separation or departure on terminal leave.
Page 11-51 thru 11-52: Condensed FSA description cell, and renumbered the steps of the SPO Demobilization Procedures.
Page 11-52: Removed the DA Separation Transaction detail and provided links to the online guide which provides the information.
Page 11-53: Added TRICARE benefits section.
Enclosure 1; Page 1: Removed CG PSC-7210 (PAO designation) form and added the information to form CG PSC 7421/2 (DA and PAO authorization).
Enclosure 1, Form CG PSC-2010; Updated the Advance Worksheet to indicate Advance Pay is authorized for certain members deployed in combat zones.
Enclosure 6; Provided a hyperlink in all Page 7's to a corresponding Word template.

Continued on next page

4. Summary of Changes (cont'd)

Enclosure 6; Page 1: Updated page numbers.
Enclosure 6; Page 5 and 6: Updated restricted ratings for non-U.S. citizens.
Enclosure 6; Page 9 thru 11: Updated references.
Enclosure 6; Page 14 thru 16: Updated references.
Enclosure 6; Page 21 thru 22: Updated references.
Enclosure 6; Page 23: Updated Entry wording for consuming alcohol as a minor.
Enclosure 6; Page 24 thru 31: Updated Entry for various CG-3307s.
Enclosure 6; Page 35: Change to reflect E-Resume vice Assignment Data.
Enclosure 6; Page 36: Entry changed to reflect CGPC-epm vice MPC-epm.
Enclosure 6; Page 42 thru 43: Entry changed to reflect CGPC-epm vice MPC-epm.
Enclosure 6; Page 44: Updated ALCOAST reference.
Enclosure 6; Page 46 thru 47: Updated SELRES Enlisted Bonus entries.

5. Procedure Remove and insert the following pages.

Remove	Insert
Pages 1-7 thru 1-18	Pages 1-7 thru 1-18
Pages 2-A-1 thru 2-A-6	Pages 2-A-1 thru 2-A-6
Pages 2-B-1 and 2-B-2	Pages 2-B-1 and 2-B-2
Pages 2-B-9 and 2-B-10	Pages 2-B-9 and 2-B-10
Pages 2-B-19 thru 2-B-46	Pages 2-B-19 thru 2-B-46
Section 2-C	Section 2-C
Section 2-D	Section 2-D
Pages 3-A-1 thru 3-A-4	Pages 3-A-1 thru 3-A-4
Pages 3-B-1 and 3-B-2	Pages 3-B-1 and 3-B-2
Pages 3-B-5 thru 3-B-10	Pages 3-B-5 thru 3-B-10
Pages 3-B-15 thru 3-B-28	Pages 3-B-15 thru 3-B-28
Pages 3-C-2	Pages 3-C-2
Pages 4-A-1 and 4-A-2	Pages 4-A-1 and 4-A-2
Page 4-B-3 thru 4-B-6	Page 4-B-3 thru 4-B-6
Pages 4-C-1 thru 4-C-12	Pages 4-C-1 thru 4-C-8
Section 5-A	Section 5-A
Section 5-B	Section 5-B
Pages 5-C-1 and 5-C-2	Pages 5-C-1 and 5-C-2
Pages 5-C-5 thru 5-C-10	Pages 5-C-5 thru 5-C-10
Pages 5-D-11 thru 5-D-14	Pages 5-D-11 thru 5-D-14
Pages 6-A-1 thru 6-A-4	Pages 6-A-1 thru 6-A-4
Section 6-B	Section 6-B
Section 6-C	Section 6-C
Section 6-D	Section 6-D
Section 7-A	Section 7-A
Pages 7-B-1 thru 7-B-4	Pages 7-B-1 thru 7-B-4
Pages 7-B-7 thru 7-B-10	Pages 7-B-7 thru 7-B-10
Section 7-C	Section 7-C
Section 7-D	Section 7-D
Pages 8-A-1 thru 8-A-4	Pages 8-A-1 thru 8-A-4
Pages 8-B-11 and 8-B-12	Pages 8-B-11 and 8-B-12
Section 8-C	Section 8-C

Continued on next page

5. Procedure (cont) Remove and insert the following pages.

Section 9-B	Section 9-B
Pages 10-A-1 thru 10-A-4	Pages 10-A-1 thru 10-A-4
Pages 10-B-1 thru 10-B-4	Pages 10-B-1 thru 10-B-4
Pages 10-B-13 thru 10-B-16	Pages 10-B-13 thru 10-B-16
Chapter 11	Chapter 11
Enclosure 1, Pages E-1-1 and E-1-2	Enclosure 1, Pages E-1-1 and E-1-2
Enclosure 1, Form CG PSC-2010	Enclosure 1, Form CG PSC-2010
Enclosure 1, Form CG PSC-7210	
Enclosure 1, Form CG PSC-7421/2	Enclosure 1, Form CG PSC-7421/2
Enclosure 6	Enclosure 6
Index	Index

6. Forms and Reports

CG PSC forms are available on the internet at http://www.uscg.mil/hq/psc/forms/.

Other forms referenced in this Manual are available in USCG Adobe Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

7. Printed Copies

Printed copies of the PPPM are not available.

8. Comments and Recommendations

Comments or recommendations may be submitted by returning the comment form in Enclosure (11) of the manual.

/s/
R. A. ROOTH

This page blank

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

COMMANDING OFFICER
U. S. COAST GUARD
PERSONNEL SERVICE CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: P&D
Phone: 785 339-2214

PSCNOTE 1000
04 October 2004

CANCELLED:
03 October 2005

PERSONNEL SERVICE CENTER NOTICE 1000

Subj: CH-10 TO PSCINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose

This notice publishes changes to PSCINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action

Addressees shall enter page changes as indicated in the Procedure section of this Notice. No paper distribution will be made of this Notice. Official distribution will be via the Coast Guard Personnel Service Center's web site: http://www.uscg.mil/hq/psc/3pm.htm.

The PPPM will be reprinted, with all changes, in November 2004. See Paragraph 7 of this Notice for ordering procedures.

3. Directives Affected

PSCNOTE 5000, BAH, Dependency and Emergency Data Forms and Reports, of 24 October 2003 is cancelled. Its contents have been incorporated into Chapter 5 of the PPPM.

PSCINST M5231.2, Source Data Automation II User Manual is cancelled. The Direct-Access online manual is the official reference for reporting personnel events and transactions.

4. Summary of Changes

A side bar in the margin marks the significant changes. Significant changes are summarized as follows.

Continued on next page

DISTRIBUTION - SDL No. 141 (Note: This notice distributed electronically only, see paragraph 7 for ordering reprints)

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	3		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION:

4. Summary of Changes (cont'd)

Chapter 1, Title updated to *Personnel and Pay Systems Overview*.
Chapter 1, Page 1-2 thru 1-3; Updated responsibilities.
Chapter 1, Page 1-8 thru 1-11; Added procedures for Authorizing Direct-Access Command Users
Chapter 1, Page 1-12 thru 1-13; Added procedures for Designating Direct-Access SPO and SPO Supervisor Users.
Chapter 1, Page 1-14; Added new section, HRS Role User Designation Criteria.
Chapter 2 - A, Page 2-A-2; Updated PCS transfer process to reflect new Direct-Access procedures.
Chapter 2 - A, Page 2-A-3; Added, Employee Review to Step 9 of the PCS Departing Checklist.
Chapter 2 - A, Page 2-A-5; Updated PCS Reporting Checklist to reflect new Direct-Access procedures.
Chapter 2 - A, Page 2-A-7; Changed the auto stop for BAH w/o Depns to "Stops on the day prior to reporting" vice the day prior to departure.
Chapter 2 - A, Page 2-A-8; Clarified the auto stop description for OCOLA, Dive Pay and OHA.
Chapter 2 - B, Page 2-B-9; Added PSC customer care contact number and email address.
Chapter 2 - B, Page 2-B-11 thru 2-B-12; Updated Signature Proxy and Approving Official information.
Chapter 2 - B, Page 2-B-14; Added a Resources row to the Support Services table.
Chapter 2 - B, Page 2-B-17 thru 2-B-19; Updated travel claim audit procedures and guidelines.
Chapter 2 - B, Page 2-B-20; Removed FAX Transmittal of Travel Claims section and replaced with, FAX of PCS Advance Requests and condensed the procedures.
Chapter 2 - B, Page 2-B-22; Added statement that Blanket Travel Orders cannot cross FYs.
Chapter 2 - B, Page 2-B-23; Added statement that travel claims are not required for Group Travel Orders.
Chapter 2 - B, Page 2-B-24 thru 2-B-25; Renamed section to Leave and Liberty Combined With TDY Travel. Updated Rationale statement.
Chapter 2 - B, Page 2-B-29; Updated CG-4251 block 12 requirements.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 2 - B, Page 2-B-31; Letter Travel Orders sample updated to reflect new CG Memo.
Chapter 2 - B, Page 2-B-40; Added statement to include original airfare, or commercial travel, receipts with travel claim.
Chapter 2 - C, Page 2-C-2 thru 2-C-4; Updated ADT Process
Chapter 2 - C, Page 2-C-6 thru 2-C-7; Updated Preparation of Annual Screening Questionnaire.
Chapter 2 - D, Page 2-D-6 thru 2-D-8; Updated ADSW-AC Order processing.
Chapter 3 - A, Page 3-A-1; Deleted Recalled RET-2 topic.
Chapter 3 - A, Page 3-A-2 thru 3-A-3; Updated member process requirements for accession.
Chapter 3 - A, Page 3-A-4; Updated prior service accession description.
Chapter 3 - A, Page 3-A-5; Updated recalled retired members payment method.
Chapter 3 - B, Page 3-B-2; Updated intro to indicate TONOs are auto generated upon completion of the separation orders. Request to change the termination date must be submitted to CGPC (epm-1 or opm-1)
Chapter 3 - B, Page 3-B-3; Updated to indicate an SOI must be submitted 60 prior to separation or departure on terminal leave.
Chapter 3 - B, Pages 3-B-5 thru 3-B-8; Updated immediate and priority separation processing procedures. Notable change: CGPC (epm-1or opm-1) now assigns termination dates.
Chapter 3 - B, Page3-B-10 thru 3-B-11; Updated routine separation processing procedures.
Chapter 3 - B, Exhibit 2-B-2; Deleted example of Requesting A Document Number and Accounting Data.
Chapter 3 - B, Page 3-B-17 thru 3-B-19; Updated separation checklist to reflect Direct-Access procedures.
Chapter 3 - C, Page 3-C-9; Updated reserve RELAD procedures and reserve integration process to reflect new Direct-Access procedures.
Chapter 3, Page 3-B-14; Updated Enlisted to Cadet processing procedures.
Chapter 4 - B, Page 4-B-2 thru 4-B-4; Warrant Officer Appointment Processes and Checklists updated.
Chapter 4 - C, Page 4-C-2; Updated Training and Educational Accomplishments to reflect Direct-Access procedures.
Chapter 4 - C, Page 4-C-6; Deleted requirement to complete an allotment stop for VEAP refunds.
Chapter 4 - C, Page 4-C-7; Updated amount of MGIB Benefits.
Chapter 5 - A; Renamed section to Designation of Beneficiaries and Emergency Data.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 5 - A, Page 5-A-2 thru 5-A-3; Added new procedures to designate beneficiaries and emergency contacts. CG-4170A is obsolete, replaced with Direct-Access and CG PSC-2020D, Designation of Beneficiaries form.
Chapter 5 - A, Page 5-A-5; Updated the address for the Office of VGLI.
Chapter 5 - A, Page 5-A-6; Updated SGLI payment process.
Chapter 5 - A, Page 5-A-7; Tightened the wording of opening paragraph of "Procedures for electing coverage of previously declines SGLI". Added "SGLI is increased or restored effective the date the USCG receives the form".
Chapter 5 - A, Page 5-A-8; Updated "Designating the Beneficiary" to reflect member's rights and authorities.
Chapter 5 - A, Page 5-A-9 thur 5-A-11 ; Updated and clarified the rules for Designating Principal Beneficiaries and the Contingent Beneficiaries. Added section "Changing a Beneficiary and Accepting the SGLV-8286 from the member". Clarified SGLI Family Member Eligibility requirements.
Chapter 5 - A, Page 5-A-13; Added "child SGLI coverage cannot be cancelled". Removed SGLI Family Member cost chart and added a hyperlink the G-WPM website.
Chapter 5 - A, Page 5-A-13; Updated spousal coverage when electing to reduce or decline coverage.
Chapter 5 - A, Page 5-A-14; Updated OSGLI address on the spousal SGLI cancellation letter.
Chapter 5 - B, Page 5-B-1; Added new BAH/Dependency Data Form section to the overview and updated page numbers.
Chapter 5 - B, Page 5-B-3; Updated verification and forms to reflect Direct-Access processes.
Chapter 5 - B, Page 5-B-4 thru 5-B-5; Added BAH/Dependency Data Form section.
Chapter 5 - B, Page 5-B-14; Added statement that the Reserve Family Member ID Card has no authorization for access to military benefits unless accompanied by a set of valid active duty orders or pay voucher.
Chapter 5 - C, Page 5-C-1; Updated overview to reflect new Direct-Access forms and procedures.
Chapter 5 - C, Page 5-C-2 thru 5-C-4; Removed section on CG-4170 and replaced with Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts.
Chapter 5 - C, Page 5-C-5; Removed requirement to request SOCS for "any prior military service" personnel.
Chapter 5 - C, Page 5-C-8; Deleted provision that units will receive PDIFs quarterly.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 5 - D, Page 5-D-1; Added E-Resume and TRICARE Selected Reserve Dental Program to the section overview.
Chapter 5 - D, Page 5-D-3; Updated Preparation of CG-2519 forms to reflect Adobe Forms.
Chapter 5 - D, Page 5-D-4 thru 5-D-5; Condensed procedures for carrying over leave in excess of 60 days.
Chapter 5 - D, Page 5-D-13; Replaced E-Assignment Data Card (E-ADC) with E-Resume.
Chapter 5 - D, Page 5-D-17 thru 5-D-18; Requests for changes to name, SSN, DOB or minority designator no longer go to PSC and are now approved at the unit level and input by the SPO.
Chapter 5 - D, Page 5-D-19 thru 5-D-20; Added TRICARE Selected Reserve Dental Program.
Chapter 6 - A, Page 6-A-3; Added "An abbreviated LES is available for members by using the Direct-Access self-service module".
Chapter 6 - B, Page 6-B-3; Condensed the description for Criteria for Special Payments Due to Nonreceipt of Pay.
Chapter 6 - B, Page 6-B-4; Added new section titled "How special payments are liquidated & posted on the LES.
Chapter 6 - B, Page 6-B-7 thru 6-B-8; Updated advance payments to reflect BAH vice BAQ.
Chapter 6 - B, Page 6-B-9; Updated Death Gratuity information and procedures.
Chapter 6 - C, Page 6-C-2; Removed U.S. Forces Caribbean from Types of Mobile Units.
Chapter 6 - D, Page 6-D-1; Removed Unit Attendance Record section. Updated section overview and page numbers.
Chapter 6 - D, Page 6-D-2; Updated IDT prerequisites.
Chapter 6 - D, Page 6-D-3; Added new section titled "Compensation".
Chapter 6 - D, Page 6-D-4; Changed reserve orders prep from 2 weeks to 1 month prior to drill dates. Condensed and clarified the IDT process.
Chapter 6 - D, Page 6-D-5 thru 6-D-6; Updated Drill Order rules.
Chapter 6 - D, Page 6-D-7; Updated IDT Drill Order Letter to reflect CG Memo format.
Chapter 6 - D, Page 6-D-8; Added SDAP to Supervisor IDT Endorsement sheet.
Chapter 6 - D, Page 6-D-9; Updated IDT Amendment letter to reflect CG Memo format.
Chapter 6 - D, Page 6-D-10; Terminology updates to the IDT Certification Sheet.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 6 - D, Page 6-D-13; Added "SPO will take action to correct discrepancies on the reserve retirement point statement".
Chapter 6 - D, Page 6-D-16; Changed "Notice of Eligibility" to "Notice of Incapacitation Benefits".
Chapter 7 - A, Page 7-A-1; Changed (HFPAY) to "Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)" and Funeral Duty Pay for reservists to "Funeral Honors Duty Allowance for Reservists.
Chapter 7 - A, Page 7-A-2; Added note regarding officer qualification for ACIP.
Chapter 7 - A, Page 7-A-5; Added reference for amount of HDIP.
Chapter 7 - A, Page 7-A-6 thru 7-A-7; Removed HFPAY and inserted Special Pay –Duty Subject to Hostile Fire or Imminent Danger (HF/ID).
Chapter 7 - A, Page 7-A-9 thru 7-A-10; Added processes and procedure for new HDIP-VBSS.
Chapter 7 - B, Page 7-B-1; Changed topic BAS to "Refund for Missed Meals – Discounted Meal Rate (DMR)".
Chapter 7 - B, Page 7-B-2; Updated references and processes to reflect Direct-Access procedures.
Chapter 7 - B, Page 7-B-3; Updated FSA-R definition.
Chapter 7 - B, Page 7-B-10; Added explanation of who is entitled to the Officer Uniform Allowance and how to they will receive it.
Chapter 7 - C, Page 7-C-2; Updated references and qualifying areas for the savings deposit program.
Chapter 7 - C, Page 7-C-4; Added instruction to forward the allotment worksheet for the savings deposit program to PSC (MAS) vice SPO.
Chapter 7 - D, Page 7-D-3; Updated taxability of CSB Payments section.
Chapter 8 - A, Page 8-A-5; Updated references and nonreceipt of allotment procedures.
Chapter 8 - A, Page 8-A-6; Added new PSC E-mail address.
Chapter 8 - B, Page 8-B-3; Updated changing state of legal residence procedure.
Chapter 8 - B, Page 8-B-11; The dollar amount was increased under Amount of Combat Tax Exclusion to $6,090.90.
Chapter 8 - B, Page 8-B-13; Block 13.Q was dropped from General information regarding the IRS Form W-2. Block 13.Q is no longer included on the W-2 form.
Chapter 8 - B, Page 8-B-14; PSC will reissue W-2 within 7 business days vice 14 days. Removed E-mail example for requesting a corrected W-2.
Chapter 8 - B, Page 8-B-15; Changed option to request changes to FITW or SITW via Rapidraft Letter to Memo.
Chapter 8 - C, Page 8-C-4; Added note to Step 1 of TSP action column.

Continued on next page

4. Summary of Changes (cont'd)

Chapter 8 - C, Page 8-C-6; Added Note to changing TSP contributions.
Chapter 8 - C, Page 8-C-7; Added instructions for TSP Catch-Up Program.
Chapter 9 - A, Page 9-A-2; Added new section "Overpayment collection – Reserves not on active duty".
Chapter 10 - A, Page 10-A-2; Changed references for Administrative Remarks, updated policies and procedures, and changed example entries.
Chapter 10 - A, Page 10-A-5 thru 10-A-8; Updated screen shots. Removed old Evaluation section and replaced with new one.
Chapter 10 – B, Page 10-B-15; Updated to reflect new Direct-Access procedures.
Chapter 11, Page 11-2; Updated to reflect Direct-Access procedures.
Chapter 11, Page 11-12; Added section HDIP-VBSS to pay entitlements when mobilized.
Chapter 11, Page 11-14 thru 11-15; Added HDIP-VBSS to mobilization chart and updated notes.
Chapter 11, Page 11-16; Added info regarding advances on Blanket Orders.
Chapter 11, Page 11-23 thru 11-29; Updated Mobilization checklist and procedures.
Chapter 11, Page 11-32; Updated mobilization of retirees checklist to reflect new Direct-Access Rehire procedure.
Chapter 11, Page 11-33; Deleted section stating reservists are not entitled to Lodging Plus Per Diem for leave days.
Chapter 11, Page 11-44; The Unit Data Report has been deleted as part of Direct-Access release 11.
Chapter 11, Page 11-45 thru 11-53; Updated Extension and Demobilization procedures to reflect new Direct-Access processes. SOI for demobilization must be submitted at least 45 days prior to separation or departure on terminal leave.
Enclosure (1); Added information for accessing form on PSC's web site and CGSWSIII. PSC forms and worksheets are no longer published in this enclosure.
Enclosure 4; Updated to reflect current correspondence standards. Added Reserve Thank You letter.

Continued on next page

4. Summary of Changes (cont'd)

Enclosure 6; Eliminated Advancement and Reduction Administrative Remarks pages 3,4 and 10; information is be stored in the competencies. Eliminated, Performance and Discipline #'s 13-19. IAW ALCOAST 354/02 states that 3307's are no longer required for enlisted evaluations.
Enclosure 7; Updated Casualty Reporting procedures.
Enclosure 8; Establishes the Direct-Access online manual as the official reference for maintaining personnel data.
Appendix B; Removed. ID Card/DD-1172 preparation instructions are published in COMDTINST M5512.1(series).
Appendix F; Renamed appendix to "LES Information". Incorporated new LES sections 'LES Review and Validation", "Leave and Errors on the LES" and "Explanation of Complex Areas on the LES" from the SDA-II User manual

5. Procedure

Remove and insert the following pages.

Remove	Insert
Table of Contents, Pages i thru viii	Table of Contents, Pages i thru viii
Chapter 1, Page 1-1 thru 1-14	Chapter 1, Page 1-1 thru 1-21
Chapter 2 Page 2-1	Chapter 2, Page 2-1
Chapter 2, Page 2-A-1 thru 2-A-10	Chapter 2, Page 2-A-1 thru 2-A-10
Chapter 2, Page 2-B-1 thru 2-B-49	Chapter 2, Page 2-B-1 thru 2-B-45
Chapter 2, Page 2-C-1 thru 2-C-7	Chapter 2, Page 2-C-1 thru 2-C-7
Chapter 2, Page 2-D-1 thru 2-D-7	Chapter 2, Page 2-D-1 thru 2-D-8
Chapter 3, Page 3-A-1 thru 3-A-5	Chapter 3, Page 3-A-1 thru 3-A-5
Chapter 3, Page 3-B-1 thru 3-B-27	Chapter 3, Page 3-B-1 thru 3-B-26
Chapter 3, Page 3-C-1 thru 3-C-10	Chapter 3, Page 3-C-1 thru 3-C-9
Chapter 4, Page 4-A-1 thru 4-A-4	Chapter 4, Page 4-A-1 thru 4-A-4
Chapter 4, Page 4-B-1 thru 4-B-5	Chapter 4, Page 4-B-1 thru 4-B-5
Chapter 4, Page 4-C-1 thru 4-C-12	Chapter 4, Page 4-C-1 thru 4-C-12
Chapter 5, Page 5-A-1 thru 5-A-20	Chapter 5, Page 5-A-1 thru 5-A-16
Chapter 5, Page 5-B-1 thru 5-B-18	Chapter 5, Page 5-B-1 thru 5-B-20
Chapter 5, Page 5-C-1 thru 5-C-9	Chapter 5, Page 5-C-1 thru 5-C-11
Chapter 5, Page 5-D-1 thru 5-D-20	Chapter 5, Page 5-D-1 thru 5-D-20
Chapter 6, Page 6-A-1 thru 6-A-4	Chapter 6, Page 6-A-1 thru 6-A-5
Chapter 6, Page 6-B-1 thru 6-B-10	Chapter 6, Page 6-B-1 thru 6-B-10
Chapter 6, Page 6-C-1 thru 6-C-6	Chapter 6, Page 6-C-1 thru 6-C-6
Chapter 6, Page 6-D-1 thru 6-D-23	Chapter 6, Page 6-D-1 thru 6-D-16

Continued on next page

5. Procedure (cont'd)

Remove	Insert
Chapter 7, Page 7-A-1 thru 7-A-8	Chapter 7, Page 7-A-1 thru 7-A-10
Chapter 7, Page 7-B-1 thru 7-B-10	Chapter 7, Page 7-B-1 thru 7-B-10
Chapter 7, Page 7-C-1 thru 7-C-5	Chapter 7, Page 7-C-1 thru 7-C-5
Chapter 7, Page 7-D-1 thru 7-D-5	Chapter 7, Page 7-D-1 thru 7-D-5
Chapter 8, Page 8-A-1 thru 8-A-6	Chapter 8, Page 8-A-1 thru 8-A-6
Chapter 8, Page 8-B-1 thru 8-B-18	Chapter 8, Page 8-B-1 thru 8-B-16
Chapter 8, Page 8-C-1 thru 8-C-7	Chapter 8, Page 8-C-1 thru 8-C-7
Chapter 9, Page 9-A-1 thru 9-A-9	Chapter 9, Page 9-A-1 thru 9-A-6
Chapter 9, Page 9-B-1 thru 9-B-3	Chapter 9, Page 9-B-1 thru 9-B-3
Chapter 10, Page 10-A-1 thru 10-A-9	Chapter 10, Page 10-A-1 thru 10-A-9
Chapter 10, Page 10-B-1 thru 10-B-14	Chapter 10, Page 10-B-1 thru 10-B-16
Chapter 11, Page 11-1 thru 11-51	Chapter 11, Page 11-1 thru 11-53
Enclosure (1), Page E-1-1 thru E-1-2 and all forms and worksheets	Enclosure (1), Page E-1-1 thru E-1-2
Enclosure (4), Page E-4-1 thru E-4-9	Enclosure (4), Page E-4-1 thru E-4-10
Enclosure (5), Page E-5-1 thru E-5-17	N/A - Vacant
Enclosure (6), Page E-6-1 thru E-6-50	Enclosure (6), Page E-6-1 thru E-6-46
Enclosure (7), Page E-7-1 thru E-7-8	Enclosure (7), Page E-7-1 thru E-7-9
Vacant	Enclosure (8), Page E-8-1 thru E-8-4
Appendix B, Page B-1 and 1 thru 139	N/A - Vacant
Appendix F, Page F-1 thru F-9	Appendix F, Page F-1 thru F-24
Index, Page I-1 thru I-7	Index, Page I-1 thru I-7

6. Forms and Reports

CG PSC forms are available on the internet at http://www.uscg.mil/hq/psc/forms/.

Other forms referenced in this Manual are available in USCG Electronic Forms on SWSIII or on the Internet at http://www.uscg.mil/ccs/cit/cim/forms1/.

Continued on next page

7. Printed Copies

Printed copies of the PPPM (reprint of original including all changes) may be requested from the Personnel Service Center. Requests may be sent or faxed to:

Commanding Officer (P&D)
U. S. Coast Guard Personnel Service Center
444 SE Quincy Street
Topeka, KS 66683-3591
Fax: 785-339-3772
E-Mail: PSC-PRC@hrsic.uscg.mil

Requests for printed copies must be received by PSC (P&D) not later than 1 November 2004. Afloat units will automatically be mailed one copy of the reprint. No request is necessary unless additional copies are desired.

8. Comments and Recommendations

Comments or recommendations may be submitted by returning the comment form in Enclosure (11) of the manual.

/s/
R. A. ROOTH

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

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 339-3695

HRSICNOTE 1000
10 June 2003

CANCELLED:
10 June 2004

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-9 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. Action Addressees shall enter page changes as indicated in the Procedure section of this Notice. The need to promulgate the information contained in this change in a timely manner precludes utilization of traditional, paper-based, distribution methods.

3. Directives Affected None

4. Summary This change adds Chapter 11, Reserve Mobilization. This chapter provides pay and personnel procedures for reserve mobilization and demobilization. This chapter also provides checklists, guides, and information required to complete the tasks associated with reserve mobilization and demobilization.

Continued on next page

DISTRIBUTION - SDL No. 141 (Note: This notice distributed electronically only)

	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 2

5. Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages vii and viii	Table Of Contents, Pages vii and viii
N/A	Chapter 11, Pages 11-1 thru 11-51

6. Comments and Recommendations Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of the manual.

/s/
M. P. SULLIVAN
Acting

Nonstandard distribution: E:b (PERSRUs), C:n

Location	Copies
Activities New York	16
Activities Baltimore	10
Air Station Cape Cod PERSRU	08
Air Station Sacramento PERSRU	04
Air Station San Diego PERSRU	09
ATC Mobile PERSRU	07
Base Galveston PERSRU	07
Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
ISC Boston	05
ISC Miami	05
ISC New Orleans	02
ISC St. Louis	03
ISC Cleveland	05
ISC Seattle	06
ISC Honolulu	05
ISC Ketchikan	05
ISC Ketchikan (Juneau-Det)	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10

TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03
COMDT (G-WPM-2).	04

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 339-3695

HRSICNOTE 1000
16 June 2002

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-8 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary A side bar in the margin marks the significant changes. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 2, Page 2-A-1 thru 2-A-8; Various changes reflecting BAS reform and CGHRMS implementation; Medical Manual, COMDTINST M6000.1B announced implementation of direct mailing of health records from CG Clinic or independent duty Health Services Technician to the receiving medical facility.

Chapter 2, Page 2-B-7 thru 2-B-8; Adds User Identification and Password to "Critical Elements" of the Unit Travel System (UTS) Process.

Chapter 2, Page 2-B-13 thru 2-B-14; Updates process for designation and procedure to designation a UTS AO.

Chapter 2, Page 2-B-29 thru 2-B-32; Changes reflecting BAS reform.

Chapter 2, Page 2-B-37 thru 2-B-40; Changes reflecting BAS reform.

Chapter 2, Page 2-B-44 thru 2-B-49; Renumbered only.

Chapter 3, Pages 3-B-1 thru 3-B-26; Numerous changes to policy reflecting changes implemented by the launch of CGHRMS.

Chapter 3, Pages 3-B-5 and 3-B-7; Ensure members receive Thrift Savings Plan (TSP) Withdrawal package.

Chapter 3, Pages 3-B-20 and 3-B-25; Ensure members receive Thrift Savings Plan (TSP) Withdrawal package.

Chapter 4, Pages 4-C-1 thru 4-C-4; Changes reflect upgrades to CGHRMS in Competencies dimension.

Chapter 4, Page 4-C-11 thru 4-C-12; Changes reflect upgrades to CGHRMS in Competencies dimension.

Chapter 5, Page 5-A-1 thru 5-A-2; Removes direction to notify insurance companies in case of death.

Chapter 5, Pages 5-A-7 thru 5-A-20; Various changes to policy on completion and distribution of SGLV-8285 and SGLV-8286. Addition of section on SGLI Family coverage. Reflects changes to casualty reporting examples in Enclosure 7.

Chapter 5, Pages 5-C-3 thru 5-C-6; Various changes to policy reflecting CGHRMS implementation.

Chapter 5, Page 5-C-9; The memorandum has replaced the rapidraft letter as the standard of communication.

Chapter 5, Pages 5-D-11 thru 5-D-12; Various changes to policy reflecting CGHRMS implementation.

Chapter 6, Page 6-A-1 and 6-A-2; Changes to payment delivery method options. Members should be encouraged to use CGHRMS Self Service to change direct deposit information.

Continued on Next Page

Changes, *continued*

Chapter 6, Page 6-C-1 thru 6-C-6; Mobile units as of October 1, 2001 are authorized Level 1 CSP. Special and advance payments to deployed personnel are no longer necessary as all members are required to utilize direct deposit.

Chapter 7, Page 7-A-5 and 7-A-6; Effective November 17, 1998, Hostile Fire Imminent Danger Pay is not prorated for members separating during a qualifying month. Entitlement is paid for the full month regardless of subsequent separation.

Chapter 7, Page 7-B-1 thru 7-B-2; Replaces procedure for reporting missed meals.

Chapter 7, Page 7-B-7 thru 7-B-8; Changes reflecting BAS reform.

Chapter 7, Page 7-C-1 thru 7-C-2; Includes new areas (Operation Enduring Freedom) eligible for Savings Deposit Program effective 1 January 2002.

Chapter 7, Pages 7-D-1 thru 7-D-5; Various changes to CSB program.

Chapter 8, Pages 8-A-1 thru 8-A-6; Various changes to policy reflecting CGHRMS implementation.

Chapter 8, Pages 8-B-1 thru 8-B-4; Directs those members with access to CGHRMS to update Federal and State Income Tax information in CGHRMS.

Chapter 8, Page 8-B-7 thru 8-B-8; Active Duty members who are residents of Minnesota are now exempt from state taxes while stationed outside the state.

Chapter 8, Page 8-B-11 thru 8-B-12; Raises ceiling amount of taxable military pay exclusion for duty in combat zone. Changes reflecting implementation of CGHRMS.

Chapter 8, Pages 8-C-1 thru 8-C-7; Section on Thrift Savings Plan (TSP).

Chapter 9, Page 9-A-5 thru 9-A-6; UDC will deduct payment for uniforms from member's pay via PMIS/JUMPS input with exception of emergency uniform issuances which are collected via submission of a PAA.

Chapter 10, Pages 10-A-1 thru 10-A-9; Introduces Enlisted Employee Review Worksheet (EERW) in place of Enlisted Performance Evaluation Form (EPEF).

Enclosure 4, Page E-4-1 thru E-4-9; Includes section on Thrift Savings Plan (TSP) in letter to members separating from the Coast Guard; require EMPLID vice Social Security Number on CG correspondence; various changes reflecting CGHRMS implementation; CG standard correspondence is now Memorandum vice Basic Letter.

Enclosure 6, Page E-6-7 thru E-6-8; Changes to names of rates and addition of IT rating to list of rates restricted to members without U.S. citizenship. Changes to names of rates restricted to those members diagnosed as color blind.

Continued on Next Page

Changes, *continued*

Enclosure 6, Page E-6-11 thru E-6-14; Changes to referenced sections of Personnel Manual. A&R-2 on page E-6-14 changed to reflect new policy of indefinite reenlistments for those members with 10 years of service.

Enclosure 6, Page E-6-17 thru E-6-18; Corrects reference to Personnel Manual for CG-3307, Advancement and Reduction (A&R-10).

Enclosure 6, Pages E-6-39 thru E-6-44; Includes requirement for counseling members on Thrift Savings Plan (TSP).

Enclosure 6, Pages E-6-47 thru E-6-50; Includes requirement for counseling members on Thrift Savings Plan (TSP); new entries on SELRES Enlisted Bonus Program.

Enclosure 7, Pages E-7-1 thru E-7-8; Various policy and procedural changes to Casualty Reporting.

Enclosure 8, Pages E-8-1 thru E-8-66; School codes available in CGHRMS.

Enclosure 10, Pages E-10-1 thru E-10-11; Award codes available in CGHRMS.

Appendix C, Page C-43 thru C-44; Note regarding deductible time for leave following TAD periods when career sea pay stops.

Appendix C, Page C-43 thru C-44; Corrects computation of Creditable Sea Duty. Leave taken en route to TAD is not deductible for Sea Pay purposes.

Appendix F, Page F-3 thru F-8; Various changes and additions as a result of BAS reform. Adds contributions to Thrift Savings Plan (TSP) to list of possible DEDUCTIONS in block 27 of the LES.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages i thru vii	Table Of Contents, Pages i thru viii
Chapter 2, Page 2-A-1 thru 2-A-8	Chapter 2, Page 2-A-1 thru 2-A-8
Chapter 2, Page 2-B-1 thru 2-B-2	Chapter 2, Page 2-B-1 thru 2-B-2
Chapter 2, Page 2-B-7 thru 2-B-8	Chapter 2, Page 2-B-7 thru 2-B-8
Chapter 2, Page 2-B-13 thru 2-B-14	Chapter 2, Page 2-B-13 thru 2-B-14
Chapter 2, Pages 2-B-29 thru 2-B-32	Chapter 2, Pages 2-B-29 thru 2-B-32
Chapter 2, Pages 2-B-37 thru 2-B-40	Chapter 2, Pages 2-B-37 thru 2-B-40
Chapter 2, Pages 2-B-43 thru 2-B-50	Chapter 2, Pages 2-B-43 thru 2-B-49
Chapter 3, Page 3-B-1 thru 3-B-2	Chapter 3, Page 3-B-1 thru 3-B-2
Chapter 3, Pages 3-B-5 thru 3-B-26	Chapter 3, Pages 3-B-5 thru 3-B-26
Chapter 4, Pages 4-C-1 thru 4-C-4	Chapter 4, Pages 4-C-1 thru 4-C-4
Chapter 4, Page 4-C-11 thru 4-C-12	Chapter 4, Page 4-C-11 thru 4-C-12
Chapter 5, Page 5-A-1 thru 5-A-18	Chapter 5, Page 5-A-1 thru 5-A-20
Chapter 5, Pages 5-B-5 thru 5-B-8	Chapter 5, Pages 5-B-5 thru 5-B-8
Chapter 5, Pages 5-C-3 thru 5-C-6	Chapter 5, Pages 5-C-3 thru 5-C-6
Chapter 5, Page 5-C-9	Chapter 5, Page 5-C-9
Chapter 5, Page 5-D-11 thru 5-D-12	Chapter 5, Page 5-D-11 thru 5-D-12
Chapter 6, Page 6-A-1 thru 6-A-2	Chapter 6, Page 6-A-1 thru 6-A-2
Chapter 6, Pages 6-B-3 thru 6-B-6	Chapter 6, Pages 6-B-3 thru 6-B-6
Chapter 6, Pages 6-C-1 thru 6-C-10	Chapter 6, Pages 6-C-1 thru 6-C-6
Chapter 7, Page 7-A-5 thru 7-A-6	Chapter 7, Page 7-A-5 thru 7-A-6
Chapter 7, Page 7-B-1 thru 7-B-2	Chapter 7, Page 7-B-1 thru 7-B-2
Chapter 7, Page 7-B-7 thru 7-B-8	Chapter 7, Page 7-B-7 thru 7-B-8
Chapter 7, Page 7-C-1 thru 7-C-2	Chapter 7, Page 7-C-1 thru 7-C-2
Chapter 7, Pages 7-D-1 thru 7-D-5	Chapter 7, Pages 7-D-1 thru 7-D-5
Chapter 8, Page 8-1	Chapter 8, Page 8-1
Chapter 8, Pages 8-A-1 thru 8-A-5	Chapter 8, Pages 8-A-1 thru 8-A-6
Chapter 8, Pages 8-B-1 thru 8-B-4	Chapter 8, Pages 8-B-1 thru 8-B-4
Chapter 8, Page 8-B-7 thru 8-B-8	Chapter 8, Page 8-B-7 thru 8-B-8
Chapter 8, Page 8-B-11 thru 8-B-12	Chapter 8, Page 8-B-11 thru 8-B-12
	Chapter 8, Pages 8-C-1 thru 8-C-7
Chapter 9, Page 9-A-5 thru 9-A-6	Chapter 9, Page 9-A-5 thru 9-A-6
Chapter 10, Pages 10-A-1 thru 10-A-10	Chapter 10, Pages 10-A-1 thru 10-A-9
Enclosure 1, Page E-1-1 thru E-1-2	Enclosure 1, Page E-1-1 thru E-1-2
	Enclosure 1, CG-3788A
	Enclosure 1, CG-3788B
	Enclosure 1, CG-3788C
Enclosure 1, CG-4251	Enclosure 1, CG-4251
Enclosure 1, CG-5489B	Enclosure 1, CG-5489B
Enclosure 1, CG HRSIC-1900	Enclosure 1, CG HRSIC-1900
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
Enclosure 1, CG HRSIC-2001	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2010	Enclosure 1, CG HRSIC-2010

Continued on Next Page

Procedure, *continued*

Remove and insert the following pages.

Enclosure 1, CG HRSIC-2015	Enclosure 1, CG HRSIC-2015
Enclosure 1, CG HRSIC-2020	Enclosure 1, CG HRSIC-2020
Enclosure 1, CG HRSIC-2020A	Enclosure 1, CG HRSIC-2020A
Enclosure 1, CG HRSIC-2030	Enclosure 1, CG HRSIC-2030
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2055A	Enclosure 1, CG HRSIC-2055A
Enclosure 1, CG HRSIC-2075	Enclosure 1, CG HRSIC-2075
Enclosure 1, CG HRSIC-2426	Enclosure 1, CG HRSIC-2426
Enclosure 1, CG HRSIC-3799R	Enclosure 1, CG HRSIC-3799R
Enclosure 1, CG HRSIC-5100	Enclosure 1, CG HRSIC-5100
Enclosure 1, CG HRSIC-7421	Enclosure 1, CG HRSIC-7421
Enclosure 4, Page E-4-1 thru E-4-2	Enclosure 4, Page E-4-1 thru E-4-2
Enclosure 4, Pages E-4-5 thru E-4-8	Enclosure 4, Pages E-4-5 thru E-4-9
Enclosure 6, Page E-6-7 thru E-6-8	Enclosure 6, Page E-6-7 thru E-6-8
Enclosure 6, Pages E-6-11 thru E-6-14	Enclosure 6, Page E-6-11 thru E-6-14
Enclosure 6, Page E-6-17 thru E-6-18	Enclosure 6, Page E-6-17 thru E-6-18
Enclosure 6, Pages E-6-39 thru E-6-44	Enclosure 6, Pages E-6-39 thru E-6-44
Enclosure 6, Pages E-6-47 thru E-6-49	Enclosure 6, Pages E-6-47 thru E-6-50
Enclosure 7	Enclosure 7
Enclosure 8, SCHOOL CODES (TAB)	Enclosure 8, VACANT (TAB)
Enclosure 8	
Enclosure 10, AWARD CODES (TAB)	Enclosure 10, VACANT (TAB)
Enclosure 10	
Appendix C, Page C-39 thru C-40	Appendix C, Page C-39 thru C-40
Appendix C, Page C-43 thru C-44	Appendix C, Page C-43 thru C-44
Appendix F, Page F-3 thru F-6	Appendix F, Page F-3 thru F-8
Index	Index

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

R. A. ROOTH

Nonstandard distribution: E:b (PERSRUs), C:n

Location	Copies
Activities New York	16
Activities Baltimore	10
Air Station Cape Cod PERSRU	08
Air Station Sacramento PERSRU	04
Air Station San Diego PERSRU	09
ATC Mobile PERSRU	07
Base Galveston PERSRU	07
Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03
COMDT (G-WPM-2).	04

This page left blank intentionally.

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 339-3660

HRSICNOTE 1000
24 July 2001

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-7 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 1, Pages 1-1 thru 1-4; Replaced references to PMIS/JUMPS with "CGHRMS". Updated to reflect policy changes.
Chapter 2, Page 2-A-3; Changed reference in Step 2. Added requirement for member screening prior to transfer to semi-isolated units.
Chapter 2, Page 2-A-5; Changed reference in Steps 7 thru 9.
Chapter 2, Page 2-B-1 thru 2-B-50; Rewrite of Section 2-B to reflect changes in policy and procedures.
Chapter 2, Pages 2-C-1 and 2-C-6 thru 2-C-7; Moved sections regarding disability processing to 6-D.
Chapter 3, Pages 3-B-3 thru 3-B-8; Updated HRSIC's phone and fax numbers.
Chapter 3, Page 3-B-13; Updated HRSIC's phone and fax numbers.
Chapter 3, Page 3-B-18; Removed references to CFTRR.
Chapter 3, Pages 3-B-19 and 3-B-20; CG-3698A replaced with E-ADC. Updated HRSIC's fax number. Changed reference in Step 18 to Chapter 2-B vice Appendix (E).
Chapter 3, Pages 3-B-23 thru 3-B-26; Removed references to Appendix (A). Updated HRSIC phone numbers as applicable. Removed RET-3 category.
Chapter 3, Pages 3-B-23 thru 3-B-26; Removed references to CFTRR.
Chapter 4, Pages 4-C-1 thru 4-C-3; Changed to reflect input of Training and Education in CGHRMS.
Chapter 5, Pages 5-B-4 thru 5-B-7; Replaced with information on TRICARE Dental Program.
Chapter 5, Pages 5-C-1 and 5-C-3; Changed Table of Contents for section. Changed criteria for requesting SOCS.
Chapter 5, Pages 5-D-20 thru 5-D-21; Removed. SELRES and IRR now covered by TRICARE Dental Program.
Chapter 6, Pages 6-B-6 and 6-B-7; Removed any reference to "Advance Pay and Allowances".
Chapter 6, Page 6-C-1; Removed references to 6-C-2 and 6-C-3.
Chapter 6, Pages 6-C-2 and 6-C-3; Removed.
Chapter 6, Pages 6-C-9 and 6-C-11; Changed to reflect payments by PERSRUs vice ACOs; added requirement to notify HRSIC (MAS) prior to issuing payments.
Chapter 6, Pages 6-D-1 and 6-D-21 thru 6-D-23; Added section on disability processing. Various changes to and regarding processes.
Chapter 7, Pages 7-B-1 and 7-B-8 thru 7-B-9; Added section on Family Subsistence Supplemental Allowance (FSSA).
Chapter 7, Pages 7-D-1 thru 7-D-5; Added section on Career Status Bonus (CSB).
Chapter 8, Pages 8-B-4 thru 8-B-9; Updated state tax information.
Enclosure (1), DD Form 2494 & DD Form 2494-1; Removed IAW ALPERSRU V/00 & ALCOAST 055/01.
Enclosure (1), CG HRSIC-1160; Removed HRSIC-1160 IAW ALCOAST 003/01.
Enclosure (1), CG HRSIC-2000; Changed POV section; removed reference to government Impact Visa card. Removed option for and definition of Advance Pay and Allowances. Added block for selection of Advance TLE.

Continued on Next Page

Changes (cont.)

Enclosure (1), CG HRSIC-2001; Changed "foreign duty pay" to "hardship location duty-pay"; added steps #9, #23, and #24. Removed reference to "Advance Pay and Allowances".
Enclosure (1), CG HRSIC-2002; Updated CG Human Resources Management System Assignment Data Worksheet.
Enclosure (1), CG HRSIC-2003; Changed language in "Authorized Travel Time" block. Remainder of formula must be "at least" 51 miles vice "exceed" 51 miles. Also, added note that states travel and proceed time are not authorized in conjunction with retirement or separation. Added section on Advance TLE.
Enclosure (1), CG HRSIC-2010; Removed option for and definition of Advance Pay and Allowances. Added block for selection of Advance TLE.
Enclosure (1), CG HRSIC-2015; Updated Pay Delivery Worksheet.
Enclosure (1), CG HRSIC-2040; Removed address section. All allotments are EFT only. Added new Additional MGIB allotment. Amended "I" allotment to read "life insurance" vice "insurance".
Enclosure (1), CG HRSIC-2045; Removed reference to CFTRR IAW ALCOAST 003/01.
Enclosure (1), CG HRSIC-2075; Family Subsistence Supplemental Allowance (FSSA) Application.
Enclosure (1), CG HRSIC-2426; Career Status Bonus (CSB) Election.
Enclosure (1), CG HRSIC-5100; Modified monetary amount listed in Claim Code E.
Enclosure (1), CG HRSIC-7421; UTS Approving Official (AO) Designation.
Enclosure (1), CG HRSIC-7421/2; CGHRMS User Access Authorization/Revocation.
Enclosure (4), Page E-4-7; Amended section on DD Form 214 to include contact addresses for obtaining copies 6 months after separation.
Enclosure (5), Pages E-5-7 thru E-5-17; The 7.5 release of CGHRMS has taken ownership of certain data previously found on PDIF.
Enclosure (5), Page E-5-12; Removed references to Qual Test and Score.
Enclosure (6), Page E-6-22; Changed reference from Personnel Manual. Section dealing with UCMJ is 8-A vice sections 8-B and 8-M.
Enclosure (6), Page E-6-37; Included section on SRB's.
Enclosure (6), Page E-6-38; Removed reference to CFTRR IAW ALCOAST 003/01.
Enclosure (6), Page E-6-47; Requirement for SRB counseling on 14th anniversary removed IAW ALCOAST 049/00.
Enclosure (10), Pages E-10-5 and E-10-7; Changed points awarded for Secretary's Award of Outstanding Achievement and for Secretary's Award for Meritorious Achievement.
Appendix A; Removed Your Guide to Retirement, HRSICINST M1800.5B.
Appendix E; Removed The Traveler's Guide to Successful Claims Processing, HRSICPUB 4600.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages i thru vii	Table Of Contents, Pages i thru viii
Chapter 1, Pages 1-1 thru 1-4	Chapter 1, Pages 1-1 thru 1-4
Chapter 2, Page 2-1	Chapter 2, Page 2-1
Chapter 2, Page 2-A-3 thru 2-A-6	Chapter 2, Pages 2-A-3 thru 2-A-6
Chapter 2, Pages 2-B-1 thru 2-B-26	Chapter 2, Pages 2-B-1 thru 2-B-50
Chapter 2, Page 2-C-1 thru 2-C-2	Chapter 2, Page 2-C-1 thru 2-C-2
Chapter 2, Pages 2-C-5 thru 2-C-9	Chapter 2, Pages 2-C-5 thru 2-C-7
Chapter 3, Pages 3-B-3 thru 3-B-8	Chapter 3, Pages 3-B-3 thru 3-B-8
Chapter 3, Page 3-B-13 thru 3-B-14	Chapter 3, Page 3-B-13 thru 3-B-14
Chapter 3, Pages 3-B-17 thru 3-B-20	Chapter 3, Pages 3-B-17 thru 3-B-20
Chapter 3, Pages 3-B-23 thru 3-B-28	Chapter 3, Pages 3-B-23 thru 3-B-27
Chapter 3, Page 3-C-3 thru 3-C-4	Chapter 3, Page 3-C-3 thru 3-C-4
Chapter 4, Pages 4-C-1 thru 4-C-4	Chapter 4, Pages 4-C-1 thru 4-C-4
Chapter 5, Pages 5-B-1 thru 5-B-8	Chapter 5, Pages 5-B-1 thru 5-B-8
Chapter 5, Pages 5-C-1 thru 5-C-8	Chapter 5, Pages 5-C-1 thru 5-C-9
Chapter 5, Page 5-D-1 thru 5-D-2	Chapter 5, Page 5-D-1 thru 5-D-2
Chapter 5, Page 5-D-20 thru 5-D-21	
Chapter 6, Pages 6-B-5 thru 6-B-8	Chapter 6, Pages 6-B-5 thru 6-B-8
Chapter 6, Page 6-C-1 thru 6-C-2	Chapter 6, Page 6-C-1 thru 6-C-2
Chapter 6, Pages 6-C-9 thru 6-C-12	Chapter 6, Pages 6-C-9 thru 6-C-10
Chapter 6, Page 6-D-1 thru 6-D-2	Chapter 6, Page 6-D-1 thru 6-D-2
	Chapter 6, Pages 6-D-21 thru 6-D-23
Chapter 7, Page 7-1	Chapter 7, Page 7-1
Chapter 7, Page 7-B-1 thru 7-B-2	Chapter 7, Page 7-B-1 thru 7-B-2
Chapter 7, Pages 7-B-7 thru 7-B-8	Chapter 7, Pages 7-B-7 thru 7-B-10
	Chapter 7, Pages 7-D-1 thru 7-D-5
Chapter 8, Pages 8-B-3 thru 8-B-10	Chapter 8, Pages 8-B-3 thru 8-B-10
Chapter 10, Pages 10-A-3 thru 10-A-4	Chapter 10, Page 10-A-3 thru 10-A-4
Enclosure 1, Page E-1-1 thru E-1-2	Enclosure 1, Page E-1-1 thru E-1-2
Enclosure 1, DD Form 2494	
Enclosure 1, DD Form 2494-1	
	Enclosure 1, CG-4251
Enclosure 1, CG HRSIC-1160	
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
Enclosure 1, CG HRSIC-2001	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2002	Enclosure 1, CG HRSIC-2002
Enclosure 1, CG HRSIC-2003	Enclosure 1, CG HRSIC-2003
Enclosure 1, CG HRSIC-2010	Enclosure 1, CG HRSIC-2010
Enclosure 1, CG HRSIC-2015	Enclosure 1, CG HRSIC-2015
Enclosure 1, CG HRSIC-2040	Enclosure 1, CG HRSIC-2040
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045

Continued on Next Page

Procedure (cont'd)

Remove and insert the following pages.

	Enclosure 1, CG HRSIC-2075
	Enclosure 1, CG HRSIC-2426
Enclosure 1, CG HRSIC-5100	Enclosure 1, CG HRSIC-5100
	Enclosure 1, CG HRSIC-7421
	Enclosure 1, CG HRSIC-7421/2
Enclosure 4, Page E-4-7 thru E-4-8	Enclosure 4, Page E-4-7 thru E-4-8
Enclosure 5, Pages E-5-7 thru E-5-21	Enclosure 5, Pages E-5-7 thru E-5-17
Enclosure 6, Page E-6-1 thru E-6-2	Enclosure 6, Page E-6-1 thru E-6-2
Enclosure 6, Page E-6-21 thru E-6-22	Enclosure 6, Page E-6-21 thru E-6-22
Enclosure 6, Page E-6-37 thru E-6-38	Enclosure 6, Page E-6-37 thru E-6-38
Enclosure 6, Page E-6-47 thru E-6-48	Enclosure 6, Page E-6-47 thru E-6-48
Enclosure 10, Pages E-10-5 thru E-10-8	Enclosure 10, Pages E-10-5 thru E-10-8
Appendix A	
Appendix E	
Index	Index

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

R. D. RECK

Nonstandard distribution: E:b (PERSRUs), C:n

Location	Copies
Activities New York	16
Activities Baltimore	10
Air Station Cape Cod PERSRU	08
Air Station Sacramento PERSRU	04
Air Station San Diego PERSRU	09
ATC Mobile PERSRU	07
Base Galveston PERSRU	07
Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03
COMDT (G-WPM-2).	04

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 357-3628

HRSICNOTE 1000
1 December 2000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-6 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 1, Page 1-13; Added DD Form 139 to list of forms referenced.
Chapter 2, Page 2-A-2; All references to CG-3698A changed to "E-ADC"; ETO changed to "Airport Terminal".
Chapter 2, Pages 2-A-4 thru 2-A-5; The Personnel Security Record (CG-5274) is no longer used. Removed requirement to send medical records via the PERSRU. Replaced all references to CG-3698A with E-ADC.
Chapter 2, Pages 2-A-6; Removed "upcoming change" from reference.
Chapter 3, Page 3-A-3; IAW SDAII Manual, the discharging PERSRU is responsible for transmitting discharge transaction from active duty AND the accession transaction for immediate enlistment in the Reserves.
Chapter 3, Page 3-B-18; CG-3698A replaced with E-ADC.
Chapter 3, Page 3-C-9; CG-3698A replaced with Electronic Assignment Data Card (E-ADC).
Chapter 5, Pages 5-A-1 thru 5-A-6; Removed "SGLI" from title of section. Updated step-by-step description on pages 5-A-4 thru 5-A-6.
Chapter 5, Pages 5-C-1 and 5-C-2; Updated to reflect the correct blocks on the CG-4170A. Added rule that if member with dependents fails to verify CG-4170A prior to 30 November, BAH entitlement will no longer be stopped. It is instead changed to BAH without.
Chapter 5, Page 5-C-7; PMIS is no longer updated with security clearance data. That information is entered into CGHRMS now.
Chapter 5, Page 5-D-1; Updated Section Overview.
Chapter 5, Page 5-D-13 thru 5-D-14; CG-3698A is replaced with E-ADC.
Chapter 6, Page 6-C-12; Changed responsible office to MAS.
Chapter 6, Pages 6-D-19 and 6-D-20; Changed reporting procedures for discrepancies on Annual Reserve Retirement Point Statements.
Chapter 9, Pages 9-B-2 and 9-B-3; Included time frame for action to be completed during waiver/remission process.
Chapter 10, Pages 10-B-4 and 10-B-6; Added requirement to notify Travel Charge Card Representative once a member has been UA for over 24 hours.
Enclosure (1), Page E-1; Added new forms HRSIC-2002 and HRSIC-7421.
Enclosure (1), CG HRSIC-1900; Removed incorrect reference to DLA from bottom margin of page.
Enclosure (1), CG HRSIC-2000; Referenced JFTR. Added selection of type of household goods move.
Enclosure (1), CG HRSIC-2002; Added CG Human Resources Management System Assignment Data Worksheet.
Enclosure (1), CG HRSIC-2030; Included reference to eligibility requirements for advancement.
Enclosure (1), CG HRSIC-2040; Moved signature block and Privacy Act Statement to front of form.

Continued on next page

Changes (continued)

Enclosure (1), CG HRSIC-2045; Clarified in Separation Section requirement for physical within one year prior to release, discharge, or retirement.
Enclosure (1), CG HRSIC-2070; Changed TONO and ACCT DATA blocks.
Enclosure (1), CG-HRSIC-5100, Updated form to reflect new officer uniform allowance rates.
Enclosure (1), CG HRSIC-7421; New form. CGHRMS User Access Authorization/Revocation.
Enclosure (4), Page E-4-7, Removed "Once A Veteran" pamphlet as an enclosure. The VA no longer prints this document.
Enclosure (6), Page E-6-1, Changed page numbers on SRB section due to addition of two new Separation Page 7's.
Enclosure (6), Page E-6-3; Deleted statement outlining requirement to use the sequential numbers assigned to each CG-3307 entries. The requirement for header information is already indicated in the latest COMDTINST 1000.14B.
Enclosure (6), Page E-6-6, Modified wording of Accession (ACC-3) entry.
Enclosure (6), Page E-6-21; Removed specific examples from Page 7 entries to highlight the fact that these are general entries and not subject specific.
Enclosure (6), Page E-6-42 and E-6-43; Added sample Page 7 entries for separation for members with ongoing medical complications.
Enclosure (8), E-8-1 thru E-8-66, Updated list of school codes.
Enclosure (9), E-9-2 thru E-9-5; Updated list of foreign countries and their abbreviation codes.

Change 2 to HRSICINST M1800.5B, Your Guide To Retirement

Appendix A, Cover & Table of Contents; Added Delta Dental toll free number to inside of cover. Updated table of contents.
Appendix A, Pages 5-1; Added new topic: "Special Compensation for Severely Disabled Uniform Services Retirees"; changed topic heading.
Appendix A, Pages 5-16 and 5-17; Added page "Special Compensation for Severely Disabled Uniform Services Retirees". Changed heading on page 5-17 to "Dual Compensation or Level V Restrictions" and added statement on discontinuance of offset from military retired pay for dual compensation.
Appendix A, Pages A-1 and A-2; Reissued to reflect correct change number (CH-1) in footer. Previously issued as "CH-5".

Resume Change 6 to PPPM

Appendix B, Replaced entire appendix with DOD modified version. Note that affective date is the same as previous version. Content has not changed but layout was improved.
Index, Page I-1 thru I-7, Updated index.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table Of Contents, Pages i thru vii	Table Of Contents, Pages i thru vii
Chapter 1, Pages 1-13 thru 1-14	Chapter 1, Pages 1-13 thru 1-14
Chapter 2, Pages 2-A-1 thru 2-A-6	Chapter 2, Pages 2-A-1 thru 2-A-6
Chapter 3, Pages 3-A-3 thru 3-A-4	Chapter 3, Pages 3-A-3 thru 3-A-4
Chapter 3, Pages 3-B-17 thru 3-B-18	Chapter 3, Pages 3-B-17 thru 3-B-18
Chapter 3, Pages 3-C-9 thru 3-C-10	Chapter 3, Pages 3-C-9 thru 3-C-10
Chapter 5, Pages 5-A-1 thru 5-A-6	Chapter 5, Pages 5-A-1 thru 5-A-6
Chapter 5, Pages 5-C-1 thru 5-C-2	Chapter 5, Pages 5-C-1 and 5-C-2
Chapter 5, Pages 5-C-7 thru 5-C-8	Chapter 5, Pages 5-C-7 thru 5-C-8
Chapter 5, Pages 5-D-1 thru 5-D-2	Chapter 5, Pages 5-D-1 thru 5-D-2
Chapter 5, Pages 5-D-13 thru 5-D-20	Chapter 5, Pages 5-D-13 thru 5-D-21
Chapter 6, Pages 6-C-11 thru 6-C-12	Chapter 6, Pages 6-C-11 thru 6-C-12
Chapter 6, Pages 6-D-19 thru 6-D-20	Chapter 6, Pages 6-D-19 thru 6-D-20
Chapter 9, Pages 9-B-1 thru 9-B-3	Chapter 9, Pages 9-B-1 thru 9-B-3
Chapter 10, Pages 10-B-3 thru 10-B-6	Chapter 10, Pages 10-B-3 thru 10-B-6
Enclosure 1, Pages E-1 thru E-2	Enclosure 1, Pages E-1 thru E-2
Enclosure 1, CG HRSIC-1900	Enclosure 1, CG HRSIC-1900
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
	Enclosure 1, CG HRSIC-2002
Enclosure 1, CG HRSIC-2030	Enclosure 1, CG HRSIC-2030
Enclosure 1, CG HRSIC-2040	Enclosure 1, CG HRSIC-2040
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2070	Enclosure 1, CG HRSIC-2070
Enclosure 1, CG-HRSIC-5100	Enclosure 1, CG-HRSIC-5100
	Enclosure 1, CG HRSIC-7421/2
Enclosure 4, Pages E-4-7 thru E-4-9	Enclosure 4, Pages E-4-7 thru E-4-8
Enclosure 6, Pages E-6-1 thru E-6-6	Enclosure 6, E-6-1 thru E-6-6
Enclosure 6, Pages E-6-21 thru E-6-22	Enclosure 6, Pages E-6-21 thru E-6-22
Enclosure 6, Pages E-6-41 thru E-6-48	Enclosure 6, Pages E-6-41 thru E-6-49
Enclosure 8	Enclosure 8
Enclosure 9	Enclosure 9
Change 2 to HRSICINST M1800.5B, Your Guide To Retirement	
Appendix A, Cover	Appendix A, Cover
Appendix A, Table of Contents, i thru ii	Appendix A, Table of Contents (CH-2)
Appendix A, Pages 5-1 thru 5-2	Appendix A, Pages 5-1 thru 5-2 (CH-2)
Appendix A, Pages 5-15 thru 5-16	Appendix A, Pages 5-15 thru 5-17 (CH-2)
Appendix A, Pages A-1 thru A-2	Appendix A, Pages A-1 thru A-2 (CH-1)
Resume Change 6 to PPPM	
Appendix B	Appendix B
Index	Index

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

/s/
R. D. RECK

Nonstandard distribution: E:b (PERSRUs), C:n

Location	Copies
Activities New York	16
Activities Baltimore	10
Air Station Cape Cod PERSRU	08
Air Station Sacramento PERSRU	04
Air Station San Diego PERSRU	09
ATC Mobile PERSRU	07
Base Galveston PERSRU	07
Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03

This page left blank intentionally.

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 357-3628

HRSICNOTE 1000
09 May 2000

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-5 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Chapter 1, Pages 1-7 thru 1-8; Second class petty officers authorized "by direction" authority with certain restrictions to sign forms and worksheets and for designation as Payment Approving Officials to sign PMIS/JUMPS transactions. Specification required on CG HRSIC-7210 of PAO authority granted to second class petty officers.
Chapter 2, Page 2-A-2 thru 2-A-3; Changed the name of CG HRSIC-2000 from PCS Departing Worksheet to PCS Departing/Separation Worksheet. Step 4 of PCS Departing Checklist changed to reflect and include ALCOAST 049/00
Chapter 2, Pages 2-B-1; Changed page number of TDY Checklist.
Chapter 2, Pages 2-B-22 thru 2-B-23; Updated example of TQC message.
Chapter 3, Page 3-B-18; Added ALCOAST 049/00 to reference listing of Step 1.
Chapter 3, Page 3-B-19; Added CG HRSIC-2000 PCS Departing/Separation Worksheet and CG HRSIC-2003 PCS Entitlements Worksheet to Step 5.
Chapter 3, Page 3-B-20; Modified step 11 by removing cancelled form CG-5274 as part of Final Termination Briefing and updated reference.
Chapter 3, Page 3-B-23; Added note regarding availability of retirement forms on HRSIC Website.
Chapter 3, Page 3-B-26; Noted instance in which reservists may be involuntarily transferred to RET-2 status.
Chapter 3, Pages 3-C-2 thru 3-C-10; Assigned responsibility for SRB calculation to HRSIC (MAS) vice (SES).
Chapter 3, Page 3-C-3; Allowed Reservists to reenlist up to 90 days prior to expiration of enlistment vice 60 days. Entered note regarding PMIS Code replacement of Page 7 requirement as outlined in ALCOAST 049/00.
Chapter 5, Page 5-A-9; Reserve SGLI will be administratively terminated due to non-payment at the end of 5 months vice 2 months.
Chapter 5, Page 5-C-2; Changed distribution of CG-4170 to reflect distribution changes made in change 4 of this manual.
Chapter 5, Page 5-C-3 thru 5-C-4; Included pay base date and/or active duty base date discrepancies as a basis for requesting immediate adjustment to Statement of Creditable Service. Changed steps completed by unit and PERSRU.
Chapter 5, Page 5-C-5; Added E-mail to Unit PDIF transmission options.
Chapter 5, Pages 5-D-4 thru 5-D-5; Designated HRSIC (MAS) to screen requests to carry over 60 days LV and forwards eligible requests to COMDT (G-WPM-1).
Chapter 5, Page 5-D-11; Changed disposition of Mailing Address Change for retired members.
Chapter 6, Page 6-D-6; Modified language in the Rules for Reporting Drills. Eliminated requirement for CO's letter justifying untimely submission of drills over 90 days old.

Continued on Next Page

Changes (cont.)

Chapter 6, Page 6-D-14; Eliminated requirement for CO's letter justifying untimely submission of drills over 90 days old.
Chapter 7, Pages 7-A-1 and 7-A-8; Added Funeral Duty Pay for Reservists as established in ALCOAST 244/99.
Chapter 7, Pages 7-C-1 thru 7-C-5; Established guidelines, rules, and procedures for Savings Deposit Program.
Chapter 8, Pages 8-B-4 thru 8-B-9; Updated State Tax Listing.
Chapter 10, Page 10-B-4; Changed reference numbers.
Enclosure (1), E-1-1 thru E-1-2; Updated list.
Enclosure (1), DD Form 2648; Revised by DOD November 1999.
Enclosure (1), CG HRSIC-1900; Added retired pay projection Website link.
Enclosure (1), CG HRSIC-2000; Changed various sections to reflect authorized entitlements for PCS transfer and Separations. Changed wording of POV Information section to reflect only one authorized POV shipment.
Enclosure (1), CG HRSIC-2001; Amended revision date of form.
Enclosure (1), CG HRSIC-2003; Removed block for "Current PDS". Removed reference to JFTR in DLA block. Amended block on Authorized Travel Time. Included sections for Alaskan Marine Highway System and OCONUS mileage.
Enclosure (1), CG HRSIC-2025; Added effective date of change in BAH status.
Enclosure (1), CG HRSIC-2045; Added "CO's recommendation signature" block for extension/reenlistment. Specified "Discharge/RELAD only" for selection of travel destination. Included block for vacating government quarters. Corrected order in which terminal leave is counted for retirements. Added note for retirements regarding input into SDA II of periods at processing point and permissive temporary duty dates.
Enclosure (1), CG HRSIC-2070; Amended revision date on form.
Enclosure (6); Updated to reflect current procedures as discussed in COMDTINST 1000.14B. Removed "Progressing" option from A&R-10.
Enclosure (7), Page E-7-1; Added "FOUO" to CASREP message example.
Enclosure (10), Pages E-10-5 and E-10-8; Added Physicians Assistant/Nurse Practitioner Insignia. Changed "Secretary's Award for Meritorious Achievement" to "silver" vice "gold".
Appendix A, Page A-1; Included information on availability of forms on HRSIC Website.
Appendix A, Page A-25; Added retired pay projection Website link to CG HRSIC-1900.
Appendix E; Changed various pages to reflect new travel policies. This is Change 1 to The Traveler's Guide to Successful Claims Processing.
Appendix F; Changed text to reflect current terminology.
Index, Pages I-1 thru I-7; Updated the Index pages.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table of Contents, Pages i thru vii	Table of Contents, Pages i thru vii
Chapter 1, Page 1-7 thru 1-8	Chapter 1, Page 1-7 thru 1-8
Chapter 2, Page 2-A-1 thru 2-A-4	Chapter 2, Page 2-A-1 thru 2-A-4
Chapter 2, Page 2-B-1 thru 2-B-2	Chapter 2, Page 2-B-1 thru 2-B-2
Chapter 2, Page 2-B-21 thru 2-B-26	Chapter 2, Page 2-B-21 thru 2-B-26
Chapter 3, Page 3-B-17 thru 3-B-20	Chapter 3, Page 3-B-17 thru 3-B-20
Chapter 3, Page 3-B-23 thru 3-B-26	Chapter 3, Page 3-B-23 thru 3-B-26
Chapter 3, Page 3-C-1 thru 3-C-4	Chapter 3, Page 3-C-1 thru 3-C-4
Chapter 3, Page 3-C-9 thru 3-C-10	Chapter 3, Page 3-C-9 thru 3-C-10
Chapter 5, Page 5-A-9 thru 5-A-10	Chapter 5, Page 5-A-9 thru 5-A-10
Chapter 5, Page 5-C-1 thru 5-C-6	Chapter 5, Page 5-C-1 thru 5-C-6
Chapter 5, Page 5-D-3 thru 5-D-6	Chapter 5, Page 5-D-3 thru 5-D-6
Chapter 5, Page 5-D-11 thru 5-D-12	Chapter 5, Page 5-D-11 thru 5-D-12
Chapter 6, Page 6-D-5 thru 6-D-6	Chapter 6, Page 6-D-5 thru 6-D-6
Chapter 6, Page 6-D-13 thru 6-D-14	Chapter 6, Page 6-D-13 thru 6-D-14
Chapter 7, Page 7-1	Chapter 7, Page 7-1
Chapter 7, Page 7-A-1 thru 7-A-2	Chapter 7, Page 7-A-1 thru 7-A-2
Chapter 7, Page 7-A-7 thru 7-A-8	Chapter 7, Page 7-A-7 thru 7-A-8
	Chapter 7, Page 7-C-1 thru 7-C-5
Chapter 8, Page 8-B-3 thru 8-B-10	Chapter 8, Page 8-B-3 thru 8-B-10
Chapter 10, Page10-B-3 thru 10-B-4	Chapter 10, Page 10-B-3 thru 10-B-4
Enclosure 1, Page E-1-1 thru E-1-2	Enclosure 1, Page E-1-1 thru E-1-2
Enclosure 1, DD Form 2648	Enclosure 1, DD Form 2648
Enclosure 1, CG HRSIC-1900	Enclosure 1, CG HRSIC-1900
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
Enclosure 1, CG HRSIC-2001	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2003	Enclosure 1, CG HRSIC-2003
Enclosure 1, CG HRSIC-2025	Enclosure 1,.CG HRSIC-2025
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2070	Enclosure 1, CG HRSIC-2070
Enclosure 6	Enclosure 6
Enclosure 7, Page E-7-1 thru E-7-2	Enclosure 7, Page E-7-1 thru E-7-2
Enclosure 10, Page E-10-5 thru E-10-8	Enclosure 10, Page E-10-5 thru E-10-8
Appendix A, Page A-1 thru A-2	Appendix A, Page A-1 thru A-2
Appendix A, Page A-25 thru A-26	Appendix A, Page A-25 thru A-26
Appendix E, Page 3 thru 6, CH-1	Appendix E, Page 3 thru 6, CH-1
Appendix E, Page 17 thru 20, CH-1	Appendix E, Page 17 thru 20, CH-1
Appendix E, Page 25 thru 26, CH-1	Appendix E, Page 25 thru 26, CH-1
Appendix E, Page 29 thru 30, CH-1	Appendix E, Page 29 thru 30, CH-1
Appendix F	Appendix F
Index, Pages I-1 thru I-7	Index, Pages I-1 thru I-7

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "HRSIC-PRC@hrsic.uscg.mil" or by returning the comment form on Enclosure (11) of this manual.

/s/
G. E. SENA

Nonstandard distribution: E:b (PERSRUs), C:n

Location	Copies
Activities New York	16
Activities Baltimore	10
Air Station Cape Cod PERSRU	08
Air Station Sacramento PERSRU	04
Air Station San Diego PERSRU	09
ATC Mobile PERSRU	07
Base Galveston PERSRU	07
Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03

This page left blank intentionally.

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 357-3628

HRSICNOTE 1000
01 October 1998

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-4 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

Purpose This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

Action Addressees shall enter page changes as indicated in the Procedure section of this Notice.

Summary The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Changes

Signature of Responsible Officer, Page 1-8; Added E5's to list of members eligible to be designated at Payment Approving Officials (PAO) IAW COMDTINST M7210.1 (series), page 1-3.

Forms Referenced in this Manual, Page 1-13; Removed Reserve Assignment Request and Orders, CG-5525, which has been replaced by the Assignment Data, CG-3698A.

Permanent Change of Station, Pages 2-A-1 thru 2-A-7; Updated the procedures before a PCS transfer.

Temporary Additional Duty, Pages 2-B-1; Rewrite of entire section to reflect current procedures established by HRSIC (travel) business line.

Active Duty For Training, Pages 2-C-1 thru 2-C-9; Update the ADT process for reserve members, amendments and preparation for Annual Screening Questionnaire.

Recalled Retired Members, Pages 3-A-3 thru 3-A-4; Clarified the payment procedures for retired members recalled to duty.

Separations Process, Pages 3-B-1 thru 3-B-28; Updated the separation process. Corrected submission time of pre-discharge interviews to 6 months. Corrected submission time of Assignment Data form to six months prior to separation.

Immediate Enlistment in the CG Reserve Upon Discharge, Page 3-C-10; Removed references to form CG-5525 which has been replaced by the Assignment Data Form, CG-3698A.

Training and Educational Accomplishments, Page 4-C-3
Removed "Reserve Information Worksheet" as prescribed form for reporting reserve educational accomplishments due to previous cancellation of form in change 3 to 3PM. Added "Record Of Professional Development, CG-4082 as an optional form for reporting accomplishments and entry in official record.

BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Section 5-A; Removed references to recording SGLI dependents on CG-4170A, as this is no longer required. Updated 5-A-7 and 8 to reflect current policy for Reserve coverage under SGLI. Made corrections to signature and distribution requirements of the SGLV-8286 and CG-4170A.

Continued on Next Page

Changes (cont.)

Family Member Dental Plan, Pages 5-B-4 and 5-B-5, Included reference to OCONUS coverage. Necessitates intent on the part of the member to remain on active duty. Stipulates active duty obligation for reservists enrolling in the program.

Transcript of Sea Service (TOSS), Page 5-C-8, Deleted Size and tonnage of each vessel and replaced with Shaft Horsepower.

Preparation of the DD Form 2 CG and DD Form 2, Page 5-D-8, Updated referenced location of Geneva Convention Categories.

Personnel Administration, Page 5-D-11, Updated disposition for Reporting Change in Mailing Address for reservists.

Permissive Travel Authorization, Page 5-D-16, Included note suggesting members on house hunting orders take certified copies of LES.

Annual Reserve Retirement Point Statement, Page 6-D-19 and 6-D-20, Changed office of responsibility from CST to SES for monthly and annual reserve retirement point statements.

Allotment Check-off List, Page 8-A-3, Allows member multiple allotments to the same payee with certain provisions.

State Tax Listing, Page 8-B-4 through 8-B-9, Added new chart giving World Wide Web addresses for obtaining tax info/documents. Added new phone numbers of state tax offices. Added note regarding Connecticut requirement for yearly certification of tax exemption.

Forms and Worksheets, Page E-1-1, Added new form, CG HRSIC-2003, PCS (JFTR, Chap 5) Entitlements Worksheet.

Preseparation Counseling Checklist, DD Form 2648, The form has been updated by the DOD.

PCS Departing Worksheet, CG HRSIC-2000, Enclosure (1), Updated the PCS departing Worksheet.

Continued on Next Page

Changes (cont.)

Departing TDY or PCS/TEMDUINS TO "A" School Worksheet, CG HRSIC-2001, Enclosure (1): Revised description in the "Purpose" block.

PCS Entitlements Worksheet, CG HRSIC-2003: Introduction of new form for computing PCS entitlements IAW JFTR Chapter 5.

Dependency Worksheet, CG HRSIC-2020: Changed PAYMAN reference.

Career Development Worksheet, CG HRSIC 2030: Revised form to include chain of command approval for advancement to E-2, E-3 and E-4 and require Verifying (Admin) Official review and signature.

Allotment Worksheet, CG HRSIC-2040: Added Series "EE" to Allotment Code B and added Series "I" to Allotment Code G on reverse of form.

Bond Worksheet, CG HRSIC-2060: Revised form to include Series I Savings Bond Election Table.

TDY Travel Request/Authorization Worksheet, CG HRSIC 2070: Changed abbreviation TAD to TDY.

Block by Block Description of PDIF, Enclosure (5), Pages E-5-1 thru E-5-21: Rewrite of PDIF block by block description to match newly formatted PDIF form.

Training School Listing, Enclosure (8): Updated the PMIS Code and Course title listing. Added step/action table describing school code process.

Award Codes, Enclosure (10) pages 5 and 11: Adds Port Security Unit Insignia to list of award codes.

Appendix A, Retirement Package: Replaced previous contents with "Your Guide in Retirement," HRSICINST M1800.5 (series).

Appendix D, PDR System: Adds page instructing members to place a copy of updated COMDTINST M1080.10E in this section.

Index, Pages I-1 thru I-5: Updated the Index pages.

Continued on Next Page

Procedure Remove and insert the following pages.

Remove	Insert
Table of Contents, Pages i thru vii	Table of Contents, Pages i thru vii
Chapter 1, Page 7	Chapter 1, Page 7
Chapter 1, Page 13	Chapter, Page 13
Chapter 2, Page 2-1	Chapter 2, Page 2-1
Chapter 2, Page 2-A-1 thru 2-A-7	Chapter 2, Page 2-A-1 thru 2-A-7
Chapter 2, Page 2-B-1 thru 2-B-15	Chapter 2, Page 2-B-1 thru 2-B-25
Chapter 2, Page 2-C-1 thru 2-C-8	Chapter 2, Page 2-C-1 thru 2-C-9
Chapter 3, Page 3-A-3	Chapter 3, Page 3-A-3
Chapter 3, Pages 3-B-1 thru 3-B-27	Chapter 3, Pages 3-B-1 thru 3-B-27
Chapter 3, Page 3-C-9	Chapter 3, Page 3-C-9
Chapter 4, Page 4-C-1 thru 4-C-3	Chapter 4, Page 4-C-1 thru 4-C-3
Chapter 5, Page 5-A-1 thru 5-A-15	Chapter 5 Page 5-A-1 thru 5-A-15
Chapter 5, Page 5-B-3 thru 5-A-5	Chapter 5 Page 5-B-3 thru 5-B-5
Chapter 5, Page 5-C-7	Chapter 5, Page 5-C-7
Chapter 5, Page 5-D-1	Chapter 5, Page 5-D-1
Chapter 5, Page 5-D-7	Chapter 5, Page 5-D-7
Chapter 5, Page 5-D-11	Chapter 5, Page 5-D-11
Chapter 5, Page 5-D-15	Chapter 5, Page 5-D-15
Chapter 6, Page 6-D-19	Chapter 6, Page 6-D-19
Chapter 8, Page 8-A-3	Chapter 8, Page 8-A-3
Chapter 8, Pages 8-B-1 thru 8-B-17	Chapter 8, Pages 8-B-1 thru 8-B-17
Enclosure (1), Page E-1-1	Enclosure (1), Page E-1-1
Enclosure (1), DD Form 2648	Enclosure (1), DD Form 2648
Enclosure (1), CG HRSIC-2000	Enclosure (1), CG HRSIC-2000
Enclosure (1), CG HRSIC-2001	Enclosure (1), CG HRSIC-2001
	Enclosure (1), CG HRSIC-2003
Enclosure (1), CG HRSIC-2020	Enclosure (1), CG HRSIC-2020
Enclosure (1), CG HRSIC-2030	Enclosure (1), CG HRSIC-2030
Enclosure (1), CG HRSIC-2040	Enclosure (1), CG HRSIC-2040
Enclosure (1), CG HRSIC-2060	Enclosure (1), CG HRSIC-2060
Enclosure (1), CG HRSIC-2070	Enclosure (1), CG HRSIC-2070
Enclosure (5), Description of PDIF	Enclosure (5), Description of PDIF
Enclosure (8), School Codes	Enclosure (8), School Codes
Enclosure (10), Pages E-10-5 and E-10-11	Enclosure (10), Pages E-10-5 and E-10-11
Appendix (A), Retirement Package	Appendix (A), “Your Guide To Retirement”
Appendix (D), PDR System	Page D-1
Index, Pages I-1 thru I-5	Index, Pages I-1 thru I-5

Continued on Next Page

5. **Comments and Recommendations** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

/s/
R. J. WILLIAMSON

Nonstandard distribution: E:b (PERSRUs), C:n

Location	Copies
Activities New York	16
Activities Baltimore	10
Air Station Cape Cod PERSRU	08
Air Station Sacramento PERSRU	04
Air Station San Diego PERSRU	09
ATC Mobile PERSRU	07
Base Galveston PERSRU	07
Group Astoria PERSRU	09
Group Charleston PERSRU	08
Group Corpus Christi PERSRU	06
Group Fort Macon PERSRU	06
Group Grand Haven	03
Group Humboldt Bay PERSRU	04
Group Key West PERSRU	09
Group Milwaukee PERSRU	06
Group Mobile PERSRU	05
Group North Bend PERSRU	07
Group Port Angeles PERSRU	04
Group Portland PERSRU	05
Group San Francisco PERSRU	06
Group Southwest Harbor PERSRU	03
Group St. Petersburg PERSRU	08
Group Woods Hole PERSRU	07
CCGD1 PERSRU	05
CCGD7 PERSRU	05
CCGD8 PERSRU	02
CCGD9 PERSRU	05
CCGD13 PERSRU	06
CCGD14 PERSRU	05
CCGD17 PERSRU	05
GANTSEC PERSRU	08
MARSEC PERSRU	04
MSO Houston/Galveston PERSRU	07
Support Center E. City PERSRU	06
TISCOM Alexandria PERSRU	10
TRACEN Cape May	12
TRACEN Petaluma	45
RESTRACEN Yorktown	20
Academy (Cadet PERSRU)	02
Academy (Perm Party PERSRU)	08
HQ SUPRT CMD	09
ISC Kodiak	10
ISC Alameda	10
NOAA Units	03

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA, KS 66683-3591
Staff Symbol: PRC
Phone: 785 357-3628

HRSICNOTE 1000
09 November 1998

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-3 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **Purpose.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **Action.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **Summary**. The significant changes are marked by a side bar in the margin. Significant changes are summarized as follows:

   PCS Transfer Process, pages 2-A-2 and 2-A-5: Updated stage 4 of the PCS transfer process to include the use of the new Departing TAD or PCS/TEMDUINS To "A" School Worksheet (CG HRSIC-2001) if applicable. Added DEERS update requirement for address change upon PCS to PCS Reporting Checklist.

   Purpose of TAD Order, page 2-B-2: Added a note to the Purpose of a TAD order to use the new Departing TAD or PCS/TEMDUINS To "A" School Worksheet (CG HRSIC-2001) for members going TAD to class "A" School.

   Active Duty For Training, section 2-C: Expanded "How to Process an ADT Order" section. Added "Amendments to ADT Orders" page. Removed ADT Checklist.

   Transfer of Personnel, section 2-D: Added new section to chapter 2 entitled "Active Duty Other Than Training – ADOT." This section focuses on ADSW-AC (formally TEMAC) procedures to follow in projecting costs, document ID's, Accounting Data and processing ADSW-AC orders.

   Separation Processing, pages 3-B-5, 7, 20, and Enclosure 4: Added requirement for PERSRU to prepare DD-214, SDAII transactions and separation letter(s). Gave samples of letters in Enclosure (4).

   Checklist for Separations, pages 3-B-18 through 3-B-19: Added ALCOAST 091/98 reference for predischarge interview action. Prescribed use of CG-3698A, Assignment Data to request assignment to a unit as a reservist following RELAD, vice using form CG-5525, Coast Guard Reserve Assignment Request and Orders which is discontinued.

   E-mail Addresses, pages 3-B-5 through 3-B-12; 3-B-19; 8-A-5; 10-A-11 and Enclosure 11: Changes have been made to update HRSIC E-mail address (es), to SWSIII format. SWSII users should also use these addresses but route via their designated center utilizing the world wide web.

Continued on Next Page

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B		6	10	1	8	5				3	3				3	1			3	3	3	1		1	3	1
C	3	3		2	2	2	1		1		10	2	1	3*			2	2		1		2	1	1	1	1
D		2	3	4		1	0	2	1		1	1	1	0		1	1	0	2	1		1	1	2	1	1
E	1	*		1				1	1		1	1		1	1			1								
F				1			1		1																	
G			1																							
H																										

*NON-STANDARD DISTRIBUTION: See page 6

Separations, pages 3-B-1 through 3-B-27: Removed the words "Expedited Separations" from Topic Chart, item 4 on page 3-B-1. Removed Page 3-B-17, sample E-mail for disability retirement, and combined information with Exhibit 3-B-1. Increased submission time to 60 days vice 45 days for CG-HRSIC-2045, Career Intentions Worksheet. Added HRSIC (SES/HRSIC) to distribution on message request for cancellation of document numbers and accounting data.

Reserve Retirement Separations, pages 3-B-26 through 3-B-28: New section added to explain procedures for Reserve Retirements.

Checklist for Reenlistment or Extension, Page 3-C-4: Changed wording on When/Then table to clarify initial SRB installment payment period.

Servicemembers' Group Life Insurance (SGLI), Pages 5-A-7 to 5-A-14: Added note to Reserve member's coverage awaiting retired pay. Modified wording to emphasize importance of having a witness signature.

Family Member Dental Plan, Page 5-B-7: Added option to fax DD-2492-1. Updated mailing address and provided fax number.

Defense Enrollment Eligibility Reporting System (DEERS) Page 5-B-17 to 5-B-18: Added new requirement that members must update their residential address within 30 days of a move such as PCS or any other change in residence.

Annual Verification of CG-4170A, Page 5-C-2: Updated procedures on the annual verification of the CG-4170A. Units should use the member's unit PDR copy of the CG-4170A for annual verification.

Requesting Statements of Creditable Service, Pages 5-C-3 to 5-C-4: Moved the last part of Stage 2 to the last part of Stage 1.

Security Clearances, Page 5-C-7: COMDTINST M5520.12A has replaced COMDTIST M5520.12. CG-5588 and SF-312 replaced CG-5274 as the forms to be attached to the Certificate of Clearance.

Leave Carried Over In Excess of 60 Days, Page 5-D-4: Added submission deadline date for letter requesting to carry over leave in excess of 60 days.

Reporting Change in Mailing Address, Page 5-D-11, 5-D-13: Removed form CG-HRSIC-2055 as an option for change in mailing address. Form is discontinued. Expanded "disposition" information and added PERSRU action to 5-D-11. Prescribed use of CG-3698A vice CG-HRSIC-2055 for requesting reserve reassignment.

Payment of Mobile Unit Personnel, Page 6-C-6 to 6-C-7: Added Pacific Area Fleet Training Group to the list of units eligible for continual CSEAPAY. Reworded the Subsistence Allowance paragraph to indicate that continual BAS or SEPRATS are authorized for Mobile Unit Personnel who are TAD aboard a government vessel.

Payment of Inactive Duty Reservists, section 6-D-1 through 6-D-20: Clarified IDT prerequisites. Expanded the IDT Process table to give more detailed instructions for each stage. Provided sample drill orders and amendments to orders. Clarified UAR procedures and provided a sample IDT Certification Sheet.

Change Income Tax Withholding Status for Puerto Rico, Page 8-B-7: If a member claims Puerto Rico as their state of legal residence and is assigned duty in the U.S., Federal income tax is withheld. If the member is assigned duty outside the U.S., Puerto Rico State income tax is withheld. This withholding agreement is effective 1 January 1998. Withholding for Puerto Rico State Tax begins 1 April 1998.

Continued on Next Page

Information about the W-2 Form and How To Request A Duplicate Or Corrected W-2 Form, Pages 8-B-12 through 8-B-14: Minor grammatical changes on 8-B-12 and 8-B-13. Page 8-B-14 changed to clarify information about block 15 on W-2 and procedures for requesting a replacement W-2 Form.

How to complete Enlisted Performance Evaluation Forms, Page 10-A-9, Step 7: Use of the "Progressing" and "Performance Qualifications Completed" ovals have been discontinued as per ALDIST 189/98.

Forms and Worksheets Enclosure (1):

- Updated the CG-HRSIC-1160, Centralized First Term Reenlistment Review (CFTRR) Application. Added reference line below the "No" box in block 12.
- Updated the CG HRSIC-2000, PCS Departing Worksheet, added JFTR References in the travel advances section on the reverse side and reworded the DLA section to clarify members' entitlement to advances of DLA. Added "Caution" block in member section. Added "Member Initials" and statement of understanding in signature block section.
- Created CG HRSIC-2001, Departing TAD or PCS/TEMDUINS to "A" School Worksheet.
- Updated the CG-HRSIC-2020, Dependency Worksheet, by adding an * to the reverse side of form in the "Documentation to be submitted" column for adopted child and child placed for adoption.
- Updated the CG-HRSIC-2025, BAH/Housing Worksheet, Privacy Act Statement to include Authority and Disclosure statements.
- Updated CG HRSIC-2030, Career Development Worksheet, to allow room for signature under Command Approval block on bottom of page.
- Updated CG HRSIC-2045, Career Intentions Worksheet, as follows:
  a. The Extension/Reenlistment Section reworded to show Effective Date Of Extension/Reenlistment vice Effective Date only and the reason for requesting an extension or reenlistment.
  b. The Final Mailing Address section was reworded to state that the final mailing address is the location where the W-2 form will be sent the following year.
  c. A block entitled "For Retirement Only" was added to record if member intends to utilize a retirement processing station, 10 days permissive temporary duty for retirement area familiarization and/or terminal leave, and dates for each.
  b. The Command Approval block has been enlarged to allow for signature.
- Deleted CG HRSIC-2055, Reserve Information Worksheet. All functions on the form, with exception of transfer request, may be accomplished via E-mail, LES pen and ink correction submission or submission of course completion letters and transcripts. Transfer requests will be completed via CG-3698A, Assignment Data Form.
- Created CG HRSIC-2055A, Reserve Retirement Transfer Request. This optional form may be used by a reservist to request retirement vice using a letter request.
- Updated CG HRSIC-2070, Tad Travel Request/Authorization Worksheet. Added E, F, and G to page 2 in the PERSRU section of the worksheet.

Standard Separation Letters Enclosure (4): Updated members' and spouses' letters to add the eligibility to disenroll from SBP coverage between the members' second and third retirement years. Created Letters for: Member Due Money, Member Owes Money, Info Regarding ACDU Separation Status, and RELAD.

School Codes Contents Enclosure (8): Added new school codes to the list.

State/Foreign Country Abbreviations Enclosure (9): Added Ukraine to the list of foreign countries.

Continued on Next Page

Award Codes Enclosure (10): Added new award, Army Professional.

Comment Form, Enclosure 11: Updated HRSIC (PRC) E-mail address on form.

Retirement Package, Appendix A: Removed punctuation from address to comply with postal standards. Changed Commandant (G-PMP) to (G-WPM) in Section V, paragraph 6 of form CG-HRSIC-4700.

Instructions for the DD-1172, Appendix B: Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals, DOD Instruction 1000.13 dated 30 December 1992 is canceled and replaced with an updated version dated 5 December 1997.

Computation Of Service, Appendix C: Clarified computation of creditable sea service when leave is taken in conjunction with TAD from a career sea pay eligible vessel.

Index: Added Reserve Dental Plan and Reserve Retirements to index.

Continued on Next Page

4. **PROCEDURE.** Remove and insert the following pages:

Remove	Insert
Table of Contents Pages i-ii	Table of Contents Pages i-ii
Chapter 2, Page 2-1	Chapter 2, Page 2-1
Chapter 2-A, Pages 1-2	Chapter 2-A, Pages 1-2
Chapter 2-A, Pages 5-6	Chapter 2-A, Pages 5-6
Chapter 2-B, Pages 1-2	Chapter 2-B, Pages 1-2
Chapter 2-C, Pages 1-6	Chapter 2-C, Pages 1-6
	Chapter 2-D, Pages 1-7
Chapter 3-B, Pages 1-25	Chapter 3-B, Pages 1-27
Chapter 3-C, Pages 3-4	Chapter 3-C, Pages 3-4
Chapter 5-A, Pages 7-14	Chapter 5-A, Pages 7-14
Chapter 5-B, Pages 7-8	Chapter 5-B, Pages 7-8
Chapter 5-B, Pages 17-18	Chapter 5-B, Pages 17-18
Chapter 5-C, Pages 1-4	Chapter 5-C, Pages 1-4
Chapter 5-C, Pages 7-8	Chapter 5-C, Pages 7-8
Chapter 5-D, Pages 3-4	Chapter 5-D, pages 3-4
Chapter 5-D, Pages 11-14	Chapter 5-D, Pages 11-14
Chapter 6-C, Pages 5-8	Chapter 6-C-, Pages 5-8
Chapter 6-D, Pages 1-15	Chapter 6-D, Pages 1-20
Chapter 8-A, Page 5	Chapter 8-A, Page 5
Chapter 8-B, Pages 7-8	Chapter 8-B, Pages 7-8
Chapter 8-B, Pages 11-14	Chapter 8-B, Pages 11-14
Chapter 10-A, Pages 9-12	Chapter 10-A, Pages 9-12
Enclosure 1, Pages E-1-1 to E-1-2	Enclosure 1, Pages E-1-1 to E-1-2
Enclosure 1, CG HRSIC-1160	Enclosure 1, CG HRSIC-1160
Enclosure 1, CG HRSIC-2000	Enclosure 1, CG HRSIC-2000
	Enclosure 1, CG HRSIC-2001
Enclosure 1, CG HRSIC-2020	Enclosure 1, CG HRSIC-2020
Enclosure 1, CG HRSIC-2025	Enclosure 1, CG HRSIC-2025
Enclosure 1, CG HRSIC-2030	Enclosure 1, CG HRSIC-2030
Enclosure 1, CG HRSIC-2045	Enclosure 1, CG HRSIC-2045
Enclosure 1, CG HRSIC-2055	Enclosure 1, CG HRSIC-2055A
Enclosure 1, CG HRSIC-2070	Enclosure 1, CG HRSIC-2070
Enclosure 4, Pages E-4-1 to E-4-4	Enclosure 4 , Pages E-4-1 to E-4-9
Enclosure 8	Enclosure 8
Enclosure 9, Page E-9-5	Enclosure 9, Page E-9-5
Enclosure 10, Pages E-10-1 to E-10-2	Enclosure 10, Pages E-10-1 to E-10-2
Enclosure 11	Enclosure 11
Appendix A, Pages A-1 to A-2	Appendix A, Pages A-1 to A-2
Appendix A, Pages 13-14	Appendix A, Pages 13-14
Appendix B, Entire Appendix	Appendix B, Entire Appendix
Appendix C, Pages C-39-40 and C-49-50	Appendix C, Pages C-39-40 and C-49-50
Index, Pages I-5 to I-6	Index, Pages I-5 to I-6

Continued on Next Page

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

/s/
R. J. WILLIAMSON

Nonstandard distribution: E:b (PERSRUs)

Location	# of Copies
Academy	16
Academy (Cadets)	10
Activities New York	33
Activities San Diego	09
Air Station Brooklyn	05
Air Station Cape Cod	08
Air Station Sacramento	04
ATC Mobile	14
Base Galveston	07
GANTSEC	08
Group Astoria	09
Group Charleston	08
Group Corpus Christi	06
Group Fort Macon	06
Group Humboldt Bay	04
Group Key West	09
Group Mobile	14
Group North Bend	07
Group Port Angeles	04
Group Portland	05
Group San Francisco	06
Group Southwest Harbor	03
Group St. Petersburg	13
Group Woods Hole	07
Headquarters Support Cmd.	20
ISC Alameda	28
ISC Boston	20
ISC Cleveland	33
ISC Honolulu	22
ISC Ketchikan	10
ISC Ketchikan-Juno Det.	17
ISC Kodiak	23
ISC Miami Beach	33
ISC New Orleans	23
ISC Portsmouth	20
ISC San Pedro	28
ISC Seattle	25
ISC St. Louis	18
MARSEC	04
MSO Houston-Galveston	10
NOAA	03
PERSCOM (adm2)	01
PERSCOM (epm)	01
PERSCOM (opm)	01
PERSCOM (rpm)	01
RTC Yorktown	15
SUPRTCEN Elizabeth City	18
TISCOM	05

U.S. Department of Transportation
United States Coast Guard

Commanding Officer
U. S. Coast Guard
Human Resources Service &
Information Center

444 SE Quincy St
Topeka, KS 66683-3591
Staff Symbol: PRC
(785) 295-2690

HRSICNOTE 1000
11 February 1998

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-2 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **PURPOSE.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **ACTION.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **SUMMARY.** A side bar in the margin marks the significant changes. Significant changes are summarized as follows:

   a. Changing of Basic Allowance for Quarters (BAQ) to Basic Allowance for Housing (BAH): Changes have been made throughout the manual to show BAH vice BAQ.

   b. PCS Departing Checklist, Page 2-A-3: Updated references on the PCS Departing Checklist.

   c. PCS Reporting Checklist, Page 2-A-5: Changed FSA Type 1 to FSH (Family Separation - Housing). Changed BAQ/VHA allowances to BAH allowance. Changed BAQ/VHA Housing Worksheet to BAH/Housing Worksheet.

   d. Overseas Transfer Checklist, Page 2-A-6: Added a step to the Overseas Transfer Checklist that requires the PERSRU supervisor to verify and sign the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN.

   e. Automatic Stops of Pay and Allowances, Pages 2-A-7 and 2-A-8: Added the new entitlement Partial BAS as an autostop on the day prior to the effective date of departure. Changed Partial BAQ to BAH Partial.

Continued on next page

DISTRIBUTION - SDL No. 135

	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B	31	6	10	1	16	5		3	3	3	3	3	3	10	3	1		80	3	3	3	1	1	1	2	1
C	3	3		2	2	2	1		1		10	2	1	10		2	2	1		1		2	1	1	1	1
D		2	3	4		1	1	2	1		1	1	1	1		1	1	1	2		1	1	1	2	1	1
E	1	*						1			1			1				1								
F																										
G																										
H																										

NON-STANDARD DISTRIBUTION: See page 8

f. How to prepare NATO Order Pages, 2-A-9 and 2-A-10: Removed the procedures on how to prepare a CENTO Order. These types of orders are no longer used.

g. Preparation of TAD Order (CG-4251) Block 12, Page 2-B-13: Added a requirement for the remarks block of the TAD Order. The maximum per diem rate (lodging and M&IE) for where the member will be TAD must be included in the remarks block of the TAD orders (if the member is going to draw per diem).

h. Accessions, Pages 3-A-1 through 3-A-5: Updated the procedures for accessions and added procedures for recalling RET-2 members.

i. Immediate and Priority Separation Processing, Pages 3-B-5 through 3-B-8: Updated the procedures for immediate separations and priority separations.

j. Expedited Separation E-Mail Message, Exhibit 3-B-1, Page 3-B-9: Changes have been made to Exhibit 3-B-1 to ensure that more detailed information is being sent on priority separation messages.

k. Requesting a Document Number and Accounting Data for Separation Orders, Exhibit 3-B-2 Page 3-B-12: Changes have been made to Exhibit 3-B-2 to have PERSRUs submit cancellation of document numbers and accounting data messages to COMDT (G-WR-1) vice COMDT (G-WR-3). Also changed E-mail messages to E-mail (so there is no confusion as to if an e-mail should be sent or a message).

l. Checklist for Reenlistment or Extension, Page 3-C-3: Added information that reserve members may reenlist up to 60 days prior to normal expiration of enlistment. Also updated the references on this checklist.

m. Immediate Enlistment in the Coast Guard Reserve Upon Discharge from the Regular Coast Guard, Page 3-C-9: Updated the reference block on this page.

n. Education and Qualifications, Page 4-C-12: When a member becomes qualified to wear the Company Commander Insignia, this qualification must be reported to the PERSRU for entry in PMIS/JUMPS. Procedures on how to report this to the PERSRU have been added to this section.

o. BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A), Pages 5-A-2 through 5-A-5: Changed the form name from BAQ/Dependency/Emergency Data and Validation (CG-4170A) to BAH/Dependency/Emergency Data and SGLI Validation (CG-4170A). Changed Servicemen's Group Life Insurance to Servicemembers' Group Life Insurance.

p. Distribution of the CG-4170A, Page 5-A-6: The distribution for the CG-4170A has been changed. Originals are now sent to CGPC (adm-3) vice the PERSRU.

q. Servicemembers' Group life Insurance, Pages 5-A-7 to 5-A-13: This section has been changed from Servicemen's Group Life Insurance to Servicemembers' Group Life Insurance. This section also has been changed significantly to show more detailed information about designation of SGLI.

Continued on next page

r. Annual Verification of CG-4170A, Page 5-C-2: Updated procedures on the annual verification of CG-4170A.

s. Requesting Statements of Creditable Service, Pages 5-C-3 and 5-C-4: This section has been changed significantly to show more detailed information on the procedures for requesting a statement of Creditable Service/Sea Service.

t. Personnel Data Information File, Page 5-C-5: Added a note that if the units are not receiving PDIFs for their members, then they should contact their servicing PERSRU. The PERSRUs have the ability to send the PDIFs via e-mail (as an attachment) or by printing them off and sending them to the unit.

u. Transcript of Sea Service (TOSS), Page 5-C-8: Updated the procedures for requesting a TOSS.

v. Leave Authorization (CG-2519), Page 5-D-2: A Leave Authorization (CG-2519) is only required for sick leave in excess of 2 days.

w. Leave Carried over in Excess of 60 Days, Pages 5-D-4 and 5-D-5: Added this section to show what needs to be done if a member or multiple members of a unit are authorized to carry more than 60 days leave into a new fiscal year.

x. Correction/Changes of a Names, SSN, Date of Birth, or Minority Designator, Pages 5-D-17 and 5-D-18: Request for corrections or changes to names, SSN, date of birth, or minority designator are now forwarded to HRSIC (MAS).

y. TRICARE Selected Reserve Dental program, Pages 5-D-19 and 5 -D-20: Added a section about the new TRICARE Selected Reserve Dental Program.

z. Special Payments, Page 6-B-3: Added a note to this section that says a member will not be authorized a special payment by HRSIC for any type of bonuses (SRB, Enlistment Bonus, SELRES bonus).

aa. Significant Pay Shortage Procedures, Pages 6-B-5 through 6-B-6: PERSRUs are required to send E-mail using the format in Exhibit 6-B-1 to MAS/HRSIC when requesting a special payment in pay shortage cases.

bb. Advance payments, Pages 6-B-7 and 6-B-8: Changed the type of advances of BAQ/VHA to BAH. Also changed the type of advances of OHA interim Housing Allowance and BAQ to OHA Interim Housing Allowance and BAH Type II.

cc. Offline Payments for Advance Payments, Pages 6-B-8 and 6-B-9: PERSRUs are required to send E-mail using the format in Exhibit 6-B-2 to MAS/HRSIC when requesting an offline payment for advance payments.

dd. Death Gratuity Payments, Page 6-B-11: Updated the procedures on Death Gratuity payments.

Continued on next page

ee. Deployed Unit Money list Message (DUMLUM), Page 6-C-3: HRSIC (MAS) issues DUMLUM approximately 3 days before each payday while cutter is deployed vice 5 days.

ff. IDT Process, IDT Prerequisites, Drill Orders, Pages 6-D-2 through 6-D-4: Updated the reference block in these sections.

gg. Waiver of Pension/Disability Compensation or Retired Pay, Page 6-D-12: Updated the reference block in this section.

hh. Annual Reserve Retirement Point Statement, Pages 6-D-14 and 6-D-15: Added a section about the Annual Reserve Retirement Point Statement (CG-4175A).

ii. Basic Allowance for Subsistence (BAS) – Enlisted, Page 7-B-2: Changed the old partial BAS to Pro-Rated BAS.

jj. Family Separation Allowance, Pages 7-B-3 through 7-B-6: Updated procedures on how to report Family Separation Allowance.

kk. Overseas Housing Allowance (OHA), Page 7-B-7: Changed BAQ to BAH Type II and FSA-Type I to Family Separation – Housing (FSH).

ll. Information about the W-2 form and how to request a duplicate or corrected W-2 form, Pages 8-B-11 through 8-B-15: This section has been changed significantly to provide more detailed information about the W-2 form.

mm. Request for Federal or State Tax Adjustments, Pages 8-B-16 and 8-B-17: Added this new section to provide the procedures for members requesting a Federal or State Tax Adjustment.

nn. Collection of PMIS/JUMPS Overpayments, Pages 9-A-2 and 9-A-3: A Notice of Overpayment (NOP) letter will be provided by HRSIC (MAS) for each member with a debt of $751.00 or more vice $500.00 or more. If a member has an overpayment of less than $150.00 then this pay will be taken during the current month if sufficient net pay exists. If member has an overpayment of $150.00 to $750.00 then this pay will be scheduled for automatic repayment at a rate not to exceed $150.00 a month starting the next month.

oo. Collection of Other Debts, Page 9-A-4: The procedures for collection of other debts has been updated.

pp. Nonjudicial Punishment (NJP) Checklist, Page 10-B-2: Reports of NJP are now reported to COMDT (W-KS-5).

qq. Courts-Martial Checklists, Page 10-B-3: Reports of courts-martials are now reported to COMDT (W-KS-5).

rr. Reporting Civil Arrest or Conviction, Pages 10-B-13 and 10-B-14: Procedures on how to report a civil arrest or conviction have been updated.

Continued on next page

ss. Forms and Worksheets Enclosure (1): All of the forms and worksheets in Enclosure (1) that had BAQ information on them have been changed to show BAH vice BAQ. The following changes have also occurred:

- The BAQ/VHA Housing Worksheet has been renamed to BAH/Housing Worksheet and the VHA information has been removed.
- A block has been added to the PCS Departing Worksheet that requires the PERSRU supervisor to verify and sign if the member is going to PCS OUTCONUS.
- A block has been added to the PCS Reporting Worksheet that ask the member if he/she is entitled to, and meets the requirements of, FSH.
- A reminder for "Advancement Evaluations should be submitted on a member who is being advanced, when applicable" has been added to the Career Development Worksheet.
- The Family Separation Allowance Worksheet has been changed. FSA Type I has been removed and the worksheet has been updated with the new terminology for FSA (i.e., FSA Type II has been changed to FSA-R, FSA-S, and FSA-T).
- A block has been added to the TAD Travel Request/Authorization Worksheet that allows a funds-approving official to sign and date the worksheet, when applicable. Also, another block has been added to the worksheet that allows the unit to enter what the total cost of per diem is going to be.

tt. PDIF Enclosure (5): A better description of all the blocks on the PDIF have been added to this section. Also a description of all the codes that may be used on the PDIF have been added to this section.

uu. Award Codes Enclosure (10): Award code 'CC' has been added to this enclosure. It is the new Company Commander Insignia.

vv. Retirement Package, Appendix A: The Reserve Component Retirement Pay Account Worksheet (CG HRSIC-4700/R) has been added to this section.

ww. Instructions for the DD-1172 Appendix B, Page B-1: Updated information on the eligibility of Wards has been added to this section.

xx. Computation of Service, Appendix C, Pages C-25 to C-33: Added examples on how to compute date of rank on members entering the service with prior service.

yy. PDR System, Appendix D: Military Personnel Data Records (PDR) System, COMDTINST M1080.10C is cancelled and has been replaced by Military Personnel Data Records (PDR) system, COMDTINST M1080.10D.

zz. Traveler's Guide, Appendix E: The Traveler's Guide has been updated with current travel claim procedures and HRSICINST 4600.1 (procedures for faxing travel claims) has been added to this section.

aaa. You and Your LES, Appendix F, Pages F-4 and F-6: BAQ entitlement have been changed to BAH entitlements on block 25 of the LES. The new Partial BAS has been added as a common entitlement to the LES.

Continued on next page

4. PROCEDURE. Remove and insert the following pages:

Remove	Insert
Table of Contents Pages i-vii	Table of Contents Pages i-vii
1 Pages 11-12	1 Pages 11-12
2-A Pages 1-10	2-A Pages 1-10
2-B Pages 9-10	2-B Pages 9-10
2-B Pages 13-14	2-B Pages 13-14
3-A Pages 1-4	3-A Pages 1-5
3-B Pages 5-12	3-B Pages 5-12
3-C Pages 3-4	3-C Pages 3-4
3-C Pages 9-10	3-C Pages 9-10
4-C Pages 1-2	4-C Pages 1-2
4-C Page 11	4-C Pages 11-12
5-A Pages 1-12	5-A Pages 1-15
5-B Pages 1-4	5-B Pages 1-4
5-B Pages 11-12	5-B Pages 11-12
5-C Pages 1-8	5-C Pages 1-8
5-D Pages 1-17	5-D Pages 1-20
6-B Pages 1-10	6-B Pages 1-12
6-C Pages 3-4	6-C Pages 3-4
6-D Pages 1-4	6-D Pages 1-4
6-D Pages 9-13	6-D Pages 9-15
7-B Pages 1-5	7-B Pages 1-8
8-B Pages 1-2	8-B Pages 1-2
8-B Pages 11	8-B Pages 11-17
9-A Pages 1-4	9-A Pages 1-4
10-B Pages 1-6	10-B Pages 1-6
10-B Pages 13-14	10-B Pages 13-14
Enclosure 1 Pages E-1-1 to E-1-2	Enclosure 1 Pages E-1-1 to E-1-2
Enclosure 1 CG-5489A	Enclosure 1 CG-5489A
Enclosure 1 CG-5489B	Enclosure 1 CG-5489B
Enclosure 1 CG HRSIC-2000	Enclosure 1 CG HRSIC-2000
Enclosure 1 CG HRSIC-2005	Enclosure 1 CG HRSIC-2005
Enclosure 1 CG HRSIC-2010	Enclosure 1 CG HRSIC-2010
Enclosure 1 CG HRSIC-2020	Enclosure 1 CG HRSIC-2020
Enclosure 1 CG HRSIC-2020A	Enclosure 1 CG HRSIC-2020A
Enclosure 1 CG HRSIC-2025	Enclosure 1 CG HRSIC-2025
Enclosure 1 CG HRSIC-2030	Enclosure 1 CG HRSIC-2030
Enclosure 1 CG HRSIC-2035	Enclosure 1 CG HRSIC-2035
Enclosure 1 CG HRSIC-2070	Enclosure 1 CG HRSIC-2070
Enclosure 5	Enclosure 5
Enclosure 7 Pages E-7-1 to E-7-4	Enclosure 7 Pages E-7-1 to E-7-4
Enclosure 10 Pages E-10-3 to E-10-4	Enclosure 10 Pages E-10-3 to E-10-4
Enclosure 10 Pages E-10-7 to E-10-8	Enclosure 10 Pages E-10-7 to E-10-8
Enclosure 11	Enclosure 11
Appendix A	Appendix A

Continued on next page

Remove	Insert
Appendix B Page B-1	Appendix B Page B-1
Appendix C Computation of Service Page C-1	Appendix C Computation of Service Page C-1
Appendix C Pages C-25 to C-44	Appendix C Pages C-25 to C-51
Appendix D (PDR Instruction)	Appendix D (PDR Instruction)
Appendix E (Travel Guide)	Appendix E (Travel Guide and HRSICINST 4600.1)
Appendix F Pages F-3 to F-6	Appendix F Pages F-3 to F-6
Index Pages I-1 to I-6	Index Pages I-1 to I-6

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "PUBS/HRSIC" or by returning the comment form on Enclosure (11) of this manual.

/s/
R. J. WILLIAMSON

HRSICNOTE 1000
11 February 1998

Nonstandard distribution: E:b (PERSRUs)

Location	# of Copies
Academy	16
Academy (Cadets)	10
Activities New York	33
Activities San Diego	09
Air Station Brooklyn	05
Air Station Cape Cod	08
Air Station Sacramento	04
ATC Mobile	14
Base Galveston	07
GANTSEC	08
Group Astoria	09
Group Charleston	08
Group Corpus Christi	06
Group Fort Macon	06
Group Humboldt Bay	04
Group Key West	09
Group Mobile	14
Group North Bend	07
Group Port Angeles	04
Group Portland	05
Group San Francisco	06
Group Southwest Harbor	03
Group St. Petersburg	13
Group Woods Hole	07
Headquarters Support Cmd.	20
ISC Alameda	28
ISC Boston	20
ISC Cleveland	33
ISC Honolulu	22
ISC Ketchikan	10
ISC Ketchikan-Juno Det.	17
ISC Kodiak	23
ISC Miami Beach	33
ISC New Orleans	23
ISC Portsmouth	20
ISC San Pedro	28
ISC Seattle	25
ISC St. Louis	18
MARSEC	04
MSO Houston-Galveston	10
NOAA	03
PERSCOM (epm)	01
PERSCOM (opm)	01
PERSCOM (rpm)	01
RTC Yorktown	15
SUPRTCEN Elizabeth City	18
TISCOM	05
TRACEN Cape May	10
TRACEN Cape May (Recruits)	15
TRACEN Petaluma	20

U.S. Department of Transportation
United States Coast Guard

Commanding Officer
U. S. Coast Guard
Human Resources Service &
Information Center

444 SE Quincy St
Topeka, KS 66683-3591
Staff Symbol: PRC
(785) 295-2690

HRSICNOTE 1000
28 July 1997

HUMAN RESOURCES SERVICE AND INFORMATION CENTER NOTICE 1000

Subj: CH-1 TO HRSICINST M1000.2A, PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. **PURPOSE.** This notice publishes changes to HRSICINST M1000.2A, Personnel and Pay Procedures Manual (PPPM).

2. **ACTION.** Addressees shall enter page changes as indicated in the Procedure section of this Notice.

3. **SUMMARY.** The initial distribution of HRSICINST M1000.2A was printed using an outdated version of COMDTINST 1000.14A (Enclosure 6). This change corrects this error.

4. **PROCEDURE.** Remove and insert the following pages:

Remove	Insert
Enclosure 6	Enclosure 6 (CH-1)

5. **Comments and Recommendations:** Comments or recommendations may be submitted by E-mail to "PUBS/PPC" or by returning the comment form on Enclosure (15) of this manual.

/s/
R. J. WILLIAMSON

DISTRIBUTION - SDL No. 134

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B	31	6	10	1	16	5		3	3	3	3	3	3	10	3	1		80	3	3	3	1	1	1	2	1
C	3	3		2	2	2	1		1		10	2	1	10		2	2	1		1		2	1	1	1	1
D		2	3	4		1	1	2	1		1	1	1	1		1	1	1	2		1	1	1	2	1	1
E	1	*						1			1			1				1								
F																										
G																										
H																										

NON-STANDARD DISTRIBUTION: See page 2

HRSICNOTE 1000
28 July 1997

Nonstandard distribution: E:b (PERSRUs)

Location	# of Copies
Academy	16
Academy (Cadets)	10
Activities New York	33
Activities San Diego	09
Air Station Brooklyn	05
Air Station Cape Cod	08
Air Station Sacramento	04
ATC Mobile	14
Base Galveston	07
GANTSEC	08
Group Astoria	09
Group Charleston	08
Group Corpus Christi	06
Group Fort Macon	06
Group Humboldt Bay	04
Group Key West	09
Group Mobile	14
Group North Bend	07
Group Port Angeles	04
Group Portland	05
Group San Francisco	06
Group Southwest Harbor	03
Group St. Petersburg	13
Group Woods Hole	07
Headquarters Support Cmd.	20
ISC Alameda	28
ISC Boston	20
ISC Cleveland	33
ISC Honolulu	22
ISC Ketchikan	10
ISC Ketchikan-Juno Det.	17
ISC Kodiak	23
ISC Miami Beach	33
ISC New Orleans	23
ISC Portsmouth	20
ISC San Pedro	28
ISC Seattle	25
ISC St. Louis	18
MARSEC	04
MSO Houston-Galveston	10
NOAA	03
PERSCOM (adm2)	01
PERSCOM (epm)	01
PERSCOM (opm)	01
PERSCOM (rpm)	01
RTC Yorktown	15
SUPRTCEN Elizabeth City	18
TISCOM	05
TRACEN Cape May	10
TRACEN Cape May (Recruits)	15
TRACEN Petaluma	20

U.S. Department of Transportation
United States Coast Guard

COMMANDING OFFICER
USCG HUMAN RESOURCES
SERVICE & INFORMATION CENTER

444 SE QUINCY ST
TOPEKA KS 66683-3591
Staff Symbol:
Phone: (785) 357-3695

HRSICINST M1000.2A
22 April 1997

HUMAN RESOURCES SERVICE & INFORMATION CENTER INSTRUCTION M1000.2A

Subj: PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

---

1. Purpose

This manual instruction establishes personnel and pay administration procedures.

- It provides guidance to field units on how and when to report personnel actions to the personnel reporting unit (PERSRU) so personnel information is quickly and accurately entered into the personnel management information system/joint uniform military pay system (PMIS/JUMPS).
- It applies to all field units within the Coast Guard and the National Oceanic and Atmospheric Administration (NOAA).

---

2. Action

The procedures and requirements set forth in this manual for maintaining personnel data must be followed by all Coast Guard and NOAA military personnel, their supervisors, unit administrative staffs, and unit Commanding Officers. Area and District Commanders, Commanders of Maintenance and Logistics Commands, Commanding Officers of Headquarters Units, Assistant Commandants for directorates, Chief Counsel and special staff offices at headquarters are requested to ensure compliance with this manual.

Continued on next page

DISTRIBUTION - SDL No. 137

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	3	2	3		3	2	2	2	1	1		2	2	2	2	2	2	1	2		3	1				
B	15	6	10	1	16	5		3	3	3	3	3	3	10	3	1		80	3	3	3	1	1	1	2	1
C	3	3		2	2	2	1		1		10	2	1	10		2	2	1		1		2	1	1	1	1
D		2	3	4		1	1	2	1		1	1	1	1		1	1	1	2		1	1	1	2	1	1
E	1	*						1			1			1				1								
F																										
G																										
H																										

NON-STANDARD DISTRIBUTION: See page 7

3. Directives Affected

This manual instruction supersedes PPCINST M1000.2, Personnel and Pay Procedures Manual (PPPM). It is a reprint of the original PPPM, updated to reflect the change of name for Pay and Personnel Center to Human Resources Service and Information Center. It includes the contents of the first PPPM through change 5 and incorporates new information which was slated for addition to the PPPM in change 6.

4. Changes

Changes to this manual instruction will be made by consecutively numbered amendments.

- Changes in this re-issuance (items which would have appeared in change 6 to the original PPPM) are marked by a vertical line in the outside margin and are summarized below.

Note: References to "Pay and Personnel Center" or "PPC" have been replaced with "Human Resources Service and Information Center" or "HRSIC" as appropriate.

Page, Section	Change
1-8, Signature of Responsible Officer	Added procedures for designating PERSRU Payment Officials (PAOs) IAW ALDIST 181/96
2-A-3, PCS Departing Checklist	Added requirement to ensure member meets obligated service requirement for transfer
2-A-6, Overseas Transfer Checklist	Added requirement to ensure member's dependents are medically qualified for overseas transfer
2-A-8, Auto Stops on PCS	Changed to show Special Duty Assignment Pay (SDAP) stops at 2400 on the day before the member departs PCS, IAW ALDIST 162/96
2-B-16, Temporary Additional Duty (TAD) Checklists	Added requirement for unit to provide the PERSRU with a copy of the member's travel claim along with a copy of the TAD order upon completion of TAD travel
3-A-3, Types of Accessions	Added former Cadets with reserve obligations to types of accessions

Continued on next page

4. Changes (cont'd)

Page, Section	Change
3-B, Separation Processing	Changed the procedures for separations processing to allow combining e-mail messages requesting separation accounting data and notifying HRSIC (SES) of member's impending separation into one e-mail message
3-B-19, Checklist for Separations	Added note that the PERSRU must submit a School Completion transaction upon receipt of a completed DD Form 2648 (Preseparation Counseling Checklist). Included requirement to prepare a Pg. 7 entry for members receiving separation pay, per COMDTINST 1910.1
3-B-20, Checklist for RELAD	Added requirements to counsel separating members on assignment to the SELRES Transition Pool and the Ready Reserve Mobilization Income Insurance program
3-C-4, Checklist for Reenlistment or Extension	Added rules and procedures for payment of lump sum leave upon reenlistment or first extension of enlistment
4-B-2, Warrant Officer Appointment Process	Added reminder that the PERSRU must reenter (in PMIS/JUMPS) the CO's recommendation and CWO exam specialty for each exam cycle that the member is recommended to participate
4-B-4, Warrant Officer Appointment Process (Reserve)	
5-A-7, Servicemen's Group Life Insurance (SGLI)	Changed to show that members of the retired reserve are now eligible for coverage under Veterans Group Life Insurance, and no longer eligible for coverage under SGLI
5-C-3, Annual Verification	Changed to allow the use of a stamp in the remarks block of CG Form 4170A to record the member's annual certification
6-B-8, Changes to liquidation schedules	Corrected to show that a member's commanding officer, vice COMDT (G-WPM), may approve requests for changes in the liquidation of advance OHA, Interim Housing Allowance, and BAQ in conjunction with overseas assignment

4. Changes (cont'd)

Page, Section	Change
6-C-2, Payment of Members on Deployed Cutters	Added that members, not on direct deposit, deploying for 3 or less paydays may request advance pay and allowances (9-D-2.b CG Pay Manual)
6-C-6, Payment of Mobile Unit Personnel	Rewritten for clarity
6-C-10, Payment of Recruits	Updated to show that recruits are now required to be on direct deposit
6-D-10, How to complete the UAR	Added meal codes for the payment of commuted rations for enlisted reserve members (ALCOAST 023/96)
7-A-6, Hostile Fire (Imminent Danger) Pay (HFPAY)	Rewritten for clarity
8-B-2, Federal Income Tax Withholding and Advance EIC	Added that members must include amounts paid (either actual or in-kind) for BAQ and/or rations when computing eligibility for Earned Income Credit and that these amounts will be included on the member's annual W-2 statement in block 13, item "Q"
8-B-9 Income Tax Exclusion for Duty in Combat Zone	New section added to incorporate procedures for Combat Tax Exclusion
10-A-4, How to complete Enlisted Performance Evaluation Forms (EPEFs)	New sections added to address problems with the preparation and review of Enlisted Performance Evaluation Forms. Includes detailed instructions and examples
10-A-10, Administrative Review of EPEFs	
Encl (1), Pre-separation Counseling Checklist DD-2648	Corrected instructions for distribution of completed form to show that a copy needs to be sent to CGPC (adm-3)

Continued on next page

4. Changes (cont'd)

Page, Section	Change
Encl (1), PCS Departing Worksheet CG HRSIC-2000	• Added requirement to complete a Career Intentions Worksheet if the member does not meet obligated service requirements for transfer • Added requirement to complete an Application for Advance of Funds (form SF-1038) when requesting travel advances • Removed "Cost of GTR" block from list of travel advance requests. Cost of GTR is not an authorized advance
Encl (1), Dependency Worksheet CG-HRSIC-2020	Added note explaining that when claiming dependents which require HRSIC (LGL) approval, the worksheet must first be forwarded to the PERSRU where a CG-4170A will be created before forwarding to HRSIC
Encl (10) Award Codes	• Added code "KL" for Kuwait Liberation medal (Kuwait) • Changed code "NW" to reflect Kuwait Liberation medal (Saudi Arabia)
Appendix (A), Retirement Package, Page A-7	Added note explaining that if the member and spouse are not collocated then the command must prepare and send a letter of notification/spousal concurrence when the member does not elect to participate in SBP at the maximum level
Appendix (E), Traveler's Guide	Rewritten for clarity

Continued on next page

5. Forms Availability

Human Resources Service and Information Center forms and worksheets included in Enclosure (1) to this manual instruction are designed to be reproduced locally. All other forms referenced in this manual are available from the appropriate sources indicated in the Catalog of Forms, COMDTINST M5213.6 (series).

6. Comments/ Suggestions

The Human Resources Service and Information Center relies on user input and feedback for improvement of this and other publications we provide. If there are any areas that are not clear, complete or accurate, additional procedures that should be included, or any other recommendations you may have for improvement, we would like to know about them. Comments or recommendations may be submitted by E-mail to “PUBS/HRSIC” or by returning the comment form in Enclosure (11) of this manual instruction.

/s/
R. J. WILLIAMSON

Nonstandard distribution: E:b (PERSRUs)

Location	# of Copies
Academy	16
Academy (Cadets)	10
Activities New York	33
Activities San Diego	09
Air Station Brooklyn	05
Air Station Cape Cod	08
Air Station Sacramento	04
ATC Mobile	14
Base Galveston	07
GANTSEC	08
Group Astoria	09
Group Charleston	08
Group Corpus Christi	06
Group Fort Macon	06
Group Humboldt Bay	04
Group Key West	09
Group Mobile	14
Group North Bend	07
Group Port Angeles	04
Group Portland	05
Group San Francisco	06
Group Southwest Harbor	03
Group St. Petersburg	13
Group Woods Hole	07
Headquarters Support Cmd.	20
ISC Alameda	28
ISC Boston	20
ISC Cleveland	33
ISC Honolulu	22
ISC Ketchikan	10
ISC Ketchikan-Juno Det.	17
ISC Kodiak	23
ISC Miami Beach	33
ISC New Orleans	23
ISC Portsmouth	20
ISC San Pedro	28
ISC Seattle	25
ISC St. Louis	18
MARSEC	04
MSO Houston-Galveston	10
NOAA	03
PERSCOM (epm)	01
PERSCOM (opm)	01
PERSCOM (rpm)	01
RTC Yorktown	15
SUPRTCEN Elizabeth City	18
TISCOM	05
TRACEN Cape May	10
TRACEN Cape May (Recruits)	15
TRACEN Petaluma	20

This page left blank intentionally.

1. Personnel and Pay Systems Overview

Responsibilities	1-2
Information Flow	1-4
Contacting the Personnel Service Center	1-6
Signature of Responsible Officer	1-7
Procedures for Authorizing Direct Access Command Users	1-9
Procedures for Designating Direct Access SPO and SPO Supervisor Users	1-13
Directives Referenced in this Manual	1-17
Forms and Worksheets Referenced in this Manual	1-20
Exhibit 1-1: Suggested format for MOU between Unit and SPO for maintenance of member competency data	1-26
Exhibit 1-2: Suggested format for MOU between Unit and SPO for the assumption of SPO data entry responsibilities	1-28

2. Movement of Personnel

A. Permanent Change of Station

The PCS Transfer Process	2-A-2
PCS Departing Checklist	2-A-3
PCS Reporting Checklist	2-A-5
Overseas Transfer Checklist	2-A-6
Automatic Stops of Pay and Allowances	2-A-8
How to Prepare NATO Supplemental Orders	2-A-10
Fax of PCS Advance Requests	2-A-12

B. Temporary Duty

The Temporary Duty (TDY) Order	2-B-2
The Travel Claim Process and Responsibilities	2-B-4
Travel Preparation and Examination (T-PAX) Process	2-B-5
The Traveler	2-B-9
The Proxy	2-B-10
The Signature Proxy	2-B-11
The Approving Official (AO)	2-B-12
Personnel Service Center (PSC)	2-B-14
The CG Finance Center (FINCEN)	2-B-15
Records Maintenance	2-B-16
Audits	2-B-17
Amendments to TDY Orders	2-B-21
Blanket Travel Orders	2-B-22
Group Travel Orders	2-B-23
Leave and Liberty Combined with TDY Travel	2-B-24
Pay Entitlements Affected by TDY	2-B-26
Preparation of TDY Order (CG-4251) Blocks 1-11	2-B-27
Preparation of TDY Order (CG-4251) Block 12	2-B-29
Preparation of TDY Order (CG-4251) Blocks 13-19	2-B-31

Continued on next page.

2. Movement of Personnel, Continued

B. Temporary Duty (*Continued*)

Letter Travel Order (Example) 2-B-32
Authenticated Original Message/E-mail Order (Example) 2-B-33
Temporary Duty (TDY) Checklists 2-B-35
Reimbursement Methods 2-B-37
Submission of Manual Travel Claims 2-B-41
Rules for Claiming Official Phone Calls 2-B-44
Accounting Data 2-B-45

C. Active Duty for Training

The ADT Process 2-C-2
Amendments to ADT Orders 2-C-6
Preparation of Annual Screening Questionnaire 2-C-7

D. Active Duty Other Than Training

Projecting Cost of ADSW-AC Orders 2-D-2
Document ID's (TONO) for ADSW-AC Orders 2-D-3
Accounting Line Data for ADSW-AC Orders 2-D-4
How to Process an ADSW-AC Order 2-D-6

E *Selected Reserve Assignments and Transfer*

Junior Reserve Officer and Senior Reserve Enlisted Assignments 2-E-2
RELAD Assignments: E2-E6 2-E-7
Junior Enlisted Reserve Assignments (Other) 2-E-5
Reserve Junior Enlisted Assignments Waiting Lists 2-E-6
Voluntary Transfer from SELRES to IRR/ISL/ASL 2-E-12
Transfer from IRR/ISL/ASL to SELRES 2-E-14
Involuntary Transfer or Recall of SELRES for Unsatisfactory Participation 2-E-16

F *PCS to Patrol Forces Southwest Asia (PATFOR SWA)*

Mobile Unit Designation 2-F-2
PCS Travel 2-F-3
PCS Orders Remarks 2-F-4
HHG/Unaccompanied Baggage 2-F-5
POV Transportation/Storage 2-F-7
Station Allowances (OHA and COLA) 2-F-8
Allowances for Members With Dependents (FSA, DLA, BAH, OHA and COLA) 2-F-9
Basic Allowance for Subsistence 2-F-11
Hardship Duty Pay, Imminent Danger Pay and Combat Allowances 2-F-12
PDR Handling 2-F-13
Points of Contact 2-F-14
Entitlements Summary (Exhibit 2-F-2) 2-F-15

Continued on next page

3. Accessions, Separations, and Reenlistments

A. Accessions

Process for Accessions 3-A-2
Types of Accessions 3-A-4
Recalled Retired Members 3-A-5

B. Separations

The Separation Process 3-B-2
Immediate Separation Processing 3-B-5
Priority Separation Processing 3-B-7
E-Mail Format for Immediate and Priority Separations (Exhibit 3-B-1) 3-B-9
Routine Separation Processing 3-B-10

B. Separations

Cancellation of Document Numbers and Accounting Data for Separation Orders (Exhibit 3-B-2) 3-B-12
Preparation of Separation Orders (Exhibit 3-B-3) 3-B-13
Enlisted to Cadet Status Processing 3-B-14
Regular Retirement Separations 3-B-15
Disability Retirement Separations 3-B-16
Checklist for Separations 3-B-18
Checklist for RELAD 3-B-21
Checklist for Discharge 3-B-22
Checklist for Retirement 3-B-23
Reserve Retirement Separations 3-B-26

C. Continuance on Active Duty

Reenlistment and Voluntary Extensions/Reextensions 3-C-2
Checklist for Reenlistment or Extension 3-C-3
Retention of Members in a Pay Status other than Military Confinement 3-C-5
Retention of Members in a Non-Pay Status or in Military Confinement 3-C-6
Active Duty Extension of Reserves and Recall of Retirees 3-C-7
Immediate Enlistment in Coast Guard Reserve Upon Discharge from the Regular Coast Guard 3-C-8
Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard 3-C-9

Continued on next page

4. Career Development

A. Enlisted Advancements

Headquarters Advancement Checklist 4-A-2
Commanding Officer Advancement Process 4-A-3
Commanding Officer Advancement Checklist 4-A-4

B. Warrant Officer Appointments

Warrant Officer Appointment Process 4-B-2
Warrant Officer Appointment Checklist 4-B-3
Warrant Officer Appointment Process (Reserve) 4-B-4
Warrant Officer Appointment Checklist (Reserve) 4-B-5

C. Education and Qualification

Training and Educational Accomplishments 4-C-2
Individual's Record of Small Arms Training 4-C-4
Lump Sum Payments for VEAP or MGIB-K Programs 4-C-5
Procedures to Enroll in MGIB for Certain VEAP Participants 4-C-7
Managing Competencies 4-C-10
Insignia 4-C-11

5. Personnel Administration

A. Decedent Affairs

Designation of Beneficiaries and Emergency Contacts 5-A-2
Servicemembers' Group Life Insurance (SGLI) 5-A-4
SGLI Family Member Coverage 5-A-11
Casualty Reporting 5-A-14

B. Dependent Affairs

Dependency Information 5-B-2
BAH/Dependency Data Form 5-B-4
TRICARE Dental Plan 5-B-6
Applying for a DD Form 1173 5-B-8
Verification of Eligibility for the DD Form 1173 5-B-10
Reserve Family Member Identification Card 5-B-12
Information Concerning the DD Form 1172 5-B-14
Defense Enrollment Eligibility Reporting System (DEERS) 5-B-16

C. Maintenance of Personnel Information

Annual Verification of BAH/Dependency, Beneficiaries, SGLI, and Emergency Data 5-C-2
Requesting Statements of Creditable Service 5-C-5
Personnel Data Information File (PDIF) 5-C-8
Personnel Data Extract (PDE) 5-C-9
Security Clearances 5-C-10
Transcript of Sea Service (TOSS) 5-C-11

Continued on next page

5. Personnel Administration (Continued)

D. Miscellaneous

Leave Authorization (CG-2519)	5-D-2
Leave Carried over in Excess of 60 Days	5-D-4
Issuance of the Common Access Card (CAC)	5-D-6
Manual Preparation of the DD Form 2 CG (active ID card)	5-D-9
Reporting Change in Mailing Address	5-D-11
Employment Verification	5-D-12
E-Resume	5-D-13
Assignment/Termination of Government Quarters	5-D-14
Permissive Travel Authorization	5-D-16
Corrections/Changes of Name, SSN, Date of Birth, or Minority Designator	5-D-17
TRICARE Selected Reserve Dental Program	5-D-19
Issuance/Termination of Official Passport	5-D-21

6. Payment of Personnel

A. Notification of Pay

Pay Delivery Method	6-A-2
Leave and Earnings Statement (LES)	6-A-3
Pay Notification for Members assigned to Deployed Cutters or Overseas/Isolated Units	6-A-5

B. Types of Payment

Regular Payments	6-B-2
Special Payments	6-B-3
Offline Payment Request Template	6-B-5
Advance Payments	6-B-6
Death Gratuity Payments	6-B-8

C. Methods of Payment

Payment of Mobile Unit Personnel	6-C-2
Payment of Recruits	6-C-4
Requesting an Accelerated SRB Payment	6-C-5

D. Payment of Inactive Duty Reservists

IDT Prerequisites	6-D-2
The IDT process	6-D-4
Drill Orders	6-D-6
Example of IDT Drill Order Letter (To Unit)	6-D-8
Supervisor Endorsement on IDT Orders	6-D-9
Example of Amendment to IDT Drill Order Letter	6-D-10
IDT Certification Sheet	6-D-11
Waiver of Pension/Disability Compensation or Retired Pay	6-D-12
Annual Reserve Retirement Point Statement	6-D-14
Disability Processing	6-D-16

Continued on next page

7. Special Pay and Allowances

A. Special Pay

Aviation Career Incentive Pay (ACIP)	7-A-2
Hazardous Duty Incentive Pay (HDIP)	7-A-3
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)	7-A-5
Special Pay-Duty Subject to Hostile Fire or Imminent Danger (HF/ID)	7-A-6
Funeral Honors Duty Allowance for Reservists	7-A-8
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams	7-A-9
Combat-Related Injury Rehabilitation Pay	7-A-11
Foreign Language Proficiency Pay	7-A-13

B. Allowances

Refund for Missed Meals – Discounted Meal Rate (DMR)	7-B-2
Family Separation Allowance (FSA)	7-B-3
Overseas Housing Allowance (OHA)	7-B-7
Family Subsistence Supplemental Allowance (FSSA)	7-B-8
Officer Uniform Allowance Claim Worksheet (CG PSC-5100)	7-B-9
Combat SGLI Allowance	7-B-10

C. Savings Deposit Program

Savings Deposit Program	7-C-1

D. Bonuses

Career Status Bonus (CSB)	7-D-1

8. Allotments, Bonds and Taxes

A. Allotments and Bonds

Allotments and Bonds	8-A-2
Allotment Checklist	8-A-4
Nonreceipt of an Allotment or Bond	8-A-5

B. Taxes

Federal Income Tax Withholding and Advance EIC	8-B-2
State Income Tax Withholding and State of Legal Residence	8-B-3
State Tax Listing	8-B-4
Income Tax Exclusion for Duty in Combat Zone	8-B-10
Information about the W-2 Form and How to Request a Duplicate or Corrected w-2 Form	8-B-12
Request for Federal or State Tax Adjustments	8-B-15

C. Thrift Savings Plan (TSP)

Thrift Savings Plan (TSP) Overview	8-C-1
TSP Enrollment	8-C-5
Account Maintenance/Contribution Changes	8-C-7
TSP Catch-Up Program	8-C-9

Continued on next page

9. In-Service Debt Collection

A. Collections

Collection of JUMPS Overpayments 9-A-2
Collection of Other Debts 9-A-4

B. Remissions and Waivers

Remissions 9-B-2
Waivers 9-B-3

10. Performance and Discipline

A. Performance

Administrative Remarks (CG-3307) 10-A-2
Reporting Medals and Awards 10-A-3
How to Complete the Enlisted Employee Review Worksheet for Units Without Direct Access Connectivity 10-A-4
Administrative Review of the Enlisted Employee Review Worksheet 10-A-9

B. Discipline

Nonjudicial Punishment (NJP) Checklist 10-B-2
Courts-Martial Checklist 10-B-3
Confinement Processing 10-B-4a
Appellate Processing 10-B-4d
Unauthorized Absence 10-B-5
Desertion 10-B-8
Reporting Return of Absentee or Deserter 10-B-11
Reporting Civil Arrest or Conviction 10-B-14

11. Reserve Mobilization

The Mobilization Process 11-2
Types of Mobilization 11-5
Mobilization Orders 11-6
Pay Entitlements When Mobilized 11-8
Travel Entitlements When Mobilized 11-17
Other Entitlements When Mobilized 11-21
Mobilization Checklist 11-23
SPO Mobilization Procedures 11-26
Recall of Retired Members 11-30
Travel Claims During Mobilization Status 11-33
Monthly Verification Procedures 11-44
Extension of Mobilization Orders 11-45
The Demobilization Process 11-47
Demobilization Checklist 11-49
Medical Readiness 11-50
SPO Demobilization Procedures 11-51
TRICARE Benefits 11-53

Enclosures and Appendices

Enclosure (1) -	Listing of Forms and Worksheets Available on PSC's Web Site
Enclosure (2) -	Standard Abbreviations for Transfer of Personnel
Enclosure (3) -	Special Instructions for Block 12 of the CG-4251 (TDY Travel Order)
Enclosure (4) -	Standard Separation Letters
Enclosure (5) -	Vacant
Enclosure (6) -	Administrative Remarks Entries
Enclosure (7) -	Casualty Reporting Examples
Enclosure (8) -	Direct-Access Procedures
Enclosure (9) -	State & U.S. Possession/Foreign Country Abbreviation Codes
Enclosure (10)-	Vacant
Enclosure (11)-	Comment Form
Appendix (A) -	Vacant
Appendix (B) -	Reserved for DODINST 10000.13 (series), Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals, Instructions for the DD-1172 (Application for Uniformed Services ID Card)
Appendix (C) -	Computation of Service
Appendix (D) -	Reserved for PDR System (distributed by COMDT (CG-102))
Appendix (E) -	Vacant
Appendix (F) -	LES Information

Chapter Overview

Introduction

This chapter introduces the personnel and pay systems in use by the Coast Guard. Responsibilities, which incorporate data input, communications guidelines, and signature authority, are also provided in this chapter.

Travel systems and procedures are covered in chapter 2 of this manual.

In this chapter

Topic	See Page
Responsibilities	1-2
Information Flow	1-4
Contacting the Personnel Service Center	1-6
Signature of Responsible Officer	1-7
Procedures for Authorizing Direct Access Command Users	1-9
Procedures for HRS/HRSUP Users	1-13
Directives Referenced in this Manual	1-17
Forms and Worksheets Referenced in this Manual	1-20
Exhibit 1-1: Suggested format for MOU between Unit and SPO for maintenance of member competency data.	1-26
Exhibit 1-2: Suggested format for MOU between Unit and SPO for the assumption of SPO data entry responsibilities.	1-28

Responsibilities

Introduction Direct Access exists as a part of the overall Coast Guard Personnel System. Six players (entities) within this system have a responsibility to ensure the system functions properly.

Entities These six entities interact to perform the personnel and pay functions for the Coast Guard. Below are their responsibilities such as, but not limited to:

Entity	Responsibility
Member	• Report changes in mailing address (for bonds and allotments too). • Understand the LES and report any discrepancies via the chain-of-command. • Understand the Retirement Point Statement and report any discrepancies via the chain-of-command (reservists). • Report changes in family member's status. • Report occasions of moving into or out of government owned or leased quarters. • Report changes in allotments or direct deposit. • Advise CO of reenlistment/extension intentions. • Submit E-Resume.
Unit CO	• Complete Enlisted Employee Reviews and ensure they are completed no later than 30 days after the reporting period. • Authorize and submit Leave Authorizations. • Endorse E-Interviews. • Conduct predischarge interviews. • Grant interim security clearance, request final security clearance from DOT Adjudication Facilities or grant/suspend access to classified information if required and conduct the briefings/debriefings. • Maintain Personnel Data Records (PDRs) as per PDR Manual (COMDTINST M1080 (series)). • Provide data in support of personnel/pay actions for members. • Review orders for attached personnel (Airport Terminal). • Maintain Security for Direct Access by keeping on file the original CG PSC 7421/2 and checking the Department Role Query on a quarterly basis to confirm access levels for unit personnel.

Continued on next page

Responsibilities, Continued

Entities (cont'd)

SPO	• Provide information feedback to the unit. • Investigate and resolve personnel and pay problems. • Ensure that required transactions are submitted within 2 working days of an event affecting a member's pay. • Ensure that units assisting input have proper training and clear understanding of job required of them (Memo Of Understanding).
PSC	• Provide feedback to SPOs when transaction errors are correctable. • Take corrective action on errors which cannot be corrected by SPOs. • Provide written notice of due process rights to members who are overpaid. • Provide timely and accurate personnel and pay service to all members of the Coast Guard. • Administer leave and retirement point accounting for active and reserve military personnel. • Arrange for settlement of claims on behalf of deceased or separated members and collect out of service debt. • Process application for allotments and garnishments for certain support obligations as set forth in 5 CFR 581, 32 CFR 63, and 33 CFR 50. • Administer the SWE program and provide enlisted advancement lists to CGPC for official issuance. • Develop written procedures to support all areas of personnel and pay policy. • Process Travel Claims.
Commander Coast Guard Personnel Command (CGPC)	• Issue normal promotion/advancement authorizations and eligibility list. • Approve retirements. • Consider all personnel waivers. • Issue assignment orders.
CG Institute	• Distribute and score Coast Guard correspondence courses. • Distribute educational funding. • Conduct military education credit evaluation.

Information Flow

Information

Information required by Direct Access is generated by an event occurring to a member. After the event occurs there are different steps that need to be taken to ensure proper input into Direct Access.

Information flow from the member

This is an example of how information should flow from the member to Direct Access.

Stage	Who Does It	What Happens
1	Member	Event occurs (e.g., marriage) Event is reported to the unit by submitting appropriate forms or worksheets (listed later in this chapter and in applicable sections of this manual) and updating any information in Direct Access.
2	Unit	Insures that member has provided all necessary information in accordance with the instructions from the appropriate section of this manual or from the reverse side of the worksheet and reports the event to the SPO.
3	SPO	Reviews PDR; contacts unit for additional information if needed and inputs appropriate information in the Direct Access system.
4	PSC	Processes the data for the event, updates personnel and pay entitlements, and provides feedback on the LES.

Continued on next page

Information Flow, Continued

Communication between the member, unit, and the SPO

There are different ways in which the member, unit and SPO can communicate. It is up to each unit and SPO to establish the most preferred method in which to communicate with their customer.

Type	Method	Uses
1	Mail	Not as fast as types 2-4, but when urgency is not a factor it is an efficient method of getting information to and from the unit (e.g., worksheets).
2	E-Mail	Very effective form of information exchange. It can be traced and other documents can be attached. Depending where sent, it can be received very quickly. **Note**: Members or units that do not have access to the Coast Guard Data Network (CGDN) for the use of E-Mail can use the Coast Guard's Internet E-Mail gateway to send and receive E-Mail between themselves and Coast Guard units if they have access to Internet E-Mail. Internet gateway users should be advised that this method does not offer the security of the CGDN and that information of a highly personal nature or information protected by the Privacy Act should not be transmitted through the gateway. Consult COMDTNOTE 5270, Policy and Procedures for the Electronic Mail Gateway to the DOT and Worldwide Internet Network, for more information.
3	Telephone	Fastest form of communication, Limitation: No tracking ability**.**
4	FAX	A fast method of communication. A good way to track information when source document is required to be cited.

Contacting the Personnel Service Center

Introduction There are three methods to contact the Personnel Service Center in Topeka, KS.

Methods These three methods are the primary means for Coast Guard personnel to establish contact with PSC.

Method	Uses
E-Mail	Contact can be established using this email address: PSC-Customercare@uscg.mil. The Customer Service Team has a three day timeframe in which to respond to email sent to this address.
Telephone	1-(866)-PSC-USCG (772-8724) or 1-(785)339-2200. Phone support hours of operation are weekday 0700 to 1600 Central Time and 0730 to 1600 on scheduled weekends (see Weekend Staffing Schedule in the left column of the PSC Website (http://www.uscg.mil/hq/psc/customerservice.shtm) for dates. **Note: Password resets cannot be provided by telephone. Utilize E-Mail or the Online Trouble Ticket to request password resets for Direct Access, JUMPS or T-PAX.**
Online Trouble Ticket	This method allows the member or unit/SPO point of contact to provide a more detailed description of the problem, resulting in faster resolution and enables PSC to track and correct recurring problems. http://www.uscg.mil/hq/psc/customerservice.shtm

Note: Refer all Servicewide Exam, Striker and Supplemental Advancement List questions directly to PSC (adv) at (785) 339-3400 or email to psc-dg-adv@uscg.mil. Waiver requests must be sent by message to COGARD PSC TOPEKA//ADV// in accordance with PSCINST M1418 (series), Servicewide (SWE) Examination Guide, and prior to scheduled deadlines.

Signature of Responsible Officer

Discussion

The requirement to sign various forms and worksheets in this manual and to electronically sign T-PAX and Direct Access transactions are necessary to affirm and give legal credence to the information contained on the form or in the transaction. The Commanding Officer (CO) should avoid situations where the responsible officer lacks the knowledge or time to validate the information and may sign as a formality.

Reference

- COMDTINST M5000.3 (series), CG Regulations
  - Chapter 7-1-8, Administration of Oaths
  - Chapter 7-1-9, Signing Official Correspondence
- COMDTINST M7210.1 (series), Certifying and Disbursing Manual

Authority to sign forms and worksheets

The CO may authorize in writing for officers, Chief Petty Officers, First Class Petty Officers, and Second Class Petty Officers to sign forms and worksheets "by direction", subject to the following restrictions.

- Only officers, the Master Chief Petty Officer of the Coast Guard (MCPO-CG), Commandant designated Command Enlisted Advisors, and designated recruiting office Chief Petty Officers and Petty Officers may administer enlisted oaths and sign enlistment contracts.
- Only Officers, the MCPO-CG, Commandant designated Command Enlisted Advisors, and permanently assigned Enlisted Officers-in-Charge may administer reenlistment and extension of enlistments oaths and sign the appropriate reenlistment or extension document.
- The "by direction" authority granted to Second Class Petty Officers (PO2) shall normally be limited to routine transactions such as leave and personnel transactions. PO2s shall only be given authority to sign specific Direct Access transactions "by direction" in cases where there is a shortage of Officers, Chief Petty Officers, and First Class Petty Officers.
- Only the CO may sign the PCS Departing Worksheet (CG-PSC-2000) or the Advances Worksheet (CG PSC-2010) when the member is requesting Advance Pay & Allowances or Advance Pay with liquidation period in excess of 12 months.

Continued on next page

Signature of Responsible Officer, Continued

Authority to sign Pay and Personnel Transactions

The Commanding Officer (CO) of a unit with a SPO must nominate at least one Officer, Chief Petty Officer, First Class Petty Officer, Second Class Petty Officer, or Civilian employee in grade GS-7 or above, for designation by PSC (MAS) as a Payment Approving Official (PAO).

- Only properly designated PAOs have the authority to approve Direct Access transactions for transmission to PSC.
- Only properly designated PAOs (see Payment Approving Officials' responsibilities and liabilities below) may have Supervisor (CGHRSUP) capability in Direct Access.

Payment Approving Officials' responsibilities and liabilities

It is Coast Guard Policy that PAOs have the same level of financial liability as an Authorized Certifying Officer (ACO), as described in Chapter 1 of Certifying and Disbursing Manual. Thus, if a PAO incorrectly certifies a document to an ACO that directly results in an erroneous or improper payment, the PAO is responsible for the error. PAOs remain fully accountable to the Coast Guard and may be found to have pecuniary[1] liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/EPEF) impacted by such action by an official in their chain with evaluation approving authority.

Designation Procedure for PAO

COs will request designations, revocations or terminations for PAOs by submitting form *CG PSC-7421/2 (Direct-Access User Access Authorization And Payment Approving Official (PAO) Designation) to PSC (MAS). If the form requests designation of a Second Class Petty Officer as a PAO, the CO shall attach a letter explaining what PAO authority will be granted to the Second Class Petty Officer (e.g., authority to sign leave and personnel transactions only).

- PSC (MAS) is the final approving authority for the designation of PAOs. After receipt and review of the CG PSC –7421/2, PSC (MAS) will certify the PAO designation. The original form will be returned to the unit along with a detailed brochure outlining the duties, responsibilities, and liabilities of the PAO. A copy of the form will be forwarded to PSC (CCB), who will update the member's permissions in DA.

**Form CG PSC-7421/2 and all other PSC forms and worksheets are available at http://www.uscg.mil/hq/psc/forms/*

[1] **pe·cu·ni·ar·y** Requiring payment of money: *a pecuniary offense.*

Procedures for Authorizing Direct Access Command Users

Introduction

Access to command functions of Direct Access is limited to authorized personnel -- *Command Users*. This section provides guidelines and procedures for designating Command Users.

The Command User

The Command User role in Direct Access provides the user with the ability to access the Self-Service for Command functions of the system. It is a powerful, multipurpose role, intended for use by trusted, mature and responsible members of the command cadre. Command Users must be designated by the unit Commanding Officer/Officer in Charge or Executive Officer/Executive Petty Officer.

The Direct Access Command User has the ability to:

- Schedule and approve (for payment) reserve IDT drills.
- Initiate and view enlisted evaluations (employee reviews).
- Access the Airport Terminal, which provides a list of personnel in receipt of orders to or from the unit and the ability to view, modify and print travel orders.
- Generate and view member competency reports.
- Print BAH/Dependency and Emergency Contacts reports.
- View command information including roster and personnel allowance list.
- View member service record information (CG Member Info) including assignment history, competencies, training history, contact telephone numbers and address.

Continued on next page

Procedures for Authorizing Direct Access Command Users,
Continued

Choosing Command Users

Each unit must designate at least one Command User. Additional Command Users should be designated based on the need to access the information listed above.

Commanding Officers may designate as many Command Users as necessary to meet the unit's needs and maintain a smooth workflow. However, designations of Command Users in pay grades below E-6 are subject to review and approval by PSC and/or COMDT (CG-102). There are alternative access roles available for personnel who do not need access to all of the Command User functions (see next page).

Command User Responsibilities

Direct Access, based on the Operator ID, allows a Command User access to all command functions. Any Command User has the ability to enter comments and approve an employee review, enter IDT drills, or view transfer information. Commanding Officers should clearly define an individual's role when making Command User designations.

When you consider designating Command Users, you should first ask yourself these questions:

Does the individual have your authorization to:

- View enlisted evaluations?
- Initiate enlisted evaluations?
- View pending transfer information?
- Run reports and rosters?
- Input reserve drill/ADT information?

Continued on next page

Procedures for Authorizing Direct Access Command Users,
Continued

Alternatives to Command User Access

Granting full command access may not always be necessary or appropriate. Consider granting one or more of these roles in lieu of full command access.

Role	Functions	Suggested users
Airport Terminal Only (CGAIRTRM).	Allows access to the Airport Terminal	Housing Officers/staffs and Relocation Specialists.
Employee Review Only (CGEMPREV)	User can initiate, route or approve enlisted employee reviews	Supervisors (E-6 and above) and Marking Officials. **Note**: Employee Reviews may be initiated using the worksheets (CG-3788a, CG-3788b or CG-3788c). A Command User can handle final data entry in the system. It is not necessary for every person in the chain of command to use Direct Access to complete an employee review. Use this rule to determine if you should authorize someone at your command Employee Review Access: *If the evaluation was being completed using the old paper-process, would that person's name and signature appear on the form as the supervisor, marking official or approving official?* If **yes**, the person should be authorized access in Direct Access. If **no**, the person's input on the evaluation may be captured using the Employee Review worksheets.
Reserve Orders Manager (CGRSVMGR)	Create, review, and endorse requests for reserve orders.	Allows supervisor to initiate requests for reserve orders on behalf of members who can't access Self-Service and allows the user to review and endorse requests for orders.
Field Admin (CGFIELDADM)	User can view and modify member competencies, run reports, view dependency data, print BAH/Dependency Data and Emergency Contacts reports, view and print travel orders, and most other non-pay related personnel actions.	Unit administrative staff. **Note**: Applications must be approved by the SPO and be accompanied by a Memorandum of Understanding (MOU). This is to ensure the SPO is aware that the unit will be assuming responsibility for entering competency data and prevents duplicate data entry. A template for the MOU is included as exhibit 1 (see page 26 of this chapter) . MOUs are valid for a maximum of two years.
Global Workforce Inquiry Solution (CGGWIS)	Allows **view-only** access to member and unit data. Includes ability to access the Airport Terminal.	HR Managers (CO/OIC, XO/XPO, Admin Officer, HQ/CGPC Staffs).

Continued on next page

Procedures for Authorizing Direct Access Command Users,
Continued

Designation Procedure

To designate a Command User (or other role types), utilize CG PSC Form 7421/2 (Direct-Access User Access Authorization).

1. Complete the first section (Blocks 1 through 7) of the form.
2. The authorizing official's name, rank, title and phone number must be printed or typed in Block 8 and the block must be signed.
   Note: "By direction" is not authorized. Only the CO/OIC, XO/XPO, or HQ/CGPC/AREA/MLC/DIST Branch Chief may authorize Direct Access.
   If the applicant is the CO/OIC, then they may sign their own application.
3. Fax the form to PSC's Customer Care Branch at: (785)-339-2297.
4. PSC Customer Care Branch will enable Command User privileges in Direct Access and notify the user, via email, when completed. Forms are *usually* processed within 3-working days of receipt.

Retain the original CG PSC Form 7421/2 until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

Terminating Privileges

To terminate Command User designation and privileges, have the member and/or Authorizing Official sign in blocks 15 and 16, respectively, of CG PSC Form 7421/2 and fax to PSC Customer Care Branch at (785) 339-2297.

Access terminates automatically upon transfer or separation. There is no need to notify PSC Customer Care when a member is transferred or is separated:

- Access, to all but self-service applications, will automatically terminate when a military member departs on PCS orders.
- All access to Direct Access will automatically be revoked when a military member is separated from the service.

Procedures for Authorizing HRS/HRSUP Users

Purpose

This section provides guidelines for determining who will be granted HRS or HRS Supervisor access at SPOs and field units and procedures for granting Human Resource Site (HRS) access to Direct Access for users assigned to Servicing Personnel Offices (SPOs).

HRS/HRSUP Access Defined

HRS access permits a Direct Access user to create and transmit transactions, which effect changes in a member's pay entitlements. HRS users can also access and maintain non-payroll data, such as competencies, awards, enlisted employee reviews, etc. HRS access duplicates the Self-Service for Employees and Self-Service for Commands roles to allow users at (SPOs) to service members and commands that do not have access to Direct Access.

HRS Supervisor (HRSUP) role users have the ability to release Direct Access transactions that require approval and to override software edits.

HRS/HRSUP User Responsibility and Liability

It is Coast Guard policy that HRS users have the same level of financial liability as an Authorized Certifying Officer (ACO). ACO liability is described in Chapter 1 of the Certifying and Disbursing Manual. If an HRS user incorrectly certifies a document to an ACO (the ACO for military pay is PSC Topeka) that directly results in an erroneous or improper payment, the HRS user is responsible for the error. HRS users remain fully accountable to the Coast Guard and may be found to have pecuniary liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/Employee Review) impacted by such action by an official in their chain with evaluation approving authority.

Continued on next page

Procedures for Authorizing HRS/HRSUP Users, Continued

Field Unit HRS Access

Personnel at field units may be granted HRS access, provided the following criteria are met, COMDT (CG-102) has approved the transfer of responsibility, and the unit has entered into a Memorandum of Understanding with the **unit's designated SPO**, for the transfer of data input responsibility (see exhibit 2, on page 28 of this chapter).

- Must be a YN or CWO (PERS).
- If YN2 or YN3, must have access to and be directly supervised by a Subject Matter Expert (someone knowledgeable in pay matters).
  - Senior YN (E-6 and above).
  - CWO (PERS).
  - Full time Personnel/Admin Officer.

- The HRS Supervisor role will not be granted to users at field units. Units will contact their SPO to coordinate input of transactions that require approval or the override of system edits.

Alternatives to HRS Access for Field Unit Personnel

Granting HRS access may not always be necessary or appropriate. Consider granting one or more of these roles in lieu of HRS access.

Role	Functions	Suggested users
Airport Terminal Only (CGAIRTRM).	Allows access to the Airport Terminal	Housing Officers/staffs and Relocation Specialists.
Employee Review Only (CGEMPREV)	User can initiate, route or approve enlisted employee reviews	Supervisors (E-6 and above) and Marking Officials. **Note**: Employee Reviews may be initiated using the worksheets (CG-3788a,CG-3788b or CG-3788c) from enclosure (1) to the Personnel and Pay Procedures Manual. A Command User can handle final data entry in CGHRS. It is not necessary for every person in the chain of command to use Direct Access to complete an employee review.
Field Admin (CGFIELDADM)	User can view and modify member competencies, run reports, view dependency data, print BAH/Dependency Data and Emergency Contacts reports, view and print travel orders, and most other non-pay related personnel actions.	Unit administrative staff. **Note**: Applications must be approved by the unit's designated SPO and be accompanied by a Memorandum of Understanding (MOU). This is to ensure the SPO is aware that the unit will be assuming responsibility for entering competency data and prevents duplicate data entry. A template for the MOU is on page 26 of this chapter. MOUs are valid for a maximum of two years.
Global Workforce Inquiry Solution (CGGWIS)	Allows **view-only** access to member and unit data. Includes ability to access the Airport Terminal.	HR Managers (CO/OIC, XO/XPO, Admin Officer, HQ/CGPC Staffs).

Continued on next page

Procedures for Authorizing HRS/HRSUP Users, Continued

SPO Staffs

Active duty, reserve and civilian employees permanently assigned to a position in one of the existing SPOs may be granted HRS access in Direct Access. Yeomen, temporarily assigned to a SPO, may be granted access.

SPO Supervisors/ Payment Approving Officials

Certain Direct Access entitlements transactions require review and approval before they can be released for processing. Approval of these transactions is limited to properly designated Pay Approving Officials (PAOs). PAOs are assigned the HRS Supervisor (HRSUP) role in Direct Access.

Commanding officer of a unit with a SPO must nominate at least one officer, chief petty officer, first class petty officer, or civilian employee in grade GS-7 or above, for designation by PSC (MAS) as a Payment Approving Official (PAO).

In addition to reviewing and approving transactions, HRS Supervisors have the ability to override Direct Access program edits. This allows the user to "force" a transaction to be saved, even if it does not meet the criteria established for an entitlement to be paid. This functionality exists because the system edits are closely tied to the member's assigned position and department in Direct Access. Therefore, the edits prevent some transactions, which are otherwise appropriate, from being entered into the system. An example of this would be attempting to put in a sea pay change on a member who has departed, PCS, from a sea pay eligible unit to a unit where sea pay is not authorized. Direct Access would normally prevent entry of this type of transaction because the member's current unit is not authorized sea pay.

Continued on next page

Procedures for Authorizing HRS/HRSUP Users, Continued

Designation Procedure

To designate an HRS/HRSUP user, utilize CG PSC Form 7421/2 (Direct-Access User Access Authorization.

1. Complete the first section (Blocks 1 through 7) of the form at the unit level.
2. The authorizing official's name, rank, title and phone number must be printed or typed in Block 8 and the block must be signed.
   - Note that for field unit access "By direction" is not authorized. Only the CO/OIC or XO/XPO may authorize Direct Access. The SPO supervisor may sign applications from users within that SPO.
   - Users at field units should include a copy of the Memorandum of Understanding.
   - HRS Supervisor applicants should include a copy of their PAO designation letter (PSC acknowledges that we have these letters on file. However, by having the applicant include it with their access form, the authorizing official is assured the applicant is a PAO. Including the letter with the application also reduces processing time at PSC).
3. Fax the form to PSC's Customer Care Center at: (785)-339-2297.
4. The PSC Customer Care Center will enable HRS privileges in Direct Access and notify the user, via email, when completed. Forms are *usually* processed within 3-working days of receipt.

Retain the original CG PSC Form 7421/2 until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

Terminating Privileges

To terminate HRS/HRSUP designation and privileges, have the member and/or Authorizing Official sign in blocks 15 and 16, respectively, of CG PSC Form 7421/2 and fax to PSC Customer Care Branch at (785) 339-2297.

Access terminates automatically upon transfer or separation. There is no need to notify PSC Customer Care when a member is transferred or is separated:

- Access, to all but self-service applications, will automatically terminate when a military member departs on PCS orders.
- All access to Direct Access will automatically be revoked when a military member is separated from the service.

Directives Referenced in this Manual

Introduction

Several directives are referenced throughout the Personnel and Pay Procedures Manual. These directives usually set policy for the procedure being described. You will need to refer to these directives from time to time.

Directives referenced

Directives used in this manual and their abbreviation. Current online versions can be found at: http://cgweb2.comdt.uscg.mil/CGDIRECTIVES/ (intranet) or at: http://www.uscg.mil/CCS/CIT/CIM/DIRECTIVES/WELCOME.HTM (internet).

Number	Long Title	Abbreviation
COMDTINST M1000.6 (series)	CG Personnel Manual	PERSMAN
COMDTINST 1000.14	Preparation and Submission of Administrative Remarks (CG-3307)	Pg-7 Instruction
COMDTINST M1001.28 (series)	Reserve Policy Manual	RPM
COMDTINST 1020.8 (series)	Weight/Physical Fitness Standards for Coast Guard Military Personnel	Weight and Physical Fitness Standards
COMDTINST M1080.10 (series)	Military Personnel Data Records (PDR) System Manual	PDR Manual
COMDTINST M1414.8 (series)	Enlisted Performance Qualifications Manual	Quals Manual
COMDTINST M1510.2 (series)	Enlisted Professional Military Education (E-PME) Manual	E-PME
COMDTINST M1500.10 (series)	Coast Guard Training and Education Manual	Training & Ed Man
COMDTINST M1650.25 (series)	Coast Guard Medals and Awards Manual	Medals & Awards Manual
COMDTINST M1900.4 (series)	Certificate of Release or Discharge from Active Duty, DD Form 214	DD 214 Manual
N/A	Separation Program Designators Handbook *(Distribution limited to SPOs. Contact COMDT (CG-1221) to obtain a copy)*	SPD Handbook

Continued on next page

Directives Referenced in this Manual, Continued

Directives referenced (cont'd)

Number	Long Title	Abbreviation
COMDTINST 4600 (series)	Travel Charge Card Program	Charge Card Instruction
COMDTINST M4600.17 (series)	Coast Guard Supplement to the Joint Federal Travel Regulations Volume 1	CGS-JFTR
COMDTINST 5000.5 (series)	Foreign Travel, Passports, and Visas	Passport Inst.
COMDTINST M5000.3 (series)	United States Coast Guard Regulations	CG Regs
COMDTINST M5260.3 (series)	Privacy (Coast Guard) and Freedom of Information Acts Manual	Privacy Act Manual
COMDTINST M5300.2 (series)	U.S. Coast Guard Competency Management System Manual	COMPMAN
COMDTINST 5310 (series)	Measuring the Contribution of Reserve Duty	None
COMDTINST M5510 (series)	Classified Information Management Program	None
COMDTINST M5520.12 (series)	Military Personnel Security Program Manual	PERSEC
COMDTINST M5512.1 (series)	Identification cards for members of the uniformed services, their eligible family members, and other personnel	None
COMDTINST M5810.1 (series)	Military Justice Manual	MJM
COMDTINST M7210.1 (series)	Certifying and Disbursing Manual	Certifying and Disbursing Manual
COMDTINST M7220.29 (series)	U. S. Coast Guard Pay Manual	PAYMAN
COMDTINST 7220.39 (series)	Management and Administration of Aviation Incentive Pays	Flight Pay Instruction

Continued on next page

Directives Referenced in this Manual, Continued

Directives referenced
(cont'd)

Number	Long Title	Abbreviation
COMDTINST M8000.2 (series)	Ordnance Manual	
COMDTINST M10470.10 (series)	Coast Guard Rescue and Survival Systems Manual	CG Rescue Manual
COMDTINST M11101.13 (series)	Coast Guard Housing Manual	Housing Manual
PSCINST M1000.2 (series)	Personnel and Pay Procedures Manual	PPPM
FINCENINST M7000.1 (series)	CG Finance Center, Standard Operation Procedures http://www.fincen.uscg.mil/sop.htm	FINCEN SOP
JFTR Vol 1	Joint Federal Travel Regulations DOD Travel Regulations	JFTR

Forms and Worksheets Referenced in this Manual

Introduction

Several forms and worksheets are referenced throughout the Personnel and Pay Procedures Manual. The forms and the PSC worksheets referenced in this manual are needed to complete the action described.

CG PSC worksheets are available on the internet at http://www.uscg.mil/hq/psc/forms/. CG PSC worksheets are no longer promulgated in enclosure (1) to this manual.

Other forms referenced in this Manual are available in Electronic Forms Application on the Coast Guard Standard Workstation (*USCG Adobe Forms*) or on the intranet at http://cgweb2.comdt.uscg.mil/CGFORMS/.

Forms & Worksheets Referenced

Forms and worksheets referenced in this manual and corresponding numbers.

Form Number	Form name
AF Form 538	Personal Clothing and Equipment Record
CG-1650	CG Award Recommendation
CG-2519	Leave Authorization
CG-2556	Move-In Housing Allowance Claim Form
CG-3029A	Individual's Record of Small Arms Training
CG-3301B	Agreement to Extend/Re-extend Enlistment
CG-3307	Administrative Remarks
CG-3719D	USCG Certificate of Training
CG-3788A	Employee Review Worksheet (Non-Rated)
CG-3788B	Employee Review Worksheet (Petty Officer)
CG-3788C	Employee Review Worksheet (Master, Senior and Chief Petty Officer)
CG-3788E	Enlisted Performance Evaluation Support Form (Petty Officer)
CG-3788F	Enlisted Performance Evaluation Support Form (Master, Senior, Chief Petty Officer)
CG-3788G	Enlisted Performance Evaluation Support Form (Non-Rated)
CG-3853	Personal Effects Inventory and Disposition
CG-4057	Chronological Record
CG-4178A	Good Conduct Certificate

Continued on next page

Forms and Worksheets Referenced in this Manual, Continued

Forms & Worksheets Referenced (cont'd)

Form Number	Form name
CG-4251	Military Temporary Additional Duty (TDY) or Civilian Temporary Duty (TD) Request and Travel Order
CG-4685	Aircrew Certificate
CG-4910	Report of Offense and Disposition
CG-5063	Coxswain Certificate
CG-5063A	Boat Engineer Certificate
CG-5063B	Boat Crewmember Certificate
CG-5063C	Surfman Certificate
CG-5063D	Heavy Weather Coxswain
CG-5064	Cutterman's Certificate
CG-5065	Command At Sea Certificate
CG-5066	Officer-In-Charge Afloat Certificate
CG-5066A	Officer In Charge Ashore Certificate
CG-5067	Boat Force Operations Insignia Certificate (Advanced)
CG-5068	Boat Force Operations Insignia Certificate (Basic)
CG-5073	Privacy Act Log
CG-5131	Standard Travel order for Military Personnel (Computer Generated)
CG-5209	Leave and Earnings Statement (Computer Generated)
CG-5475	Clothing and Small Stores Checkage
CG-5481	Reserve Officer Personal Resume
CG-5489-1	Remission Application
CG-5489-2	Waiver Application
CG-5489A	SPO's Endorsement Waiver/Remission Application
CG-5489B	Financial Statement
CG-5530	Advancement Certificate to SN/FN
CG-5588	Personnel Security Action
CG-5673	Child's Appreciation Letter
CG-5674	Spouse Reenlistment Appreciation Letter
CG-5675	Oath Of Reenlistment Certificate
CG-6058	Coast Guard Sponsor Notification
CG-9556	Acceptance and Oath of Office

Continued on next page

Forms and Worksheets Referenced in this Manual, Continued

Forms & Worksheets Referenced (cont'd)

Form Number	Form name
CG PSC-1570	Individual Monthly IDT Tracking Worksheet
CG PSC-1884	Application For Annuity Under The Survivor Benefit Plan (SBP), Reserve Component Survivor Benefit Plan (RCSBP), Retired Serviceman's Family Protection Plan (RSFPP) And/Or Final Retired Pay Due
CG PSC-2000	PCS Departing Worksheet
CG PSC-2001	Departing TAD or PCS/TEMDUINS to "A" School Worksheet
CG PSC-2002	Assignment Data Worksheet
CG PSC-2003	PCS Entitlements Advance Travel Worksheet
CG PSC-2005	PCS Reporting Worksheet
CG PSC-2010	Advances Worksheet
CG PSC-2015	Pay Delivery Worksheet
CG PSC-2020	Dependency Worksheet
CG PSC-2020A	Support Statement
CG PSC-2020B	Full-Time Student Statement
CG PSC-2020C	Former Spouse Statement
CG PSC-2020D	Designation of Beneficiaries
CG PSC-2025	BAH/Housing Worksheet
CG PSC-2025A	Housing Allowance (BAH/OHA) Protection Worksheet
CG PSC-2030	Career Development Worksheet
CG PSC-2035	Family Separation Allowance (FSA) Worksheet
CG PSC-2040	Allotment Worksheet
CG PSC-2045	Career Intentions Worksheet
CG PSC-2050	Nonreceipt Worksheet
CG PSC-2426	Career Status Bonus (CSB) Election
CG PSC-3600	Designation Of Beneficiary For Payment Of Unpaid Retired Pay
CG PSC-3799R	Reserve Annual Screening Questionnaire (ASQ)
CG PSC-3867	Claim for Final Retired Pay

Continued on next page

Forms and Worksheets Referenced in this Manual, Continued

Forms & Worksheets Referenced (cont'd)

Form Number	Form name
CG PSC-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election
CG PSC-5100	Officer Uniform Allowance Claim Worksheet
CG PSC-5150	Civilian Clothing Monetary Allowance Worksheet
CG PSC-5200	Ethnicity and Race Self-Reporting Worksheet
CG PSC-7221	Retired Allotment Authorization Form
CG PSC-7270	COLA - Unique Expenses Reimbursement Worksheet
CG PSC-7421	T-PAX Approving Official (AO) Designation
CG PSC-7421/2	DA User Authorization/Revocation
CG PSC-7421/3	JUMPS User Access Authorization
CG PSC-7543	Statement of Financial Status Submitted for Consideration In Connection with Indebtedness to the United States
CG PSC-11221	Reserve Component Survivor Benefit Plan (RCSBP) Option - Election Certificate
DD-216CG	Petty Officer Advancement Certificate
DD-256CG	USCG Honorable Discharge Certificate
DD-257CG	USCG General Discharge Certificate
DD-259CG	USCG Bad Conduct Discharge Certificate (accountable form)
DD-260CG	USCG Dishonorable Discharge Certificate (accountable form)
DD Form 1172	Application For Department of Defense Common Access Card DEERS Enrollment
DD Form 1173	Uniformed Services ID and Privilege Card
DD Form 1173-1	Reserve Family Member Identification Card
DD Form 1299	Application for Shipment and/or Storage of Personal Property
DD Form 1351-2	Travel Voucher
DD-1351-2C	Travel Voucher or Subvoucher (Continuation Sheet)
DD Form 1351-3	Statement of Actual Expenses
DD-1351-4	Voucher Or Claim For Dependent Travel And Dislocation Or Trailer Allowance

Continued on next page

Forms and Worksheets Referenced in this Manual, Continued

Forms & Worksheets Referenced (cont'd)

Form Number	Form name
DD Form 139	Payment Adjustment Authorization
DD Form 1475	Basic Allowance For Subsistence Certification
DD Form 2058, CG	State of Legal Residence Certificate
DD Form 2842	DOD Public Key Infrastructure Registration Official Certificate of Acceptance and Acknowledge of Responsibilities
DD-2556	Move-In Housing Allowance Claim Form
DD Form 216 CG	Petty Officer Appointment Certificate
DD Form 216 CGR	Reserve Petty Officer Appointment Certificate
DD Form 2278	Application for Do It Yourself/Self-Procured Move and Counseling Checklist
DD Form 2329	Record of Trial by Summary Courts-Martial
DD Form 2366	Montgomery GI BILL Enrollment/Disenrollment, SOI
DD Form 2366-1	Montgomery GI BILL Increased Benefit Contribution Program
DD Form 2367	Individual/Overseas Housing Allowance
DD Form 2648,	Preseparation Counseling Checklist for **Active** Component Service Members
DD Form 2648-1	Preseparation Counseling Checklist for **Reserve** Component Service Members Released From Active Duty
DD Form 2656-9	Survivor Benefit Plan (SBP) and Reserve Component Survivor Benefit Plan (RCSBP) Open Enrollment Election
DD Form 2895	Agreement to Serve in the Selected Reserve for TRICARE Reserve Select
DD Form 397	Claims Certificate and Voucher for Death Gratuity Payment
DD Form 4/1	Enlistment/Reenlistment Document Armed Forces of the United States
DD Form 553	Deserter/Absentee Wanted by the Armed Forces
DD Form 616	Return of Absentee
DD Form 803	Certificate of Termination

Continued on next page

Forms and Worksheets Referenced in this Manual, Continued

Forms & Worksheets Referenced (cont'd)

Form Number	Form name
DD-214	Certificate of Release or Discharge From Active Duty (Computer Generated)
DD-214WS	Certificate of Release or Discharge From Active Duty (Computer Generated)
DD-Form 2 (CG)	Armed Forces Identification Card
IRS Form W-2	Wage and Tax Statement
IRS Form W-4	Employee's Withholding Allowance Certificate
IRS Form W-5	Federal Earned Income Credit
PHS 731	International Certificate of Vaccination
SF-312	Nondisclosure Agreement
SF-1038	Advance of Funds Application and Account
SGLV-8285	Request for Insurance (Servicemembers' Group Life Insurance)
SGLV-8286	Servicemembers' Group Life Insurance Election Certificate
SGLV-8286A	Family Coverage Election (SGLV)
VA Form 4-5281	Refund of Educational Contributions

Exhibit 1-1: Suggested format for MOU between Unit and SPO for maintenance of member competency data

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

Commanding Officer
Unit Name

Address.
City, ST Zip
Staff Symbol: ()
Phone: ( )
Fax: ( )
Email:

5230

MEMORANDUM

From: Unit and Servicing SPO

Reply to
Attn of: Unit Point of Contact

To: Distribution
Thru:

Subj: MEMORANDUM OF UNDERSTANDING FOR UNIT TO MAINTAIN MEMBER COMPETENCY DATA

Ref:

1. To allow field units to maintain member competency and other non-payroll related personnel data, using the Direct-Access, these parties have entered into an agreement on the following items:

(a) **SYSTEMS ACCESS:** (Enter Name of Unit) will complete a user access form (CG PSC 7421/2) for each person that will be authorized full access, to Direct-Access applications, in order to provide pay and personnel support for members assigned to the following units:

List Units

Access forms must be delivered to SPO Chief for expedited processing through PSC.

(b) **RESOURCES:** No additional YN resources will be provided to Name of Unit during the initial phases of software rollout.

(c) **RESPONSIBILITIES:** Data input responsibilities will shift from (SPO) to (Unit) . (Unit) will be responsible for entering all member competency information (**Education, Honors and Awards, Qualification Codes and Training, collectively know as "Competencies"**), for those units listed above, on the effective date of this agreement. (Unit) must incorporate internal controls to safeguard data input integrity. The Personnel Service Center (PSC) may require the future designation of at least one Payment Approving Official.

(d) **SUPPORT:** (SPO) will provide training, as requested, on data input requirements and software navigation. They will also be available to provide assistance with various pay entitlement questions.

(e) **EFFECTIVE DATE:** This agreement is entered into effective (date) and will remain in effect for a period not to exceed two years from the effective date or until terminated by both parties, whichever occurs first.

(f) **Agreed to by** (Signatures Below):

FIRST LAST NAME RANK, USCG Title: (CO, XO, or SPO Chief only)	FIRST LAST NAME RANK, USCG Executive Officer, Unit #

Enclosures: List of CG-PSC form 7421/2 (Direct-Access Form) For Each Unit Member Who Is To Be Authorized Access

Dist: Original SPO General Files
Copy Unit General Files
Copy Fax to PSC (Customer Service) with User Access Forms

Copy: COMDT (CG-102)

Exhibit 1-2: Suggested format for MOU between Unit and SPO for the assumption of SPO data entry responsibilities.

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

Commanding Officer
Unit Name

Address.
City, ST Zip
Staff Symbol: ()
Phone: ( )
Fax: ( )
Email:

5230

MEMORANDUM

From: Unit and Servicing SPO

Reply to
Attn of: Unit Point of Contact

To: Distribution
Thru: COMDT (CG-102 – YN Force Manager)
Subj: MEMORANDUM OF UNDERSTANDING FOR UNIT TO ASSUME SPO DATA INPUT RESPONSIBILITIES

Ref:

1. To begin the process of shifting personnel and pay data input responsibilities using Direct-Access these parties have entered into an agreement on the following items:

(a) **SYSTEMS ACCESS:** (Enter Name of Unit) will complete a user access form (CG PSC 7421/2) for each person that will be authorized full access, to Direct-Access applications, in order to provide pay and personnel support for members assigned to the following units:

List Units

Access forms must be delivered to SPO Chief for processing through PSC.

(b) **RESOURCES:** No additional YN resources will be provided to Name of Unit during the initial phases of software rollout.

(c) **RESPONSIBILITIES:** Data input responsibilities will shift from (SPO) to (Unit) . (Unit) will be responsible for entering pay and personnel transactions for those units listed above, on the effective date of this agreement. (Unit) must incorporate internal controls to safeguard data input integrity.

(d) **SUPPORT:** (SPO) will provide training, as requested, on data input requirements and software navigation. They will also be available to provide assistance with various pay entitlement questions. The SPO will continue to input those transactions, which require approval by a Payment Approving Official (PAO).

(e) **EFFECTIVE DATE:** This agreement is entered into effective (date) and will remain in effect for a period not to exceed two years or until terminated by both parties, whichever occurs first.

(f) **Agreed to by** (Signatures Below):

FIRST LAST NAME RANK, USCG Title: (CO, XO, or SPO Chief only)	FIRST LAST NAME RANK, USCG Executive Officer, Unit #

Enclosures: List of CG-PSC form 7421/2 (Direct-Access Form) For Each Unit Member Who Is To Be Authorized Access

Dist: Original SPO General Files
Copy Unit General Files
Copy Fax to PSC (Customer Service) with User Access Forms

This page left blank intentionally

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for transferring personnel. This chapter provides checklists, guides, and information required to complete this task.

In this chapter

Section	Description	See Page
A	Permanent Change of Station - PCS	2-A-1
B	Temporary Duty - TDY	2-B-1
C	Active Duty for Training - ADT	2-C-1
D	Active Duty Other than Training - ADOT	2-D-1
E	Selected Reserve Assignments and Transfer	2-E-1

This page left blank intentionally

Section Overview

Introduction

This section will guide you through the Permanent Change of Station (PCS) process.

In this section

Topic	See Page
The PCS Transfer Process	2-A-2
PCS Departing Checklist	2-A-3
PCS Reporting Checklist	2-A-5
Overseas Transfer Checklist	2-A-6
Automatic Stops of Pay and Allowances	2-A-8
How to Prepare NATO Supplemental Orders	2-A-10
Fax of PCS Advance Requests	2-A-12

The PCS Transfer Process

Introduction

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

Process

This is the process. The SPO and unit are to build a relationship that ensures these items are completed using the most expeditious means possible.

Stage	Who Does It	What Happens
1	Member	Prepares E-Resume in Direct Access.
2	CG PERSCOM	Issues transfer order in Direct Access (Airport Terminal).
3	SPO	Notifies unit when order is received.
4	Member/Unit	Completes forms and worksheets for PCS departure, request for advance of travel funds, obligated service, passports, etc.
5	Member/Unit	If Official Passport is required, follow instructions in ALCOAST 113/07
6	SPO	Approves and prints Direct Access orders.
7	PAO/PSC (tvl)	If requested, will process travel advances.
8	TO (TOPS site)	Counsels member and arranges shipment of HHG.
9	Unit	Endorses order upon departure. Ensures that member checks-out with ESU/ESD for transfer of CGSWSIII account. Ensures member's, and dependents ID cards are up-to-date.
10	SPO	Approves and transmits PCS Departing Transactions.
11	Member	Reports to new unit, prepares forms and worksheets for PCS reporting, travel claims(s), housing allowances, etc. • Updates information (e.g. email address, home and mailing addresses, Emergency Contacts, etc.) in Direct Access. • Updates information (e.g. email address, home and unit addresses, default AO, etc.) in T-PAX. Note: Do not submit final travel claim until all member/dependent travel is completed, when and advance of funds of taken.
12	New Unit	• Endorses order with date and time reported and messing status (e.g. ENL BAS, ENL BAS MINUS DISC MEAL RATE). • Forwards the reviewed and signed approved travel claim(s) with original order/s to PSC (tvl). • Forwards worksheets to SPO w/ copy of the endorsed order.
13	SPO	Completes PCS Reporting Transactions.
14	PSC (tvl)	Processes travel claim(s).

PCS Departing Checklist

Introduction

This checklist is provided as a job aid to assist the member, unit and SPO in completing all necessary tasks required for departing PCS. Use this checklist in conjunction with the Overseas Transfer Checklist (see page 2-A-6) for members transferring OUTCONUS.

Checklist

Follow these steps when a member receives a PCS transfer order.

Step	Action	Reference	Date
1	Ensure member is eligible for transfer.	PERSMAN, 4-B	
	Ensure member meets weight standards	Weight and Physical Fitness Standards, COMDTINST 1020.8(series)	
	Ensure member meets obligated service requirements for transfer. Complete CG PSC-2045, Career Intentions Worksheet and forward to SPO if member needs to extend enlistment	PERSMAN, 4-B-6	
	Counsel member on SRB entitlement if additional obligated service is required.	PERSMAN, 3-C	
2	Complete member screening for assignment to semi-isolated units (if applicable) and administrative assignments.	PERSMAN, 4-E	
3	Complete Coast Guard Sponsor Notification (CG-6058), and send it to the member's destination unit to arrange for sponsor services.	PERSMAN, 4-A-15.b.7	
4	Counsel member on PCS travel entitlements, and complete PCS Entitlements Worksheet (CG PSC-2003). **Note**: Per ALCOAST 514/05 ferry tickets for transfers to and from Alaska and airline tickets for travel to or from OUTCONUS shall be charged against a GTA account and **not** the member's individually billed government travel charge card. All other airline tickets for PCS travel may be charged against a GTA account or the member's individually billed account.	CGS-JFTR, Chapter 5	
5	Verify member's entitlement to FSH and/or FSA-R and BAH allowances. • Complete Basic Allowance for Housing Rate Protection Worksheet (CG PSC-2025A) if member is eligible for, and desires to apply for, BAH Rate Protection. Forward completed worksheet to COMDT (CG-1222 for approval).	PAYMAN, 3-F	
6	Complete PCS Departing Worksheet (CG PSC-2000), and, if applicable, a PCS/TEMDUINS to "A" school worksheet (CG PSC-2001). Forward to SPO for data entry.		

Continued on next page

PCS Departing Checklist, Continued

Checklist (continued)

Step	Action	Reference	Date
7	Ensure Common Access card for member and ID cards for dependents are valid (Note: Ensure member knows his/her PIN number).	ID CARD INST	
	Verify that member's dependents are enrolled in DEERS and instruct member on procedure for reporting change of address to DEERS.	PPPM, 5-B-17	
8	Ensure member has an appointment scheduled with transportation office (TOPS site) to arrange shipment of HHG.	CG Personnel Property Transportation Manual	
9	If member is being assigned to a unit where his/her official duties are expected to result in international travel into or out of a country requiring that U.S. service personnel present an official passport to enter or exit that country (see www.fcg.pentagon.mil), ensure member completes application for Official Passport.	ALCOAST 113/07 (Procedures for obtaining Official (no-fee) Passports can be found at the CG-00I web site at www.uscg.mil/international/)	
10	If member and/or dependents will be required to travel outside of the U.S. in order to reach new duty station (e. g. PDS is in Alaska and travel via Canada), ensure member and dependents obtain passports.		
11	Complete SF-1038 for travel advances.	CGS-JFTR 2300 PPPM 2-A-12	
	Fax copy of original order and SF-1038 to PSC (tvl) for travel advances.		
12	Prepare PCS Departing Transactions (SPO). (Note: For PHS Officers, notify CGPC (OPM-2) when Officer departs, they are the SPO for PHS Officers).	Direct Access Guide, PCS	
13	Transfer Government Travel Charge Card account to coordinator at the new PDS.	Charge Card Instruction	
14	Complete an Enlisted Employee Review (EER). E7 and above - if on the date of detachment 184 or more days have elapsed since the last EER was completed. All Others - if on the date of detachment 92 or more days have elapsed since the last EER was completed.	PERSMAN, 10-B-5 Direct Access Guide, EER	
15	Ensure security debriefing is conducted.	PERSEC	
16	Review PDR.	PDR Manual	
	Forward SPO PDR and Unit PDR to receiving SPO unless member is authorized to hand-carry IAW COMDTINST M1080.10(series).		
17	Notify Health Record Custodian to forward Medical PDR to the receiving medical facility.	Enclosure (9) to the PDR Manual,	
18	Ensure IT support staff (ESU/ESD/ESDD) is notified of member's PCS so they can initiate an "Employee Transfer". The CGSWSIII/ Windows 2003 environment requires user accounts to be moved from one location to another within active directory by the staff at the CG Enterprise Management Facility (EMF) located at TISCOM. It is imperative that users properly check-out with their computer support staffs prior to PCS departure to ensure that required information is provided to process the account moves.	ALCOAST 389/06	

PCS Reporting Checklist

Introduction

This checklist has been provided as a job aid to assist the unit in completing all necessary tasks for reporting in from PCS. This job aid is to be reproduced locally, and modified as necessary to unit unique requirements.

Reporting checklist

Action upon member reporting.

Step	Action	Reference	Date
1	Endorse orders (Note: For PHS Officers, notify CGPC (OPM-2) when Officer reports, they are the SPO for PHS Officers).	PPPM, 2-A-2	
2	Verify member's entitlement to FSH and/or FSA-R, and BAH allowances.	PAYMAN, 3-F	
3	Complete PCS Reporting and BAH/Housing Worksheets and forward to SPO with copy of endorsed order.	CG PSC-2005 CG PSC-2025	
4	Update address in DEERS.	PPPM, 5-B-17	
5	Ensure member has a valid ID card.	PPPM, 5-D-6	
6	Update emergency contacts, e-mail and mailing addresses, allotment and bond addresses in Direct Access.	PPPM, 5-D-11	
7	If unable to complete address changes in Direct Access, ensure member completes PSC-2040, Allotment Worksheet and PSC-2060, Bond Worksheet.	CG PSC-2040 CG PSC-2060	
8	If member is from one of the states that stops taxing when a member is no longer stationed in the state or starts taxing again when stationed back in the state, ensure member submits state tax withholding form.	PPPM, 8-B-3	
9	Ensure member completes travel claim for self and dependents, if applicable.	PPPM, 2-B-4	
10	Ensure supervisor or Authorizing Official sign block 20c or 21a within 2 working days.	PPPM, 2-B-4	
11	Ensure the travel claim and original order are forwarded to PSC (tvl) for processing.	PPPM, 2-B-4	
12	Conduct security briefing.	PERSEC	
13	If applicable, ensure Government Travel Charge Card account was transferred from old PDS.	Charge Card Instruction	
14	For Reservists, check and update member's Training/Pay code in DA	DA Online Help	
15	Update Family Member/Beneficiary/SGLI/FSGLI Information in Direct Access.	PPPM, 5-A-2	
16	Review PDR.	PDR Manual	

Overseas/OUTCONUS Transfer Checklist

Checklist This checklist is provided as a job aid to be used when a member receives an order for overseas. **It must be used along with the PCS Departing Checklist (page 2-A-3).**

Step	Action	Reference	Date
1	Ensure that message concerning overseas transfer with list of screening questions is received from entry approval point. Member must be in compliance with all Overseas Duty Suitability requirements as well as the requirements listed in the Overseas Transfer Message. An Entry Approval Request Message must then be sent IAW Step 7 below.	PERSMAN, 4-H-2	
2	Screen member and/or dependents to determine for suitability for overseas assignment within 10 days of receipt of transfer order. Use the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN, "Overseas Screening for Active Duty Dependents", Exhibit 4-H-2.b of the PERSMAN, and the list of screening questions sent by the overseas command to complete the interview.	PERSMAN, Exhibit 4-H-2	
3	Ensure the servicing SPO supervisor has verified for completeness and signed the "Command Checklist for Overseas Screening" and that has been faxed to Entry Approval Point within 15 days of receipt of transfer authority with copies filed in SPO and Unit PDR.	PERSMAN, Exhibit 4-H-2	
4	Ensure the member and dependents are medically qualified for overseas transfer. The member must have an approved overseas physical including immunizations and any essential dental treatment completed within the last 6 months. **Note**: Per ALCOAST 098/06 commands may submit screening packages with the medical screenings and physicals portion still pending, but must indicate the exact dates the physicals and screenings are scheduled. In addition, the requirement to complete blocks 9.B. and 9.C. of Part Two, of PERSMAN Exhibit 4.H.2.B is waived by ALCOAST 098/06 and ALCOAST 235/05.	PERSMAN, 4-H-3 MEDMAN, 3-B-3	

Continued on next page

Overseas/OUTCONUS Transfer Checklist, Continued

Checklist **(continued)**

Step	Action	Reference	Date
5	Ensure member and dependents • have valid CAC and ID cards • have International Certificates of Vaccination PHS-731 (if required) • are provided with detailed information concerning tour length and have elected an appropriate tour • are counseled regarding overseas station allowances when member is assigned to a restricted area and dependents reside in an area outside the U.S. • are counseled regarding requirements for the transportation of pets and/or firearms to new PDS	PERSMAN, 4-H-7	
6	Ensure the member has made arrangements for a Passport and Passports for dependents. If PDS is outside the U.S. or if the member and/or the member's dependents will be required to travel outside of the U.S. in order to reach new duty station (e. g. PDS is in Alaska and travel via Canada), passports may be required.	ALCOAST 113/07	
7	Send entry approval request message to overseas command. **Note:** Ensure that the overseas command has received a copy of the Command Checklist for Overseas Screening prior to requesting approval. **Exceptions**: 1) Per ALCOAST 020/06 TRACEN Cape May can grant entry approval for recruit graduates without dependents who do not intend to acquire dependents enroute to new PDS. 2) Per ALCOAST 078/06 CG Academy can grant entry approval for Academy, OCS and DCO graduates without dependents who do not intend to acquire dependents enroute to new PDS	PERSMAN, 4-H	
8	Ensure entry approval has been granted prior to member receiving ORIGINAL orders or travel advances.	PERSMAN, 4-H-4-a	

Automatic Stops of Pay and Allowances

Introduction

Certain pay entitlements are automatically stopped when the departing or reporting endorsement on orders transaction processes.

References

- PAYMAN
  - Chapter 3, Allowances
  - Chapter 4, Special Pay
  - Chapter 5, Incentive Pay
- JFTR, para. U9100, Housing and Cost-of-Living Allowances

Auto Stops on PCS

This table shows pay entitlements, which will be automatically stopped when PCS transfer occurs.

Note: Automatic stops will not occur on interoffice transfers.

Entitlement Description	When the Entitlement Stops
Basic Allowance for Housing - Child (BAH Diff) (Codes P or Q)	On the day prior to PCS Departure.
Basic Allowance for Housing (BAH)-Without Dependents	On the day prior to reporting.
Basic Allowance for Housing - Partial (BAH Partial)	On the day prior to the effective date of departure.
Enlisted Discount Meal Rate deduction	On the day prior to the effective date of departure.
Enlisted Basic Allowance for Subsistence (ENL BAS)	On the effective date of reporting PCS.
Career sea pay/time and premium	On the effective date of departure.
Combat SGLI Allowance	On the last day of the month of the effective date of departure.
Combat Tax Exclusion	On the last day of the month of the effective date of departure.
CONUS Cost of Living Allowance (CCOLA)	On the day prior to the effective date of reporting.

Note: Effective 1 January 2006, BAH for members without dependents auto-stops effective the date of PCS departure. These members are entitled to BAH W/O while in transit and the system (JUMPS) will credit any BAH due when the reporting endorsement on orders transaction processes.

Continued on next page

Automatic Stops of Pay and Allowances, Continued

Auto Stops on PCS (continued)

Entitlement Description	When the Entitlement Stops
OUTCONUS-Cost of Living Allowance (OCOLA), with or without dependents and partial If dependents are delayed	On the day prior to the effective date of departure. Date last dependents departs within 60 days.
Crew flight pay (enlisted only)	On the effective date of departure
Diving Pay	On the effective date of departure
Family Separation - Housing (FSH)	On the day prior to the effective date of PCS departure.
Family Separation Allowance	On the day prior to reporting, less any leave, proceed time or compensatory absence.
Hardship duty pay-location	On the effective date of departure.
Hostile Fire, Imminent Danger Pay	On the last day of the month of the effective date of departure.
Noncrew flight pay	On the effective date of departure.
Overseas Housing Allowance (OHA), with and without dependents If dependents are delayed	On the day prior to the effective date of departure. Date last dependent departs (Delay not to exceed 60 days).
Responsibility Pay	On day prior to departure.
Diving Duty Pay	On the effective date of departure
Special Duty Assignment Pay (SDAP)	On the day prior to the effective date of departure.
Flight Deck Hazardous Duty Incentive Pay	On the day prior to the effective date of departure.
Foreign Language Proficiency Pay	On the day prior to the effective date of departure.
Hazardous Duty Incentive Pay for Visit, Board, Search & Seizure	On the day prior to the effective date of departure.
Exclusion from State Income Tax Withholding (SITW)	Member's exclusion from SITW ends the day prior to PCS reporting if member is assigned to unit in a state that taxes military pay while member is stationed within the state (See Chap. 8-B)

How to Prepare NATO Supplemental Orders

Introduction

A NATO order, along with proper identification, allows an individual to pass without difficulty from one NATO nation to another. This order is only for the movement of military personnel, their personal baggage, individual weapons, and official documents.

References

PERSMAN, 4-A-18

Format for order

The below table describes how to complete a NATO order.

Step	Action
1	Top of letterhead type: Grading of Form: NATO UNCLASSIFIED
2	Include in the heading: country of origin, SSN, date order prepared.
3	In the first paragraph include: • Name, rank, grade and ID card number • Destination, within NATO country. • Date of departure from original country. • Number of days member will remain in NATO country, if PCS, so indicate.
4	In the second paragraph include: Authorization for member to possess and carry firearms.
5	In the third paragraph include: The number of official dispatches and that they are official documents.
6	In the fourth paragraph include: A certification that the travel is under the provisions of the NATO Status of Forces Agreement.

Note: Officer authorizing the NATO travel will sign the order.

Continued on next page

How to Prepare NATO Supplemental Orders, Continued

Recommended format

Here is the recommended format for NATO travel orders

Note: NATO travel orders will be prepared in English and French. Any instructions printed on the reverse of the orders will appear in English only.

Grading of form: **NATO UNCLASSIFIED**

NATO TRAVEL ORDER **ORDRE DE MISSION OTAN**

Country of Origin:
Pays de provenance:

Social Security Number
Date order issued

1. The bearer (and group as shown heron or on attached list)
Le porteur (et personnel porte ci-dessus ou sur la list jointe)

Personal/Identity Card No. (if any) Name: Rank/Grade
*No Mle/de la cazrte d'identite*_____*Nom:*_____
(s'il y a lieuy)

will travel to:
fera mouvement a: _____

Date of departure
*Date du depart, le (ou vers le):*_____

___For a period of approximately _____days _____For permanent change of station,
*Pour a peu pres*_____*jors*_____ *Pour changement permanent de garnison.*

2. Authority (is)(is not) granted to possess and carry arms.
Autorisation dep port d'armes (accordee) (non accordee).

3. The person named in paragraph 1 is authorized to carry _____ sealed dispatches.
La personne indequee au paragraphe 1 est authorisee a porter _____ plis scelles.

a. These dispatches contain only official documents.
Ces plis ne contiennent que des documents officiels.

4. I hereby certify that this individual/group is/are member(s) of a Force as defined in the NATO Status of Forces Agreement, and that this is an authorized mover under the terms of this agreement.

Je soussigne certifie que le personnel vise appartient a une armee telle definie dans I'Accord OTAN sur le statu des Forces Armees et que ce deplacement est officiel selon les termes de cet accord.

Signature of Officer
Authorizing Movement

FAX of PCS Advance Requests

Introduction

This section provides the procedure for requesting advances of PCS travel funds.

PCS Advance Requests:

Fax the following documents for PCS Advance:

- A fax cover sheet that identifies the originator, the member's full name and SSN, authorizing official's name, and unit name with phone number.
- A completed original PCS Travel Order signed by the authorizing official. Ensure PCS travel advance entitlements are authorized on orders.
- A completed original SF-1038 "Advance of Funds Application and Account" with the authorizing official's signature (Original signature in ink, not stamped). Blocks 1 through 10 on the SF-1038 must be completed. A traveler who submits a command approved PCS Departing Worksheet requesting an advance does not need to sign the SF-1038. Their signature is on the PCS Departing Worksheet; type "Signature on File" in the signature block of the SF-1038.

Where to Fax:

Fax #: (785) 339-3775

Status of Advance of Funds Requests

Members may check the status of their advance of funds requests and payment summaries in T-PAX.

Section Overview

Introduction

This section prescribes processes completed for the execution of Temporary Duty (TDY).

In this section

Topic	See Page
The Temporary Duty (TDY) Order	2-B-2
The Travel Claim Process and Responsibilities	2-B-4
Travel Preparation and Examination System (T-PAX) Process	2-B-5
The Traveler	2-B-9
The Proxy	2-B-10
The Signature Proxy	2-B-11
The Approving Official (AO)	2-B-12
Personnel Service Center (PSC)	2-B-14
The CG Finance Center (FINCEN)	2-B-15
Records Maintenance	2-B-16
Audits (Reviews)	2-B-17
Amendments to TDY Orders	2-B-21
Blanket Travel Orders	2-B-22
Group Travel Orders	2-B-23
Leave and Liberty Combined With TDY Travel	2-B-24
Pay Entitlements Affected by TDY	2-B-26
Preparation of TDY Order (CG-4251) Blocks 1–11	2-B-27
Preparation of TDY Order (CG-4251) Block 12	2-B-29
Preparation of TDY Order (CG-4251) Blocks 13-19	2-B-31
Forms of Written Orders (Examples)	
• Letter Travel Order	2-B-32
• Authenticated Original Message / E-mail Order	2-B-33
Temporary Duty (TDY) Checklists	2-B-35
Reimbursement Methods	2-B-37
Submission of Manual Travel Claims	2-B-41
Rules for Claiming Official Phone Calls	2-B-45
Accounting Data	2-B-46

The Temporary Duty (TDY) Order

Introduction

It is critical for Coast Guard travelers and their supervisors to understand the administrative responsibilities for completing and reviewing TDY Travel Orders and Travel Claims.

For the Traveler

The traveler is the single most important person involved in the travel claim liquidation process. Without a properly completed claim, full reimbursement will not be possible.

Purpose of a TDY Order

The Temporary Duty (or TDY) Order establishes the conditions for official travel and transportation and provides the basis for traveler entitlement and reimbursement. An effective TDY Order provides information that is clear and is complete.

Requirements for a TDY Order

The written TDY order is a document that meets several practical and mandated administrative requirements. The travel order expresses:

- Detailed information for personnel or agencies to provide support services to the traveler, (i.e., Travel Management Centers, Commercial Ticketing Offices (CTO), Transportation Officer, etc.).
- Accounting information to enable correct funds accounting.

Continued on next page

The Temporary Duty (TDY) Order, Continued

Information elements

The TDY Order must answer several elemental questions. The questions are:

- **WHAT** mode of transportation is authorized and/or directed?
- **WHAT** type of quarters is authorized and/or directed?
- **WHAT** type of messing is authorized and/or directed?
- **IS** the traveler a government travel charge card holder?
- **WHAT** is maximum amount of travel funds authorized?
- **WHAT** is the accurate Travel Order Number (TONO) and Accounting line data?
- **WHAT** are the specific reimbursable expenses that must be pre-authorized on the Travel Order, (i.e., Conference costs, Registration fees, Rental vehicle and size authorization, Communication services, Excess baggage, etc.)

While You Are Traveling

Obtain receipts for **ALL** expenses while you are traveling. Although receipts are required only for lodging, rental vehicles, air fare and individual expenditures of $75 or over, the receipts you collect during your trip will act as a record of expenses and be an invaluable tool when you complete your travel voucher.

The Travel Claim Process and Responsibilities

Introduction

This section outlines the travel claim process and shows the responsibilities associated with each stage of the travel claim process.

Integrated Automated Travel System (WINIATS)

The Coast Guard uses a system called Integrated Automated Travel System (WINIATS) for the liquidation of travel claims. With this system the Coast Guard can liquidate travel settlements in a matter of days.

Process

This table shows the manual travel claim process and responsibilities.

Stage	Who Does It	When	What Happens	
1	Traveler	Within 3 days of completion of TDY or PCS travel. (For PCS, submit after dependents travel, if dependents travel separately)	Submits travel voucher to Supervisor for administrative review. • Retains copy of travel voucher, orders, and receipts. Member must retain copies for 6 years, three months.	
2	Supervisor	Within 2 days of receipt from member.	Reviews claim for completeness. • Dates and signs claim indicating the traveler completed the ordered travel. • Forwards original claim to PSC.	
3	PSC (TVL) Examiner	Within 4 days after receipt, depending on workload. (e.g., For periods of heavy travel it may take longer.)	Review travel voucher and enter into WINIATS.	
			If travel voucher is	**Then**
			Correct and complete	Forward reviewed claim and voucher summary to PAO. (Go to Step 4)
			Incorrect or incomplete	Examiner returns claim to member.
4	PSC (TVL) PAO	Claim is received from examiner	Certifies travel voucher for payment and returns to examiner for filing and mailing. **Note**: A traveler whose entitlements are less than a Government travel advance will be sent a letter of overpayment at this point. See the section about advances for more information on the recoupment procedures.	
5	Coast Guard Finance Center	Upon receipt from PSC (TVL)	**If payment is**	**Then**
			Direct Deposit	Payment will be transferred to the traveler's account within 10 days.
			Check (For non-military traveler)	Check will be mailed to the address listed on the travel claim within 15 days.

NOTE: Travelers utilizing industrial site funding MUST contact their respective industrial site to ascertain if payment has been made.

Travel Preparation and Examination System (T-PAX) Process

Introduction

T-PAX is an application that provides standard drop-down menu boxes and tabs to complete and process TDY transactions.

Benefits

Utilizing stored data from the T-PAX Travel Order to complete the T-PAX Request for Travel Settlement eliminates paperwork and improves data accuracy.

- Increased percentage of correct entitlements and payments for travelers.
- Per Diem rates are available to ALL system users on a “real-time” basis.
- Travelers can verify/inquire about the status of claim(s) on-site by accessing the T-PAX main menu.
- A single system that can create and produce ALL travel documents necessary to execute government travel.
- Eliminating manual processes decreases reimbursement cycle time.

Description

Travel Preparation and Examination System (T-PAX) is a software application designed to run on Coast Guard Standard Workstation III (CGSWSIII). T-PAX provides an electronic link between the traveler, the Authorizing Official and the Integrated Automated Travel System (WINIATS). WINIATS is the software application used by PSC (TVL) to compute claim/voucher entitlements and transmit the information to FINCEN for payment. T-PAX deployment is a significant stride toward the travel claim process becoming a “paperless” system.

Purpose

T-PAX has been developed to be the primary TDY Travel Claim Settlement System for the U.S. Coast Guard.

Uses

T-PAX may be used to create a Temporary Duty (TDY) Travel Order, Request for TDY Travel Advance and/or Request for TDY Settlement. It is not used for PCS authorizations, advances, or claims at this time.

Travel Preparation and Examination System (T-PAX) Process, Continued

Process This table shows the automated travel claim process and responsibilities.

Stage	Who	When	What Happens	
1	Traveler	For TDY Order: Prior to departure on TDY. For TDY Settlement: Within 3 days of completion of TDY.	Complete Request For TDY Authorization and "Send to AO" for approval. Complete Request For TDY Settlement and "Send to AO" for approval. • Forward original travel order and receipts to AO.	
2	AO	Within 2 days of receipt from member.	Reviews TDY Authorization and TDY Settlement in T-PAX for accuracy and completeness. • If error, return to Traveler w/remarks to correct. • If accurate and complete, release in T-PAX, as approved, to PSC.	
3	PSC (TVL)	Daily.	• Conduct export routine to create batch of T-PAX transactions. • Conduct import routine to download T-PAX batch to WINIATS for computation and release to FINCEN.	
		In WINIATS:	**If travel voucher is:**	**Then:**
			Complete and accurate	Release claim blocks to FINCEN for payment.
			Incorrect or incomplete	• Utilize workaround if one exists for the particular problem. • Return claim for subsequent submission by traveler if workaround doesn't exist.
4	PSC (TVL) PAO	PAO requests original travel claim for member on a random basis	Conduct audit to verify as complete, accurate and in accordance with Federal Travel Rules and Regulations. • If underpayment due to traveler and/or AO oversight, the responsibility is on the traveler to submit a supplemental claim to receive entitlement. • If underpayment due to system error, supplemental will be processed by PSC (TVL). • If overpayment due to system error or due to traveler and/or AO oversight, PSC (TVL) will submit supplemental to establish collection of debt. **Note:** A traveler, whose total entitlement is less than an applicable government travel advance, will be sent a letter of indebtedness for collection of overpayment.	
5	Member	If audited	Mails ***copies*** of original orders, claim, and receipts within 2 days of notification. *See the page 2-B-17 for audit procedures and mailing address.*	

Travel Preparation and Examination System (T-PAX) Process, Continued

Critical Elements

These "Critical Elements" should be addressed to successfully manage the T-PAX process at your unit:

Number of T-PAX Approving Officials. Designate enough T-PAX Approving Officials at your unit to approve T-PAX transactions and avoid backlogs or process delays. It is recommended that one T-PAX AO be designated in each section, or otherwise at a ratio of 1:12.

Obligating Travel Funds. T-PAX *will not* obligate travel funds. Normally, the obligating of funds is done prior to creating travel orders. Coordinate the flow & timing of this activity with Accounting or Admin offices. Develop internal procedures that streamline and coordinate this activity at your unit.

Empowering T-PAX Approving Officials. It is critical to empower T-PAX AO's by granting them the authority to request, retrieve, and input Travel Order Numbers (TONO's/Document ID numbers) in T-PAX. The T-PAX AO cannot approve a T-PAX transaction without first having a valid TONO and fund accounting string. Develop internal procedures that streamline and coordinate this activity at your unit.

Record-keeping. The traveler is required to maintain complete and accurate records of all travel claims for 6 years and 3 months.

Airline or Hotel Reservations. Use your designated Travel Management Center and coordinate this activity at your unit.

User Identification and Passwords. User identification and passwords are the most common method of controlling access to the system. Identification involves the identifier or name by which the user is known to the system (e.g., user). Each user should have a unique user identification (Normally the member's Employee ID Number) and password. Passwords will be eight characters long and must be alphanumeric (no special characters, such as @!?). The traveler is required to change their password and confirmation codes every six months.

User Categories

There are four categories of T-PAX users, each with a different role and responsibility. These T-PAX user categories are:

1. Traveler
2. Proxy
3. Signature Proxy
4. Approving Official

Continued on next page

Travel Preparation and Examination System (T-PAX) Process, Continued

User Categories/ Privileges

T-PAX allows users more than one access capacity, if authorized. All T-PAX users initial view when they log in is as "*Traveler*". If the user is authorized more than one type of access (Proxy or AO) they must select the **Log in as** menu item and change their view to access the additional privileges. After completing actions as a Proxy or AO, the user must select the **Log in as Traveler** option to complete the T-PAX logout process or to work on or view their own requests and settlements.

Figure 1: T-PAX **Log in as** menu.

USER CATEGORY	T-PAX Log In As Menu Selection	THIS PRIVILEGE CAN…	HOW TO SET PRIVILEGE
TRAVELER	Traveler	Create your own travel documents and forward to a Unit AO for approval.	Set automatically, this is a basic, universal user setting.
PROXY	Proxy This privilege supports all travelers of the same business unit.	Create all travel documents on behalf of another traveler, BUT such documents can only be forwarded to the traveler.	Set automatically by unit OPFAC number. Any traveler can act as a proxy for another member of the same unit.
SIGNATURE PROXY	Proxy This privilege only supports one specific traveler.	A traveler can designate another user (Proxy) to create, sign for, and forward travel documents to a Unit AO.	The traveler would designate a signature proxy, someone of the same unit, in the Personal Profile, Security & Access Information.
APPROVING OFFICIAL **Administrative Reviewer**	Authorizing This privilege supports all travelers of the same unit or as designated.	Approves travel documents. Ensures that mission was completed and that travel expenses were reasonable, justified, and consistent with the mission.	Each business unit designates enough AO's to keep T-PAX work flowing. ONLY PSC Travel can turn on and off AO privileges

The Traveler

Introduction

The basic user access level in T-PAX is called “TRAVELER”.

Authorized T-PAX Travelers

Any Coast Guard active duty, reserve, and civilian employees having access to CGSWSIII can use T-PAX as a “TRAVELER”. Passwords must be carefully guarded and not shared.

Non-T-PAX Travelers

Other travel customers/claimants must continue to submit paper-based travel claims, using form DD-1351-2. These customers must mail their travel claims to PSC for processing.

Non-T-PAX Travelers are:

- Anyone who does NOT have access to CGSWSIII
- Other service members or civilians traveling on behalf of the USCG
- Dependents
- Non-appropriated fund activity employees
- Members who separate or retire from the service (who depart their unit)
- Coast Guard Auxiliarists

Traveler Database

PSC (TVL) downloads, maintains and updates the customer database once every two weeks, following the JUMPS and civilian payroll update cycles. This updates unit OPFACs, but members must keep other profile information (e.g. e-mail address, default AO, etc.) up to date.

Problems with Traveler Database

Each TRAVELER profile is linked to a Unit OPFAC number. If you have an employee/member assigned to your unit who is unable to access T-PAX, contact PSC Customer Care for assistance:

Phone: 1-866-772-8724 or 1-785-339-2200.

Online Trouble Ticket – http://www.uscg.mil/hq/psc/customerservice.shtm

The Proxy

Definition	A Proxy is a person designated to create (but not sign for or deliver) travel documents (travel orders and claims) for another individual.
Who Can Be a Proxy	Any traveler can act as a Proxy for another member of the same unit.
Limits	Travel documents prepared by a Proxy can only be forwarded to the traveler.

The Signature Proxy

Definition	A Signature Proxy is a person designated by a traveler to create, sign for, and forward travel documents.
Who Can Be a Signature Proxy	Any person in the same unit can be designated a Signature Proxy by a traveler.
Designation Procedure	The traveler designates the Signature Proxy in their personal profile.

Note: A member shall not serve as both the Signature Proxy and Approving Official.

The Approving Official (AO)

Introduction

The Approving Official (AO) authorizes travel, approves expenses and forwards e-claims to PSC. Each unit must designate AO's to approve their T-PAX transactions. PSC (TVL) controls the maintenance of AO privileges in T-PAX for all units. **AO's are required to physically possess the hardcopy order and all required receipts for the advance or settlement request prior to electronic approval in T-PAX.**

Who Can Be an AO

Any E-5 or GS-6 and above, operating in the capacity of supervisor or manager, can be designated an AO.

AO Duties

AO's must:

- Confirm individual travelers possess a Government-sponsored Travel Charge Card (GTCC) when commencing official travel.
- Authorize and approve travel in support of the required mission(s).
- Make certain that directed travel is performed in the most efficient manner.
- Determine that travel expenses were necessary, reasonable, justified, and consistent with completing the assigned objective or mission.
- Deny/disapprove travel and travel expenses that DO NOT adhere to Federal Travel Rules and Regulations.
- Review and approve travel documents within two days of receipt.
- **Physically possess the hardcopy order and all required receipts for the advance or settlement request prior to electronic approval in T-PAX.**

The **Approving Official Checklist** is available to assist AO's in completing their duties. The Approving Official Checklist is available from PSC's web site at http://www.uscg.mil/hq/psc/travel/aochecklist.pdf.

Continued on next page

The Approving Official (AO), Continued

Designation

T-PAX profiles must be set up with user's password and general information required prior to faxing a request for T-PAX AO designation. T-PAX AO designation requests without a member's basic profile will not be updated in T-PAX by PSC.

Procedure

To designate a T-PAX AO, complete T-PAX Approving Official (AO) Designation form, CG PSC-7421 (http://www.uscg.mil/hq/psc/forms/psc7421.pdf).

1. Complete the first three sections of the form at the unit level.
2. Fax the form to PSC Travel at (785) 339-3774.
3. Within 3 business days of receipt, PSC Travel will enable AO privileges in T-PAX.

The unit shall retain the original CG PSC-7421 until the member/employee departs the unit (transfer, discharge, etc.), or the T-PAX AO designation is otherwise terminated or revoked. The unit must complete the termination section of the form when a member/employee departs the unit (transfer, discharge, etc.). Follow the procedure in the Terminating Privileges section below.

Terminating Privileges

To terminate T-PAX AO designation and privileges, complete the final section of CG PSC Form 7421 and fax to PSC Travel at (785) 339-3774.

PSC

Introduction As the Process Owner of T-PAX, PSC (TVL) conducts system management, maintenance, and development.

Support Services This list identifies T-PAX support services provided by PSC (TVL).

Service	Description
Technical Support	Assistance troubleshooting T-PAX software errors, providing feedback to the field, and reporting corrections and enhancements to programmers.
Maintenance	Download/update T-PAX database(s) of AO's, user profiles, CG standard accounting lines, city per diem rates, and Reimbursable Agreement Numbers (RAN).
Travel Entitlement Computation	Process T-PAX transactions through WINIATS to calculate entitlements.
FINCEN Liaison	Act as liaison by releasing WINIATS data electronically to FINCEN for payment processing and resolving reported errors.
Reports	Provide query reports of value to units.
Resources	Travel Branch maintains several valuable links on travel entitlements at: http://www.uscg.mil/hq/psc/tvl.htm and T-PAX specific guidance at: http://cgweb.psc.uscg.mil/t-pax.shtm

The CG Finance Center (FINCEN)

Introduction

The CG Finance Center (FINCEN) is responsible for verifying WINIATS downloads from PSC and processing travel claim data for payment.

Support Services

This list identifies T-PAX support services provided by CG FINCEN.

Service	Description
Payment Status	Travelers can call 1-800-564-5504 (or 757 523-6940 for OCONUS travelers) to use FINCEN's auto-attendant that reports the status of a travel payment.
FINCEN Website	To electronically view payment status of claims go to: http://cgweb.fincen.uscg.mil/ or http://www.fincen.uscg.mil/

Records Maintenance

Traveler

It is the traveler's responsibility to manage records for all travel transactions related to T-PAX. This includes printing travel authorizations **BEFORE** traveling, printing claims **AFTER** approval by the AO and retaining authorizations, claims (both with signatures of traveler and AO) and required receipts for a period of not less than six years and three months following completion of travel.

Travel Document Verification

Prior to approving transactions for claim settlement in T-PAX, the AO must have all supporting documentation, including printed original signed authorization, claim and receipts, and verify the data entered in T-PAX is accurate. Without the original travel authorization/order, amendments, receipts, and advance requests, the AO *should not* approve the transaction for payment.

Records Retention

The member must retain travel claim records (listed below) for six years and three months.

- Original Travel Authorization/Order with signatures of the traveler and AO.
- Amendments to the Travel Authorization/Order, if applicable.
- Claim (DD-1351-2) with signatures of the traveler and AO.
- Receipts as required by current regulation (JFTR). A receipt must show what and when specific services were rendered or articles purchases, and the unit price. See JFTR, U2500.

  Receipts are required for:
  - Lodging expenses regardless of dollar amount
  - Any claimed expenditures of $75.00 or more.
  - Rental vehicles and commercial travel (airfare, train, etc.), regardless of cost.

Note: See page 2-B-41 for guidance on the documentation necessary in the event a required receipt is lost or missing.

Audits (Reviews)

Auditing

Due to requirements of the JFTR, ALL travel claims submitted via T-PAX are subject to the audit review process to ensure funds accountability, unit controls, and process integrity.

PSC (TVL) will notify a member by email of Travel Claims selected for audit. *Members are not to submit an audit package prior to receiving a request.*

Travel Claim Package

The Audit Travel Claim package will consist of:

- Copy of signed original orders (all original travel orders MUST be signed by an approving official including those generated by Direct Access).
- Copy of all signed amendments.
- Copy of travel claim (DD-1351-2 signed by traveler and AO).
- Copy of itemized receipt(s) for all lodging.
- Copy of airfare itinerary(s) (must reflect cost of airfare).
- Copy of rental vehicle contract(s) (estimate receipts are not acceptable).
- Copy of receipts for all reimbursable expenses of $75 or more.

Note: Credit card statements are not authorized to be used as a receipt.

Responsibilities

This table describes the responsibilities associated with T-PAX travel claim audits.

Who	Responsibility
PSC (TVL)	• Initiate audit requests for specific claims by e-mail to the traveler. Further instructions will be provided at the time of the audit request. • Audit claims by comparing T-PAX travel claim information with submitted audit package. • If an incorrect payment is found during the audit, a credit or pay adjustment authorization (PAA) will be issued to resolve the travel discrepancy.

Continued on next page

Audits (Reviews), Continued

Who	Responsibility
PSC (TVL)	• Notify traveler of first audit request via e-mail. If a requested audit is not received within one month, a second request is sent. If a requested audit is not received within two months, a third and final request is sent via email to the traveler and traveler's command. If a requested audit is not received within three months after the initial audit request, the traveler will be placed in an overpayment status and collection action will be taken. All of these e-mail notifications are sent first using the travelers T-PAX email address and secondly using their Direct Access e-mail address. **It is imperative that members ensure their e-mail address in both T-PAX and Direct-Access are current.** • Claims received from units will NOT be returned. • Claims that do not result in an overpayment of travel entitlements and have original orders and/or receipts will be returned to traveler using their most current address in Direct Access. • Notifies traveler via e-mail that audit package has been received at PSC. • Initiate and mail Pending Audit Reports to units providing notification of audit requests. • Return incomplete audit packages to travelers for corrective actions.
Traveler	• Mail travel claims package for T-PAX audits to: Commanding Officer (TVL- T-PAX Audits) U. S. Coast Guard Personnel Service Center PO Box 3551 Topeka, KS 66601-3551 • For travel claim packages being sent via DHL or other express service, mail to the following address as these companies do NOT deliver to a PO Box: Commanding Officer (TVL- T-PAX Audits) U. S. Coast Guard Personnel Service Center 444 SE Quincy Street Topeka, KS 66683-3591

Continued on next page

Audits (Reviews), Continued

Who	Responsibility
Traveler (cont)	• Do NOT mail original orders, amendments, and receipts with your travel claims package, **send copies**. You are required to keep the original documents for six years and three months following completion of travel. • Notify T-PAX AO immediately of any known discrepancies or changes to audited original travel claims. • Travelers can request a suspension of an audit due to operational commitments. Requests need to be submitted to PSC Customer Care. Requests must include the claim number and the estimated ending date of suspension. Submit requests via the PSC web site: http://www.uscg.mil/hq/psc/customerservice.shtm. • Is responsible for repayment of monies received due to erroneous information provided on original claim submission. Do NOT send any cash, checks, or money orders to PSC (tvl). Please make your check or money order payable to "U.S. Coast Guard", and write your SSN and TONO on your payment. Include a copy of your official notice of travel overpayment letter and send your payment to: U. S. COAST GUARD TRAVEL & ART PO BOX 70969 CHARLOTTE, NC 28272-0969 • If an audit results in an overpayment, travelers are not authorized to submit subsequent claims in T-PAX to cancel the debt. If a supplemental travel claim is necessary to offset the debt the supplemental claim package must be mailed to PSC (TVL-T-PAX Audits). • Take corrective action on returned claims and resubmit for audit within 10 days. • Maintain original orders, amendments, travel claim, and receipts for a period of 6 years and 3 months.

Continued on next page

Audits (Reviews), Continued

Audit Request Information Packages

Monthly, all units will receive a T-PAX Audit Request Information Package containing four reports. These reports list all members who have been sent audit requests.

1. The first report lists those members who have been sent three audit requests with an action date when PSC will adjust the claim for the monies in question if no response is received. If a member listed on the report has transferred, please notify the member's new unit immediately.
2. The second report lists members who have been sent two audit requests.
3. The third audit report lists members who have been sent the first request.
4. The fourth report will be the "T-PAX Monthly Audit Error Report" for the unit. This report shows claims submitted by the unit that were audited during the past 45 days. This will include the AO's name, traveler's name, TONO, travel dates, percentage of correct claims and the value of the errors found by the audit. The error information is being provided to the unit for possible training topics and improving T-PAX claim submission accuracy.

Audit Status Reports

To assist travelers and commands in tracking the status of audit requests, PSC and FINCEN have reports on the web.

The most recent audit request reports can be accessed the first week of each month via the PSC intranet (CGWEB) page at http://cgweb.PSC.uscg.mil/travel/audits/. Enter the unit 7 digit OPFAC in the search box to find the link to your unit page, which contains 5 reports: 1st requests; 2nd requests; 3rd requests; suspended requests; and requests being recouped.

Travelers can also view audit request status by going to the FINCEN website http://cgweb.FINCEN.uscg.mil/tvs_aux2/. This shows the following information on a requested audit: claim number, TONO, travel dates, dates of requests, date received at PSC, date suspended, suspension end date, date cancelled, date returned to the traveler for further documentation, and date when the audit was completed.

Amendments to TDY Orders

Amendment to Orders

Orders can be amended after-the-fact to document verbal authority given during the TDY travel period when unforeseen circumstances emerge that require the traveler to incur costs not originally anticipated.

The Order Issuing Official who directed and funded the travel makes amendments to TDY Orders. The amendment should identify:

- Traveler
- TONO/ACCTNG Data
- Entitlement specified
- Reason for change
- Authorized Official Signature (Original signature in ink, not stamped)

Amendments are done on memo, letterhead, or handwritten note and attached to the original TDY order. Amendments require the AO's original signature.

When Amendments Are NOT Authorized

There are some provisions that, if not authorized in the TDY order BEFORE travel starts, CANNOT be approved for payment after travel is completed.

Example: An order DIRECTING use of common carrier cannot be amended after the fact to permit some other form of transportation when common carrier was the order issuer's intended form of transportation for the member.

Amendments Cannot Be Used to Deny an Entitlement

Under NO CIRCUMSTANCES can a TDY order be amended after the fact to deny a travel entitlement originally contained in the travel order

Example: Orders may not be revoked or modified retroactively so as to increase or decrease the rights that have accrued or becomes fixed, after the travel has been performed.

After travel is completed, an authority cannot retroactively modify travel orders to direct a reduced per diem rate when a commercial meal rate was initially authorized.

Blanket Travel Orders

Definition	A Blanket Travel Order is a TDY Order that covers repeated travel over an extended period of time.
Reference	JFTR, U2140-B and U2015
Requirements	Blanket Travel Orders must meet the following requirements. • Be an order for an individual. • Define the time period covered by inclusive dates. • Inclusive dates to not cross fiscal years (30 Sep/01 Oct). • Define the geographic area in which travel can be performed.
Monthly Order	The period covered by a Blanket Travel Order that is one month in duration.
Quarterly Order	In a situation of almost constant travel (e.g., the sum of the TDY travel is expected to be 1 out of 3 months), a quarterly travel order may be appropriate.
Order For a Period in Excess of a Quarter	Only under the most continuous travel circumstances (e.g., the sum of the traveler's TDY period is expected to equal or exceed 6 months) should a Blanket Travel order for a period in excess of a quarter be issued.

Note: Generic actual expenses, i.e. Actual Expense or Super Actual Expense, are not authorized. Authority must list specific dates and locations for each trip.

Group Travel Orders

Definition

A group Travel Order is a no cost order that covers a group while traveling between the permanent duty station and a TDY location or between TDY locations. Travel claims are not required to be submitted.

Reference

- JFTR, U4000 and U2015
- PERSMAN, Exhibit 4-G-1, Page 4

Travel Entitlements

- Group travel affects travel entitlements for travelers of the group ONLY while traveling between locations. Group travel has no impact on travel entitlements for travelers of the group while at TDY location(s).
- For unexpected expenses, attach form SF-1164 to orders.

Identifying the Travelers

The name of the senior traveler of the group will appear on the order with other travelers listed on an attachment that is a part of the order.

Example: TO: LTJG/O2 SAFE T. HATCH 000-00-0000, USCGR and group (see attached)

- This procedure generally enables changing only the attached list when the membership of the group changes <u>before</u> travel begins.
- If the senior member changes, the basic order <u>must</u> be redone.

Preparing the Attachment

The attachment will list and fully identify each traveler of the group by the following information:

- rate/rank/grade
- name
- SSN
- document identification number suffix

Note: The document identification # for each member will be the same EXCEPT each traveler will have a unique suffix specifically identifying that member.
The command and staff symbol and duty phone need only be shown if the travelers are from different commands than that of the senior member.

The last entry must be “AND NO OTHERS”.

Leave and Liberty Combined With TDY Travel

Introduction

A traveler will sometimes combine leave and/or liberty (LV/LIB) with TDY travel.

- The member may be…
  - Taking LV/LIB time to depart on TDY early or
  - Taking LV/LIB time and returning from TDY late

An entry in the "remarks block" of the travel order specifying the traveler's LV/LIB status in connection with TDY travel is required. The entry needs to denote the travel status will "constructively" begin on the necessary departure date and/or end on the necessary return date, exclusive of LV/LIV time.

The traveler will note LV/LIB in the itinerary section 15 of DD-1351-2.

Rationale

TDY Orders where LV/LIB liberty is combined with travel MUST be annotated to prevent per diem from being erroneously paid for liberty days. THERE ARE NO TRAVEL ENTITLEMENTS EARNED DURING LEAVE OR LIBERTY.

Example 1: Member Departs Early

Situation: Travel that should commence on January 8 but actually commences on January 6.

Entry: "You are to depart for TDY on 08JAN(YR) for about 6 days. You are authorized to depart on 06JAN(YR) in a liberty status. Travel status for per diem will begin constructively on 08JAN(YR). Note on your travel claim in block 16 the time and date your official duties at the TDY site began."

Example 2: Member to Return Late

Situation: Travel that should commence on January 8, and should end back at the permanent duty station on January 13 but will actually end on January 15.

Entry: "You are to depart for TDY on 08JAN(YR) for about 6 days. You are authorized to remain at (TDY location) in a liberty status until 15JAN(YR). Travel status for per diem will end constructively on 13JAN(YR). Note on your travel claim in block 16 the time and date when your official duties at the TDY site ended."

Continued on next page

Leave and Liberty Combined with TDY Travel, Continued

Example 3: Member to Depart Early and Return Late

Situation: Travel, which should commence on January 8 but actually will commence on January 6 and should end back at the permanent duty station on January 13 but actually will end on January 15.

Entry: "You are to depart for TDY on 08JAN(YR) for about 6 days. You are authorized to depart on 06JAN(YR) in a liberty status. You are authorized to remain at (TDY location) in a liberty status until 15JAN(YR). Travel status for per diem will begin constructively on 08JAN(YR) and end constructively on 13JAN(YR). Note on your travel claim in block 16 the time and date when your official duties at the TDY site began and ended."

Pay Entitlements Affected by TDY

Introduction

Some pay entitlements may be affected by TDY assignment. The SPO/Unit must ensure the traveler is aware of all entitlements affected by TDY orders.

Reference

PAYMAN

- Section 3-B, Basic Allowance for Subsistence - Enlisted Members
- Section 3-G, Family Separation Allowance (FSA)
- Section 4-A, Hardship Duty Pay - Location
- Section 4-B, Career Sea Pay

Affected pay entitlements

Use this table when counseling a member on which pay entitlements may be affected by a TDY order.

WHEN member goes TDY	THEN member
to a career sea pay eligible vessel/mobile unit,	is entitled to sea pay/time at the Level One rate (unless the member is permanently assigned to a CSP-eligible unit with a higher level of sea pay).
to a unit without a government dining facility	is entitled to ENL BAS while TDY (both during travel and while at the TDY site).
to a unit with a government dining facility,	is entitled to ENL BAS during travel days, and ENL BAS minus DISCOUNT MEAL RATE while at the TDY site.
to a shore unit from a career sea pay eligible vessel/mobile unit over 30 days,	is not entitled to sea pay after 2400 on the 30th day.
over 30 days and has dependents	may be entitled to Family Separation Allowance (FSA-T).
from a career sea pay eligible vessel,	may not combine ship underway time with TDY time to qualify for FSA-T.
over 30 days	MAY lose entitlement to hardship duty pay-location and/or diving pay.
away from overseas permanent station	entitlement to Family Separation Allowance - Housing (FSH) will terminate on the 59th consecutive day of TDY.

Preparation of TDY Order (CG-4251) Blocks 1-11

Introduction

The CG-4251 is a form for issuance of civilian and military Temporary Duty (TDY) orders. The CG-4251 can be prepared using the USCG Adobe Forms application software or a typewriter.

Procedure

Here are specific directions to complete blocks 1 through 11 of the CG-4251.

Block	Entry	Ref.
1. Name	For individual travel enter the traveler's name in the following format: LAST, FIRST, MI, SUFFIX	
	For group travel enter the senior traveler's name in the following format: LAST, FIRST, MI, SUFFIX, AND GROUP (SEE ATTACHED)	
2. Grade/Rate	The traveler's rate/rank and pay grade Example 1: MK2/E5 Example 2: LTJG/O2	
3. DIV/Branch	The traveler's command (and staff symbol) if any. Example 1: ISC ALAMEDA (pru) Example 2: COMDT (G-WPM-2)	
4. Ext	The traveler's duty phone number, including area code, and extension. Example: 7853573691X35	
5. Depart Date	The date that the traveler is to depart the PDS and begin TDY travel, in the following format: DDMMMYYYY Example: 08DEC1996 ♦ Note: If the traveler is taking leave or liberty and departing early enter the "constructive" date that the traveler would have departed to report on time had there been no leave or liberty authorized.	
6. Est. Days Absent	The number of days the traveler is expected to remain away from the PDS in a TDY status (do not include leave and liberty days) ♦ Note: This is the maximum number of days for which travel allowances can be paid. If the traveler is authorized to depart early and/or return late, an endorsement to the order authorizing the additional travel day(s) is required for additional travel allowances to be paid.	
7. Est. Cost	An estimate of the costs anticipated to be incurred to complete the ordered travel. Comment: The estimate is used to reserve (or obligate) funds for the travel, so accuracy is important. Costs that are more or less than the estimate will cause financial adjustments when the travel is completed and the actual costs are posted to the accounting system.	
8. Repeat Travel Orders	For a Blanket Travel Order enter the beginning and ending dates for the period the order covers, use the DDMMMYYYY format Example: FROM 01OCT1998 TO 31OCT1998 ♦ If this is NOT a Blanket Travel Order enter "N/A"	PPPM 2-B-20

Continued on next page

Preparation of TDY Order (CG-4251) Blocks 1-11, Continued

Procedure,
continued

Block	Entry	Ref.
9.a Cmd, Dist., Firm or Org.	The name(s) of the TDY activity(ies) Example: TRACEN PETALUMA CGDSEVEN	
9.b Location	The geographic location(s) including county(ies) if in CONUS Example: Sonoma County, CA Miami (Dade County) FL	
9.c Date/ Time	Used if desired by the order issuing command to specify the reporting date and time. Time is expressed using the 24-hour clock and the date is expressed in the DDMMMYYYY format. Example: 2400 22OCT1998	
9.d Revisit	• YES if traveler is authorized to revisit the TDY location(s) • NO if traveler is not authorized to revisit the TDY location(s)	
10.a Registration Fee	• Registration fees reimbursement is authorized/approved when such fees are a condition for attendance. • Indicate in remarks (block 12) if the registration fee includes the cost of any meals and/or lodging.	JFTR U4535
10.b Excess Baggage	• Any accompanied / excess baggage to be carried at government expense in connection with the TDY travel.	JFTR U3015
10.c Local Travel	• Check the box if reimbursement for travel in the area of the temporary duty station is authorized.	JFTR U3300 JFTR U3510
10.d 1st class jet	• Leave blank, unless approval for use of first-class air accommodations has been received from the Commandant or Vice Commandant. • See DOT Travel Guiding Principles and submit Exhibit B – Request for Approval of Premium – Class Accommodations to COMDT (G-WPM-2)	JFTR U3125, DOT Travel
10.e U-Drive GSA Veh.	• <u>Leave blank</u>, rental car authorization (if any) will be entered in block 12 (remarks)	
10.f Days Leave	• The number of days leave authorized (if any). The leave must also be authorized on a CG-2519 (Leave Authorization)	PPPM 5-D-2
11 Mode of Travel	• <u>Leave blank</u>, use block 12 (remarks) to authorize or direct the mode of travel.	PPPM Enclosure (3)

Preparation of TDY Order (CG-4251) Block 12

Introduction

Block 12 of the CG-4251 is used to

- document WHY the travel is being performed
- document WHAT is intended to be accomplished
- show HOW the travel is to be performed
- indicate expenses authorized
- indicate travel advances authorized
- enter any special provisions for the travel
- document the availability/non-availability of government quarters
- indicate TYPE of messing available

Reference

(a) JFTR, U2015
(b) PPPM, Encl. 3

Instruction

Follow these instructions to complete block 12 of the CG-4251.

- Example entries can be found in enclosure (3) to this manual.

Entry	Travel Data
A	TDY Quarters availability (Select only one per TDY site): (1) Government Quarters (Includes Contract) directed by TDY site. (2) Commercial Facilities. *****NOTE:** Per JFTR U4400, for CG Personnel only: Govt Qtrs are available only if use is directed in the order.*
B	Type of Messing directed at TDY location (Select only one): (1) Government Mess for all 3 meals. (2) Government Mess at the proportional Meal Rate. (3) Commercial Rate. (4) Reduced Per Diem in the amount of ($) per day IAW COMDT (G-WPM-2) letter 4600 of (Date) NOTE: When travel orders do not direct the Government Meal Rate, or Proportional Meal Rate, or a Reduced Per Diem Rate, the settlement will result in the locality M&IE rate being paid. (See JFTR U4125-A3g for "deductible meals")
C	State the mode of transportation directed to, from, and around TDY locality. One or more of these example attachments may apply. (1) AUTH (compact, mid, full-size) rental car at TDY location. (2) AUTH Commercial Air Trans between PDS/TDY location. (3) AUTH local travel/public transportation or taxi at TDY site. (4) AUTH local travel in vicinity of PDS incident to TDY. *****NOTE**: Always arrange Official travel from either a CTO, in-house travel office or TMC, JFTR U3120*

Preparation of TDY Order (CG-4251) Block 12, Continued

D	Government Travel Charge Card availability (Select only one): (1) Member possesses a Govt Travel Charge Card. (2) Member does not possess a Govt Travel Charge Card. (3) When either a Govt or Personal ATM Travel Advance is requested and authorized, the orders will state the following: (4) Travel Advance is authorized in the amount of ($).
E	Travel Expense reimbursable items that require pre-authorization on the travel order are: (1) AUTH Registration or Seminar fee, JFTR U4535. (2) AUTH Reimbursement for Conference Costs, JFTR U2550. (3) AUTH Actual Expense Allowance in the amount of ($) at (City, ST) for TDY period (Dates of TDY), JFTR U4200.
F	A statement must be on each travel order indicating whether transportation tickets are purchased using a "Centrally Billed Account" (CBA) or an "Individually Billed Account" (IBA).

Preparation of TDY Order (CG-4251) Blocks 13-19

Introduction This will assist you in completing the remainder of the CG-4251.

Procedure Use these instructions to complete blocks 13-19.

Block	Description
13	Enter the date the individual requesting the travel signs the order, and the individual's signature. (OPTIONAL)
14	Enter the accounting data from the message (or other document) ordering the member's TDY. Object codes can be found in the Finance Center SOP, Appendix F.
14a	Approving official signs and dates.
15	Accounting division will complete.
15a	Accounting division official signs and dates.
16	Enter appropriate information as required.
17	Enter appropriate information as required.
18	From: Enter the approving official's command. To: Enter the name of the traveler.
Dist.	Original and 4 copies to the member. Copy for unit files. Copy for accounting/finance office Copy for each command to which the member is to report Copy for SPO
19	Authorizing Official signs and dates. Include the AO's phone number.

Letter Travel Orders

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

COMMANDING OFFICER
USCG PERSONNEL
SUPPORT CENTER

444 SE QUINCY St.Topeka, KS
66683-3591Staff Symbol: (xxx)
Phone: (xxx) xxx-xxxx
Fax: (xxx) xxx-xxxx
Email:

XXXX
3 Jan 2004

MEMORANDUM

From: JOE BOSN, CGC NEVERSAIL

Reply to Attn of: TONO XX/XX/XXXXXXXXX000

To: BM1 C. Sick XXX XX XXXX, USCG

Subj: ORDERS; TEMPORARY DUTY; TRAVEL ORDERS

1. You are authorized to proceed from time to time during Fiscal Year _____ to such places within and beyond the continental limits of the United States as may be necessary on official business of the Coast Guard. Upon completion thereof, you will return to your permanent duty station for resumption of regular duty.

2. **Your TONO is XX/XX/XXXXXXXXX000**. Travel necessary to the execution hereof is required by the public interests and is authorized chargeable against Coast Guard Accounting Data X/X/XXX/XXX/XX/X/XX, cost center XXXXX. Travel within CONUS is chargeable against object code XXXX.

3. Travel via government transportation is directed beyond the continental limits of the United States wherever available. Travel via commercial carrier is authorized when government contract carrier is authorized in order to satisfy travel schedule requirements. For MAC, Class Two priority is certified.

4. Travel via privately owned conveyance is authorized providing it has been administratively determined, for each travel segment, that this mode of travel is clearly more advantageous to the government. Local travel via streetcar, bus, subway, street railway, train, etc., is authorized. The use of taxicabs at your temporary duty station is authorized subject to the restrictions outlined in paragraph JFTR U3510. Hire of special conveyance (GSA vehicle or rental vehicle) is authorized as set forth in paragraph JFTR U3415. Excess baggage is authorized.

5. Registration fees for conferences, seminars, etc., are authorized.

6. The provisions of chapter 4 of the Joint Federal Travel Regulation, governing per diem rate and reimbursable expenses shall apply under these orders. Authorizations for Actual Expenses Allowance must be authorized on a trip by trip basis made by a separate endorsement. The endorsement must indicate the location and of Actual Expense.

7. Possession of valid TOP SECRET clearance is certified. Prior to departure, you will, as required, avail yourself of Defensive Security Briefing procedures as set forth in Coast Guard Security Manual, M5500.11A.

8. No proceed time is allowed under these orders.

9. The authority contained herein will expire 30 September, 2004, or upon relief of your duties as Director of Resources.

#

Authenticated Original Message Order

Introduction

In our effort to improve and simplify the travel process. There are three very acceptable methods of travel order production. When the use of a Coast Guard travel order form is not necessary, these methods can be used.

Types

Message Traffic

- That official telecommunication message traffic may be used as a travel order. Messages that fund and direct official travel can be modified in a travel order authenticating process and used instead of TDY travel order forms CG-4251 or CG-5131. The message would contain the same travel data as the form. Simple – Print it, Endorse it, Sign it, and mark as "Original".

E-mail

- Like message traffic, electronic mail (e-mail) can also be used as a travel order. Such e-mail must comply with COMDTINST 5270.1d (Management of Electronic Mail).

TQC

- TDY training orders issued by Training Quota Management Center (TQC) via the Direct-Access Airport Terminal are on form CG5131. Simple – Print it, Endorse it, Sign it, and mark as "Original".

Message Authentication

The message travel order authentication process has the potential to reduce travel order preparation time and eliminate duplicative effort**.**

To qualify and use as a travel order form, the message/E-mail travel order, should possess this type of travel data (just like that of form CG-4251):

A. Travel order number (TONO) and accounting line data;
B. Traveler name, SSN, rank and unit;
C. Traveler PDS subsistence allowance (as shown in example below);
D. The Temporary Duty destination, Purpose and Location (City/County/St);
E. Reporting Time/Date;
F. Duration of TDY;
G. Mode of transportation authorized or directed;
H. Type of Quarters authorized or directed;
I. Type of Messing authorized or directed;
J. Whether traveler is (is not) a Gov't travel charge card holder;
K. Maximum amount of TDY travel advance funds authorized; and
L. Specifically name reimbursable expenses that must be pre-authorized on the travel order, i.e., Conference costs, Registration fees, Rental vehicle & size authorization, Communication fees, Excess baggage, or Actual expense allowance in the amount of ($) for (Locality name)(TDY period), etc.

Continued on next page

Authenticated Original Message Order, Continued

Message Endorsement

Make the following authentication endorsement on the top of the first (front) page of the E-mail or if using a message, immediately above the date time group (DTG) number:

QUOTE
(Type in the current date)
FROM: CO (OINC), LONG TITLE NAME OF UNIT
TO: RANK/RATE TRAVELER'S FULL NAME, SSN
1. YOU ARE DIRECTED TO TRAVEL TDY AS DESCRIBED HEREIN AND RETURN AND RESUME REGULAR DUTIES THEREAFTER. FOLLOW GUIDELINES ESTABLISHED IAW THIS MESSAGE TRAVEL ORDER CONSISTING OF (#) PAGES. UNLESS OTHERWISE DIRECTED, THE ACCEPTED MODE OF TRANSPORTATION IS: (AS APPROPRIATE).
2. YOU ARE (ARE NOT) A GOVERNMENT TRAVEL CHARGE CARD HOLDER. A TRAVEL ADVANCE IN THE AMOUNT OF ($OOO.00) IS AUTHORIZED AND SHOULD BE OBTAINED VIA (ATM OR TRAVELERS CHECKS). IF TRAVEL ADVANCE IS CHARGED TO THE USCG, ATTACH SF-1038 ADVANCE APPROVAL.
3. YOUR PERMANENT DUTY SUBSISTENCE ALLOWANCE IS:
(INDICATE EITHER: PARTIAL BAS, SEPRATS, OR ENL REG BAS OR OFF BAS)
4. (PLACE ADMIN MATTERS HERE, IE, AUTH LEAVE, MAW COMPLIANCE, ETC)
SUBMIT YOUR TRAVEL CLAIM WITHIN 3 DAYS AFTER RETURNING FROM TDY FOR REVIEW AND APPROVAL BY YOUR SUPERVISOR.
//S//
AUTHORIZING OFFICIAL SIGNS MSG/E-MAIL
INSERT AO PHONE NUMBER AND DATE.
UNQUOTE

- AFTER AO SIGNATURE (Original signature, in ink, not stamped) (AUTHENTICATION) HAVE MSG STAMPED: ORIGINAL.

Continued on next page

Temporary Duty (TDY) Checklists

Introduction

These checklists have been provided to assist the unit/SPO in completing all necessary tasks required for departing and reporting members who are performing TDY. These job aids are designed to be reproduced locally.

TDY Departing checklist

Use this checklist when a member requires a TDY order.

Step	Action	Reference	Date
1	Counsel member on travel and pay entitlements	JFTR, Chap. 4 PPPM, 2-B-26	
2	Set up travel arrangements. If member is going TDY to "A" School, and an airline ticket is issued, ensure it is a round trip ticket.	Local policy	
3	Get Commandant (CG-1222) approval if TDY will be over 180 days	CGS-JFTR, 2145	
4	Complete travel order	PPPM, 2-B-27	
5	Ensure member has sufficient funds; arrange for advances if needed	CGS-JFTR, 2300	
6	Ensure member has sufficient obligated service	PERSMAN	
7	Ensure member has proper security clearance	PERSEC	
8	Ensure member meets weight standards (if applicable)	Weight Instruction	
9	Complete PCS/TEMDUINS to "A" School worksheet (CG PSC-2001) if member is going TDY to "A" School.	Local Policy	
10	If the TDY period is expected to be over 30 days **or may involve changes to member's BAS and/or Career Sea Pay/Time**, send a copy of the orders, annotated with the date and time the member departed, to the SPO so that pay entitlements affected by TDY can be stopped/started. The SPO will forward SPO PDR to TDY unit's SPO if TDY is over 60 days.	PPPM, 2-B-26 Direct Access Online Manual, TDY Entitlements	
11	**If** / **And** / **Then** the member has dependents / the TDY period is expected to be over 30 days / provide the member with an FSA Worksheet Instruct the member to complete and submit the FSA Worksheet to the SPO, with a copy of the TDY order on the 31st day away from the permanent duty station	PPPM, 7-B-3	

Note: The unit will notify the SPO if the member does not travel on the dates of the original TDY orders (e.g. send copies of the amendments or annotations).

Continued on next page

Temporary Duty (TDY) Checklists, Continued

TDY Duty Site checklist Use this checklist for members TDY at your duty site:

Step	Action	Reference	Date
1	Receive copy of TDY order		
2	Verify member reports for TDY. If member fails to report, notify the permanent unit.	PPPM, 10-B-5	

TDY return checklist Use this checklist when a member returns from TDY

Step	Action	Reference	Date
1	Ensure member traveled in accordance with the order. If member was required to deviate from the order as issued, ensure any necessary amendments and/or endorsements have been affixed to the original order	JFTR, 4400	
2	Ensure member submits travel claim to supervisor within 3 working days of return	PPPM, 2-B-4	
3	Ensure supervisor reviews the travel claim and signs and dates block 16 within 2 working days	PPPM, 2-B-4	
4	Provide the SPO with a copy of the orders, annotated with the date and time that the member returned to the unit. The SPO will submit Direct Access transaction to change BAS (unless the member is not required to eat at a government messing facility at both the permanent unit and the TDY unit).	PPPM, 2-B-26 Direct Access Online Manual, TDY Entitlements	
5	Ensure the travel claim is prepared and submitted through T-PAX with documentation retained by the member for a period of 6 years & 3 mos, or travel claim, original orders, and receipts are forwarded to PSC (tvl) if T-PAX is not used	PPPM, 2-B-4	
6	Forward Career Development Worksheet (PSC-2030) to SPO to report school completion or addition of enlisted competency codes.		
7	Review and complete PCS/TEMDUINS to “A” School (CG PSC-2001) if member is returning from TDY to “A” School.		

Reimbursement Methods

Introduction

This section covers various reimbursement methods used during TDY.

Reference

(a) JFTR
(b) PAYMAN
(c) FTR

Per Diem Definition

Per Diem is a daily fixed allowance based on geographic locality used to reimburse travelers for lodging, meal and incidental expenses incurred while performing official travel. This allowance is separate from transportation and other miscellaneous expenses.
Note: *Current locality per diem rates are available at https://secureapp2.hqda.pentagon.mil/perdiem/rateinfo.html*

Per Diem Types

Normal Lodging Plus Rate (LDP):

Entitlement to per diem is based on the actual lodging cost incurred plus meals and incidental expense (M&IE) allowances. The total amount is limited to the maximum locality rate established for the TDY area. This per diem type is known as the Lodging Plus (LDP) System. See Joint Federal Travel Regulations (JFTR), Chapter 4.

♦ *Note:*
1. *This type of per diem is commonly listed on orders as "Government Quarters & Messing Not Available."*
2. *For INCONUS daily lodging, taxes are* ***not*** *included in the daily amount. These taxes are an allowable reimbursable expense under the "miscellaneous reimbursement section." OUTCONUS lodging taxes are included in the daily lodging amount.*

Continued on next page

Reimbursement Methods, Continued

Per Diem Types, continued

Actual Expense (AE) & Super Actual Expense (SAE):

For circumstances where lodging plus per diem reimbursement would not be sufficient to cover traveler expenses, entitlement to an actual expense allowance may be authorized. Actual expense (AE) permits the traveler to exceed the maximum locality rate for both lodging and M&IE expenses. When the traveler is authorized to exceed the maximum lodging portion only, the per diem rate is actual expense for lodging with the M&IE portion at the LDP rate (AELP). Normally actual expense is limited to 150% of the maximum locality rate for the area where duty is performed. In certain cases, such as short notice TDY or TDY in seasonally high cost areas, actual expense may be authorized not to exceed 300% (SAE). Actual expense cannot be a blanket authorization. Each trip and locality must be authorized separately listing the locality, dates, and amounts. See JFTR, U4200.

Note: This type of per diem is listed on orders as either "Government Quarters & Messing Not Available, Authorized Actual Expense not to exceed $_____ per day or Actual Expense Authorized for Lodging only not to exceed $_____ per night for the dates of _____ through _____."

Example: Locality is city "A" – Maximum is $80.00 per day
Lodging - $50.00 & M&IE - $30.00
150% Actual Expense for Lodging & M&IE is
150% x $80.00 = $120.00 per day for lodging & M&IE
150% Actual Expense for Lodging only is
(150% x $80.00) - $30.00(M&IE) = $90.00 per night for lodging.

Training (TNG):

When military traveler's attend various courses of instruction and are required to use government quarters and unit essential messing, per diem is paid at the current government meal rate (unless provided meals at no cost) and an incidental rate of $2.00 for INCONUS or $3.50 for OUTCONUS. Travelers may also be reimbursed for government quarters fees, if charged. See JFTR, U4125.

Field Duty:

Travelers on field duty are not entitled to per diem unless circumstances per reference JFTR, U4105.D apply. The period during which this prohibition is in effect begins at 0001 on the day after the day on which field duty begins and ends at 2400, the day before the day on which it ends. See JFTR, U4102.L & U4105.D.

Continued on next page

Reimbursement Methods, Continued

Per Diem Types, continued

Sea Duty (SD) or Government Ship (GS):

Military members are not entitled to per diem for any period of TDY or training while in a sea duty status or aboard a government vessel. Per diem entitlement ceases at 0001 on the day after the date of arrival aboard and ends at 2400 on the day before the date of departure from the vessel. This duty is considered unbroken when a member transfers from one vessel to another and the transfer is made within a 10 hour period. See JFTR, U4102

Special or Reduced Per Diem (SPR):

Special or Reduced per diem is a flat rate that is below the normal lodging and M&IE rate for the locality. This per diem rate must be approved by COMDT (G-WPM-2) and are established for a particular mission/operation. If used, the special rate must be listed on the travel order. See JFTR, U4135.

Inpatient:

There is no per diem entitlement for travelers in an inpatient status. However, travelers who must remain on TDY at a medical facility for follow-up appointments or therapy are entitled to per diem allowances. See JFTR, U7125.

- Assigned to Rehab Center (REH)
  There is no per diem entitlement for travelers while assigned TDY to a rehabilitation center where both government quarters and mess are available. See JFTR, U7125.
- No Per Diem (NP)
  There are some other circumstances where per diem is not authorized for travel. Some examples are:

  - Travel or TDY Within PDS Limits - Except as for JFTR, U4105.H per diem is not payable for travel or TDY within the limits of the PDS.
  - Round Trips Within 12 Hours - Per diem is not payable for any period of TDY that is performed entirely within 12 hours.

  Note: 1. See JFTR, U4100 & U7125 for more info about non-per diem status.
  2. Occasional meals may be reimbursement for certain circumstances for the above types duty. See JFTR, U4102.

Continued on next page

Reimbursement Methods, Continued

Travel Settlement Defaults

TDY travel rules have several 'defaults' or assumptions when information is inadequate or absent on the travel order. The protection against these defaults is a TDY order that contains clear, adequate, and correct information. The defaults include:

- Government Messing

Default meal settlement standard (JFTR, U4400). When Travel Orders do not direct the government or proportional meal rate, the locality meal and incidental (M&IE) rate shall be paid.

- Quarters

Government Quarters are available ONLY IF use is directed in the Official Travel Order.

- Transportation

Unless the order-issuing official directs a specific transportation mode(s) or any exception(s), transportation expenses will be paid on the assumption common carrier air transportation is the most cost efficient and expeditious way to travel. For ticketing purposes, always use an in-house Travel Office, Contract Travel Office (CTO), or Travel Management Center (TMC) to ensure the traveler receives the government contracted reimbursable rate. See JFTR, Chapter 3.

- Other Expenses

ONLY EXPENSES that are pre-authorized and clearly implied by the order (e.g., transportation to/from common carrier terminals when common carrier transportation is necessary) or specifically addressed by the order (e.g., rental car) are available to the traveler.

- Receipt Requirements. A receipt must show what and when specific services were rendered or articles purchased, and the unit price. See JFTR, U2500.

  Receipts are required for:
  - Lodging expenses regardless of dollar amount (must list the daily lodging rate and daily tax rate)
  - Any claimed expenditures of $75.00 or more.
  - Rental vehicles (regardless of dollar amount)
    Commercial travel (airfare, train, etc.).

Manual Submission of Travel Claims

Introduction

This section provides the procedure for the manual submission of travel claims. T-PAX is the primary method for submitting TDY claims. The procedures in this section apply to PCS claims (which cannot be submitted in T-PAX). The procedures in this section may also be used to submit a TDY claim in the event T-PAX is not available.

The Travel Claim Package

The following items are required for each travel claim:

- Original Travel Voucher
- Original travel orders, including any amendments or endorsements. (For Document Type 13, Repeat Travel Orders: order issuing activity will retain all original orders; orders must indicate in the remarks block the name, phone number and e-mail address of the office where the originals are on file.

Lost or Missing Original Orders

Please provide statement on a separate plain 8-1/2" x 11" paper. Statement must have TONO and accounting data, must be dated, and have employee's printed full name, original signature and Emplid as well as the printed full name, original signature of the Authorizing Certifying Official for the member's permanent duty station.

Member Name: _____ Date: _____

Travel Order Number: _____

Accounting Data: _____

Dates Of Order: _____ to _____

Place Ordered From and To: _____

I hereby certify that my original TAD/PCS (circle one) travel orders under travel order number _____ are lost and/or irretrievable to obtain a certified copy. I will not make another claim against the government under this travel order number unless otherwise authorized through official authority.

I understand that there are severe criminal and civil penalties for knowingly submitting a false, fictitious, or fraudulent claim (U.S. Code, Title 18, Sections 287 and 1001 and Title 31, Section 3729)

Signature: _____
Printed Full Name, Signature & Emplid

Signature: _____
Printed Full Name, Signature & Emplid
Authorized Certifying Official

Continued on next page

Manual Submission of Travel Claims, Continued

The Travel Claim Package (Cont'd)

- Original itemized receipt for lodging expenses no matter the amount.
- Original Airfare, or primary commercial transportation, receipt.
- Original receipts for reimbursable expenses of $75 or over. For lost receipts, sign a statement as below in block 29 of your travel claim:

LOST OR MISSING ORIGINAL RECEIPTS FOR REIMBURSABLE EXPENSES OF $75 OR OVER AND/OR LOST RECEIPT FOR LODGING EXPENSES

I will not make another claim against the government for this item on Travel Order Number _____ and travel dates _____ to _____.

I understand that there are severe criminal and civil penalties for knowingly submitting a false, fictitious, or fraudulent claim (U.S. Code, Title 18, Sections 287 and 1001 and Title 31, Section 3729)

Signature_____
Printed Full Name, Signature & Emplid

Signature_____
Printed Full Name, Signature & Emplid
Authorized Certifying Official

NOTE: Please itemize your costs (i.e.how much spent for each item).
For hotel receipts it is necessary to provide the name of the hotel, phone number including area code, address and a point of contact at the hotel for verification.

- Endorsement(s) or SF-1038 for advance travel payment(s), if any.

Travel Voucher Submission

Review the travel claim package to ensure it is complete, correct; and that all entitlements are claimed. Review with the "Traveler's Checklist".
Prior to submitting the travel claim package to your supervisor for admin review, make a complete copy for your records. It is important to keep a copy in case you need to submit a supplemental claim or the claim is lost in the mail. You must retain copies of your travel claims for six years and three months from the date of settlement of the claim. PSC (TVL) will not return the original travel claim package.

- Securely staple the travel claim package to prevent loss of receipts or separation of package. (Refrain from using paper clips).
- Remember that you must submit your travel voucher to your supervisor within three days of completion of travel.
- All permanent change of station and separation travel claims must be filed within 30 days of completion of travel.
- It is up to your supervisor to complete the administrative review and forward the entire package to PSC (TVL) for processing.

Continued on next page

Manual Submission of Travel Claims, Continued

Payment

If all documentation is correct, PSC (tvl) will process your claim then electronically transmit the payment information to the Coast Guard Finance Center (FINCEN) for payment.

NOTE: If you want direct deposit sent to an account other than your current payroll account, complete and forward a Direct Deposit Fast-Start Form (SF-1199A) (available from your financial institution) or a **CG PSC-2015, Pay Delivery Worksheet** to the Coast Guard Finance Center. For the Pay Delivery Worksheet, mark the form "*For Travel Claim Payment Only*." You can also complete FINCEN's online enrollment form at https://www.fincen.uscg.mil/secure/enrollment_form.htm to change the account used for the Direct-Deposit of travel payments.

Non-receipt of Payment

Allow 10 working days from the date the Travel Voucher Summary is received to the date you receive payment. If payment or notification of overpayment/ claim rejection is not received by the end of this period, contact Coast Guard Finance Center's automated voice response toll-free number 1-800-564-5504 or visit https://www.fincen.uscg.mil/secure/TravelPay/TPQuery.htm to receive information for travel claims processed.

If the Finance Center has no record of the travel payment, contact PSC's Customer Care Branch for assistance (Travelers using Industrial site accounting should contact their respective site). They will assist the unit/ traveler to verify the claim was processed, the amount due, and the date travel payment authorization was sent to the Finance Center. Contact PSC Customer Care by submitting an online Trouble Ticket at:

http://www.uscg.mil/hq/psc/customerservice.shtm
or call: (785) 339-2200 or 1-888-872-8724

Note: If you have waited more than 15 working days from the date the claim was mailed you should contact PSC Customer Care to ascertain the claim's status.

Continued on next page

Manual Submission of Travel Claims, Continued

Mailing Procedures

When submitting claims to PSC (tvl) for processing, use the address below

Address
COMMANDING OFFICER (TVL) U. S. COAST GUARD PERSONNEL SERVICE CENTER TOPEKA KS 66683-3591

Note: Mail (unfolded) in a large envelope with all documents and receipts stapled together as one package. This will help to reduce the risk of lost documents. DO NOT fold travel claim documents.

Rules for Claiming Official Phone Calls

Introduction

This section provides additional information for military personnel and civilian employees who are requesting reimbursement for official telephone calls or other communication charges.

Rules Concerning Official Calls for Military Personnel

Military personnel should follow these rules when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business, JFTR, T4060:

- Local calls may only be claimed when the calls were for official business, and you provide an itemized listing when you submit your travel voucher.
- Long distance calls are not reimbursable unless the order-issuing official has completed the certification in block 20 of the travel voucher.
- Travel Orders and their subsequent amendments will authorize reimbursement for communication services as approved by the order issuing activity.

Rules Concerning Personal Calls for Civilian Personnel

Civilian personnel should follow these rules when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business:

<u>For calls made within the Continental United States:</u>

- Brief calls (less than 5 minutes) are allowed.
- A claim of no more than $5 may be made for each day while in a travel status.
- Reimbursement will not be made for more than one call per day.

<u>Outside the Continental United States</u>

- A claim of no more than five documented minutes may be made for each day while in a travel status.
- Reimbursement will not be made for more than one call per day.
- The maximum reimbursement allowed for telephone calls is $10 per day.

Accounting Data

Introduction

The most common cause for delay in processing travel claims is incorrect accounting data. This section will help determine whether or not the accounting data on your travel order is correct.

Reference

(a) FINCEN SOP
Chap 4, Accounting Line Data
Chap 5, Document Numbering

Document Number

The Document ID Number or Travel Order Number (TONO) consists of 16 digits. The first four digits represent the type of travel and Fiscal Year. The TONO should be similar to one of the following:

Type of order	Example
TAD	1106234PBZA73000
PCS, Retirement, Discharge	1206234P23704000
Blanket or Repeat	1306234ZM1233000

Note: Industrial site TONOs differ from this restriction.

Accounting String

The accounting string is used to charge the cost of travel to the appropriate unit and funding account. The string is represented by a series of alphanumeric characters. The general format of Coast Guard accounting line data is:

2/	F/	601/	136/	30/	0/	AB/	12345/	2100
Agency Code "2" for CG	Region/ District Code	Appropriation Code	Appropriation Limitation code	Allotment Fund Control Code	Allotment Level Indicator Code	Program Element	Cost Center	Object Class

Continued on next page

Accounting Data, Continued

Reimbursable Agreement Numbers (RAN)

Coast Guard travelers often travel TDY for other Government agencies (**OGA**), such as State Governments, EPA, Treasury, and other U. S. Armed Forces. When an OGA offers to fund TDY, the unit must coordinate how that TDY will be reimbursed through FINCEN.

Produce Travel orders and assign a routine TONO & Accounting String

Note: In Accounting line, change AFC 30 to read 80. Ensure TONO region corresponds to Program Element.

An example of a RAN accounting string and TONO follows:

- ACCT String: 2/H/801/899/80/0/WA/77950/2152
- TONO: 1198238HWA026000

Note: The region H is the 8th character of the TONO. The Program Element WA is the 9th & 10th character of the accounting string. AFC: 30 is also changed to read 80. If the Appropriation limitation code is greater than 400 (899 in the above example), a RAN number is required.

Note: These accounting restrictions do not apply to Industrial accounts.

Document Type 33 and DITY Moves

Claims for reimbursements of Document Type 33 (Miscellaneous items) and Do-It-Yourself (DITY) moves should be forwarded to the Coast Guard Finance Center (FINCEN) for processing. PSC (TVL) does not process these types of claims.

Send Document Type 33 and DITY move claims to:

COMMANDING OFFICER (33)
U S COAST GUARD FINANCE CENTER
1430 A KRISTINA WAY
CHESAPEAKE, VA 23326-1000

ATTN: MISC. REIMB.

This page left blank intentionally

Section Overview

Introduction

Active Duty for Training (ADT) includes:

- Active Duty for Training for Annual Training (ADT-AT)
- Initial Active Duty for Training (IADT)
- Active Duty for Training - Other Training Duty (ADT-OTD)

ADT is a tour of Active Duty that is used for training members of the reserve components to provide trained units and qualified persons to fill the needs of the Armed Forces during war or national emergency and such other times as national security requires. RPM, 3-A defines these duty types in detail. This section will focus on the procedures and processes governing ADT.

In this section

Topic	See Page
The ADT Process	2-C-2
Amendments to ADT Orders	2-C-6
Preparation of Annual Screening Questionnaire	2-C-7

The ADT Process

ADT order processing

This table describes the stages of ADT order processing.

Reference

(a) Direct Access Online Guide for Reserve Orders
(b) RPM
(c) PDR Manual

Direct Access Path

Member
Home > Self Service > Tasks > Reserve Orders

Reserve Orders Manager
Home > Self Service > Manager > Tasks > Reserve Orders

Process

This is the process.

Stage	Who Does It	When	What Happens
1	Member	At least 45 working days prior to the date of ADT	• Negotiates duty dates with unit • Complete the Request for ADT Orders through Direct Access (Reserve Orders module)

2	Reserve Orders Manager	Within 5 days of receipt of request	• Complete the Request for ADT Orders through Direct Access if member is unavailable
			• Completes the Reserve Orders Manager portion of the Request for ADT.
			  • Verifies all readiness requirements (ASQ, medical, dental, security, etc.).
			  • Verifies Personal Information is current.
			  • Verifies no other duty/drills are scheduled during timeframe desired.
			  • Completes Per Diem Entitlements (if applicable).
			  • Completes Other Authorized Expenses (if applicable).
			  • Completes Partial Entitlements Tab.
			• Forward to supervisor or ISC (pf) as appropriate.

Continued on next page

The ADT Process, Continued

Stage	Who Does It	When	What Happens
3	Supervisor or Reserve Orders Manager	Within 2 days of receipt of request	• Administratively reviews orders and forwards to Servicing ISC (pf). NOTE: The orders may go thru several approvers before sending to ISC (pf).
4	ISC (pf)	Within 2 days of receipt of request	• Approve the Request for ADT Orders in Direct Access. • If member is performing IADT Phase II and attending class "A" School, complete the Departing for TDY or PCS/TEMDINST To "A" School Worksheet (CG PSC-2001). • Ensure the member has a security clearance if required while on ADT.
5	SPO **** Note, Verify that member is not in receipt of any type of disability, compensation, pension or retired pay from the Department of Veterans Affairs.***	Within 2 days of receipt of an approved request	• Administratively reviews the orders. • Prints the Orders • Signs the Orders • Mails the orders to the member. • Complete Direct Access start entitlement transactions if the member is entitled to SDAP or COLA while on ADT. • Maintain approved request and copy of orders in SPO files and PDR for 1 year. In cases where the ADT is for 60 or more days (e.g., IADT Phase II to "A" School): 1. Review and mail the SPO PDR to the SPO servicing the ADT site. 2. Set up tracking of completion date of ADT period.

Continued on next page

The ADT Process, Continued

Stage	Who Does It	When	What Happens
6	Member's Unit	Prior to member's arrival at ADT site	Forward Medical/Unit PDR IAW ref. (c).
7	Member	As directed by orders	Reports to ADT site
8	ADT site	Member reports for ADT	Reports actual reporting date to the SPO.
9	SPO	Immediately	Upon arrival notification from ADT site or ISC: • Completes actual report date in Direct Access • Completes the Travel Report Dates Section. • Validates partial entitlements. • Starts appropriate pay and allowances.
10	ADT site	Member completes ADT	• Endorse Travel Orders to show: (1) date and time member reported and departed, and; (2) availability of Gov't qtrs/mess. • Fax copy of endorsed Travel Orders to member's home SPO on the same day. • Complete a performance evaluation using Direct Access.

Continued on next page

The ADT Process, Continued

Stage	Who Does It	When	What Happens
11	SPO	Upon departure notification	**(Less than 140 days)** • Enters actual depart date. • Completes Duty to Home dates • If necessary submits action to correct Pay and Points for Reserve Active Duty Periods of Less Than 139 Days via Direct Access IAW reference (b). • If ADT was over 29 days submit Direct Access transaction (Process Lump Sum Leave). • Submit Direct Access transaction to stop SDAP/COLA if appropriate. • In IADT cases, verify that the reservist's school completion and advancements/designator assignment have been recorded in Direct Access.
12	Member	Within 3 days following completion of travel	Complete DD-1351-2 (Travel Voucher) and forward to unit with original Travel Orders.
13	Unit	Within 2 days of receipt from member	Complete administrative review of travel voucher and forward to PSC (TVL) for processing.
14	PSC (TVL)	Upon receipt of voucher	Process travel voucher for payment of travel entitlements.

Amendments to ADT Orders

When orders can be amended

Orders can be amended after the fact to document verbal authority given during the ADT travel period when unforeseen requirements emerge that require the member to incur costs not originally anticipated.

Travelers seek modifications or changes to their orders through the Order Issuing official that directed and funded the travel. The form of the amendment should identify the:

- Traveler
- TONO/ACCTNG Data
- Entitlement specified
- Reason for change

This information should be attached (memo, letterhead, or handwritten note) to the original travel order.

Situations when amendments are not authorized

There are some provisions that, if not authorized in the order BEFORE travel starts, CANNOT be approved for payment after travel is completed.

Example: An order DIRECTING use of common carrier cannot be amended after the fact to permit some other form of transportation when common carrier was the order issuer's intended form of transportation for the member.

Amendments cannot be used to deny an entitlement

UNDER NO CIRCUMSTANCES CAN AN ORDER BE AMENDED AFTER THE FACT TO DENY A TRAVEL ENTITLEMENT CONTAINED IN THE ORDER

Example: An order can't be amended after the fact to "unauthorize" a rental car authorized by the order in order to deny payment to the traveler.

Preparation of Annual Reserve Screening Questionnaire

Introduction

Federal law requires that all Ready Reservists (Selected Reservists (SELRES) and Individual Ready Reservists (IRR)) be regularly screened to ensure their availability and fitness for duty if mobilized and submit updated information to their chain of command. Coast Guard reservists will complete the screening annually.

Note: Members who are on Extended Active Duty or serving on a recall to active duty and those who have completed a questionnaire within the four months preceding 1 October are not required to submit a new questionnaire for the current year. The questionnaire is designed to be done as often as the information or recall availability changes at anytime of the year.

References

(a) 10 USC 10149
(b) ALCOAST 485/02
(c) ALCOAST 558/02
(d) RPM
(e) Screening of the Ready Reserve DODD 1200.7
(f) Direct Access Guide, How to Complete the ASQ

Direct Access Path

Self-Service:
Home > Self-Service > Employee > Tasks > Annual Screening Questionnaire

SPOs and Reserve Orders Managers:
Home > Administer Workforce > Administer Workforce (GBL) > Use > Annual Screening Questionnaire

Process Overview

Members with access to Direct Access will complete the Annual Screening Questionnaire (ASQ) using Self-Service. SPOs will enter questionnaires on behalf of those members without access to the system.

Reservists who cannot access Direct Access may use CG PSC-3799R, from enclosure (1) of this manual, to provide screening information to the servicing SPO.

Continued on next page

Preparation of Annual Reserve Screening Questionnaire,
Continued

Supervisor Notification

When members indicate on the Annual Screening Questionnaire they are not available for recall or do not understand their mobilization requirement Direct Access prompts them (or the Reserve Orders Manager if entering a questionnaire on behalf of a member who cannot access Direct Access) for a supervisor's Operator ID for follow-up counseling or action (transfer to IRR or discharge). The email function to supervisor is only active when the reservist chooses "do not accept/understand mobilization requirement" or any selection other than "available for mobilization." A view-only link of the reservist's Annual Screening Questionnaire is added to the supervisor's worklist.

Supervisor Action

Supervisors must contact and counsel those members who indicate they are not available for recall or do not understand their mobilization requirement. If the counseling results in the member being able to indicate they are available for mobilization a new Annual Screening Questionnaire must be submitted. Members who are not available for mobilization should be processed for transfer or separation as appropriate (consult the references cited at the beginning of this section for additional guidance).

Procedures

- See Ref. (f) for procedures to complete the Direct Access Annual Screening questionnaire.
- Form CG PSC-3799R (from enclosure (1) to this manual) includes complete instructions needed to complete the form.

Section Overview

Introduction

Active Duty Other Than Training (ADOT) includes:

- Involuntary Active Duty
- Voluntary Active Duty for Emergency Operations
- Active Duty for Special Work (ADSW)

This section will focus on the procedures and processes governing ADSW-AC, (formerly TEMAC). Reservists in the Selected Reserve, Individual Ready Reserve (IRR) or the Standby Reserve (Active Status) may perform this duty.

Note: IRR and Standby Reserve include those referred to as Active Status Pool (ASP).

References

(a) RPM
(b) COMDTINST 1330.1 (series) (Temporary Active Duty)
(c) PDR Manual
(d) Direct Access Guide, Reserve Orders Guide

In this section

Topic	See Page
Projecting Costs of ADSW-AC Orders	2-D-2
Document ID's (TONO) for ADSW-AC Orders	2-D-3
Accounting Line Data for ADSW-AC Orders	2-D-4
How to Process an ADSW-AC Order	2-D-6

Projecting Cost of ADSW-AC Orders

Introduction

All ADSW-AC costs, including pay and benefits, travel and per diem, and permanent change of station (PCS) entitlements (when applicable) are normally the responsibility of the commands using ADSW-AC. Commands using long-term ADSW-AC should keep in mind those personnel ordered to active duty for 181 or more days are entitled to PCS entitlements.

References

(a) PERSMAN, 4.G and 7.A.19-20
(b) PAYMAN, Chapter 12
(c) JFTR, U7G
(d) Direct Access Guide, Reserve Orders Guide

Estimating Total Cost

The Benefiting Unit shall determine the cost of Pay and Allowances, FICA and Travel. Units are directed to use the Standard Personnel Cost (SPC) worksheet to determine the costs. The SPC worksheet is located on CG Central and at http://cgweb.comdt.uscg.mil/cg8/cg83/cg832/sct/sr/index.htm. If the period of ADSW-AC covers a portion, rather than a full 15 day pay period, (i.e.: 25-30 June vice 16-30 June), compute the pay and allowances for the partial period by dividing a full month's entitlement by 30 days then multiply that daily amount by the number of days. Compute total cost taking the following into account:

Pay and Allowances

- Base Pay (including longevity increases)
- BAH/OHA
- Subsistence (actual days)
- FSA (if period of ADSW-AC is over 30 days refer to page 7-B-3)
- CONUS COLA or COLA
- Leave to be earned and sold
- Any other station allowances

FICA

- Multiply .0765 x one month's base pay. This amount is reduced from the base pay accounting line and added to the FICA accounting line.

Travel Entitlements

- Travel costs to and from the ADSW-AC site
- Per diem for travel days

Note: Travel Entitlements are not payable if ADSW-AC site is within the geographical limits of the members' home.

Document ID's (TONO) for ADSW-AC Orders

Introduction

Direct Access does not automatically generate Document IDs for ADSW-AC orders. The Benefiting Unit shall provide three separate Document ID's. The DOC Type 72 is used to pay the member in JUMPS. DOC Type 11 (single claim), 12 (PCS) or 13 (multiple claims) are used to reimburse the member for travel.

References

(a) FINCEN SOP, FINCENSTFINST M7000.1, Chapter 5
(b) Direct Access Guide, Reserve Orders Guide

Document Number Examples

- 11/07/29/7/8/16/001/000 (for TVL)
- 72/07/29/7/8/16/001/000 (for P&A)
- 72/07/29/7/8/16/001/001 (for FICA)

DOC ID TABLE

This table gives guidance on each part of the document number.

Field	Function
11 - Document Type	Use DOC type 11 for ADSW Travel Orders with a duration under 181 days where only a single travel claim will be submitted. Use DOC type 13 for ADSW Travel Orders with a duration under 181 days where multiple travel claim will be submitted (e.g. Monthly claims). Use DOC type 12 for PCS Travel Orders (duty of 181 or more days). Use DOC 72 for Pay and Allowances and FICA.
07 - FY Funded	Last two digits of the FY in which the transaction will be funded.
29 - Procurement Site Code	"29" represents ISC New Orelans. A listing is found in Appendix H to the FINCEN SOP. This number should remain constant for each office.
7 - FY Contract Originated	Last digit of the fiscal year of the initial document.
8 - Region	Region/district from Appendix A, FINCEN SOP. "8" stands for Eighth District.
16 - Program Element (PE)	For most units, this field will be constant. Those units that have several program elements or other than normal 2-digit PE's should use a master 2-digit PE assigned by their Budget Office for document numbering purposes. For reserve orders use only the first two characters of the Accounting Line Program Element.
001 - Document Sequence	Assigned by the unit for expenditure of funds.
000 - Suffix	Subdivision within expenditure. For ADSW-AC Orders, use 000 for Travel and Pay & Allowances, and 001 for FICA Entries.

Accounting Line Data for ADSW-AC Orders

Introduction

Direct Access does not automatically generate Accounting Lines for ADSW-AC orders.

References

(a) FINCEN SOP, FINCENSTFINST M7000.1, Chapter 4
(b) Direct Access Guide, Reserve Orders Guide

Accounting Line Data:

- 2/8/701/108/30/0/16xx/12345/2100 (Travel)
- 2/8/701/108/30/0/16xx/12345/117K (P&A)
- 2/8/701/108/30/0/16xx/12345/122R (FICA)

Accounting Line Table

This table gives guidance on each part of the document number.

Field	Function
2 - Agency Code	Indicates the Coast Guard. It will always be “2”.
8 - Region/District Code	Normally constant for a particular unit. Example: 8 for Eighth District, F for FINCEN. **See Appendix A, FINCEN SOP for additional region codes**.
701 - Appropriation Code	Last digit of the fiscal year. (7=2007). Remaining digits are the appropriation account. For ADSW-AC use “01”.
108 - Appropriation Limitation Code (ALC)	First digit is type of funding, direct or indirect. Use “1, 2, 3 or 8” as per Appendix C of reference (a) for Reserve Orders. 1=Direct Funds, 2=Direct Funds (pickup accounts), 3=Direct Funds (HQ Refund Program), and 8=Reimburseable Funds. Second two digits is Administrative Target Unit (ATU): 01 for First Coast Guard District, 07 for Seventh Coast Guard District, 36 for FINCEN, etc.
30 - Allotment Fund Control Code (AFC)	Most units and staff elements will use a constant 30 in this field. Day to day CG operations are generally funded through AFC 30.

Continued on next page

Accounting Line Data for ADSW-AC Orders, Continued

Field	Function
0 - Allotment Level Indicator Code (ALIC)	• This field will always be 0.
16 - Program Element (PE)	• This is the "source of funds" for procurement. Up to six positions may be used for projects in other appropriations. Some large units have multiple Program Elements. For most units, this field will be constant, and will be two digits
12345 - Cost Center	• Normally the benefiting units OPFAC.
117K - Standard Object Class	• 117J - Commissioned & Warrant Officers Pay & Allowances • 117K - Enlisted members Pay & Allowances • 1220 - FICA Tax - Officers • 122R - FICA Tax - Enlisted • 2100 - General Operational INCONUS Travel. The travel object class may vary. See FINCEN SOP, Appendix F (http://www.fincen.uscg.mil/sop/appendix/appenf.pdf), 2100 series for a complete listing of travel and pay related object class codes.

How to Process an ADSW-AC Order

Introduction The below stages shall be followed in the ADSW-AC Order Process

References
(a) Direct Access Guide, Reserve Orders Guide http://www.uscg.mil/hq/psc/da/reserveorders.pdf)
(b) RPM, Art. 3-D-12
(c) MEDMAN, Art 3.A.7.j.(1)

ADSW-AC Order Processing This table describes the stages of ADSW-AC order process where Direct Access cannot be utilized.

Stage	Who Does It	When	What Happens
1	Member & Supervisor	At least 45 working days prior to the date of ADSW-AC	• Discuss desired consecutive/non-consecutive duty dates. • Coordinates duty days with unit.
2	Member or Designated Unit Reserve Orders Manager		• Complete the Request for ADSW-AC Orders through Direct Access (Reserve Orders module) • Route to the Unit Reserve Orders Manager.

Continued on next page

How to Process an ADSW-AC Order, continued

Step	Who Does It	When	What Happens

3	Unit Reserve Orders Manager	Within 2 days of receipt of request	• Creates the Request for Reserve Orders in Direct Access if member is unable.
			  • Enters TONO and Accounting Data provided by unit.
			  • Completes Per Diem Entitlements (if applicable).
			  • Completes Other Authorized Expenses (if applicable).
			  • Completes Partial Entitlements Tab.
			• Verifies all readiness requirements (ASQ, medical, dental, security, etc.).
			• Verifies Personal Information is current.
			• Verifies no other duty/drills are scheduled during timeframe desired.

4	Supervisor or Reserve Orders Manager	Within 2 days of receipt of request	• Approve request in Direct Access and forward to the servicing ISC (pf) for final approval Or • Disapprove request and forward back to member/unit.
5	ISC (pf)	Within 5 days of receipt of request	• Verifies all previous information. • Reviews TONO. • Approves the orders. • Ensure the member has a security clearance if required.
6	Member's Unit	Prior to member's arrival at ADT site	If ADSW-AC is over 60 days, forward Medical/Unit PDR to ADSW-AC site.

Continued on next page

How to Process an ADSW-AC Order, continued

Stage	Who Does It	When	What Happens
7	SPO **** Note, Verify that member is not receiving military retired pay or any type of disability compensation from the Department of Veterans Affairs.***	Within 2 days of receipt of an approved request	• Ensure member has sufficient obligated service to cover the ADSW-AC period. • Verify direct deposit. • Complete Standard Travel Orders using the Reserve Orders transaction in Direct Access. • Complete other Direct Access pay transactions if the member as necessary (e.g. If member is entitled to SDAP or COLA while on ADSW-AC). • Maintain approved request and copy of orders in SPO files and PDR for 1 year. In cases where the ADSW-AC is for 60 or more days: 1. Review and mail the SPO PDR to the SPO servicing the ADSW-AC site. 2. Set up tracking of completion date of ADSW-AC period.
8	Member	As directed by orders	• Obtain new I.D. card at nearest issuing unit if ADSW-AC is over 30 days. • Report to ADSW-AC site.
9	ADSW-AC site	Member reports for ADSW-AC	• Reports actual reporting date to SPO. • Notify SPO if member deviates from orders by reporting at a different time or fails to report.

10	SPO	Upon notification	• Reserve Orders transaction.
			  • Completes actual report/depart dates.
			  • Completes the Travel Report Dates section.
			  • Validated partial entitlements and BAH.
			  • Starts appropriate pay and allowances.

Continued on next page

How to Process an ADSW-AC Order, continued

Stage	Who Does It	When	What Happens
11	ADSW-AC site	Member completes ADSW-AC	Reports actual depart date to SPO • Endorse Travel Orders to show: (1) date and time member reported and departed, and; (2) availability of Gov't qtrs/mess. • Fax copy of endorsed Travel Orders to SPO on the same day. • Complete a performance evaluation using Direct Access. **(181 days or more)** Submit separation paperwork, e.g. SOI.
12	SPO	Within 2 days of receipt of endorsed Orders	Less than 181 days: • Enters number of days leave sold upon completion of orders. 181 or more days: • (181 days or more) Receives separation information from the member's duty command. Processes member RELAD in the Separations Module.
13	Member	Within 3 days following completion of travel	Complete DD-1351-2 (Travel Voucher) and forward to unit with original Travel Orders.
14	Unit	Within 2 days of receipt from member	Complete administrative review of travel voucher and forward to PSC (tvl) for processing.

This page left blank intentionally

Section Overview

Introduction

This section will guide you through the Permanent Change of Station (PCS) assignment process and transfer process for Selected Reserve (SELRES) members.

Reference

(a) Reserve Policy Manual, COMDTINST M1001.28 (series)
(b) Personnel Manual, COMDTINST M1000.6 (series), Chapter 10

In this section

Topic	See Page
Junior Reserve Officer and Senior Reserve Enlisted Assignments	2-E-2
RELAD Assignments: E-2 – E-6	2-E-7
Junior Enlisted Reserve Assignments (Other)	2-E-5
Reserve Junior Enlisted Assignments Waiting Lists	2-E-6
Voluntary Transfer from SELRES to IRR/ISL/ASL	2-E-12
Transfer from IRR/ISL/ASL to SELRES	2-E-14
Involuntary Transfer or Recall of SELRES for Unsatisfactory Participation	2-E-16

Junior Reserve Officer and Senior Reserve Enlisted Assignments

Introduction

This section outlines the process for PCS assignment of Selected Reserve (SELRES) junior commissioned officers (O-1 through O-4) and senior enlisted members (E-7 through E-9).

Process

Annual ISC Assignment Panels: E-7 through E-9 and O-1 through O-4. ISCs will release message traffic during the course of the year with the current timeline and deadlines. The sample below reflects AY/06.

Stage	Who Does It	What Happens
1	ISC (pf)	Advertises shopping list and list of personnel required to compete for new assignments NLT 28 April of each assignment year. Positions slated to be filled during the summer by SRDC selectees shall be marked as "filled" in the Direct Access shopping list and shall not be advertised.
2	Unit	Notifies ISC (pf) of any discrepancies to the shopping list or list of personnel required to compete for new assignments.
3	ISC (pf)	Publishes shopping list updates NLT 30 SEP for junior officers and 30 June for senior enlisted members. Maintains Direct Access shopping list to ensure accuracy, updating as soon as changes occur.
4	Member	If affected, submits e-Resume in Direct Access to request new assignment NLT 04 Nov. A minimum of three positions and a minimum of two commands must be listed on the e-Resume.
5	Unit	Endorses requests for extensions or early rotations (mandatory). For early rotation endorsements, expeditionary units must include statement concerning whether or not on-site relief is required.
6	ISC (pf)	Compiles lists of applicants for positions at each major unit and shares each unit's list with that unit's executive officer, NLT 26 Aug. Executive officers should treat these lists as FOUO and shall not distribute them further. Note: major units are defined as units overseeing subordinate units, such as Sectors.

Continued on next page

Junior Reserve Officer and Senior Reserve Enlisted Assignments, Continued

Process (continued)

Stage	Who Does It	What Happens
7	Unit	Submits any command concerns to ISC (pf) NLT 2 Sep. Major units shall coordinate command concerns for all subordinate units.
8	ISC (pf)	Convenes assignment panel NLT Dec-Feb consisting of four officers and one senior enlisted member (E9).
9	Assignment Panel	Determines new assignments based on criteria in the Reserve Policy Manual, COMDTINST M1001.28 (series), to be effective on or about 7 Nov-10 March.
10	ISC (pf)	Once panel results are approved by supported district's Chief of Staff, releases results via message. Authorizes new assignments in Direct Access (posts on Airport Terminal) NLT 10 Mar. Rotation date entered in Direct Access for new assignments should be five years from assignment date. Rotation date entered in Direct Access for extensions or overbillets should be one year from assignment date.
11	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations. Orders must be executed even for members transferring to new positions within the same command.
12	Departing SPO	Approves and prints Direct Access Orders; mails original to member, copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.

Continued on next page

Junior Reserve Officer and Senior Reserve Enlisted Assignments, Continued

Process (continued)

Stage	Who Does It	What Happens
13	Departing Unit	Informs affected personnel of new assignments once message is released. Completes a departure OER if more than 6 months have elapsed since last OER was completed or completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
14	Departing Unit	Forwards unit PDR to receiving unit, if applicable. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
15	Receiving Unit	Designates sponsors to contact new members to confirm initial reporting dates and drill schedules.
16	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.
17	Member	If out of season assignment is required, submits endorsed e-Resume for temporary assignment (RELADs included).
18	ISC (pf)	Considers temporarily assigned members for permanent assignment during the next scheduled assignment panel.

RELAD Assignments: E-2 through E-6

Introduction

This section outlines the process for PCS assignment junior enlisted RELAD members (E-2 through E-6) to Selected Reserve (SELRES) assignments.

Process

SELRES RELAD Assignments: E-2 through E-6

Stage	Who Does It	What Happens
1	ISC (pf)	Maintains Direct Access shopping list to ensure accuracy, updating as soon as changes occur. Positions slated to be filled by new recruits who have not yet been accessed shall be marked as "filled" in the Direct Access shopping list and shall not be advertised.
2	SPO/Unit Personnel Admin / ISTT	Initiates counseling concerning CG Reserve opportunities for every active duty member who will be Released from Active Duty (RELAD) or discharged.
3	Member Leaving Active Duty	Completes e-Resume to state reserve affiliation intentions. Requests assignment consideration for SELRES positions on shopping list or requests transfer to IRR (or discharge for members with no remaining military service obligation).
4	Unit	Endorses e-Resume with brief statement concerning suitability for SELRES assignment at least 60 days prior to active duty termination date.
5	ISC (pf)	Assigns member requesting SELRES assignment to position meeting business rules outlined in Reserve Policy Manual, COMDTINST M1001.28 (series).
6	ISC (pf)	As soon as assignment decision is made, authorizes new assignment in Direct Access (posts on Airport Terminal). As a result, the position should then show as "filled" on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date.

Continued on next page

RELAD Assignments: E-2 through E-6, Continued

Process (continued)

Stage	Who Does IT	What Happens
7	ISTT / Departing Unit	Informs member of new assignment
8	Departing Unit	Completes evaluation for departing member in accordance with reference Chap. 10 of the Coast Guard Personnel Manual, COMDTINST M100.6 (series).
9	Departing Unit	Forwards unit PDR to receiving unit. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
10	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations. Orders must be executed even for members RELADing to new positions within the same command.
11	Departing SPO	Approves and prints Direct Access Orders; delivers original to member (via mail if member has already departed on terminal leave), copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.
12	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.
13	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.

Junior Enlisted Reserve Assignments (Other)

Introduction

This section outlines the process for PCS assignment of Selected Reserve (SELRES) junior enlisted members (E-2 through E-6).

Process

SELRES Assignments: E-2 through E-6

Stage	Who Does It	What Happens
1	ISC (pf)	Maintains Direct Access shopping list to ensure accuracy, updating as soon as changes occur. Positions slated to be filled by new recruits who have not yet been accessed shall be marked as "filled" in the Direct Access shopping list and shall not be advertised.
2	Member	Completes e-Resume at least 90 days prior to requested assignment date, including reason for request in comments block (e.g., civilian job transfer, desire for another unit in area, desire for better advancement opportunity, etc.) Note: members who received enlistment bonuses for assignment to PSUs or NCW units must fulfill the bonus obligation before requesting transfer (normally six years).
3	Unit	Endorses e-Resume at least 60 days prior to requested assignment date. Requests for transfer from a member who has been assigned for less than five years shall be treated by the unit as an early transfer request for endorsement purposes.
4	ISC (pf)	Assigns member to vacant position meeting business rules outlined in the Reserve Policy Manual, COMDTINST M1001.28 (series). *Note: ISC must check to see if PSU/NCW members have remaining obligation tied to enlistment bonus before authorizing transfers.*

Continued on next page

Junior Enlisted Reserve Assignments (Other), Continued

Process (continued)

Stage	Who Does It	What Happens
5	ISC (pf)	As soon as assignment decision is made, authorizes new assignment in Direct Access (posts on Airport Terminal). As a result, the position should then show as "filled" on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date.
6	Departing Unit	Informs member of new assignment. Completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
7	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations.
8	Departing SPO	Approves and prints Direct Access Orders; mails original to member, copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.
9	Departing Unit	Forwards unit PDR to receiving unit. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
10	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.
11	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.

Reserve Junior Enlisted Assignments Waiting Lists

Introduction

This section outlines the process for Selected Reserve (SELRES) junior enlisted members (E-2 through E-6) to be placed on unit waiting lists.

Process

SELRES Assignment Waiting Lists: E-2 through E-6

Stage	Who Does It	What Happens
1	Member	May request to be placed on a waiting list for an assignment meeting the criteria of the Reserve Policy Manual, COMDTINST M1001.28 (series), if unit assignment is not available due to no vacant positions. (Comments block of e-Resume should be used to request placement on a waiting list.) A member may not be assigned to more than three units' waiting lists at any given time.
2	ISC (pf)	Maintains unit waiting lists for E-6 and below members. A unit waiting list for a particular rating must be cleared before an assignment to that unit can be offered to a new potential transfer (i.e., there must be no BMs on the unit waiting list before a vacant BM position can be offered to a new potential transfer. Priority for placement of members on waiting lists: 1. Member at a PSU or NCW unit, assigned for more than five years. 2. Member at any other unit, more than five years. 3. Member at any unit, assigned for less than five years.

Continued on next page

Reserve Junior Enlisted Assignments Waiting Lists, Continued

Process (continued)

Stage	Who Does It	What Happens
2		**Example**: There are three BMs on a unit's waiting list; the first BM on the list has been at a PSU for more than five years, the second BM has been at a boat station for more than five years, and the third has been at a PSU for less than five years. If a new request for assignment to the waiting list is submitted from a BM who has been at a PSU for more than five years, then that member is placed in the second position on the list and other two members drop down one position.
3	ISC (pf)	At least once per month, revisits E-6 and below assignments at each unit and assigns reservists to new positions within the same command to ensure best internal paygrade match (e.g., to accommodate advancements, open up positions for members on unit waiting lists, and to push vacancies down to lowest paygrades).
4	ISC (pf)	Makes two contact attempts within five business days to first member on unit waiting list once a vacancy opens up. After second failed attempt, mails inquiry to member, then waits three weeks before crossing member off list and going to next member on list or new member.
5	Member	If still interested in unit assignment, submits e-Resume within two weeks of notification, and follows up with e-mail to ISC (pf) that e-Resume has been submitted.
6	Unit	Endorses e-Resume within three weeks of receipt.
7	ISC (pf)	Follows up with unit if endorsement has not been submitted within three weeks of notification by member that e-Resume was submitted.

Continued on next page

Reserve Junior Enlisted Assignments Waiting Lists, Continued

Process (continued)

Stage	Who Does It	What Happens
8	ISC (pf)	If agreement is reached, authorizes new assignment in Direct Access (posts on Airport Terminal). As a result, the position should then show as "filled" on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date.
9	Departing Unit	Informs member of new assignment. Completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
10	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations.
11	Departing SPO	Approves and prints Direct Access Orders; mails original to member, copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.
12	Departing Unit	Forwards unit PDR to receiving unit. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
13	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.
14	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.

Voluntary Transfer from SELRES to IRR/ISL/ASL

Introduction

This section outlines the process for voluntary transfers of reserve members from the Selected Reserve (SELRES) into Inactive Ready Reserve (IRR), or Standby Reserve, Active Status List (ASL) or Inactive Status List (ISL).

Process

Voluntary transfers from the SELRES

Stage	Who Does It	What Happens
1	Member	Submits e-Resume requesting position 00062025 at DeptID 002817 (unbudgeted reserve position at Coast Guard Personnel Command, Reserve Personnel Management Division). Indicates IRR, ASL or ISL and describes reason for the request for change of status in the comments block. Transfer requests must meet the criteria of section 5.B of the Reserve Policy Manual, COMDTINST M1001.28 (series).
2	Unit	Conducts records review in coordination with servicing SPO to ensure that member has met all contractual obligations and is eligible for transfer from the SELRES. Endorses e-Resume within three weeks of receipt; must discuss the member's value as a future potential mobilization asset at that unit.
3	ISC (pf)	Confirms that member's request meets criteria for transfer to the IRR or Standby Reserve (ASL or ISL) and verifies that member has completed his or her initial SELRES obligation. If request does not meet the requirements of transfer from the SELRES per Section 5.B of Reserve Policy Manual, COMDTINST M1001.28 (series), informs unit of the reason why and advises the unit on remaining time that the member must remain in the SELRES.
4	ISC (pf)	Confirms that the member is not under any bonus contract that may require recoupment, and confirms that the member is not in receipt of educational benefits including the Montgomery GI Bill or Tuition Assistance benefits that may require suspension or recoupment.

Continued on next page

Voluntary Transfer from SELRES to IRR/ISL/ASL, Continued

Process (continued)

Stage	Who Does It	What Happens
5	ISC (pf)	Notifies CGPC-rpm that member meets all requirement for transfer and specifies whether transfer is to IRR, ASL or ISL.
6	CGPC-rpm-2	Verifies that member meets all requirements for transfer and issues orders (on airport terminal) assigning member to IRR/ASL/ISL as appropriate.
7	Departing Unit	Informs member of transfer authorization. Completes a transfer OER if more than 6 months have elapsed since last OER was completed or completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
8	Departing Unit	Ensures that member has appropriate ID card and cancels Government Travel Charge Card account (if applicable).
9	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) and transfer to IRR, ASL, or ISL based on Airport Terminal authorizations.
10	Departing SPO	Prints Direct Access Orders; mail to member. Ensures that unit and SPO PDRs and medical record are mailed to CGPC-rpm via certified mail.
11	CGPC-rpm	Monitors transfers to IRR, ASL and ISL from field units and if above process was not followed, transfers of member will not be completed and member will remain in the SELRES status at unit for correct processing.

Transfer from IRR/ISL/ALS to SELRES

Introduction

This section outlines the process for transfers of reserve members from the Inactive Ready Reserve (IRR), or Standby Reserve, Active Status List (ASL) or Inactive Status List (ISL), to an assignment at a unit in the Selected Reserve (SELRES).

Process

Transfers from the IRR/ASL/ISL to a unit assignment in the SELRES

Stage	Who Does It	What Happens
1	Member	Submits written request (e-mail is acceptable) to CGPC-rpm requesting SELRES assignment.
2	CGPC-rpm	Conducts PDR review to determine if member is suitable for transfer to SELRES. Negative page 7s, NJP, etc., can result in denial of request for transfer. Conducts a review of medical record to determine currency of last physical and dental exam. Ensures that member has current ASQ, meets weight standards, has current background check, and has current contact information in Direct Access.
3	CGPC-rpm	Forwards relevant PDR information to ISC (pf). If member is determined suitable for transfer to SELRES, checks shopping list and communicates with appropriate (pf) then conveys assignment options to member.
4	Member	Rank orders unit assignment desires and provides to CGPC-rpm.
5	CGPC-rpm	Passes members assignment desires to the appropriate (pf).
6	ISC (pf)	Works with member to schedule exam and contact CGPC-rpm with appointment information.

Continued on next page

Transfer from IRR/ISL/ALS to SELRES, Continued

Process (continued)

Stage	Who Does IT	What Happens
7	CGPC-rpm	Issues RMP orders for medical appointment if last physical and dental exam are more than one year old, or if medical record is missing and member cannot provide documentation of physical and dental exam less than one year old.
8	ISC (pf)	Authorizes SELRES assignment in Direct Access (posts on Airport Terminal) within three weeks of receipt of member's assignment desires. As a result, the position should then show as "filled" on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date. If decision is not to offer assignment, provides substantive documentation of reason for denial to CGPC via e-mail.
9	CGPC-rpm	Informs member of transfer authorization.
10	ISC (pf)	Ensures appropriate SPO executes no-cost PCS orders (departing, reporting and R910 transactions). SPO prints Direct Access Orders; mails original to member, copies to receiving unit and ISC (pf). Ensures that unit and SPO PDRs and medical record are mailed to reporting SPO via certified mail.
11	Reporting SPO	Ensures that unit PDR and medical record are delivered to unit admin and servicing clinic.
12	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.
13	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.

Involuntary Transfer or Recall of SELRES for Unsatisfactory Participation

Introduction

This section outlines the process for involuntary transfers of reserve members from the Selected Reserve (SELRES) to the IRR or discharge, or recall to active duty, due to unsatisfactory participation.

Process

Involuntary transfer or recall to active duty due to unsatisfactory participation

Stage	Who Does It	What Happens
1	Unit	Documents counseling and disciplinary action in accordance with Reserve Policy Manual, COMDTINST M1001.28 (series). Conducts records review in coordination with servicing SPO to determine whether or not member has met all contractual obligations. If member has no remaining SELRES obligation but still has value as a future potential mobilization asset, pursues transfer to IRR. If member has remaining SELRES obligation, pursues discharge or recall to active duty.
2	Unit	Submits request for transfer to the IRR, discharge, or recall to active duty to ISC (pf), attaching copy of previous evaluation and documentation of counseling and disciplinary action. For requests for transfer to IRR, provides substantive statement concerning member's value as a future potential mobilization asset.
3	ISC (pf)	Confirms that unit's request meets criteria for transfer to the IRR, discharge, or recall to active duty. Verifies whether or not member has completed his or her initial SELRES obligation. Informs unit if request is missing any required documentation. Informs unit if request does not meet requirements of Reserve Policy Manual, COMDTINST M1001.28 (series), providing suggestions of other options to pursue.

Continued on next page

Involuntary Transfer or Recall of SELRES for Unsatisfactory Participation, Continued

Process (continued)

Stage	Who Does It	What Happens
4	ISC (pf)	Confirms that the member is not under any bonus contract that may require recoupment, and confirms that the member is not in receipt of Montgomery GI Bill benefits that may require suspension or recoupment.
5	ISC (pf)	Authorizes PCS order (posts on Airport Terminal) in Direct Access for requests for transfer to IRR. Endorses request for discharge and forwards to CGPC-rpm for processing. Processes request for recall to active duty and forwards authorization and TONO to servicing SPO.
6	CGPC-rpm	Monitors transfers to IRR from field units and if above process was not followed, transfers member back to SELRES status at unit for correct processing. Processes requests for discharge.
7	Unit	Informs member of IRR transfer authorization, discharge action, or recall to active duty. Completes evaluation for departing member in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10. Ensures that member has appropriate ID card and cancels Government Travel Charge Card account (if applicable).
8	SPO	For transfer to IRR, executes no-cost PCS orders (departing and reporting transactions) and transfer to IRR based on Airport Terminal authorizations. For transfer to IRR or recall to active duty, prints Direct Access Orders, ensures personal delivery to member or mails to member via certified mail return receipt.
9	SPO	For transfer to IRR or discharge, ensures that unit and SPO PDRs and medical record are mailed to CGPC-rpm via certified mail.

This page left blank intentionally

Section Overview

Introduction

This section consolidates information on PCS travel, household goods, privately owned vehicle storage and pay entitlements for members ordered to Patrol Forces Southwest Asia (PATFOR SWA), Bahrain or a cutter deployed (for a year or more) in support of Operation Iraqi Freedom.

In this section

Topic	See Page
Mobile Unit Designation	2-F-2
PCS Travel	2-F-3
PCS Orders Remarks	2-F-4
HHG/Unaccompanied Baggage	2-F-5
POV Transportation/Storage	2-F-7
Station Allowances (OHA and COLA)	2-F-8
Allowances for Members With Dependents (FSA, DLA, BAH, OHA and COLA)	2-F-9
Basic Allowance for Subsistence	2-F-11
Hardship Duty Pay, Imminent Danger Pay and Combat Allowances	2-F-12
PDR Handling	2-F-13
Points of Contact	2-F-14
Entitlements Summary (Exhibit 2-F-2)	2-F-15

Mobile Unit Designation

Mobile Unit Designation for PATFOR SWA Cutters

Per Commandant (CG-1) Memo (No SSIC) of 04 Apr 06 (*see below*) members ordered to serve on PATFOR SWA cutters, on or after 4 April 2006, are considered to be assigned to a "Mobile Unit". They receive the same PCS, Household Goods (HHG), Privately Owned Vehicle (POV) storage, and travel entitlements as those personnel assigned ashore to PATFOR SWA. Members assigned to mobile units (other than those assigned in an administrative capacity) are entitled to continuous career sea pay (and career sea pay premium, if otherwise eligible) on the same basis as members assigned to other Coast Guard vessels.

Exhibit 2-F-1: CG-1 Memo of 04 Apr 06

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

Commandant
United States Coast Guard

2100 Second Street, S.W.
Washington, DC 20593-0001
Staff Symbol: CG-122
Phone: (202) 267-0914

APR 4 2006

MEMORANDUM

From: Kenneth T. Venuto, RADM
CG-1

Reply to Attn of: CAPT M. C. Cosenza
202-267-0914

To: CG-8

Subj: PATROL FORCES SOUTHWEST ASIA (PATFORSWA) CUTTERS DESIGNATION AS MOBILE UNITS

1. Commander, Atlantic Area presented several concerns regarding pay and entitlement inequities between the PATFORSWA shore side personnel and those Coast Guard members assigned to PATFORSWA cutters. Designating all of PATFORSWA as a mobile unit was proposed as a potential solution. However, this proposal creates a service-wide inequity by providing sea time to the PATFORSWA shore-side personnel. In coordination with LANTAREA and your staff, I have resolved this issue by designating just the PATFORSWA cutters alone as mobile units. This designation for the cutters will remedy the most significant issues of LANTAREA's concern.

2. The key entitlement differences are a result of the cutters being homeported in CONUS when in reality, they are actually located overseas. The proposed solution establishes new sub-OPFACs for each cutter and the augment crew as a subunit of PATFORSWA, and designates them as mobile units. By then assigning the WPB crews to those sub-OPFACs, they would become eligible for OCONUS entitlements, including COLA, and would gain the ability to have vehicles stored at government expense and receive credit of an overseas tour. Under this arrangement, each member would require TAD orders to a cutter in order to properly credit and track career sea pay. This designation will also provide the same entitlement to BAH for members with dependents assigned to the cutter forces as well as those assigned ashore.

3. In an effort to provide uniform entitlements to members who will be arriving in Bahrain this transfer season and to address the inequities as soon as possible, I request expedited establishment of the sub-OPFACS before the incoming personnel report this summer.

#

PCS Travel

Introduction

This section provides information on PCS travel entitlements for members ordered to PATFOR SWA.

PCS Travel

Members will receive PCS Orders from their current duty station to PATFOR SWA. They also receive TAD Orders to LANTAREA for Pre-Deployment training (Note: The only exception to this rule is for members coming from outside the U.S. (i.e. Guam, Alaska, etc.). They may request PCS/TEMDU orders from Atlantic Area (Arec-5). The member's SPO must first obtain TEMDU approval from CGPC (OPM-2 or EPM-2)).

Following the Pre-Deployment training, members either go on leave or return to their current Duty Station. When they depart their PDS, their PCS Orders require a layover at LANTAREA, Portsmouth, VA to await transportation. Transportation from LANTAREA to PATFOR SWA is Government Procured Transportation. Members are entitled to 2 additional travel days for the flight from Portsmouth, VA to Bahrain.

Members without dependents are authorized:

- PCS travel entitlements from their old PDS via Portsmouth VA for transportation to Bahrain. Members are not allowed round-trip travel between a TDY station and designated place.
- Members may elect mode of travel to Portsmouth, VA.

Members with dependents are authorized:

- PCS travel entitlements from their old PDS via the designated place per Joint Federal Travel Regulations, Volume 1, par. U5120-g to assist their dependents in relocating before reporting TAD/TDY to Portsmouth for training.

Continued on next page

PCS Travel, Continued

PCS Travel (cont'd)

- Dependents can remain at their current location or travel to a designated place. A designated place is the location where the dependents will establish a permanent residence while the member serves a dependent restricted tour in Bahrain. The designated place can be any location in CONUS or OCONUS locations as indicated in Joint Federal Travel Regulations, Volume 1, par. U5222-d1.

- Designated places must be authorized by COMDT (CG-1222). Use form CG PSC-2025A, Housing Allowance Protection Worksheet (http://www.uscg.mil/hq/psc/forms/psc2025a.pdf) for requesting BAH or OHA at a designated place of dependents, or if eligible, the previous duty station (BAH location only).

PCS Orders Remarks

Introduction

Include these standard remarks on all PCS orders for members assigned to PATFOR SWA:

PCS Orders Remarks

```
A.   THESE ORDERS CONSTITUTE A PCS MOVE FM _____________________   FOR FURTHER
ASSIGNMENT TO BAHRAIN VIA AUTH DELAY IN PORTSMOUTH, VA.
B.  DEPN INFO:  WILL BE TRAVELING OOA_____________TO DESIGNATED LOCATION OF
_______________.    OR   DEPENDENTS NOT RELOCATING AT THIS TIME.
C.  IAW JFTR U5012-B:  ENTITLEMENTS DEPEND ON THE MBR & DEPN INDIVIDUAL TRAVEL
CIRCUMSTANCES. TRAVEL SETTLEMENTS WILL BE DETERMINED BY PSC(TVL)BASED ON TYPE
OF ORDERS/TRAVEL VOUCHER AND ACTUAL TRAVEL PERFORMED.
D.  MBR NOT AUTH POV SHIPMENT TO BAHRAIN- COMMAND RESTRICTED, IAW JFTR U5405.
E.  MBR AUTH POV STORAGE IN LIEU OF SHIPMENT AT GOVT EXPENSE IAW JFTR U5466.
STORAGE OF POV NOT AUTH IF A POV IS SHIPPED TO DESIGNATED PLACE FOR DEPN USE.
AUTH POV SHIPMENT TO DESIGNATED PLACE FOR USE BY MEMBER'S DEPENDENTS IAW JFTR,
U5410. INCONUS SHIPMENT OF POV IS AT THE INITIAL EXPENSE OF THE MEMBER PENDING
TRAVEL CLAIM REIMBURSEMENT NOT TO EXCEED STANDARD MILEAGE ALLOWANCE.
F.  AUTH GTR TRANS FROM ____________________ TO BAHRAIN VIA PORTSMOUTH, VA, MOST
COST ADVANTAGEOUS TO THE COAST GUARD.
G.  OFFICIAL DISTANCE (MILEAGE)__________ FM  __________TO,IAW JFTR U5222-D.
H.  DLA NOT AUTHORIZED FOR SINGLE MEMBERS.  MANDATORY GOV'T QUARTERS. OR
AUTH ADVANCE DLA WITH DEPENDENTS FOR PAYGRADE ___ IN THE  AMOUNT OF
$__________ , IAW JFTR U5600.
I.  MBR WAS COUNSELED ON THE TLE (U5710) ENTITLEMENTS.
J.   TVL ADVANCES  REQUESTED THE AMOUNT OF $_________, (EXACT AMOUNT) CHARGED
AGAINST THE COAST GUARD. or  TVL ADV NOT REQUESTED.
PER DIEM:
       MBR: $99.00 X (TVL DAYS) =
      DEPN: $74.25 X
      DEPN:  $49.50 X
      MALT:
            (# OF TRAVELERS):  (MILEAGE) X (CENTS) =
K.  ADV PAY NOT REQUESTED. OR  REQUESTED ADV PAY FOR ___ MONTHS  or SPECIFIC
AMOUNT TO BE LIQUIDATED OVER 12 MONTHS.
L.  AUTH PARTIAL SHIPMENT OF HHG'S NOT TO EXCEED COMMAND RESTRICTED WEIGHT OF
500 LBS.   AUTH SHIPMENT OR NTS OF REMAINING HHG'S FOR PAYGRADE ____ WITH or
WITHOUT DEPN RATE IAW U5012-C.
M.  SPO ADDRESS:
COMMANDING OFFICER (SPO)
COAST GUARD INTEGRATED SUPPORT COMMAND
ATTN:  PATFOR SWA
4000 COAST GUARD BLVD.
Portsmouth, VA 23703
```

A template for these standard remarks is available in Direct-Access. The "Orders Note" code is "P4S".

Household Goods/Unaccompanied Baggage

HHG/ Unaccompanied baggage

Bahrain is designated an administrative weight restricted area for Coast Guard personnel assigned to PATFOR SWA. All members should be aware they will be required to reside in fully furnished government quarters equipped with TVs and stereos.

- Storage space is limited, so members should only ship those personal effects that can be accommodated in their assigned quarters.
- Members need not bring personal computers; there are Internet cafes at the residence and on base.
- Partial HHG /Unaccompanied baggage shipments to and from Bahrain are limited to 500 pounds.
- Additional information/restrictions on HHG shipments to Bahrain can be found in Chapter 11 of the *The Personal Property Consignment Instruction Guide – Online (PPCIG-OL)* available online at: https://tops.ppcigweb.sddc.army.mil/ppcig/menu/query/country.do (Click the "*Country Instructions*" tab and search for Bahrain.)

For members without dependents, the HHG not shipped to Bahrain should be placed in NTS (non-temporary storage) at origin. Members with dependents may ship HHG to a designated place for dependents use or place them in NTS at origin.

POV Transportation/Storage

POV Transportation/ storage

Transportation:

- Coast Guard personnel assigned to PATFOR SWA are not authorized shipment of a POV to/from Bahrain. However, a POV may be shipped to a designated place, including OCONUS, for use by the member's dependents in accordance with Joint Federal Travel Regulations, Volume 1, par. U5410-b1. INCONUS shipment of POV is at the initial expense of the member pending travel claim reimbursement not to exceed standard mileage allowance.

Storage:

- POV storage is authorized in lieu of a shipment. Since POV shipment to Bahrain is restricted by service regulations, members are entitled to storage of one POV at government expense under the provisions of Joint Federal Travel Regulations, Volume 1, par. U5466. The POV can be stored using the SDDC global POV storage program or self-procured by the member. For travel entitlement to the storage facility when accomplished concurrently with TDY enroute to the OCONUS PDS, see Joint Federal Travel Regulations, Volume 1, par. U5468-e. For information on POV storage see SDDC pamphlet *Storing Your POV* online at: http://www.sddc.army.mil/sddc/Content/Pub/8810/DBCN8810.pdf.

- Members who travel by POV to Portsmouth must arrange to place their POV in storage prior to departing for Bahrain. Storage of a POV is not authorized if a POV is shipped to a designated place for dependents use.

Station Allowances

Station Allowances (OHA and COLA).

OHA is not authorized for members in Bahrain since all members will be assigned government leased quarters or shipboard berthing. While stationed in Bahrain members will be entitled to OUTCONUS COLA at the full without dependents rate. Members with dependents are authorized to receive both full OCONUS COLA at the without dependent rate, and, if payable, CONUS COLA at the with-dependents rate for the designated place of dependents. Station allowances may also be authorized by COMDT (CG-1222) for dependents residing at a designated place OCONUS per Joint Federal Travel Regulations, Volume 1, par. U9301-b. Requests for station allowances must be submitted before the dependents relocation.

Entitlements Summary

Exhibit 2-F-2 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

Allowances for Members With Dependents

Introduction

This section provides information on allowances and entitlements for members with dependents assigned to PATFOR SWA.

Dislocation Allowance (DLA)

Only members with dependents that relocate dependents to a designated place are authorized DLA.

BAH, OHA and COLA for Members With Dependents

To request BAH for either the previous duty station location or a designated place of dependents, or OHA for a designated place of dependents, members with dependents will submit a CG PSC-2025A, Housing Allowance Protection Worksheet (http://www.uscg.mil/hq/psc/forms/psc2025a.pdf) to COMDT (CG-1222) for processing.

For a member stationed OCONUS (non-BAH location), OHA cannot be requested for a previous duty station location, only for a designated place of dependents.

BAH for a previous duty station location may be authorized if the member has no intention of relocating their dependents from the residence established while receiving the BAH rate for their previous duty station. The dependents residence location must be within a reasonable commuting distance (as determined by COMDT (CG-1222) – see Note 2 below) to the previous duty station for a member to be authorized to receive the BAH for their previous duty station, if more equitable than the dependents location.

Note 1: Members who receive BAH or OHA with dependents based on the payment of child support are not eligible to submit a CG PSC-2025A. Effective upon their PCS reporting date, these members are entitled to receive BAH-DIFF, if otherwise so entitled per Section 3-C-2.c. of the Coast Guard Pay Manual, COMDTINST M7220.29(series). If a member acquires a dependent(s) during their OCONUS assignment which changes their dependency status to a member with-dependents, the member will complete and submit a CG PSC-2025A to request BAH or OHA for the designated place of their dependent(s).

Note 2: A reasonable commuting distance is 50 miles one-way or a 2 hour round-trip, whichever is to the member's advantage.

Continued on next page

Allowances for Members With Dependents, Continued

BAH, OHA, and COLA (cont'd)

COLA Entitlement:

If BAH is authorized for a previous duty station location, CONUS COLA, by law, cannot be paid for the previous duty station location, only the dependent's location.

If BAH or OHA is authorized for the dependents location, COLA will be based on the dependents location.

Upon processing the worksheet, COMDT (CG-1222), will mail the member a memo authoring the housing allowance for either the designated place of dependents, or if eligible, the previous duty station. A copy is also sent to the ISC Portsmouth SPO and CG PSC (MAS & FAIR).

FSA

Members with dependents, including member-married-to-member (see Coast Guard Pay Manual, COMDTINST M7220.29(series), Section 3-G-13), are entitled to FSA. The current rate for FSA is $250 per month.

Entitlements Summary

Exhibit 2-F-2 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

Basic Allowance for Subsistence

BAS

Officers	Officer BAS
Enlisted Members Assigned ashore	Enlisted BAS
While deployed to a cutter	Enlisted BAS-ESM (Essential Station Messing) less DMR (Discount Meal Rate) deduction

Entitlements Summary

Exhibit 2-F-2 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

Hardship Duty Pay, Imminent Danger Pay and Combat Allowances

Hardship Duty Pay, Imminent Danger Pay and Combat Allowances

Some members assigned to PATFOR SWA may be eligible for one or more of the following entitlements. Consult the references listed below to determine eligibility:

Entitlement	Reference
Hardship Duty Pay – Location	Sec. 4.A CG Pay Manual
Combat Tax Exclusion	Sec. 8.G CG Pay Manual
Combat SGLI Allowance	ALCOAST 060/06 E-Mail ALSPO B/06
Imminent Danger/Hostile Fire Pay	Sec 4.H. CG Pay Manual
Responsibility Pay (for cutter COs)	Sec 4.D. CG Pay Manual
Savings Deposit Program	Sec 7.C. PPPM (PSCINST M10002.A)

See the Special and Incentive Pays topic in the DA Online Manual for SPO procedures: http://www.uscg.mil/ps/pay_entitlements/special_and_incentive_pays.htm

Entitlements Summary

Exhibit 2-F-2 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

PDR Handling

PDR Handling

Note: Check the online version of this section at http://www.uscg.mil/hq/psc/pppm/chap02F.pdf for updates to this page.

Please ship SPO PDRs, via rapid, accountable means (DHL, express mail, etc.) to:

Commanding Officer (SPO)
ATTN: PATFOR SWA YN
Coast Guard Integrated Support Command
4000 Coast Guard Blvd
Portsmouth, VA 23703

Normally (per COMDTINST M1080.10(series)) the SPO PDR is sent via regular mail. However, these transfers call for special handling to ensure timely input of transactions.

Points of Contact

Points of Contact (as of 16 May 2007)

Note: Check the online version of this section at http://www.uscg.mil/hq/psc/pppm/chap02F.pdf for updates to this page.

ISC Portsmouth SPO:

- YNC Tina Sporkin, (757) 686-4115

HHGs/POV Storage/Relocation of Dependents (OCONUS):

- Commandant (CG-1222) at (202) 267-1646

Operations/Mission issues: LANTAREA: SKCS Sandra Fletcher
Atlantic Area, (Arec-5)
PATFOR SWA Coordinator
Tel: (757) 295-2220, Ext 1
Cell: (757) 651-2409
Fax: (757) 295-2217
Sandra.J.Fletcher@uscg.mil

Exhibit 2-F-2: Patrol Forces SW Asia (PATFOR SWA) Cutter and Augmented Crew Pay Entitlements (Effective 4 April 2006)

PAY AND ENTITLEMENTS BASED ON DEPENDENCY STATUS

Member Status	Basic Allowance for Housing (BAH)	Conus Cost of Living Allowance (COLA)	Outconus COLA w/ out dpn (FULL)	Family Separation Allowance (FSA) ($250/month) [3]	Reimbursement of (POV Storage) [4]
Married	BAH w/dpn [1]	YES [1]	YES	YES	YES
Married to service member (w/out child dependent)	Partial	NO	YES	YES	YES
Married to service member (w/ child dependent)	NO [2]	NO[2]	YES	YES	YES
Single w/ child support	BAH-diff only	NO	YES	NO	YES
Single w/out dependents	Partial	NO	YES	NO	YES

Notes:
[1] BAH and COLA is based on dependents location unless otherwise designated by CG-1222. Housing Allowance Protection Worksheet (CG-PSC-2025A) must be submitted to CG-1222 for determination and approval. All OCONUS M-2-M w/minors should claim minors to be entitled to BAH-W or for spouse to receive BAH-Death (in case of fatality).
[2] Member may be entitled to BAH w/ dpn and Conus COLA at dependents location if they are claiming child on BAH/Dependency Data form vice spouse claiming. BAH Protection Worksheet required.
[3] FSA - All eligible members receive FSA-R, no one receives FSA-S.
[4] POV Storage - Member may store vehicle via government sponsored SDDC Global POV storage program or self-procure storage and submit claim for reimbursement. Member will be reimbursed up to government cost.

Continued on next page

Exhibit 2-F-2: Patrol Forces SW Asia (PATFOR SWA) Cutter and Augmented Crew Pay Entitlements (Effective 4 April 2006), continued

PAY AND ENTITLEMENTS REGARDLESS OF DEPENDENCY STATUS

Member Status	Level-3 Career Sea Pay/ Time (CSEAPAY) [5]	(BAS) [6]	Per Diem (IE Portion)	Responsibility Pay ($50/ Month)	HDIP Vessel Boarding Search & Seizure (HDIP-VBSS) [7]	Imminent Danger Pay ($225/month)[8]	Combat Zone Tax Relief (CZTR)[9]	Combat SGLI [10]	Savings Deposit Program Participation[11]	IRA and Thrift Savings Plan (TSP)[12]	Rest and Recuperation (R&R) Leave Transportation [13]
Cutter Crew	YES	YES	NO	NO	YES	YES	YES	YES	YES	YES	YES
Augmented Crew	YES	YES	NO	NO	YES	YES	YES	YES	YES	YES	YES
CO	YES	YES	NO	YES [14]	YES	YES	YES	YES	YES	YES	YES

Notes:
[5] CSEAPAY - Member receives continuous sea pay unless member exceeds 30 days ashore, IAW Section 4-B of USCG Pay Manual. Career Sea time runs continuously with CSP; when CSP suspended, career sea time counter goes into neutral until CSP is re-started. CSP-PREM is payable if current career sea time counter exceeds 36 months.
[6] Enlisted members will have Daily Discount Meal Rate deducted from BAS; PAYGO rules apply to officers.
[7] HDIP-VBSS - designated boarding teams only - Commanding Officers will authorize via written correspondence and verify requirements of ALCOAST 353/04 are met.
[8] IDP – Areas defined by SECDEF.
[9] CZTR areas designated by the President or Congress. Applies to all taxable income (up to the highest enlisted pay grade (E-10) plus imminent danger pay), including any bonuses earned while member is in the area (SRBs & Career Status Bonus (CSB) and the Basic Pay for all leave earned in the CZTR area. Federal & State Income Taxes not withheld, however, FICA tax is withheld. Although most states follow Federal rules concerning CZTR, some do not & will still require payment of state income taxes even though SITW not applied to military pay in CZTR areas. See Section 8-A of USCG Pay Manual for details.
[10] Government sponsors first $150K of SGLI, plus Traumatic SGLI (TSGLI).
[11] SDP – Members may make an allotment or directly deposit up to $10K with 10% annual interest guaranteed on average quarterly balance. Cannot exceed unallotted pay earned in theatre. May not use advance pay for SDP deposit. See Section 6-F of USCG Pay Manual.
[12] Members may make contributions to IRA and TSP (including special & incentive pays for TSP only), NTE Internal Revenue Code limits.
[13] One R&R trip at government expense per 12 month tour.
[14] Augment crew CO only receives Resp Pay during periods actually in command afloat. At no time will RSPLTY PAY be paid concurrently to more than one officer assigned to the same vessel. Acting CO for less than 30 days is not entitled to RSPLTY PAY.

Chapter 3 ACCESSIONS, SEPARATIONS, AND REENLISTMENTS

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for accessing, separating, or reenlisting a member. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Accessions	3-A-1
B	Separations	3-B-1
C	Continuance on Active Duty	3-C-1

This page left blank intentionally.

Section Overview

Introduction

This section will guide you through the process of accessing a member onto active duty.

In this section

Topic	See Page
Process for Accessions	3-A-2
Types of Accessions	3-A-4
Recalled Retired Members	3-A-5

Process for Accessions

Introductions The accession process depends on communication between the member, unit, and SPO to ensure a smooth transition into the Coast Guard. This process is broken down into stages based on what needs to be completed and who is responsible.

Note: This process is for prior service members who report directly to their new unit vice attending indoctrination at Cape May.

Reference (a) Direct Access Guide, Accessions

Process This is the process.

Stage	Who Does It	What Happens	Date
1	Member	The Unit should assist the Member in completing the following: • DD Form 2058, State of Legal Residence Certificate • IRS W4 Form • Appropriate state tax withholding certificate • Direct Deposit information • CG PSC-2020D (Designation of Beneficiaries) • CG PSC-2020 (Dependency Worksheet) *if member has dependents* • DD-1172 (Application for Uniformed Service Identification Card) • DD-1173 (Uniformed Service Identification and Privilege Card) *if member has dependents*	

Continued on next page

Process for Accessions, Continued

Process
Continued

Stage	Who Does It	What Happens	Date
1 (cont)	Member	• Completes SGLV-8286 • Completes SGLV-8286A (if member is married) • TSP-U-1 (if member desires to participate in TSP) • TDP Enrollment Form (if member has dependents & desires to enroll them in the TRICARE Dental Plan) • DD 2366 (Montgomery GI Bill Election Form) *if member is eligible to enroll in MGIB* • CG PSC-5100 (Officer Uniform Allowance Claim Worksheet) *for eligible officers*	
2	Unit	Assist member in completing PCS Reporting Worksheet (PSC 2005) forwards to SPO with other related forms from Stage 1	
3	SPO	• Creates PDR • Submits Direct Access transactions: Applicant Data Contract Data Hire Applicant Employee Tax Data Information Payment Option Election (Non Self-Service) Enter Family Members/Dependents Enter Emergency Contacts Enter SGLI Election Enter Family SGLI Election Employee Entitlements **Note:** For members who are changing components of the Coast Guard with no break in service, the SPO must ensure that a separation transaction in Direct Access has been completed and approved on the member prior to transmitting accession (rehire) transactions.	

Types of Accessions

Introduction

Accession is the process of establishing personnel and pay records when a member comes on active duty. There are several ways to be accessed and several points where members can be processed.

Types of accessions

This table describes types of accessions and identifies processing points.

Types	Description	Processing Points
Direct commission	When an officer comes from the civilian sector or other military service and is processed through Direct Commission Officer (DCO) course before departing for their first unit.	Academy
	When an officer comes from the civilian sector or other military service and reports directly to their first unit prior to attending the DCO course.	Responsible SPO for designated unit.
Cadet Graduates	When a Cadet graduates from the Academy and becomes an officer.	Academy
Cadet	When a Cadet reports to the Academy.	Academy
Former Cadet with a reserve obligation	Non-Prior service cadets whose appointment is terminated in their junior or senior year are assigned to the Coast Guard Reserve SELRES Transition Pool for 59 days and subsequently assigned to either the IRR or a drilling unit to complete their military obligation.	Academy
Prior service (other than DCO)	When an enlisted member comes from another service and attends Basic Training.	Cape May
	When a member comes from prior CG or CG Reserve and reports directly to a unit without going through basic training. Note: This includes members who are being discharged from the active duty component of the Coast Guard to be immediately accessed into the reserve component of the Coast Guard and vice versa. The servicing SPO losing the member must submit the discharge transaction in Direct Access and accession transaction within 24 hours.	Responsible SPO for designated unit.
	When a member reports directly to the Individual Ready Reserve (IRR).	Servicing ISC SPO
	If the member enlists in the reserves and attends Cape May as a REBI student.	Cape May
Recruits	When an enlisted member goes to basic training before departing for their first unit.	Cape May

Recalled Retired Members

Introduction

The Commandant may direct that a retired member be recalled to active duty. These members may be paid by PSC (RAS) or by PSC (MAS) through JUMPS depending on the duration of the recall.

Payment Method

Use this table to determine if the member will be paid by PSC (MAS) or by PSC (RAS).

If the member is	And the duration of the recall is	Then the member is paid by
Immediately recalled to active duty upon retirement (no break in service)	For any period immediately following retirement	• JUMPS. • The Assignment Officer issues Recall from Retirement Orders via Direct Access. These orders will generate a P193 JUMPS action and continue the member on Active Duty. • No need to retire member.
Recalled to active duty after a break in service of more than 24 hours	For any period	• JUMPS. • CGPC (opm/epm) creates orders. • SPO creates contract data and PCS endorsements to access (rehire) the member.
Recalled from RET-2 status	For any period	• The CGPC (opm/epm) Assignment Officer issues orders to the member (copy to PSC (RAS). • PSC (RAS) changes members Training Pay Category (R910 transaction) to make the member's records available to the SPO in Direct-Access • The SPO records the member's active duty in Direct Access using the Reserve Orders module.

This page left blank intentionally.

Section Overview

Introduction

This section prescribes procedures for separating members on active duty whose obligated service is for 140 days or more.

In this section

Topic	See Page
The Separation Process	3-B-2
Immediate Separation Processing	3-B-5
Priority Separation Processing	3-B-7
E-mail Format For Immediate and Priority Separations (Exhibit 3-B-1)	3-B-9
Routine Separation Processing	3-B-10
Cancellation of Document Numbers and Accounting Data (Exhibit 3-B-2)	3-B-12
Preparation of Separation Orders (Exhibit 3-B-3)	3-B-13
Enlisted to Cadet Status Processing	3-B-14
Regular Retirement Separations	3-B-15
Disability Retirement Separations	3-B-16
Checklist for Separations	3-B-18
Checklist for RELAD	3-B-21
Checklist for Discharge	3-B-22
Checklist for Retirement	3-B-23
Reserve Retirement Separations	3-B-26

The Separation Process

Introduction

The proper execution of the separation process depends on close communication between all participants. Timely processing of all paperwork and Direct Access data entry is essential to provide the member a smooth transition and to ensure separation payments are made consistent with applicable directives. TONOs are automatically generated when the Separation Orders are entered in Direct Access.

Note: Requests to change the termination date of discharge orders already posted on the Airport terminal to an earlier date may be sent to PSC (ses), by e-mail to PSC-PF-SES@uscg.mil. If the date needs to be changed to a later date, the request must be made to CGPC (EPM-1, for enlistd personnel or OPM-1, for officers).

References

(a) DD 214 Manual
(b) SPD Handbook
(c) PERSMAN, Chap 12-A and 12-B
(d) Direct Access Online Manual (SPO Transactions > Separations)
(e) Identification Cards, COMDTINST M5512.1(series)

Retention on Active Duty

When a member is retained for any reason beyond the established separation date, documentation submitted to JUMPS to process the original separation must be deleted and modified/replaced with new transactions. This may require action by various sources:

WHO	MAY NEED TO
CGPC (opm)	extend an officer's date of separation
Member's SPO	submit a Personnel Action to indicate a member has been retained beyond normal expiration of enlistment.
PSC	reopen the member's pay account and reprocess the separation

Continued on next page

The Separation Process, Continued

Types of separations

Separations are classified as ***Immediate***, ***Priority***, or ***Routine***. Each type is defined below.

Type	Description
Immediate	Separations, which must be processed in less than 15 days. Separations require four working days for processing by PSC. This 4-day clock begins once: • The SPO notifies PSC of the authorization to separate the member. This may require coordination between the unit, SPO, and PSC (ses) to change the member's separation date.
Priority	Separations, which must be processed within a 15 to 30 day period. Note: If rapid administrative action is required commands (CO/XO) may request Immediate separation processing by contacting PSC (ses) at (785) 339-3550.
Routine	Separations, which can be processed in 30 days or more. **Note:** 30 days is the minimum time in which a Routine separation can be processed. In order to avoid delay in the final payment or payment for any leave sold, units/members must submit the Career Intentions Worksheet (CG PSC-2045) to the SPO not later than 60 days prior to the separation date or departure on terminal leave.

Continued on next page

The Separation Process, Continued

Which type to use

This table prescribes separation classifications.

IF Separation is	THEN use
due to misconduct and unit commanding officer desires rapid administrative action	Immediate
not due to misconduct, but rapid administrative action is required (Note: The unit CO/XO must request Immediate separation processing by contacting PSC (ses) at (785) 339-3550).	Immediate
for reserve members disenrolling from a class “A” school, officer candidate school, or other training program	Immediate
due to unsatisfactory performance	Priority
due to unsuitability	Priority
due to physical disability	Priority
directed by CGPC (epm-1) for urgent reasons	Priority
under normal circumstances	Routine

Immediate Separation Processing

Introduction

Immediate separations require 4 working days for processing after CGPC (epm-1) posts the orders on the airport terminal. Immediate separations are often due to misconduct. If a separation is not due to misconduct (would normally be processed as a Priority or Routine separation) but rapid administrative action is required, commands (CO/XO) may request Immediate separation processing by contacting PSC (ses) at (785) 339-3550.

References

(a) DD 214 Manual
(b) SPD Handbook
(c) PERSMAN, Chap 12-A and 12-B
(d) Direct Access Online Manual (SPO Transactions > Separations)
(e) Identification Cards, COMDTINST M5512.1(series)

Procedures

Procedures required for an Immediate separation.

Day	Who Does It	What Happens
1	CGPC (epm-1)	• Approves separation. • Posts separation orders with the Termination Date, TONO and Accounting Data to the airport terminal. The orders will contain detailed information to enable SPOs to prepare all documents required for separation.
	UNIT	• Ensures member is physically qualified for separation. • Notifies SPO upon receipt of separation authority from CGPC. **Note:** For immediate separations requiring less than normal processing time, a signed CG-3307 by the member (see Enclosure 6 of this manual, CG-3307's for Separation (SEP-1)) shall be faxed to (785-339-3784) PSC (ses).
T H R U 3	SPO	• Sends Urgent E-mail to PSC-PF-SES@uscg.mil on Day One with pertinent information using the format provided in Exhibit 3-B-1. • SPOs must contact PSC (ses) to request approval of immediate separations • SPOs must contact PSC (ses) to request a change to member's termination date set in Direct Access. **Note:** E-mail must be routed through and released by the SPO supervisor (with "By direction" authority).

Continued on next page

Immediate Separation Processing, Continued

Procedures, continued

Day	Who Does It	What Happens
1	PSC (ses)	Upon receipt of the SPO's E-mail. • Calculates the final pay due the member. • Sends E-Mail to the SPO with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized.
T H R U 3	SPO	• Prepares the DD-214 • Prepares the appropriate Direct Access separation transactions. • Prepares appropriate separation letter(s) from Enclosure (4) of this manual. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account. • Verifies/enters final mailing address in Direct Access. Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W2.
4	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Orders, appropriate travel claim forms, an envelope addressed to PSC (tvl) for liquidation purposes, and the standard separation letter. Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: http://www.dmdc.osd.mil/rsl/owa/home.
	SPO	On the effective date of separation, transmits the separation transaction.

Priority Separation Processing

Introduction Priority separations require 15 working days for processing. Therefore, to allow for weekends and holidays, the effective date of separation will be 21 days after CGPC (epm-1) posts the orders on the airport terminal.

References
(a) DD 214 Manual
(b) SPD Handbook
(c) PERSMAN, Chap 12-A and 12-B
(d) Direct Access Online Manual (SPO Transactions > Separations)
(e) COMDTINST M5512.1, Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel

Procedures Procedures required for a Priority separation.

Day	Who Does It	What Happens
1 THRU 9	CGPC (epm-1)	• Approves separation. • Posts separation orders with the Termination Date, TONO and Accounting Data to the airport terminal. The orders will contain detailed information to enable SPOs to prepare all documents required for separation.
	UNIT	• Ensures member is physically qualified for separation. • Notifies SPO. **Note:** For Priority separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in Encl 6 of this manual) must be faxed (785-339-3784) to PSC (ses).
	SPO	Sends Urgent E-mail to PSC-PF-SES@uscg.mil on Day One with pertinent information using the format provided in Exhibit 3-B-1. • SPOs must contact PSC (ses) to request approval of priority separations • SPOs must contact PSC (ses) to request a change to member's termination date set in Direct Access. **Note:** The E-mail must be routed through and released by the SPO supervisor (with "By direction" authority).

Continued on next page

Priority Separation Processing, Continued

Procedures (continued)

Day	Who Does It	What Happens
1 T H R U 9 (Cont.)	PSC (ses)	Upon receipt of the SPO's E-mail. • Calculates the final pay due the member. • Sends E-Mail to the SPO with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, and the amount of payment authorized. • Schedules a special payment through Treasury to ensure member receives final separation pay on his/her separation date.
	SPO	• Prepares the DD-214 • Prepares the appropriate Direct Access separation transactions. • Prepares appropriate separation letter(s) from Enclosure (4) of this manual. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account. • Verifies/enters final mailing address in Direct Access. Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W2
LAST DAY	UNIT	On the effective date of separation, delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PSC (tvl) for liquidation purposes, and the standard separation letter(s). Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: http://www.dmdc.osd.mil/rsl/owa/home.
	SPO	On the effective date of separation, or date of departure on terminal leave, transmits the separation transaction.

E-mail Format for Immediate and Priority Separations

(Not Requesting a Document Number and Accounting Data)

From: SPO Supervisor
To: PSC-PF-SES@uscg.mil
Cc: Unit POC
Subject: SEPARATION FOR _____(NAME/EMPLID)_____, USCG(R)

Reference (A): CITE CGPC Separation Summary Authorization

1. CITE TYPE OF SEPARATION: IMMEDIATE, PRIORITY, OR DISABILITY

NOTE: The CO/XO must call SES for all Immediate separations unless the member's SPD code ends with one of the following two characters:

FS FU JA JB JC JD JE KA KB KD KF KK KL KM KN KQ NC

2. DATE OF SEPARATION

3. SPD CODE

4. LEAVE INFORMATION (SPO must still input leave transactions)

A. DAYS LEAVE SELLING
B. NUMBER OF DAYS TERMINAL LEAVE TAKING AND THE DATES OF TERMINAL LEAVE
C. NUMBER OF DAYS LEAVE TAKEN AND THE DATES OF LEAVE, NOT POSTED IN RECENTS
D. NUMBER OF DAYS EXCESS LEAVE (Only if allowed by CO)

NOTE: Include any leave scheduled to be taken prior to separation. The SPO must still input the leave transaction(s). Enter 'NONE' in each block when not applicable.

5. LOST TIME NOT POSTED IN RECENTS

NOTE: Enter 'NONE' when not applicable.

6. PAY ADJUSTMENTS NOT POSTED IN JUMPS:

A. REDUCTION: RATE AND DATE
B. FORFEITURE: AMOUNT AND DATE
C. MUTUAL ASSISTANCE (follow procedures noted on page 9-A-5 of this manual)
D. OTHER INDEBTEDNESS (see page 9-A-4 of this manual prior to transmission of this e-mail)
E. ENTITLEMENTS NOT POSTED IN RECENTS (SPO must still transmit necessary transactions)
F. BONUS PAYMENTS PREVIOUSLY MADE (SRB, SELRES, or Enlistment Bonus)

NOTE: Enter 'NONE' when not applicable.

7. FINAL MAILING ADDRESS AFTER SEPARATION AS INDICATED IN DIRECT ACCESS ENTERED THIS DATE IS

8. SPO POINT OF CONTACT (name and phone number)

NOTE: When producing this e-mail, ensure each paragraph is typed out entirely (i.e., paragraph 2 would read "Date of Separation: 07JAN01" vice "07JAN01"), However you do not need to include notes.

EXHIBIT 3-B-1

Routine Separation Processing

Introduction

Routine separations occur with sufficient lead-time to allow routine processing.

References

(a) DD 214 Manual
(b) SPD Handbook
(c) PERSMAN, Chap 12-A and 12-B
(d) Direct Access Online Manual (SPO Transactions > Separations)
(e) Identification Cards, COMDTINST M5512.1(series)

Procedures

Procedures required for Routine separation.

When	Who does it	What happens
At least 180 days prior to Separation	UNIT	Ensures member is physically qualified for separation.
At least 45 days prior to Separation or departure on terminal leave	SPO	Prepares and transmits Statement of Intent. Note: Failure to submit this document in a timely manner will normally result in delay in final pay or payment for any leave sold. The SPO must notify PSC (ses) if there is any change to the statement of intent. On routine separations, the amount of final pay will appear on the member's prior month LES. • For routine separations the TONO and Accounting Data are automatically generated when the SPO creates and saves the Direct Access separation orders. For the separation orders follow the guidance on page 3-B-13.
Prior to separation	SPO	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.

Continued on next page

Routine Separation Processing, Continued

Procedures (continued)

When	Who does it	What happens
At least 10 days prior to separation	PSC (ses)	Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and the amount of payment authorized.
7 days prior to separation	SPO	If information required for block 18 of the DD-214 (if applicable) has not been received, contacts PSC (ses).
Prior to separation	PSC (ses)	Schedules a special payment through Treasury to ensure member receives final separation pay.
Day of separation	UNIT SPO	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PSC (tvl) for liquidation purposes, and the standard separation letter. Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: http://www.dmdc.osd.mil/rsl/owa/home. SPO approves separation transaction in Direct Access

Note: SPO's can approve transactions up to 14 days prior to separation.

Cancellation of Document Numbers and Accounting Data

Separation Document Number and Accounting Data issued to a member who wishes to remain in the service must be cancelled. In this event, the responsible SPO must send a Coast Guard message (not an E-mail) within 48 hours of discovering the need for cancellation to COMDT (CG-12A) with PSC (ses), the order issuing authority, and the responsible Transportation Officer as information addressees, requesting cancellation of the Document ID.

The **message** must contain the following information:

- Member's rate/rank, name, EMPLID and unit.
- Document Number and Accounting Data issued; date issued
- Member's scheduled separation date.
- Reason for cancellation request and member's resulting status (e.g. Reenlisted, Extended, Retained). If member is retained provide reason, estimated duration and subsequent status at the end of retention.
- SPO E-mail address.

NOTE: Members electing to remain in the service where actions to expend funds have been made (e. g. Shipment of household goods has occurred) shall be counseled on their liability and the applicable recoupment procedures. Such counseling shall be documented and acknowledged by the member's signature on their separation orders.

Exhibit 3-B-2

Preparation of Separation Orders

Introduction

After the Document Number and Accounting Data is in the Direct Access Airport Terminal for CGPC approved separations, the responsible SPO shall issue Separation Orders on a Standard Travel Order for Military Personnel (CG-5131).

Special Instructions

Separation Orders shall include the following remark:

"You are directed to submit a Travel Claim to PSC (tvl) within 3 days after completion of the travel under these orders. If you decide to cancel these orders, you are personally liable for the repayment of any funds expended in accordance with these orders."

Statement required should separation be cancelled (Exhibit 3-B-3)

If a member elects to remain on active duty after funds have been expended during separation processing, the following amendment to members separation orders shall be made:

"I acknowledge that I have voluntarily elected to remain on Active Duty after previously starting separation processing, and that I have been counseled concerning my liability to repay any funds expended during my separation processing and the applicable recoupment procedures."

MEMBER'S SIGNATURE

Enlisted to Cadet Status Processing

Introduction

The Academy SPO has the primary responsibility for ensuring a member's pay account in JUMPS is converted to cadet status when an enlisted member is being released from active duty to accept an appointment as a Cadet at the Coast Guard Academy.

The member's SPO has the responsibility to ensure that the member's PCS transfer is handled in a timely and accurate manner.

Procedures

When transferring an enlisted member to the Academy for appointment as a Cadet, the member's SPO shall:

- Prepare and transmit the Statement of Intent transaction and verify/enter mailing address information in Direct Access at least 45 days prior to the Cadet swearing-in date.
- Approve and endorse the member's PCS orders in Direct Access.
- The Academy SPO will input a Direct Access Discharge transaction to discharge the member from enlisted status, and submit an Accession transaction to enlist the member as a cadet.

Note: Advance Pay cannot be authorized (the member will be separated upon swearing-in as a cadet and would not be able to liquidate an advance).

Regular Retirement Separations

Introduction Retirements are normally processed as routine separations

Reference
(a) Direct Access Online Manual; Retirements, DD-214
(b) Personnel Manual, COMDTINST M1000.6 (series)
(c) Joint Federal Travel Regulations, Volume 1
(e) Identification Cards, COMDTINST M5512.1(series)

Procedures Procedures required for a retirement.

When	Who Does It	What Happens
At least 60 days prior to: • The date the member goes on terminal leave: or, • The effective date of retirement, whichever is earlier	Member	Submits: Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG PSC-4700) **Note: AUTOMATIC FULL COVERAGE in the Survivor Benefit Plan (SBP) is elected in the absence of a properly completed PSC-4700.** **The SPO and/or unit will assist in counseling the member and completing the PSC-4700, but ultimate responsibility lies with the member.**
Same as above	SPO	Prepares and transmits Statement of Intent (SOI). Verifies/enters mailing address information in Direct Access.
Note: If an SOI has processed in the system by the end-month compute for the month prior to the month of separation, the regular mid-month payment and the final pay, as well as allotments will be paid by JUMPS and the final pay projection will include any leave being sold.		
Prior to separation	SPO	Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214.
Note: The SPO will notify PSC (ses) if there is any change to the information submitted on the Statement of Intent (SOI). On routine separations, the amount of final pay will appear on the member's prior month LES.		
Day of separation	Unit	Delivers the DD-214, the final payment, (unless the member is on direct deposit) and the standard separation letter.
	Member	Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facilities go to the following website: http://www.dmdc.osd.mil/rsl/owa/home.
	SPO	On the effective date of terminal leave or retirement, transmits the retirement transaction.

Disability Retirement Separations

Introduction Temporary and permanent disability retirements are retirements that are approved under the physical disability evaluation system. They are processed as priority separations. The retirement date for members in this category will normally be 20 working days after the date CGPC's action. Active duty allotments will be paid by JUMPS for the last month of active duty.

Reference
(a) Direct Access Guide, Retirements, DD-214
(b) PERSMAN, Chap 17
(c) Joint Federal Travel Regulations, Volume 1
(e) Identification Cards, COMDTINST M5512.1(series)

Procedures Procedures required for Temporary and Permanent Disability Retirements.

Day	Who Does It	What Happens
0	CGPC (opm/epm)	Issues message directing temporary or permanent disability retirement.
1	SPO	• Sends urgent E-mail message to PSC (ses) with pertinent information using the format provided in Exhibit 3-B-1 (Email Format for Separations). • Ensures member has an updated Mailing Address in Direct Access or completes an update if member does not have access to Direct Access. **Note:** The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W-2. • Prepares the Orders transaction in Direct Access
2	PSC (ses)	Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable). • Calculates the final pay due the member. • Schedules a special payment through Treasury to ensure the member receives final separation pay on his/her separation date.

Continued on next page

Disability Retirement Separations, Continued

Procedures, Cont.

Procedures required for Temporary and Permanent Disability Retirements.

Day	Who Does It	What Happens
13	SPO	If the PSC (ses) separation notification is not received at least 7 days prior to the date of separation, contacts PSC (ses). Nonreceipt of this E-mail message is an indication of a problem with the separation processing.
	Unit	On the effective date of retirement, delivers the DD-214 and the standard separation letter (from enclosure (4) to this manual) to the member.
	Member	Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facilities go to the following website: http://www.dmdc.osd.mil/rsl/owa/home.
	SPO (HRSUP Role User)	On the effective date of terminal leave or retirement, approves the retirement separation transaction in Direct Access.

Checklist for Separations

Introduction This checklist is provided to assist the unit/SPO in completing all necessary tasks required for separating members from active duty. It should be used along with the Checklist for RELAD, Checklist for Discharge, or Checklist for Retirement, as appropriate. This job aid is designed to be reproduced locally.

Separation checklist Action when separating a member.

Step	Action	Reference	Date
1	• Complete predischarge interview 6 months prior to separation date • If member is not recommend or not eligible for reenlistment, complete documentation as required	PERSMAN, 12-B-4, ALCOAST 049/00, PERSMAN 12-B-5	
	• Transition Assistance Program counseling	COMDTINST 1900.2 (series)	
	Forward the following to the SPO: • Preseparation Counseling Checklist for **Active** Component Service Members (DD-2648). OR • Preseparation Counseling Checklist for **Reserve** Component Service Members Released From Active Duty (DD-2648-1) **Note**: Upon receipt of the DD-2648, the SPO will prepare and transmit a Direct Access Training file update using School Code 500650	(Forms available from PSC's web site http://www.uscg.mil/hq/psc/forms)	
	• CG-3307 with SEP-4 entry completed.	PPPM, Encl. (6)	
2	Ensure member is physically qualified for separation.	PERSMAN, 12-B-6	
3	Complete an E-Resume at least six months prior to date of separation indicating member's intention to separate. For all members eligible/recommended for reenlistment: • Indicate in "career intentions" field of E-Resume, member's preferences in regards to a Selected Reserve Unit or Individual Ready Reserve (IRR). Also, include the member's address and phone number following separation.	PPPM, 5-D-13 Direct Access Guide, E-Resume	

Continued on next page

Checklist for Separations, Continued

Separation checklist (continued)

Step	Action	Reference	Date
3 C O N T I N U E D	Upon receipt of the E-Resume, an ISC representative will contact the member to discuss assignment options and answer questions about participation in the reserve. If agreement is reached on an assignment to a billet in the selected reserve, the ISC will provide the member's servicing SPO with the information needed to effect the assignment. The E-Resume with assignment information will be used to complete reserve assignment orders to the new unit.		
4	Complete follow-up interview at 3 months prior to separation date.	PERSMAN, 12-B-4	
5	Complete Career Intentions Worksheet, PCS Departing/Separation Worksheet, PCS Entitlements Worksheet, and, and forward to SPO at least 60 days prior to the separation date.	(Forms available from PSC's web site http://www.uscg.mil/hq/psc/forms) • CG PSC-2000 • CG PSC-2003 • CG PSC-2045	
6	SPO forward DD-214 WS (worksheet) to the member, via the unit, for review and approval	DD-214 Instruction	
7	If the member is being discharged, and desires immediate enlistment in the Coast Guard Reserve the SPO will complete and forward an Enlistment Contract (DD-4/1), effective the day following discharge, to the unit for administration of the oath and signature.		
8	Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods.	CGTRANSMAN, 1-H-1	

Continued on next page

Checklist for Separations, Continued

Separation checklist (continued)

Step	Action	Reference	Date
9	Conduct Final Termination Briefing	PERSEC	
10	Counsel member on separation, • Complete CG-3307 entries; see enclosure (6) of this manual) for sample entries. • Ensure member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package (http://www.tsp.gov/forms/tspbk02.pdf) if they have a TSP account.	PERSMAN, 12-B-53	
11	Ensure Government Travel Charge Card is turned into coordinator for cancellation.	Charge Card Instruction	
12	Complete CG-3307 (SEP-19) entry for all enlisted members receiving Separation Pay and send a copy by fax to PSC (ses) at 785-339-3784.	PPPM, Encl (6)	
13	SPO completes Direct Access transactions (Statement of Intent, DD-214 and Discharge or Retirement or RELAD)	Direct Access Online Manual:	
14	Complete appropriate separation letter(s) from enclosure (4) to this manual.	PPPM, 3-B-5, 7	
15	Counsel member on separation travel • Provide member with travel claim form(s) and instructions for completion.	CGS-JFTR	
16	Provide member with pre-addressed envelope to mail travel claims and original separation travel order to PSC (tvl).	PPPM, 2-B	
17	Review SPO/MED PDR's.	PERSMAN, 12-B-49	
18	Distribute PDR's and notify Health Record Custodian (by completing encl (9) to the PDRMAN) to forward MED PDR as appropriate.	PDR Manual	
19	Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal.	ID Cards, COMDTINST M5512.1(series)	

Checklist for RELAD

Introduction

This checklist provides a job aid to be used when a member is released from active duty (RELAD) and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for RELAD

Additional items when releasing a member from active duty.

Step	Action	Reference	Date
1	Complete Continued Health Care Coverage Benefit Program application.	CGCBP Instruction	
2	Complete ID Card(s).	Appendix (B) PPPM	
3	Counsel member on: • Assignment to Selected Reserve • Assignment to Individual Ready Reserve • Updating bank account information in Direct Access if the member will be assigned to a drilling status after separation.		
4	Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PSC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	PPPM, Encl (6)	
5	Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the SPO.	PPPM, 9-A-5	
6	Deliver separation paperwork to member.		

Checklist for Discharge

Introduction

This checklist provides a job aid to be used when a member is discharged, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for discharge

Additional items when discharging a member.

Step	Action	Reference	Date
1	Notify PSC (ses) (for Immediate or Priority discharges)	PPPM, 3-B	
2	Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PSC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	PPPM, Encl (6)	
3	Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the SPO.	PPPM, 9-A-5	
4	Complete Continued Health Care Coverage Benefit Program application.		
5	Complete appropriate Discharge Certificate.	PERSMAN, 12-B-51	
6	Issue Honorable Discharge Button (if applicable).	PERSMAN, 12-B-52	
7	Refer to exhibit in PERSMAN for special information concerning discharges.	PERSMAN, 12-B-1	
8	If member will be enlisting in the Coast Guard Reserve immediately following discharge, complete an enlistment contract and return to servicing SPO		
9	Deliver separation paperwork to member.		

Checklist for Retirement

Introduction

This checklist provides a job aid to be used when a member retires, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for retirement

Additional items when retiring a member.

Step	Action	Date
1	Endorse retirement order • Forward one copy to the SPO.	
2	Ensure member contacts PSC (ras) for retirement information. The following web site address provides "Information for Retirees." – http://www.uscg.mil/hq/PSC/RAS.htm	
3	Ensure the member completes and returns the following form(s) from Enclosure (1): CG PSC-4700, (Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election) and if starting new allotments, CG PSC-7221, (Retired Allotment Authorization Form) The member must include a copy of their latest LES if they are continuing any allotments or direct deposit to same account. • Administratively review the form(s), ensuring they are completed in accordance with instructions.	

Continued on next page

Checklist for Retirement, Continued

Checklist for retirement (cont'd)

Step	Action	Date
4	If the member is married, • Use this table to determine what actions are necessary to comply with the spousal notification/concurrence requirements of the Survivor Benefit Plan (SBP) when a married member elects not to participate or to participate at less than the maximum level in SBP.	

If the Member and Spouse	And	Then
are co-located in the area of the member's duty station and are living together as husband and wife	the spouse concurs with the member's SBP election	the spouse and witness will complete and sign part VII of the CG PSC-4700
	the spouse does not concur with the member's SBP election	the command will send a letter of notification/concurrence to the spouse as shown in Enclosure (4) page E-4-3 of this manual
are not co-located or are not living together as husband and wife		the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual
are not living together as husband and wife	and the spouse's whereabouts are unknown and cannot be determined	the member will complete and sign the following statement "The whereabouts of my spouse are unknown to me and have been unknown to me for at least 90 days. I understand that if this statement is later found to be untrue that spouse coverage will be established on the full amount of retired pay with costs and interest collected retroactive to my date of retirement unless my spouse consents otherwise. I understand that any false statement or misrepresentation thereto is a violation of law punishable by fine of not more than $10,000 or imprisonment of not more than 5 years or both (18 U.S.C. 1001)".

Continued on next page

Checklist for Retirement, Continued

Checklist for retirement (cont'd)

Step	Action	Date
5	Forward the following to PSC (ras) at least 30 days prior to retirement or start of terminal leave	
	• CG PSC-4700 (four pages)	
	• Copy of latest LES, if member is continuing any allotments or direct deposit to same account	
	• CG PSC-7221 if member is starting any new allotments	
	• SBP Spousal notification/concurrence letter, endorsed by spouse, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse does not complete part VII of the CG PSC-4700	
	• Statement signed by member, attesting that the whereabouts of spouse are unknown, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse cannot be located.	
6	Ensure retirement certificate and spouse's certificates are received from PSC (ras) at least 30 days prior to member's retirement or departure on terminal leave. You may order Retirement Certificates at http://www.uscg.mil/hq/PSC/RAS.htm.	
7	Contact CG-1221 if the White House Letter of Appreciation for members retiring with more than 30 years of service has not been received.	
8	Ensure member receives copy of the Thrift Saving Plan (TSP) Withdrawal Package if they have a TSP account. This includes TSP withdrawal forms, the booklet "Withdrawing Your TSP Account After Leaving Federal Service", and the notice "Important Tax Information About Payments From Your TSP Account."	
9	Complete retired and dependent ID cards.	

Reserve Retirement Separations

Introduction

Reserve retirements are processed by PSC (ras). The two retirement categories are:

- Retirement with Pay (RET-1) for reservists who complete 20 years of satisfactory service and have reached age 60.
- Retirement Awaiting Pay at Age 60 (RET-2) for reservists who have satisfied all requirements for RET-1, except reaching age 60.

Procedures

Procedures for Retirement With Pay (RET-1)

When	Who does it	What happens
Six months prior to reaching age 60 if member has 20 years of satisfactory service	PSC (ras)	Notify member in writing by sending an "Information Concerning Retirement With Pay (RET-1)" letter and information about the Reserve Component Survivor Benefit Plan.
After receipt of "Notification of Eligibility Letter" and retirement forms.	Member	Request transfer to RET-1 status by completing forms CG-PSC-2055A (Reserve Retirement Transfer Request) and CG-PSC 4700 (Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election from Enclosure (1) to this manual. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time.
Note: 1. If the member is in a drilling status the retirement package will be sent to the member's home address one month prior to age sixty; if the member is not in a drilling status the retirement package will be sent approximately six months prior to the sixtieth birthday. 2. If it is determined that member is not eligible for RET-1 status, member will be separated (age waivers to attain eligibility may be requested from and granted by CGPC (rpm).		
1 month prior to retirement	PSC (ras)	Forward to member: • Retirement Letter • Final Point Statement • Retirement Certificates (if applicable)
Retirement day	PSC (ras)	Transmit Endorsement on Orders transaction
Note: Normally, reservists are voluntarily transferred to RET-2 status upon their request. There is one instance, however, where a reservist may be involuntarily transferred to RET-2 status. If an enlisted reservist has over 20 years satisfactory service, the reservist's enlistment expires, and the reservist fails to reenlist, the reservist may be involuntarily transferred to RET-2 status per PERSMAN, 1.G.9.G. In such cases, the reservist's SPO shall notify ISC (pf) that the reservist has failed to reenlist. ISC (pf) shall in turn notify PSC (ras). PSC (ras) shall transmit Endorsement on Orders transactions to transfer the reservist to RET-2 status.		

Continued on next page

Reserve Retirement Separations, Continued

Procedures For RET-2 Status

Procedures for Retirement Awaiting Pay at Age 60 (RET-2) followed by Retirement With Pay (RET-1) upon reaching age 60.

Note: These steps apply only to those members who choose RET-2 status rather than continuing to drill.

When	Who Does It	What Happens
After completing 20 years of satisfactory service	PSC (ras)	Sends "20 Year Letter" notifying member of eligibility for RET-2 Retirement. Include Reserve Component Survivor Benefit Plan election forms. (RCSBP is optional at this time)
After receipt of "20 year letter".	Member	May request transfer to RET-2 status by completing form CG-PSC-2055A from Enclosure (1) to this manual. Written requests are submitted to ISC (pf) via the chain of command. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time.
Upon receipt of request for RET-2 Retirement	ISC (pf)	Forwards to PSC (ras).
Upon receipt of request for RET-2 Retirement	PSC (ras)	Forwards to member Retirement Information Package. **Note:** Members requesting RET-2 status who are not yet age 60 will receive retirement certificates at this time rather than at age 60 when transferred to RET-1 status.
RET-2 Retirement day	PSC (ras)	Transmits Endorsement on Orders transactions to RET-2 status.
RET-2 Retirement Day	Member	Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facility go to the following website: http://www.dmdc.osd.mil/rsl/owa/home.

This page intentionally blank

Section Overview

Introduction

This section will guide you through the procedures for reenlisting, extending, or retaining a member.

Continuous Pay

Members reenlisting or extending/re-extending an enlistment are not separated from JUMPS on the date of reenlistment or extension/re-extension. JUMPS recognizes this service as continuous and, if all documents are input timely, pay continues uninterrupted.

In this section

Topic	See Page
Reenlistment and Voluntary Extensions/Reextensions	3-C-2
Checklist for Reenlistment or Extension	3-C-3
Retention of Members in a Pay Status Other than Military Confinement	3-C-5
Retention of Members in a Non-Pay Status or in Military Confinement	3-C-6
Active Duty Extensions of Reservists and Recall of Retirees	3-C-7
Immediate Enlistment in Coast Guard Reserve Upon Discharge from the Regular Coast Guard	3-C-8
Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard	3-C-9

Reenlistments and Voluntary Extensions/Reextensions

Introduction This section will guide you through the process of continuing a member on active duty.

Reference
(a) PERSMAN, Chap 1
(b) Direct Access Guide
- Begin Extension
- Begin Re-extension
- Agreement to Extend
- Agreement to Re-extend
- Reenlistment
- Statement of Intent

Process This is the process for Reenlistments and voluntary Extensions or Reextensions.

When	Who Does It	What Happens
At least 45 days prior to effective date of reenlistment/extension/re-extension	SPO	Prepares and transmits a Statement of Intent (SOI) using Direct Access.
Notes: (1) If an Acceptance of Agreement to Extend/Reextend Enlistment transaction has processed in JUMPS then a Statement of Intent transaction is required to be submitted 45 days in advance only if the member is entitled to an SRB or if the member is selling leave. (2) Failure to submit this document in a timely manner may result in full stoppage of all pay, allowances and allotments.		
Effective date of reenlistment/extension/ reextension	SPO	Ensures Reenlistment Contract (DD Form 4/1) or Agreement to Extend/Reextend is signed and then transmits the Direct Access transaction in the Contract Data module.
If applicable	PSC (MAS)	Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the SRB.
If applicable	**PSC (MAS)**	**Payment of the initial SRB installment will be included in the first regular pay period following successful processing of the reenlistment, extension or re-extension transaction.**
If applicable	**PSC (MAS)**	**Payment of any leave being sold will be included in the first regular end-month payment following successful processing of the reenlistment/extension transaction.**
Note: The documents input by PSC (MAS) for credit of the SRB will not process in JUMPS until the reenlistment/extension/reextension document input by the SPO successfully processes.		

Checklist for Reenlistment or Extension

Introduction This checklist provides a job aid to be used when a unit/SPO is completing necessary tasks for reenlistments or extensions and should be used along with the Checklist for Separations in section B of this Chapter. It is designed to be reproduced locally.

Step	Action	Reference	Date
1	Ensure member meets eligibility requirements.	PERSMAN, 1-G	
2	Advise member: • Early reenlistment can effect SRB. The saved leave balance and regular leave balance on the effective date of separation. The number of days of leave previously sold during career. • If entering into an indefinite reenlistment, there will be no further opportunities to sell leave until separation or retirement.	PERSMAN, 3-C ALCOAST 317/04	
3	Counsel member on SRB program.	PERSMAN, 3-C	
4	Ensure CG-3307 entry is completed for citizens of the Republic of the Philippines (see Pg-7 Instruction for sample entry).	PERSMAN, 12-B-47 PPPM, Encl (6)	
5	Ensure member completes a CG PSC-2045 Career Intentions Worksheet and forwards to SPO.	PPPM, Encl (6)	
6	SPO forwards appropriate documentation to unit for member's signature.	PPPM	
7	Unit returns signed documentation to SPO for input into Direct Access.	PPPM	
8	If member intended to discharge and decides to reenlist/extend, ensure member submits new CG PSC-2040 (Allotment Worksheet) (if allotments stop).	PPPM, Encl (6)	
9	Explain Article 137, UCMJ and code of Conduct, Complete Page 7 (CG-3307) entry.	PERSMAN, 8-A-1 ALCOAST 049/00	
10	Verify U.S. citizenship.	PERSMAN, 1-G-5	

Continued on next page

Checklist for Reenlistment or Extension, Continued

SRB processing

Process table for Selective Reenlistment Bonuses.

WHEN	THEN
retention documents submitted by the SPO have successfully processed in JUMPS,	initial 50% SRB installment will be made within two pay periods.
lump sum payment is approved by COMDT (CG-1211)	lump sum SRB payments will be processed by PSC within 30 days after receipt and included in the member's first regular payment following successful processing of the reenlistment/extension transaction.

Rules for payment of lump sum leave upon reenlistment or first extension of enlistment

See Art. 7-A-20, PERSMAN for rules when selling leave upon reenlistment or entering the first extension an enlistment.

Payment for lump sum leave will be included in the first end month payment following successful processing of the reenlistment/or begin service under first extension transaction.

Procedures for members with more than 90 days remaining on first enlistment

Members who desire to sell leave, but are not within 90 days of their normal expiration of enlistment, should enter into an agreement to extend their enlistment to meet the obligated service requirement.

These members will be eligible to sell leave when their first extension of enlistment becomes effective.

Retention of Members in a Pay Status Other than Military Confinement

Introduction

This includes members retained for reasons of Home Awaiting Orders Status (HOAS), cutter at sea, national emergency, failure to pass separation physical, etc., when stoppage of pay, allowances, and allotments should not occur.

Reference

(a) PERSMAN, Chap 12-B-11
(b) PPPM, Chap 3-C
(c) PAYMAN, Chap 2-L
(d) Direct Access Online Manual, Contract Data

Procedures

Procedures required by the SPO for retention of members in a pay status other than Military confinement.

When	Action
Prior to retention	Review PERSMAN to determine length of time the enlistment is to be extended.
At least 45 days prior to effective date of retention	Prepare and transmit a Statement of Intent transaction to JUMPS.
Notes: (1) In cases of short notice (between 10 and 44 days prior to the retention date) the SPO is required to submit a Statement of Intent (SOI) transaction. (2) In cases less than 10 days prior to retention effective date, the SPO shall notify PSC (SES) in addition to preparing and transmitting an SOI.	
Effective date of retention	Prepare and transmit a new Contract in Direct Access to reflect the new EOE.

Retention of Members in a Non-Pay Status or in Military Confinement

Introduction

This includes member involuntarily retained because of military confinement, appellate leave, or any other non-pay status.

Reference

(a) PERSMAN, Chap 12-B-11
(b) PPPM, Chap 3-C
(c) PAYMAN, Chap 2-L
(d) Direct Access Online Manual, Contract Data

Procedures

Procedures required by the SPO for retention of members in a non-pay status or in Military confinement.

When	Action
Prior to retention	Review reference to determine length of time the enlistment is to be extended.
Note: Do not prepare a Statement of Intent transaction.	
Effective date of retention	Prepare and transmit new Contract in Direct Access to reflect the new EOE.

Active Duty Extensions of Reservists and Recall of Retirees

Introduction

This includes: Reservists on active duty being paid by JUMPS whose active duty period is extended; regular members retiring and immediately being recalled to active duty, and members currently in a recall from retirement status whose active duty is being extended.

Procedures

Follow these procedures for all cases of active duty extensions of Reservists and recall of retirees.

- For reservist active duty extensions, the Reserve Orders will be modified and approved.
- For recalled retiree active duty extensions, the assignment officer will create orders and those orders will automatically generate the appropriate Reserve Orders Direct Access transaction (P192), without any action required by the SPO.

When	Who Does It	What Happens
At least 45 days prior to effective date	SPO	Prepares and transmits a Statement of Intent transaction.
30 days prior to effective date	SPO	Modify and approve the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date.
Notes: (1) In cases of insufficient lead time (less than 10 days), the SPO shall notify PSC (SES) via E-mail and provide all relevant information that would have been provided on the Statement of Intent. (2) If the member's active duty is being extended via an amendment to the member's original orders and the Orders Order End Date has been modified and transmitted in Direct Access to reflect the new active duty termination date 45 days or more prior to the member's expected active duty termination date, then an SOI is not required.		

Immediate Enlistment in Coast Guard Reserve upon Discharge from the Regular Coast Guard

Introduction

Members in the regular Coast Guard being discharged may immediately enlist in the Coast Guard Reserve if they meet eligibility requirements.

Reference

(a) PERSMAN
Chap 1-G, Enlistment of Regular and Reserve Personnel
Chap 3-C, Selective Reenlistment Bonus Program
(b) Direct Access Guide:
Discharge to Immediate Enlistment
Statement of Intent

Definition

The term "Immediate Enlistment" means within 24 hours following separation from the regular Coast Guard.

Procedures

The ISC (fot) where the member will reside following separation from the regular Coast Guard must approve the member's E-Resume before the member may enlist in the Coast Guard Reserve.

Detailed instructions for completing and processing the E-Resume can be found at http://cgweb.uscg.mil/g-w/psc/Direct-Access/eresume/overview.htm. The process is summarized on the Checklist for Separations in Section 3-B of this manual.

If approved for enlistment in the Coast Guard Reserve the member shall be processed for discharge from the regular Coast Guard using the Routine Separation Procedures listed in Section 3-B of this manual, and rehired into the Coast Guard Reserve by the SPO servicing the member at the time of separation.

Enlistment in Coast Guard Reserve after 24 hours

Enlistment in the Coast Guard Reserve after 24 hours following discharge from the regular Coast Guard must be processed at a Coast Guard recruiting office.

Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard

Introduction

Coast Guard Reserve members serving on extended active duty of 12 months or more may be authorized to enlist in the regular Coast Guard if they meet eligibility requirements.

Reference

(b) PERSMAN
Chap 1-G, Enlistment of Regular and Reserve Personnel
Chap 3-C, Selective Reenlistment Bonus Program
(b) Direct Access Guide:
Discharge to Immediate Enlistment
Statement of Intent

Procedures

The member shall be processed for discharge from the Coast Guard Reserve and for enlistment in the regular Coast Guard by the regular SPO handling the member's records, using the following procedures:

When	Who Does It	What Happens
In time to allow approval prior to date of reenlistment	Member	Submits letter request for reenlistment to Commander (CGPC-EPM) via chain of command as prescribed in the reference.
At least 45 days prior to effective date of separation or departure on terminal leave.	SPO	Prepares and transmits a Statement of Intent (SOI) transaction to JUMPS.
Day of discharge	Unit	Delivers DD form 214 to member.
	SPO	Transmits a Discharge Separation transaction.
Day following discharge If applicable	SPO PSC (MAS)	Transmits a Rehire transaction. Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the Selective Reenlistment Bonus.

Continued on next page

Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard, Continued

Reservist on extended active duty	Coast Guard Reserve members who desire to enlist in the regular Coast Guard, and who are NOT currently on extended active duty of 12 months or more, must be processed at a Coast Guard recruiting office.

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for processing enlisted advancements and CWO appointments, recording educational accomplishments, and adding or deleting qualification codes. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Enlisted Advancements	4-A-1
B	Warrant Officer Appointments	4-B-1
C	Education and Qualifications	4-C-1

This page left blank intentionally.

Section Overview

Introduction

This section will guide you through the procedures for advancing a member.

In this section

Topic	See Page
Headquarters Advancement Checklist	4-A-2
Commanding Officer Advancement Process	4-A-3
Commanding Officer Advancement Checklist	4-A-4

Headquarters Advancement Checklist

Introduction

Following each Servicewide exam PSC (ADV) and CGPC (epm) will publish eligibility lists and a series of Enlisted Personnel Advancement Authorizations (EPAA), for active duty personnel, or Headquarters Reserve Advancement Authorizations (HRAA) for reservists. An EPAA or HRAA is notification of who will be advanced and on what date the advancement will be effective.

Reference

(a) PERSMAN
(b) PPPM
(c) Weight Instruction

Checklist

Use the following checklist when a member is authorized by an EPAA or HRAA to be advanced.

Step	Action	Reference	Date
1	Ensure member meets weight standards	Weight Instruction	
2	• Complete Petty Officer Advancement Certificate for advancement to E-4 through E-6. • Certificate for E-7 through E-9 will be completed by PSC (ADV)	PERSMAN, 5-C-35	
3	• Issue new ID card DD-2CG	PPPM	
4	• Remove member from "A" school list • (members in pay grade E-3 only)	PERSMAN, 5-C-29	
5	• Complete performance evaluations • (if applicable)	PERSMAN, 10-B-5	
6	• Ensure member has sufficient obligated service for advancement to E-7, E-8, or E-9 and complete appropriate CG-3307. **Note:** A person authorized advancement who cannot meet the obligated service requirement due to high year tenure will be advanced as long as they obligate to their professional growth point.	PERSMAN, 5-C-25 PPPM, Encl (6), A&R2	

Commanding Officer Advancement Process

Introduction

The advancement process is broken down into stages by what needs to be completed and who is responsible.

Advancement process

This table identifies the process for advancement to E-3 and designated class A school graduate's advancement to E-4.

Stage	Who does it	What Happens
1	Member	Completes EOCT and Performance Qualifications. Submits Career Development Worksheet (CG PSC-2030) (encl. (1) to this manual).
2	CO of Unit	Ensures member is eligible, approves request and forwards Career Development Worksheet to the SPO with special evaluations, if needed.
3	SPO	Completes advancement transactions.

Commanding Officer Advancement Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required for advancing a member. This job aid is designed to be reproduced locally.

Usage

The Commanding Officer Advancement Checklist can be used to complete the necessary transactions on a member for:

- Advancement.
- Adding a designator.
- Removing a designator.
- Change in rating.
- Reduction in rate (use the Disciplinary Actions page for reductions awarded as the result of CO's NJP or Courts-Martial).

This checklist is not used for:

- Members who are being advanced by the EPAA or HRAA.

IAW 10-B-5 of the PERSMAN, advancement evaluations are only completed for those members being advanced to E7 and above.

Advancement checklist

Action when the CO authorizes a member to be advanced.

Step	Action	Reference	Date
1	Unit ensure member is eligible for advancement and advancement is not retroactive	PERSMAN, 5-C-3 and 5-C-28	
2	Complete Career Development Worksheet, CG PSC-2030	PPPM, Encl. (1)	
3	SPO completes Direct Access transactions Develop Workforce > Career Management > Use > Adv/Promote One Member	Direct Access Guide for Advancements	
4	Unit complete CG-5530 or DD Form 216 CG	PERSMAN, 5-C-35	
5	Issue ID cards (if applicable)	PPPM	
6	Complete advancement evaluation when applicable	PERSMAN, 10-B-2	

Section Overview

Introduction

This section will guide you through the warrant officer appointment process

In this section

Topic	See Page
Warrant Officer Appointment Process	4-B-2
Warrant Officer Appointment Checklist	4-B-3
Warrant Officer Appointment Process (Reserve)	4-B-4
Warrant Officer Appointment Checklist (Reserve)	4-B-5

Warrant Officer Appointment Process

Introduction

The Coast Guard Personnel Command CGPC (opm-1) is the owner of the CWO Appointment Board Process. In November of each year CGPC will release an ALCGPERSCOM announcing the timeline for the next CWO Appointment Board. This message will establish responsibilities and cutoff dates.

Reference

(a) PERSMAN, 1-D

Process

Here is the warrant officer appointment process.

Stage	Who Does It	What Happens
1	Member	Meets all eligibility requirements by 1 January
2	Member	Prior to published cutoff date: • Submits request to CO to obtain recommendation • Once recommendation obtained submits E-resume in Direct Access
3	CO of Unit	Completes E-interview in Direct Access to enter member in process
4	Direct Access	Produces PDE for member's validation.
5	Direct Access	Produces Profile Letter
6	CGPC (opm-1)	Publishes pre-board eligibility list via ALCGPERSCOM
7	Member	Submits Resume if listed as a primary or alternate candidate
8	CO of Unit	Submits OER and an initial endorsement to member's resume prior to established cutoff date.
9	CGPC (opm-1)	Convenes selection board Publishes selection list

Warrant Officer Appointment Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required when a member is selected for **appointment** to warrant officer. This job aid to designed to be reproduced locally.

Reference

(a) PERSMAN, 1-D

Procedures

Procedures required upon selection to warrant officer

Step	Action	Reference	Date
1	Ensure physically qualified for appointment (within 12 months of appointment).	1-D-11 PERSMAN	
2	Review SRB entitlement	SRB Instruction	
3	Endorse Appoint letter		
4	Ensure weight requirements are met	Weight Instruction	
5	Execute Oath of Office, CG-9556	1-D-11 PERSMAN	
6	Complete ID card(s)	PPPM	
7	Appointee mails copy of Oath of Office and Physical to CGPC (opm-1)	1-D PERSMAN	

Warrant Officer Appointment Process (Reserve)

Introduction

The warrant officer appointment process for reserve members is broken down into stages by what needs to be completed and who is responsible.

Reference

(a) RPM, 7-B

Process

Process table for selection to warrant officer

Stage	Who Does It	What Happens
1	Member	Meets all eligibility requirements under 7-B-1, RPM
2	Member	Prior to 1 December: • Updates BI or NAC (if required) • Submits request • Completes required ADT
3	CO of Unit	Sends SPO, via letter, names of recommended candidates NLT 1 Jan
4	SPO	Enters CO's recommendation into PMIS NLT last update in Jan. **Note**: The SPO must reenter the CO's recommendation and CWO exam specialty for each cycle (annually) that the member is recommended to participate.
5	PSC	Produces PDE for member's review
6	PSC	Develops pre-board total scores
7	COMDT	Publishes list of candidates and alternates eligible for consideration via ALDIST in Feb/Mar
8	CO of Unit	Submit WO recommendation files on candidates directly to district (a) NLT 1 May
9	District	Submits recommendation files to arrive COMDT (G-WTR) NLT 15 Jun
10	COMDT	• Convenes selection board in Aug • Publishes selection list Aug/Sep

Warrant Officer Appointment Checklist (Reserve)

Introduction

This checklist has been provided as a job aid to assist the unit/SPO in completing all necessary tasks required when a reserve member is selected for **appointment** to warrant officer. This job aid is designed to be reproduced locally.

Reference

(a) RPM, 7-B

Procedures

Procedures required upon selection to warrant officer

Step	Action	Reference	Completed
1	Ensure physically qualified for appointment.	RPM, 7-B-1	
2	Ensure weight requirements are met.	Weight Instruction	
3	Endorse appointment letter.		
4	Execute Oath of Office, CG-9556	CG-9556	
5	Complete Officer Uniform Allowance Claim, PSC-5100	PPPM, Encl. (1)	
6	Complete ID Card(s)	PPPM	

This page left blank intentionally.

Section Overview

Introduction

This section will guide you through the process and procedures to report completion of formal training courses, educational accomplishments, and qualification changes.

In this section

Topic	See Page
Training and Educational Accomplishments	4-C-2
Individual's Record of Small Arms Training	4-C-4
Lump Sump Payments to VEAP or MGIB-K Programs	4-C-5
Managing Competencies	4-C-7
Insignia	4-C-8

Training and Educational Accomplishments

Introduction

Completion of Coast Guard formal training courses (Class "A" and "C" schools) must be recorded in the Direct Access system. Other educational accomplishments shall be recorded in the Training Management Tool (TMT) application in accordance with COMDTINST 5270.2, Mandatory Use of the Training Management Tool.

References

(a) Training & Ed Man, Chap 4
(b) RPM, 8.C.9
(c) Direct Access Online Manual, Member Competencies :

Formal Training Courses

This is the process of reporting completion of a formal training course:

Stage	Who Does It	What Happens
1	Member	Completes a Career Development Worksheet (CG PSC-2030) **Note:** If more than one member of the unit attended the same course, at the same time, the unit may submit a list of attendees in lieu of individual worksheets.
2	Unit	Forwards worksheet or list of attendees to SPO or
3	SPO/Unit	Completes appropriate Direct Access transaction. Direct Access path: Develop Workforce > Manage Competencies (GBL) > Use > Training

Retest of enlisted battery tests

This is the process for reporting a retest of an enlisted battery test.

Stage	Who Does It	What Happens
1	Unit	• Provides a copy to the member • Forwards a letter documenting a retest to SPO or
2	SPO/Unit	Completes appropriate Direct Access transaction. Direct Access path: Develop Workforce > Recruit Workforce > Use > Test Results

Continued on next page

Section Overview, Continued

Change in language competency

This is the process for reporting a change in language competency.

Stage	Who Does It	What Happens
1	Member	Completes Defense Language Proficiency Test (DLPT)
2	ESO	Enters DLPT results in Direct-Access Develop Workforce > Manage Competencies (GBL) > Use > **Foreign Language Test Results**

Off duty educational accomplishments

This is the process for reporting completion of an off duty course of study such as completing a GED or earning a college degree.

Stage	Who Does It	What Happens
1	Member	Provides documentation to ESO
2	Unit/ESO	Forwards copy of documentation to the SPO
3	SPO/Unit	Records accomplishment in Direct-Access. Home > Develop Workforce > Manage Competencies (GBL) > Use > Education

Record Of Professional Development

In addition to the methods listed above for entering training and education data in Direct-Access, form CG-4082, Record Of Professional Development (RPD) may be used to report accomplishments. This form offers active duty, and reserve personnel the opportunity to record their professional development accomplishment to CGPC-ADM-3 where it will become a part of their official record. The procedure is voluntary and does not affect Direct-Access entry.

Individual's Record of Small Arms Training

Introduction

The Individual's Record of Small Arms Training (CG-3029A) provides a chronological summary of an individual's small arms qualifications and awards. Prepare this form when the member participates in small arms training.

Reference

(a) Ordnance Manual, COMDTINST M8000.2C

Preparation

The instructions for completion of the CG-3029A are on the reverse side of the form. Upon completion, file the original in the unit PDR, (if maintained) otherwise in the training record, and forward a copy to the SPO.

Types of awards

Members who qualify with a pistol or rifle will receive a Marksman (M), Sharpshooter (S), or Expert (E) award according to the qualifying score.

Award breakdown

See enclosure (9) (for pistol) or enclosure (12) (for rifle) of reference (a) for the qualification and breakdown of scores when completing CG-3029A.

Competency Code Updates

The Competency Codes for a member who qualifies with a pistol, rifle or shotgun must be updated in Direct-Access.

Code	Weapon
MAREP	Pistol Qualification
MARER	Rifle Qualification
MARES	Shotgun Qualification

Lump Sum Payments for Veterans Education Assistance Program (VEAP) or Montgomery GI Bill (MGIB) Additional Contributions and Request for VEAP Refunds

Introduction

This section provides the procedures for making lump sum payments for educational benefit programs and for requesting a refund of contributions made under VEAP.

Reference

(a) Training & Ed Man, 3-D-3
(b) PAYMAN, 7-D
(c) GI Bill Website - http://www.gibill.va.gov/
(d) COMDTINST 1760.9(series), Montgomery G.I. Bill (MGIB) - Active Duty Education Assistance Program
(e) The Veterans Benefits And Health Care Improvement Act of 2000 (Public Law 106-419)

VEAP

The Veterans Education Assistance Program (VEAP) was available to any member who first became a member between 1 January 1977 and 30 June 1985. Participating members, who had an "E" type allotment in the past, may make a lump sum payment to bring their total contribution up to $2700, in order to convert their VEAP eligibility to MGIB.

MGIB Additional Amount

Effective May 1, 2001, qualified members can increase their monthly MGIB benefits by contributing additional funds up to $600. Members with sufficient remaining time in service may make the additional contribution via an allotment. Monthly deductions are made in increments of $20 with a minimum contribution of $20. The total additional contribution will not exceed $600. Members separating from the service may elect to make a lump sum contribution.

- Members desiring to make the additional contribution via an allotment should complete an Allotment Worksheet (CG PSC-2040) and forward it to their SPO.
- Lump sum contributions shall made in accordance with the procedure on the following page.

Continued on next page

Lump Sum Payments for Veterans Education Assistance Program (VEAP) or Montgomery GI Bill (MGIB) Additional Contributions and Request for VEAP Refunds, Continued

Procedure for lump sum VEAP or MGIB payment

This is the process for making lump sum payments for contributions to VEAP or MGIB-K accounts:

Stage	Who does it?	What Happens
1	Member	Contacts SPO
2	SPO	Determines if amount being deposited is a valid amount (e. g. Member is eligible and has not already made the maximum contribution).
3	Member	Prepares a check or money order payable to U. S. Coast Guard with the following information: 1. Name 2. SSN 3. Total amount of lump sum and period covered by the lump sum. Mails payment to: ATTN: COLLECTION CLERK COMMANDING OFFICER (MAS-DC) USCG PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591

Procedure for VEAP refund

Use this procedure to request a VEAP refund.

Step	Action
1	Complete application for Refund of Educational Contributions (VA Form 4-5281) items 1-10 must be completed.
2	Mail application to: ATTN: VOUCHER SECTION COMMANDING OFFICER (DC) USCG PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA, KS 66683-3591
3	Member should receive refund within 90 days.

Managing Competencies (Qualification Codes)

Introduction

Competencies **(formerly known at Qualification Codes)** are used as a means of recording a member's accomplishments while in service. This section helps you determine when to add or delete competencies.

Reference

(a) Qual Code Man, Chap. 2, Enlisted Qualification Code Assignment
(b) Direct Access Guide, Competencies

Direct Access Path

Home > Develop Workforce > Manage Competencies (GBL) > Use > Competencies

Adding a competency

Add a competency for a member.

WHEN	THEN
A member completes a school on orders issued by TQC and receives a competency	Direct Access automatically updates the member's record to reflect the additional competency
A member completes school on orders issued by other than TQC and receives a competency	Forward Career Development Worksheet (CG PSC-2030) to the SPO. SPO will complete Direct Access competencies transaction.
A member is assigned a competency (qualification code) by the unit CO	The CO will forward a letter or a worksheet to the SPO and provide a copy to the member. SPO will complete Direct Access competencies transaction.
A member completes small arms training and receives a competency	Forward Career Development Worksheet (CG PSC-2030) to the SPO. SPO will complete Direct Access competencies transaction.

Insignia

Introduction

When a member becomes qualified to permanently wear an insignia, such as that for Company Commander or Marine Safety, this competency must be entered into Direct Access.

Reference

(a) Direct Access Guide, Competencies

Direct Access Path

Home > Develop Workforce > Manage Competencies (GBL) > Use > Competencies

Reporting this competency

When a member becomes qualified to permanently wear an insignia, the following must occur:

Stage	Who does it	Action to be taken
1	UNIT	• Prepare a designation letter to the member; • Copy of the designation letter will be sent to the SPO; **or**
2	UNIT/SPO	Will record this honor or award in Direct Access using appropriate honor or award code.

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

Section	Description	See Page
A	Decedent Affairs	5-A-1
B	Dependent Affairs	5-B-1
C	Maintenance of Personnel Information	5-C-1
D	Miscellaneous	5-D-1

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

Topic	See Page
Designation of Beneficiaries and Emergency Data	5-A-2
Servicemembers' Group Life Insurance (SGLI)	5-A-4
SGLI Family Coverage	5-A-11
Casualty Reporting	5-A-14

Designation of Beneficiaries and Emergency Contacts

Introduction

To designate beneficiaries, complete a Designation of Beneficiaries form (CG PSC-2020D, from http://www.uscg.mil/hq/psc/forms/psc2020d.pdf) and submit to the SPO. The CG PSC-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.

Reference

(a) PAYMAN, Chap 3-F and 10-K
(b) Direct Access, Dependency/Emergency Data Activity Guide

Purpose

The Designation of Beneficiaries 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

Annual Verification

Annually, during the month of November, members must verify their Designation of Beneficiaries form (CG PSC-2020D) and computer generated Emergency Contact Information. Refer to Section 5-C of this manual for procedures on the annual verification.

Continued on next page

Designation of Beneficiaries and Emergency Contacts,
Continued

When to submit the CG PSC-2020D

The Designation of Beneficiaries (CG PSC-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

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

Servicemembers' Group Life Insurance (SGLI)

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.

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 (CG SGLI Homepage)
(c) http://www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/SGLI.htm (CG Military Personnel's SGLI homepage)
(d) Direct Access Online Manual, SGLI (http://www.uscg.mil/hq/psc/ps/persru/elections_and_beneficiaries.htm)

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.

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.

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

Servicemembers' Group Life Insurance (SGLI)

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 PSC (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 PERSONNEL SERVICE CENTER
ATTN: SGLI
444 SE QUINCY STREET
TOPEKA KS 66683-3591

Procedures for electing coverage or increased coverage previously declined or decreased

Use Request for Insurance, form SGLV-8285, in accordance with instructions contained on the back of the form.

Visit http://www.insurance.va.gov/sgliSite/forms/forms.htm for SGLV forms.

Use the table on the following page to determine if approval by the Office of Servicemembers' Group Life Insurance (OSGLI) is required before coverage can be increased or restored:

Continued on next page

Servicemembers' Group Life Insurance (SGLI), continued

If	Then
Member answers "NO" to item 11, and all parts of items 12 and 13	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 - CGPC (adm-3) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)
Member answers "YES" to item 11 or any part of item 12 or 13	The original SGLV-8285 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 at the SPO. Photocopies of the "Approval" are distributed as follows: Photocopy 1 - CGPC (adm-3) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)

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.

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.pdf.

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

Instructions for completing the SGLV-8286

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

Designating the Beneficiary(ies) Member's absolute authority to designate or change a beneficiary

- Under federal law, the member has the absolute right to name whomever they want as their beneficiary and to change their beneficiary at any time without the knowledge or consent of the prior beneficiary.
- When a member does not designate a surviving dependent or parent as their beneficiary, a responsible representative should counsel the member to the fact that the Servicemembers' Group Life Insurance Act was specifically designed to provide some form of security for dependents or parents. The member should be encouraged to designate such dependents or parents as beneficiaries. When dependents or parents are disregarded as beneficiaries, it is desirable that the member files a written statement in their PDS along with their SGLV–8286 stating they voluntarily selected their beneficiary (ies).

Designations of beneficiaries who are minors

See Ref (a), 6.04.

If member does not designate a Beneficiary (ies)

See Ref. (a), 6.06.

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

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 immediately sign and date the form as the USCG representative. 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
USCG Representative Signature and date

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.

A unit representative must sign and date 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 sign his or her name below the member's signature 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 and signed 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.

Common errors on the SGLV-8286

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

- The member does not sign the form.
- When the form is completed by the member, there is no received by or received date.
- The form is not filed in the member's unit PDR and SPO PDR.
- The sum total of either the primary or contingent beneficiaries does not equal 100%.

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

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 signs and dates 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 - CGPC (adm-3) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional) **Note:** The distribution printed on the SGLV-8286 itself should be disregarded.
3	SPO	Enters SGLI information in Direct-Access Direct Access path: Home > Compensate Employees > Administer Base Benefits > 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 page 5-A-6 of this section.

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

Continued on next page

Servicemembers' Group Life Insurance (SGLI), Continued

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>
<Address2>
<City>, <ST> <Zip>

Dear <Mr. or Ms.> <SpouseLastName>: *(Salutation may be omitted)*

Your spouse, <MemberFirstName>, recently made changes to the amount of coverage or beneficiary designations for a life insurance policy. The change may affect you. In accordance Public Law 109-63 we are required to notify a servicemember's spouse whenever a member declines coverage, reduces the amount of insurance coverage or names a principal beneficiary other than the member's spouse or child.

The insurance coverage is provided under Servicemembers' Group Life Insurance (SGLI). It is a low-cost group life insurance program for active duty and ready reserve members of all military services. Coverage is available in $50,000 increments up to the maximum of $400,000. The monthly premium rate is $3.25 per $50,000. For the maximum coverage the premium is $26 per month. <MemberFirstName> has $<coverage> in effect.

*(This section may be omitted member named spouse or child as beneficiary)*The revised beneficiary designations are listed below. The change was effective as soon as it was signed, on <DateChanged>.

<Beneficiary1>	<Benefit1> *(Label clearly as dollars or percent)*
<Beneficiary2>	<Benefit2>

There is no requirement for you to reply to this letter. We are merely required to keep you informed of changes.

Sincerely,

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

Copy: Member

Sample Spousal Notification Letter

SGLI Family Member Coverage

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.

Reference:

(a) Servicemembers' and Veterans' Group Life Insurance Handbook Chap 10
(b) http://www.insurance.va.gov/sgliSite/SGLI/SGLI.htm (CG SGLI Homepage)
(c) http://www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/SGLI.htm (CG Military Personnel's SGLI homepage)
(d) ALCOAST 282/03

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 page 5-A-5 of this manual 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

SGLI Family Member Coverage, Continued

Coverage Amounts

See Ref. (a), 10.01

Cost of Coverage

See Ref. (a), 10.04

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.

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/8286a.pdf), 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.

Reinstating/ Increasing Family Coverage

See Ref. (a), 10.07

Spousal Notification

Units must notify the member's spouse, by letter, when the member declines SGLI or Family Member SGLI coverage. 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

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

Commanding Officer
United States 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 declining coverage. Your spouse elected to:

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

___ Decline his/her SGLI Family (spouse) Coverage

Sincerely,

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

Casualty Reporting

Introduction

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

Reference

(a) PERSMAN, Chap 11-A, Casualties
(b) PPPM, Encl. (7)

Reporting procedures

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

Examples of the following are contained in Ref: (b) of this manual.

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

Inventory and Disposition of Personal Effects

In cases where a member dies or is missing, complete a CG-3853 (Personal Effects Inventory and Disposition) in accordance with Ref: (a). Distribute the form as follows:

Original and two copies: To the officer designated by the Commanding Officer to assume custody of the effects.

- 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. IAW PERSMAN, Art. 11-A-11.b (3)

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

Continued on next page

Casualty Reporting, Continued

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, which is reprinted as Appendix (D) to this manual.

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

Topic	See Page
Dependency Information	5-B-2
BAH/Dependency Data Form	5-B-4
TRICARE Dental Plan	5-B-6
Applying for a Uniformed Service Identification and Privilege Card (DD Form 1173)	5-B-8
Verification of Eligibility for the DD Form 1173	5-B-10
Reserve Family Member Identification Card (DD Form 1173-1)	5-B-12
Information concerning the Application For Uniformed Services Identification Card-DEERS Enrollment (DD Form 1172)	5-B-14
Defense Enrollment Eligibility Reporting System (DEERS)	5-B-16

Dependency Information

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.

References

(a) PAYMAN
(b) ID Cards (DODINST 1000.13) Procedures for manually issued (non-RAPIDS) ID cards.
(c) COMDTINST M5512.1(series), Identification cards for members of the uniformed services, their eligible family members, and other personnel.
(d) Direct Access, Dependency/Emergency Data Activity Guide

Responsibility

The member has responsibility for reporting dependency status changes. Complete a Dependency Worksheet (CG PSC-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 form SGLV-8286A, Family Coverage Election (SGLI), whenever a married member is accessed into the service and when a member's marital status changes.

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

Dependency Information, Continued

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.

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	COMDTINST M5512.1 (series)
Designation of Beneficiaries (CG PSC-2020D)	Casualty reporting, list next of kin and designate beneficiaries	PPPM 5-A
Dependency Worksheet (CG PSC-2020)	Provide dependency information to SPO and also to determine eligibility for payment of BAH with dependents	PAYMAN Chap 3-F
DOD Guard and Reserve Family Member ID Card DD-1173-1	Identify dependents of Ready Reserve Members	COMDTINST M5512.1 (series)
Full-Time Student Statement (CG PSC-2020B)	Supporting documentation for a member claiming a child over age 21 as a dependent (Support Statement CG PSC-2020A also required, see below).	COMDTINST M5512.1 (series) & PAYMAN Chap 3-F
SGLI Election and Certificate (SGLV-8286)	Elect SGLI amount and designate beneficiaries	PPPM 5-A
SGLV-8286A, Family Coverage Election	Married members must make an election or specifically decline Family SGLI coverage	PPPM 5-A
Support Statement (CG PSC-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.	COMDTINST M5512.1 (series) & PAYMAN Chap 3-F
Uniformed Services Identification and Privilege Card (DD-1173)	Identify individual eligible for dependent benefits and privileges	COMDTINST M5512.1 (series)

BAH/Dependency Data Form

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 Dependency Worksheet (CG PSC-2020) with the new data to their SPO. Instructions for completing the CG PSC-2020 are on the back of the form. Members must also submit form SGLV-8286A, Family Coverage Election (SGLI), whenever their marital status changes.

References

(a) PAYMAN, Chap 3-F
(b) ID Cards (DODINST 1000.13) Procedures for manually issued (non-RAPIDS) ID cards.
(c) COMDTINST M5512.1(series), Identification cards for members of the uniformed services, their eligible family members, and other personnel.
(d) Direct Access, Dependency/Emergency Data Activity Guide

Purpose

The BAH/Dependency Data form 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
- 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.

Annual Verification

Annually, during the months of October and November, members must verify their computer generated BAH/Dependency Data form. Refer to Section 5-C of this manual for procedures on the annual verification.

Continued on next page

BAH/Dependency Data Form, Continued

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

Cases not to use the Dependency Worksheet (CG PSC-2020)

Do not use the CG PSC-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

When to submit the Designation of Beneficiaries (CG PSC-2020D

The CG PSC-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 PSC approval of the dependent, a copy of the new BAH/Dependency Data form must be forwarded to PSC (lgl).

Tricare Dental Plan

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.

Reference

(a) PAYMAN 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/tdptws/forms/TDP_Booklet_Lo_Res.pdf

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.

Eligibility / Enrollment requirements

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

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

Tricare Dental Plan, Continued

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.
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.
Disenrollment procedure	See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for disenrollment procedures.
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.
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.
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.

Applying for a DD Form 1173

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.

References

(a) PERSMAN, Chap. 18-C, Uniformed Service Identification and Privilege Card, DD Form 1173
(b) ID Cards (DODINST 1000.13) Procedures for manually issued (non-RAPIDS) ID cards.
(c) COMDTINST M5512.1A, Identification cards for members of the uniformed services, their eligible family members, and other personnel, Chap. 15,

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

Applying for a DD Form 1173, Continued

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 PSC 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 PSC 2020A) (*See note*) • Full-Time Student Statement, (CG PSC-2020B) **Note**: The Support Statement, (CG PSC 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 PSC 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 PSC 2020C) • Certified copies of marriage and divorce decrees

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 COMDTINST M5512.1A, Identification cards for members of the uniformed services, their eligible family members, and other personnel.

Verification of Eligibility for the DD Form 1173

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.

Reference

(a) PERSMAN, Article 18-C-2, Eligibility
(b) COMDTINST M5512.1A, Identification cards for members of the uniformed services, their eligible family members, and other personnel, Chap. 15,

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

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 PERSONNEL SERVICE 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

Continued on next page

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

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.

Reserve Family Member Identification Card

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.

Reference

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

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 PSC (RAS)

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.

Continued on next page

Reserve Family Member Identification Card, Continued

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.

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.

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.

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.

Instructions

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

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.

Information Concerning the DD Form 1172

Introduction

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

Reference

(a) PERSMAN, Chap 18-C, Uniformed Service Identification and Privilege Card.
(b) ID Cards (DODINST 1000.13) Procedures for manually issued (non-RAPIDS) ID cards.
(c) COMDTINST M5512.1A, Identification cards for members of the uniformed services, their eligible family members, and other personnel, Chap. 11 and Attachment 3

Preparation of DD Form 1172

Detailed instructions on how to complete the DD Form 1172 can be found in Ref. (b) and (c) which are available from the PPPM web page at http://www.uscg.mil/hq/psc/3pm.htm. Ref (c) gives block-by-block descriptions.

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.

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.

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

Information Concerning the DD Form 1172, Continued

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."

Questionable cases

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

Privileges authorized

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

Defense Enrollment Eligibility Reporting System (DEERS)

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.

Data on sponsors

Data on sponsors is provided to DEERS through magnetic tape submission from PSC 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.

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 or floppy diskette applications should contact the appropriate district or MLC personnel office for local procedures used to update DEERS.

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.

Continued on next page

Defense Enrollment Eligibility Reporting System (DEERS), Continued

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).

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.

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

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.

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.

This page intentionally blank

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.

Topic	See Page
Annual Verification of BAH, Dependency, Beneficiaries, SGLI, and Emergency Data	5-C-2
Requesting Statements of Creditable Service	5-C-4
Personnel Data Information File (PDIF)	5-C-8
Personnel Data Extract (PDE)	5-C-9
Security Clearances	5-C-10
Transcript of Sea Service (TOSS)	5-C-11

Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts

Introduction Annually beginning in October, members must verify their BAH, dependency, beneficiaries, SGLI and emergency data.

Reference
(a) PAYMAN
(b) PERSMAN
(c) Direct Access Guides
- Annual BAH/Dependency Validation
- Emergency Data
- SGLI Election

Verification Procedures Here is how verification of the BAH, Dependency, SGLI, Beneficiaries and Emergency Contacts works:

Stage	Who Does It/ When	What Happens
1	SPO/1st Week of October	Forwards the following forms and worksheets to units: • Direct Access BAH/Dependency Data Forms • Direct Access Emergency Contact Information Report • Copies of member's SGLI Elections forms (SGLV-8286 & SGLV-8286A) • Copy of member's Designation of Beneficiaries (CG PSC-2020D) form **Note:** If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms and Designation of Beneficiaries 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 the member for verification. Also provides members with blank, or with instructions to access, Designation of Beneficiaries Form (CG PSC-2020D).

Continued on next page

Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

Verification Procedures, Continued

Stage	Who Does it/ When	What Happens
3	Member NLT 30 Nov	1. Completes Designation of Beneficiaries Form (CG PSC-2020D). Forwards original to SPO, retains copy for Unit PDR if one is maintained. 2. Reviews BAH/Dependency Data for accuracy: • Annotates any necessary changes or corrections. • If single member with dependents, or member married to member with dependents, certify availability for worldwide assignment IAW reference (b), Art. 4.A.6.g. • Signs and dates in the "Members Certification" area. • Returns to SPO, includes Dependency Worksheet (CG PSC-2020), and supporting documentation 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/SPO data entry.
4	SPO	Enter, into Direct Access, any changes or corrections the member noted using the appropriate process: • 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.**) • Files SGLI forms, BAH/Dependency forms and CG PSC-2020D forms in section 4 of SPO PDR.

Requesting Statements of Creditable Service

Introduction

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

When to Request

Always request a SOCS/SOCSS for members who meet any of these criteria:

- Newly accessed USCG/USCGR member with prior service that has not been verified by prior issuance of SOCS. Request for SOCS should be submitted by the accession processing point (as listed in section 3-A-4 of this manual).
- Any reserve member entering Extended Active Duty (EAD) must have request for a SOCS submitted for ADBD verification regardless of the fact that a SOCS may have been previously completed.
- Any disputed service.

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

Procedure for requesting Statements of Creditable Service

This is the procedure for requesting statements of creditable service/sea service.

Stage	Who Does It	What Happens
1	Unit/Member	Reviews the member's PDR and any supporting documents the member has, notes the specific period of service/sea service the member is disputing and forwards to the SPO. • Members can help the process by providing any documents they have that substantiate prior service, such as a DD Form 214, any reserve point statements, orders, or a Navy Statement of Service. • If a member requests career sea service validation for the purpose of Merchant Marine licensing, be aware that the document required by the Merchant Marines is a Transcript of Sea Service (TOSS) (PSC 1075). Do not confuse this with a SOCSS, because the TOSS will include periods of service aboard vessels not eligible for sea pay/time (see 5-C-9 of this section for requirements on requesting TOSS).
2	Unit	Forwards SOCS request (memo) to SPO. Include: • Member's full name, Employee ID Number, service branch, and period of service

Continued on next page

Requesting Statements of Creditable Service Continued

Procedure for requesting Statements of Creditable Service, Continued

Stage	Who Does It	What Happens
2	**Unit (Cont'd)**	• Supporting documentation (DD-214s, AD orders, etc.) • A Privacy Act Release Statement if the member is claiming credit for service in any branch other than the Coast Guard or Coast Guard Reserve (other service personnel centers and the National Archives require a Privacy Act Release Form, signed by the member, before they will release documentation to the Coast Guard). A sample Privacy Act Release Statement is shown as Exhibit 5-C-1 on page 7 of this section
3	**SPO**	Reviews the Direct Access database to verify whether or not a SOCS has already been completed. **Direct Access path:** Home > Administer Workforce > Administer Workforce (GBL) > Use > Statement of Creditable Service • If a SOCS has not been completed, and it can be verified that the member is not receiving credit for a specific period of *prior* service/sea service, endorse the memo request from the unit accordingly and forward it to PSC (SES) VERY IMPORTANT: If there is a DD-214 or other documents supporting creditable service and/or sea service, and the member's pay base date, active duty base date or sea pay longevity is incorrect, the member can request an immediate adjustment. *The request must be sent to PSC (SES) and must indicate:* *"The member has been counseled and understands that if the pay base date, active duty base date or total sea time, based on the DD-214, is not supported by the prior service records, the member may be in an overpaid status".* **Note:** Please ensure that periods of Coast Guard sea service or ADT that are in dispute are processed by the SPO in Direct-Access. There is no need to request a SOCS/SOCSS in these instances because the transmitted documents will result in the member's JUMPS account being adjusted correctly.

Continued on next page

Requesting Statements of Creditable Service, Continued

Procedure for requesting Statements of Creditable Service, Continued

Stage	Who Does It	What Happens
4	**PSC**	Verifies and validates all periods of prior service (all branches) and sea service to adjust a member's Pay Base Date (PBD), Active Duty Base Date (ADBD) or cumulative sea service time. • With supporting documentation provided by the member, makes interim adjustment to member's service dates and/or sea service time. The member must provide a statement indicating that the interim adjustment may put him/her in an overpaid status (as discussed in stage 3 on previous page). • Request records from Headquarters or from the appropriate record center (if applicable). • Verifies dates. • Issues member a SOCS (PSC Form 1071) and/or a SOCSS (PSC Form 1072). • Makes necessary adjustments to member's pay account. **Note:** Completing the process can take from 3 to 6 months, depending on how quick the other Service responds to the request. The most difficult part of this process is retrieving the necessary information needed from the other Services. Please allow 90 days for processing of SOCS/SOCSS requests by PSC before submitting any follow-up or tracer requests.
5	**SPO**	Once the SOCS/SOCSS has been forwarded to the SPO, ensure a copy is retained in the SPO PDR, and forward a copy to the unit requesting verification. **Note:** If the original SOCS/SOCSS is found to be in error, because of an incorrect date or missing period of service/sea service, please forward the original SOCS/SOCSS with all documentation to PSC (SES) by memo, with the periods in dispute clearly addressed.
6	**UNIT**	After PSC completes the SOCS/SOCSS and the SPO forwards the package to the unit, the member should be made aware of the impact the SOCS/SOCSS will have on his/her PBD, ADBD, or cumulative sea service. Member should also be aware that a credit or debit to his pay will probably occur due to the change in his/her PBD, ADBD, or cumulative sea service. **Note:** Unit should ensure member understands and agrees with SOCS/SOCSS and then notify SPO by deadline date contained in the letter.

U. S. Coast Guard Privacy Act Release Statement

NAME: _____
(**please print**)

SSN#: _____

ADDRESS: _____

_____

_____

PHONE NO.: _____

In accordance with the Privacy Act of 1974 (U.S.C. 552a(e)(3)), I authorize release of the requested military service information/documents to the address below for official use only.

I authorize the release of the following information: **ENLISTMENT CONTRACTS, DISCHARGE DOCUMENTS, DD-214s, HISTORY OF ASSIGNMENTS, RESERVE RETIREMENT POINTS STATEMENT, TRANSCRIPT OF SEA SERVICE, NGB22/23, DD-215.**

Send all documents to:

Commanding Officer (SES-S4)
U. S. Coast Guard
Personnel Service Center
444 SE Quincy Street
Topeka, Kansas 66683
(785) 339-3554

Signature: _____ Date: _____

Exhibit 5-C-1

Personnel Data Information File (PDIF)

Introduction

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

Reference

(a) Direct Access Guide, Personnel Data Information File Report

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.

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.

Direct Access Path

Home > Develop Workforce > Manage Competencies (GBL) > Report > PDIF

Personnel Data Extract (PDE)

Introduction

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

Reference

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)

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.

Upon receipt

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

Direct Access Path

Field units have the capability to view/print SWE PDEs for their enlisted members. Once PSC (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.

Security Clearances

Introduction

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

Reference

(a) PERSEC, Chap. 2, Administrative Procedures.

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.

Preparation and Maintenance of Security Documents

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

Transcript of Sea Service (TOSS)

Introduction

A Transcript of Sea Service (TOSS (CG PSC-1075)) is used to document service on board Coast Guard vessels for the purpose of obtaining a Merchant Marine License. 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-3 of this section).

How to obtain a Transcript of Sea Service

If a member desires that a Transcript of Sea Service be prepared, the following must occur:

Stage	Who does it	Action to be taken
1	SPO	Request TOSS (CG PSC 1075) via Memorandum or E-mail and forward to PSC (SES). **Note:** The request should include the date the member entered the service and a summary of vessels he/she served on.
2	PSC (SES)	Issues CG PSC-1075 within 30 days of the date PSC received the request. The original and a copy are mailed to the SPO.
3	SPO	Forwards the original TOSS to the member and files the copy in SPO PDR.

This page left blank intentionally

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

Topic	See Page
Leave Authorization (CG-2519)	5-D-2
Leave Carried over in Excess of 60 Days	5-D-4
Issuance of the Common Access Card (CAC)	5-D-6
Manual Preparation of the DD Form 2 CG (active ID card)	5-D-9
Reporting Change in Mailing Address	5-D-11
Employment Verification	5-D-12
E-Resume	5-D-13
Assignment/Termination of Government Quarters	5-D-14
Permissive Travel Authorization	5-D-16
Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator	5-D-17
TRICARE Selected Reserve Dental Program	5-D-19
Issuance/Termination of Official Passport	5-D-21

Leave Authorization (CG-2519)

Reference

(a) PERSMAN, Chap. 7-A, Leave
(b) ALCOAST 387/04
(c) Direct Access Guide, Leave

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.
- Compensatory absence in connection with leave

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

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.
- Authorizing a member to attend to associated family needs following the birth or adoption (Note: Adoption "*Leave*" (up to 21 days in a calendar year) is an Administrative Absence it is not chargeable as leave) of a child.

The policy for granting administrative absences is provided in Chapter 7-A-10, CG Personnel Manual. Procedures for administrative absences are provided on page 5-D-16 of this manual.

Continued on next page

Leave Authorization (CG-2519), Continued

Preparation of the CG-2519

The CG-2519 can be typed, prepared using **USCG Adobe Forms**, 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. Only 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.

Item	Description
1	Enter the member's last name, first and middle initials.
2	Enter rate/rank of the member.
3	Enter member's SSN.
4	Enter the unit where the member is assigned.
5	Enter the complete address and phone number.
6	Enter the number of days of authorized absence.
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.

Disposition

Forward parts 1 and 2 to the SPO upon member's return from leave. If part 2 was given to the member (e.g., for AMC flight) forward only part 1.

Leave Carried over in Excess of 60 Days

Introduction

Members may be authorized to carry more than sixty (60) days leave into a new fiscal year, if the provisions of Article 7.A.15 of the PERSMAN (as may be modified by temporary program expansion or enhancements) are met.

Reference

(a) PERSMAN, Article 7.A.15

(d) ALCOAST 149/07

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 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 3 years to use any carryover leave. Any such leave will automatically be carried forward until used, or until the three 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 65.0 days on 1 October 1996 (5 days out of the 65 days is carryover leave). During fiscal year 1997 this member uses 32 days leave and accrues 30 days leave. This reduces the member's carryover leave balance from the prior year to 3.0 days (the 2.0 days over 30.0 coming off the carry over). On 1 October 1997, Direct Access/JUMPS will automatically carry 63.0 days forward (30 days accrued for fiscal year 1997 plus 33 days carried over from the prior year equals 63 days), since the 3 year window is still open.

Members who are authorized to carry over leave in excess of 60 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 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.

Continued on next page

Leave Carried over in Excess of 60 Days, Continued

Procedures for carrying over leave of more than 60 days for a member

If a member believes that he/she is **qualified** to carry over more than 60 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 PSC (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 PSC (MAS) NLT 1 November.
3	PSC (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.

Procedures for multiple members at a unit

If multiple members of a unit are qualified to carry over more than 60 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.

Step	Who Does It	Action Taken
1	UNIT	Must submit a memo or message to PSC (MAS) 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	PSC (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.

Issuance of the Common Access Card (CAC)

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/owa/home.

Reference

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

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.

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 COMDT (CG-1222) for assistance.

Continued on next page

Issuance of the Common Access Card (CAC), Continued

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.

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.

Continued on next page

Issuance of the Common Access Card (CAC), Continued

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 Personnel Service Center (RAS) for Coast Guard members, dependents, and beneficiaries who fall into the categories than can not be cross-serviced.

Manual Preparation of the DD Form 2 CG (Active)

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.

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

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

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.

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

Lamination

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

Reporting Change in Mailing Address

Introduction	A member's mailing address is shown in block 22 of 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, and LESs for reservists as well as members assigned to detached OPFACs.
Reference	(a) Direct Access Guide, Changing Mailing Address
Members without access to Direct Access	If you do not have access to Direct Access, contact your servicing SPO for instructions.
Members with access to Direct Access	Follow the instructions in Reference (a).

Employment Verification

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.

Reference

(a) Privacy Act Manual, Encl. (7)

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.

E-Resume

Introduction

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

Reservists may request reassignment by completing an E-Resume. Forward the completed transaction to the appropriate ISC (fot) via the Commanding Officer.

References

(a) PERSMAN, 4-C.2.a thru 4-C-2.f
(b) Commissioned and Warrant Officer Billet Manual
Section A, Officer Billet Code System
Section B, Occupational Field Codes
Section C, Organizational Level Codes
Section D, Job Position Locator Codes
(c) Enlisted Billet Manual, Chapter 4, Tables of General OPFAC Codes & Geographic Areas.
(d) Direct Access Guide, E-Resume

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 S.P.E.A.R. assignment process, for members who will be tour complete in the upcoming fiscal 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 ISC (PF) via the reservist's unit..

Assignment/Termination of Government Quarters

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 you in notifying the SPO to avoid over/under payments.

References

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

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.

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.

Continued on next page

Assignment/Termination of Government Quarters, Continued

Notifying the SPO

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

Follow these procedures upon notification that a member has been assigned or terminated quarters:

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.
2	Ensure notification includes: • Member's name • Rate/Rank • Name & SSN • 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
3	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 transactions.
4	The Housing Office will run the BAH Verification Report contained in the Housing Management Information System (HMIS) every two weeks.
5	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.

Permissive Travel Authorization

Introduction

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

Reference

(a) PERSMAN, Chap. 7-A-10

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 the PERSMAN

> "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

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.

Note

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.

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator

Introduction

Changes in official Coast Guard records must be made only after an administrative examination has been made of the documentation presented.

Reference

(a) PDR Manual

Policy

- Commands have the authority to approve changes to Names, SSN, Date of Birth and Minority Designator.
- PSC will run a weekly query for changes to: Names, SSN, DOB and Minority Designators. This query will be forwarded to COMDT (ADM-3) for review.

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 marriage certificate.
- Copy of final divorce decree containing provisions for restoration of maiden name.
- Copy of court order authorizing name change
- Naturalization certificate authorizing name change
- Birth certificate registered before first enlistment, if not available, provide one of the following:
- Original or Photostat copy from Family Bible, notarized
- Baptismal certificate
- Original or certified copies of school records
- Census records
- Birth certificate registered subsequent to first enlistment
- Corrected birth certificate with supporting evidence
- Affidavits from officials of business concerns such as banking houses or insurance companies that the individual has in the past carried on business under the desired name.

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

Continued on next page

Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator, Continued

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.

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.

Change to Minority Designator

To change a minority designator, members can input the change in Direct Access via Self Service.

TRICARE Selected Reserve Dental Program

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.

TSRDP Premiums

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

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.

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

TRICARE Selected Reserve Dental Program, Continued

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.

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.

Effective date of coverage

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

Issuance of Official Passport

Introduction

This section provides procedures for issuance or termination of official passports.

Reference

The following directives and web pages provide information about travel and official passports.

(a) CG Personnel Manual, COMDTINST 1000.6 (series)
(b) Foreign Travel, Passports and VISAS,COMDTINST 5000.5F (as modified/superseded by ALCOAST 113/07)
(c) Commandant, CG-00I Webpage http://www.uscg.mil/international/

Policy

Per ALCOAST 113/07, official passports shall only be issued to Coast Guard personnel whose official duties are expected to result in international travel into or out of a country requiring that U.S. service personnel present an official passport to enter or exit that country (see https://www.fcg.pentagon.mil). In such cases, personnel shall only use diplomatic (black) or official (red) passports as credentials. In those countries where official passports are not required, other accepted forms of identification such as military ID and orders shall suffice. Official passports shall not be issued to deploying crews based solely on the prospect of a mid-patrol break or logistics stop in a foreign country.

Passport issuance procedure

The most updated information, forms, detailed instructions, and illustrative examples are maintained on the CG-00I internet site: http://www.uscg.mil/international.

Passport acceptance agents are available at servicing ISCs and MLCs to assist with and verify passport applications. A complete listing of these agents and their locations is available in the international affairs community of CG Central and on the CG-00I internet site.

This page left blank intentionally.

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for understanding and executing the policies and procedures of the military pay system. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Notification of Pay	6-A-1
B	Types of Payment	6-B-1
C	Methods of Pay	6-C-1
D	Payment of Inactive Duty Reservists	6-D-1

This page left blank intentionally.

Section Overview

Introduction

This section provides you the information needed to understand how the member elects a payment method and the numerous ways the Coast Guard keeps the members informed of their individual pay.

In this section

Topic	See Page
Pay Delivery Method	6-A-2
Leave and Earnings Statement (LES)	6-A-3
Pay Notification for Member assigned to Deployed Cutters or Overseas/Isolated Units	6-A-5

Pay Delivery Method

Introduction

Coast Guard pay customers (active duty, retirees, annuitants, recruits, and reservists are required to have their pay delivered by Direct Deposit/Electronic Fund Transfer (DD/EFT). Direct deposit is the most efficient and reliable method of pay delivery. The possibility of a lost or stolen check is eliminated with use of direct deposit. If a member is on direct deposit and a pay delivery problem occurs, PSC can normally correct the problem and make payment within 48 hours.

Reference

(a) Direct Access Guide,
Payment Option Election (self service)
Payment Option Election (non-self service)

Delivery Methods

This table shows the two different options for the election of pay delivery.

Option	Method	Description	Restrictions/Notes
1	Direct Deposit	The member's pay is deposited into their checking or savings account each payday via Electronic Fund Transfer (EFT).	This is the safest and most convenient method of pay delivery.
2	Accrue net at PSC	A member may have their pay held at PSC during PCS or extended leave/TAD periods.	Submit a new election to resume regular pay delivery.

How to select a pay delivery method

Members should use Direct Access to change existing Direct Deposit account information. Alternatively, the member may change the pay delivery method by completing a new CG-PSC 2015, Pay Delivery Worksheet (Enclosure (1) to this manual), and forwarding the completed form to the SPO.

Direct Access Path:

Home > Self-Service > Employee > Tasks > Direct Deposit

Leave and Earnings Statement (LES)

Introduction

The Leave and Earnings Statement (LES) may be the most important document a member receives and therefore must be well understood by administrative support personnel to assist members when they have questions concerning their pay.

Description

Block-by-block descriptions may be found on the reverse of the LES. A comprehensive description is contained in "You and Your LES", Appendix (F) of this manual.

Disposition

Leave and Earnings Statement are distributed as follows:

- For active duty members, except members assigned to detached OPFACs, PSC (MAS) mails the Privacy Act copy of the LES to the member's permanent unit for delivery to the member. If LESs for the entire unit are not received by the fifth day of the following month, notify the SPO and PSC-Customercare@uscg.mil or submit an online trouble ticket at www.uscg.mil/hq/psc/customerservice.htm. If an LES for one member is not received by the fifth of the following month notify the SPO.
- If a member is transferred before the LES is delivered, the unit from which the member departs forwards the LES to the new unit for delivery to the member.
- For reserve members, and members assigned to detached OPFACs, PSC (MAS) mails the Privacy Act copy of the LES to the member's mailing address (the address shown in block 22 of the LES). Reserve members not on active duty, or members assigned to detached OPFACs, who do not receive their LES by the fifth day of the following month, should contact their SPO.
- SPO copies of LESs are forwarded by PSC (MAS) to the member's SPO for review and filing in the SPO PDR. If the member has been transferred, the SPO will forward the SPO copy of the LES to the member's new servicing SPO. The SPO process for reviewing and validating LES's is contained in App (F) of this manual.

An abbreviated LES is available for members by using the Direct Access self-service module.

Direct Access path

Self Service > Employee > View > View Paycheck

Continued on Next Page

Leave and Earnings Statement (LES), Continued

Non-Computes

Occasionally, a member's file may not meet the conditions necessary to compute pay. When this occurs, the member will receive an LES for projected pay for the month(s) the member is in a non-compute status. The projected LES will only reflect allotment deductions. When the file is corrected, the member will receive a corrected LES for each month the file was in a non-compute status.

Pay Notification for Members Assigned to Deployed Cutters or Overseas/Isolated Units

Net Pay Advice Message (NPAM)

Cutters and overseas/isolated units may receive mid and end of month pay information via Net Pay Advice Message (NPAM).

Requesting NPAMs

Eligible units must submit a one-time request to receive NPAMS.

- Requests for NPAMs may be submitted by message or E-mail to PSC-Customercare@uscg.mil or submit an online trouble ticket at http://www.uscg.mil/hq/psc/customerservice.shtm.

After the request has been processed, the unit will receive NPAMs on a continuous basis. There is no need to submit a new request prior to each deployment.

This page left blank intentionally.

Section Overview

Introduction

This section explains the types of payments available to Coast Guard members and the procedures to request special payments, advances and death gratuity.

In this section

Topic	See Page
Regular Payments	6-B-2
Special Payments	6-B-3
Offline Payment Template	6-B-5
Advance Payments	6-B-6
Death Gratuity Payments	6-B-8

Regular Payments

Introduction

A regular payment is a payment made by JUMPS based on the member's pay account. It is delivered based on the member's payment option election.

Pay periods

Each month is divided into two pay periods. Approximately 10 days before the end of each pay period, PSC computes the payroll based on Direct Access transactions.

Description

A regular payment covers the amount of pay and allowances accruing to an account during a semimonthly pay period. This payment also includes routine adjustments to previous pay periods.

Special Payments

Background

In addition to making regular semimonthly payments, PSC has the authority and ability to make certain special payments through the Department of Treasury. Special payments can be authorized in two instances:

1. **Nonreceipt of pay**: Member did not receive his/her regular semimonthly payment, or received it but it was lost or stolen.
2. **Significant pay shortage**: Member's regular semi-monthly payment was significantly less than it should have been, and the member will experience a hardship if he/she must wait until the next scheduled payday to receive the pay due.

Reference

(a) PAYMAN, Section 9-C

Criteria for special payments due to nonreceipt of pay

A member may be authorized a special payment once the ACH (Automated Clearing House) department at the member's financial institution verifies that no payment has been received. Special payments may only be requested by SPO personnel E-7 and above using the Offline Payment template (see page 6-B-5) and sent via email to PSC-Customercare@uscg.mil or submit an online trouble ticket at http://www.uscg.mil/hq/psc/customerservice.shtm. Be sure to put member's Name, Emplid, and Special Payment Request in subject line.

Criteria for special payments due significant pay shortage

A member may be authorized a special payment if he or she meets all of the following 5 criteria:

(1) The member is underpaid $100.00 or more in his/her regular semimonthly payment; and

(2) The pay shortage amounts to 10% or more of the member's total pay entitlements; and

(3) The member is not scheduled to receive the reimbursement of the pay shortage in the next scheduled payday; and

(4) The pay shortage is causing the member to experience a financial hardship; and

(5) The SPO has submitted documentation certifying the member's entitlement to the additional pay due.

Continued on next page

Special Payments, Continued

How special payments are liquidated & posted on the LES

Special payments are posted as a debit/deduction from the next scheduled pay date. For example, a special payment made to a member on 4 June 2007 will be deducted from the member's 15 June 2007 pay. Special payments made in a mid-month compute cycle will post as a debit/deduction from the mid-month pay. Special payments made in an end-month compute cycle will post as a debit/deduction from the end-month pay.

Nonreceipt of pay procedures

Follow these procedures for claiming nonreceipt of pay.

When member's pay delivery is	Then the ...	Does this...
Direct Deposit	Member	Notifies unit admin office, provides the following: • name and address of financial institution. • name and phone number of person to contact at the financial institution.
	Unit	Notifies SPO.
	SPO	Verifies information and sends email to PSC-Customercare@uscg.mil or via online trouble ticket using the Offline Payment template.
	PSC (mas)	Makes special payment via EFT if needed within 3 working days.

Significant pay shortage procedures

Follow these procedures for requesting a special payment in pay shortage cases:

Note: Special payments for IDT pay discrepancies are generally not authorized but may be considered on a case-by-case basis.

When member's pay delivery is	Then the ...	Does this...
significantly less than it should have been	Member	• Notifies unit admin office that a special payment is needed to avoid a financial hardship.
	Unit	• Notifies SPO.
	SPO	• Verifies information and sends email to PSC-Customercare@uscg.mil or via online trouble ticket using the Offline Payment template.
	PSC (mas)	• Makes or authorizes special payment if needed within 3 working days.

Continued on next page

Special Payments, Continued

Offline Payment template

To: PSC-CustomerCare@uscg.mil
Cc: Unit POC; Member
Subject: Request for Special Payment

1. Request a special payment for RATE/RANK NAME, EMPLID, USCG

2. (*Reason for request*) Request for special direct deposit payment of pay and allowances for the period 16June 2007 to 30 June 2007, due to non-receipt of pay for 01 July 2007. An e-mail statement of intent was submitted on 08 June 2007, reflecting member's intentions to extend current contract but was not submitted in time to make the 15 June 2007 pay cut.

Computation of payment are as follows:

CREDIT	PERIOD	MONTHLY/DAILY AMOUNT
BASIC PAY	2007JUN16 - 2007JUN30	$60.91 X 15 DAYS = $913.64
SDAP STRIKE TM	2007JUN16 - 2007JUN30	$4.67 X 15 DAYS = $70.05
ENL BAS	2007JUN16 - 2007JUN30	$8.31 X 15 DAYS = $124.68
BAH WITH DEP	2007JUN16 - 2007JUN30	$37.74 X 15 DAYS = $566.06

DEBIT	PERIOD	MONTHLY/DAILY AMOUNT
TAXES	2007JUN15 - 2007JUN30	$9.13 X 15 DAYS = $137.02

TOTAL PAYMENT **$1,526.79**

3. Request meets the criteria of chapter 6-A of PSCINST M1000.2(series), Personnel and Pay Procedures Manual.

4. Corrective actions taken by the SPO to rectify the non pay issue...(for example, documents submitted and when)

5. SPO Point of Contact: (provide rate, name, e-mail address and phone number)

6. Released by: (Must be a Designated Payment Approving Official (PAO), provide rate, name, e-mail address and phone number)

Advance Payments

Introduction

This information is provided to aid in determining what type of advances are allowed, when they may be utilized, and how they will be liquidated.

Reference

(a) PAYMAN, Section 9-D, Advance Payments.
(b) Direct Access Online Manual, SPO Transactions > Advances

Rules

Payment of advances must be made through Direct Access/JUMPS unless a bona fide emergency exists. Advance Pay may not be paid in cash.

Types and amounts of advances

See reference. (a), Paragraphs 9-D-3 and 9-D-4 to determine which advance should be taken and the amounts payable.

Process

This is the process for payment of advances:

Step	Who Does It	Action Taken
1	Member	Submits appropriate worksheet to unit • Submits Advances Worksheet (CG PSC-2010), or • Submits PCS Departing Worksheet (CG PSC 2000), if applicable.
2	Unit	Authorizes advance and forwards to SPO.
3	SPO	Completes Advance transactions in Direct Access per reference (b)

Liquidation

Refer to reference. (a), Paragraph 9-D-5 for specific liquidation schedules. The Advances Worksheet (CG PSC-2010) provides a general description of the liquidation process.

Continued on next page

Advance Payments, Continued

Changes to liquidation schedules

See reference (a), Paragraph 9-D-5. Use this table to determine action needed to change liquidation schedule.

When Member	Then
requests increase in payment amount,	monthly amount is increased.
requests a payment decrease and the liquidation period for advance pay will not exceed 24 months. Note: Applicable to liquidation of advance pay only. The liquidation period for advance BAH, OHA, and Interim Housing Allowance is limited to 12 months.	decrease may be authorized by unit commanding officer.
requests a payment decrease for liquidation of advance OHA or Interim Housing Allowance, and BAH in conjunction with Overseas Assignment	decrease may be authorized by unit commanding officer.
is separated during liquidation schedule,	ensure a lump sum payment is effected.
did not use advance for its intended purpose,	ensure a lump sum payment is effected.

Changes in the monthly installment amount being deducted are made in Direct Access by the servicing SPO following the procedures in reference (b).

Death Gratuity Payments

Introduction Death gratuity is payable to eligible survivors of Coast Guard members who die while on active duty, Active Duty for Training (ADT) or Inactive Duty for Training (IDT), or while traveling to/from IDT/ADT. The survivors of a member or former member, who dies within 120 days of their separation date, are also authorized a death gratuity, if the Administrator of Veterans Affairs determines the death was service connected.

References (a) PERSMAN, Article 18-A-4, Death Gratuity
(b) PAYMAN, Section 10-K, Death Gratuity

Discussion PSC (ses) normally pays the Death Gratuity via an EFT, but the beneficiary may request payment by check. PSC (ses) records Death Gratuity payment in JUMPS.

Procedure This is the procedure for payment of the Death Gratuity:

Step	Who Does It	Action Taken
1	ISC Decedent Affairs Officer (DAO) or Casualty Assistance Calls Officer (CACO)	1. Prepares DD Form 397 (Claim Certification and Voucher for Death Gratuity Payment). • Places the following information in Block 5: o Beneficiary SSN o Indicate whether beneficiary has requested payment by check or EFT. If by EFT, indicate if the EFT will be sent to the member's account as listed in Direct Access/JUMPS or to another account designated by the beneficiary. If not using the same account as listed in Direct Access/JUMPS please provide the bank information via a deposit slip or voided check. 2. Takes DD Form 397 to beneficiary for signature. 3. Faxes signed DD Form 397 to PSC (ses) at (785) 339-3784 for payment.
2	PSC (ses)	Issues payment.

Retired Pay Projection Request

Introduction

The Retired Pay Projection (CG PSC-1900) form may be used to obtain an estimated projection of your future retired pay. It is a financial planning service offered by PSC (RAS) to members with over 15 years service who are considering retirement.

Completing the CG PSC-1900

The member should complete the CG PSC-1900 in original only. Instructions for completion of the form are on the reverse side of the form. The bottom of the form is for PSC (RAS) use.

Mail the completed form to:

COMMANDING OFFICER (RAS)
USCG PERSONNEL SERVICE CENTER
444 SE QUINCY STREET
TOPEKA KS 66683-3591

Section Overview

Introduction

This section explains the different payment methods and gives policies, procedures and processes to guide the unit in support of personnel.

In this section

Topic	See Page
Payment of Mobile Unit Personnel	6-C-2
Payment of Recruits	6-C-4
Requesting an Accelerated SRB Payment	6-C-5

Payment of Mobile Unit Personnel

Introduction

This will assist you in providing timely reporting of a member's entitlement, or loss of entitlement, to Career Sea Pay (CSEAPAY), Career Sea Pay Premium (CSEAPAY PREM) and enlisted subsistence entitlements when attached to a mobile unit.

Reference

(a) PAYMAN, Section 3-B and 4-B, Career Sea Pay.
(b) JFTR, Para U4105-B2 and U4125.

What is a Mobile Unit?

See ref. (a) section 4-B-4.

Types of Mobile Units

See ref. (a) section 4-B.

Career Sea Pay Entitlement

Members assigned to mobile units (other than an administrative capacity) are entitled to continuous career sea pay (and career sea pay premium, if otherwise eligible) on the same basis as members assigned to Coast Guard vessels, subject to the conditions in Ref (a).

Subsistence Allowance for enlisted personnel

When mobile unit personnel are deployed to a vessel with a dining facility:

- If the vessel is a Coast Guard vessel, the member will be charged the Discount Meal Rate for all meals while on the vessel.
- If the vessel is a Navy or foreign vessel, the member will not have a Discount Meal Rate deduction from his/her pay. The member must either:
    0. Pay cash for meals; or
    0. The ship will submit a Pay Adjustment Authorization (DD Form 139) to PSC (MAS) for recoupment of meal charges.

Per Diem while underway

Members issued TAD orders to a Government vessel are NOT entitled to per diem.

Continued on next page

Payment of Mobile Unit Personnel, Continued

Certifying entitlement

To accomplish payment of continuous CSEAPAY, each member's eligibility must be certified monthly by the appropriate personnel:

- District (ole) staffs.
- Group Commanders.
- CO of the PACAREA TACLET.
- Regional TACLET Commanders.
- Senior CG liaison officer attached to Navy mobile units.

Monthly Roster

A certification roster must be submitted within 3 working days after the first of each month and signed by the CO or Chief of the District Office (ole) staff, to the servicing SPO with the following information:

- Rate/Rank.
- SSN.
- Each member must be annotated that they either remain eligible for CSEAPAY or are ineligible for CSEAPAY effective (date).
- A copy of each member's ride sheet must be attached.

Roster not received by SPO

If the monthly certification roster is not received by the fifth working day after the first of the month, the SPO will submit Direct Access transactions to stop CSEAPAY on all members not certified.

Record keeping

The CO/staff chief signing the certification roster shall retain copies for 3 years and have it available for audit. The servicing SPO will retain the CO's monthly certification roster for 3 years and shall retain a copy of the mobile unit designation and designation removal document(s) for 3 years after removal of the designation for audit.

Payment of Recruits

Introduction

Recruits are accessed in Direct Access/JUMPS upon reporting to TRACEN Cape May, and are required to be on Direct Deposit (pay option 4).

Method of payment

This table describes the payment methods used to pay recruits at various stages of recruit training.

Stage	Description
During training	Depending upon the JUMPS input/cutoff dates, direct deposit payments will be made on the first or second payday after arrival at Cape May. For recruits with dependents who are not paid on the first payday after arrival due to missing cutoff, Cape May shall solicit off-line payment by sending an e-mail request to PSC-Customercare@uscg.mil or by sending an online trouble ticket at http://www.uscg.mil/hq/psc/customerservice.shtm.
At separation	Discharged recruits will have their first direct deposit payment made by PSC within 4 working days of notification of discharge.
At graduation	Within 2 working days after graduation, Cape May's Payment Authorization Official (PAO) shall ensure all Direct Access transactions are submitted.
After graduation	JUMPS will continue to generate payments on regularly scheduled paydays for EFT to member's direct deposit account.
Advances	Recruits are entitled to advance pay during their first PCS move. TRACEN Cape May will coordinate their entitlements with PSC (MAS) for inclusion in their last direct deposit payment prior to graduation. If the normally authorized amount of advance ($500) is insufficient to cover anticipated PCS expenses, Cape May will issue additional advance pay in form of traveler's checks.

Requesting an Accelerated SRB Payment

Introduction

An accelerated payment is defined as an early payment of the next SRB installment, prior to the normal anniversary date, but in the same fiscal year in which the installment payment is due.

Reference

(a) PERSMAN, 3.C.8

Process

This is the process.

Stage	Who Does It	What Happens
1	Member	Submits a letter requesting accelerated payment to unit CO.
2	Unit CO	Approves/disapproves request and forwards to PSC (MAS) if approved.
3	PSC	Processes payment within 30 days of receipt. Payment will be in the first regular payday after documents process.

THIS PAGE BLANK

Section Overview

Introduction

This section explains the Inactive Duty Training (IDT) pay system, and gives policies, procedures and processes to guide the unit in support of reserve personnel.

In this section

Topic	See Page
IDT Prerequisites	6-D-2
The IDT Process	6-D-4
Drill Orders	6-D-6
Example of IDT Drill Order Letter (To Unit)	6-D-8
Supervisor Endorsement on IDT Orders	6-D-9
Example of Amendment to IDT Drill Order Letter	6-D-10
IDT Certification Sheet	6-D-11
Waiver of Pension/Disability Compensation or Retired Pay	6-D-12
Annual Reserve Retirement Point Statement	6-D-14
Disability Processing	6-D-16

IDT Prerequisites

Introduction

Before crediting a reservist with pay and/or points for IDT drills certain conditions must be met.

Reference

(a) PAYMAN, Sections 12.E.4 and 12.H.2
(b) RPM
(c) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

Drills must be scheduled

- Reservists must be scheduled to attend drills.
- Correspondence necessary to document attendance at drills include endorsed inactive duty drill orders, copies of Standard Travel Order for Military Personnel (CG-5131) for appropriate duty drills, and documentation of actual attendance at the drill (e.g., sign-in sheets, records of muster, endorsement on orders, etc.).

Pay Status For IDT

Only reservists in a training/pay category (e.g. “A, B, C and D”) are authorized payment for IDT drills.

Readiness Management Peirod (RMP)

- ISC (fot) must authorize appropriate RMP with pay.
- The authority for issuing appropriate duty orders without pay may be delegated to unit commanding officers.
- Only reservists in training/pay categories A, B, C, D, E, H, J, and P may be authorized RMP with pay.

Funeral Honors Duty (FHD)

- Unit Commanding Officers may issue FHD orders to Ready Reservists who volunteer to perform funeral honors at the funeral of a veteran.
- Only reservists in training/pay categories A, B, D, E, and H may be authorized FHD with pay.

Continued on next page

IDT Prerequisites, Continued

Compensation

- Reservists performing IDT or RMP, with pay, receive 1/30th of the month rate of basic pay for each single drill/RMP.
- Enlisted reservists may also be eligible for three other types of compensation while performing IDT:
  (a) Enlisted reservists assigned to a PSU receive additional special IDT pay of $10 per drill.
  (b) Enlisted reservists are entitled to Reserve Clothing Maintenance Allowance for each IDT drill performed.
  (c) Enlisted reservists serving on IDT for 8 or more hours in the same calendar day are eligible for commuted rations (COMRATS) when government-provided meals are not available.
- Reservists performing FHD are paid a flat rate of $50.

The IDT Process

Introduction

Inactive duty reservists are paid by the JUMPS system. This section was developed to help guide the field in the IDT processes.

Reference

(a) RPM, Chap. 2
(b) Direct Access Guide, Reserve Orders
- IDT Overview
- Scheduling IDT Drills (Self Service)
- Schedule/Approve Drills (command)
- Schedule/Approve Multiple Drills (Commands and SPOs)
- Creating IADT Orders

Quick Reference Guide
(c) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3
(d) Information and Life Cycle Management Manual, COMDTINST M5212.12

The IDT process

Stages of the IDT process.

Stage	Who Does It	What Happens
1	Unit	• Coordinate drill dates and location with member(s).
2	**Reservist, Command or SPO**	• **Schedule drill in Direct Access**
3	**Command or SPO**	• **Approve Drill**
4	**Unit**	• **Prepare and send drill orders to member(s) at least 1 month prior to drill dates.**
5	Reservist	• Perform drill(s) as scheduled • Ensure orders are endorsed by supervisor and give to unit ADMIN. • Keep a personal copy of endorsed orders for your records.

Continued on next page

The IDT Process, Continued

Stage	Who Does It	• What Happens
6	Unit	• Endorse member's orders verifying that member completed drill(s) as ordered. • Record drill attendance in Direct Access, or forward to servicing SPO for input if necessary
7	SPO	• Verify proper completion of and signature on IDT Certification Sheet(s) or local form. • Complete Direct Access transactions for payment as necessary.
8	PSC	• Process payments

Drill Orders

Introduction

The inactive duty pay cycle starts with the inactive duty drill orders. This section will discuss the rules for drill orders and provide the recommended format of group and individual IDT Drill Orders.

Reference

(a) RPM
(b) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

Rules for Drill Orders

Follow these rules for IDT drill orders:

- Prepare and send drill orders to member(s) at least one month prior to drill dates.
- Only those reservists whose names are on inactive duty drill orders (with pay) and are in a good pay status, or who have been issued RMP or FHD orders (with pay), are authorized to receive pay for periods of inactive duty.
- If a reservist's name is not on the inactive duty drill orders when they are issued, and the reservist is later authorized by the commanding officer to perform duty on the date or dates covered by the orders, a written amendment to the order must be prepared and signed.

Verbal Orders

A reservist may be authorized to attend drills or perform RMP or FHD verbally if written authorization cannot be prepared until after the duty has commenced. However, written amendments to the inactive duty drill orders or appropriate duty orders must contain a statement similar to the following: "These orders constitute written confirmation of verbal orders issued by _____ on _____."

Continued on next page

Drill Orders, Continued

Rules for reporting drills

When reporting RMP and FHD drills, you cannot report:

- Two single drills on the same day. (However, you may report a multiple drill with two separate program designator codes.)
- Two multiple drills on the same day
- Two periods of RMP on the same day
- RMP and single drill on the same day
- RMP and multiple drill on the same day
- Two FHD periods on the same day
- FHD and a multiple drill on the same day
- Drills, RMP or FHD while a reservists is on active duty or while in a travel status in conjunction with active duty
- More than 48 paid IDT drills during a Fiscal Year (with an exception being that deployable units such as PSU's are authorized 60 paid drills per Fiscal year)
- More than 30 RMPs during a Fiscal Year

IDT Drill Orders

- See Ref. (a), Article 2.B.1.a for required information that must be included in all drill orders.

Example of IDT Drill Order Letter (To Unit)

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

Commanding Officer
United States Coast Guard
Unit Name

Unit Address

Phone: ( )
FAX: ( )

1321/1326
Date

MEMORANDUM

From: J. B. Smith
"Unit"

Reply to
Attn of:

To: "Unit Name" Reservists

Subj: MONTHLY INACTIVE DUTY FOR TRAINING (IDT) ORDERS

1. The following members are ordered to report as indicated below to perform IDT:

Member Name	Date	Times	Type	Meals Auth	Duty Purpose
PS3 Smith, Johnson	5 Jan 05	0730-1630	M	SIK – L	Port Safety & Security
MST2 Clark, Dan J.	5 Jan 05	0730-1630	M	SIK – L	Environmental Protection

2. If emergency or unforeseen circumstances arise and you are unable to perform duty on the time and dates directed, you must notify your supervisor prior to the start of duty.

#

Supervisor Endorsement on IDT Orders

RESERVIST NAME _____ RANK _____ SSN _____

Note: Refer to page 6-D-16 for most commonly used codes. For a complete list of "TYPE, CODE, and MEAL CODES, see COMDTINST 5310 (series)

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE _____SDAP_____

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE _____SDAP_____

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE _____SDAP_____

DATE _____ DUTY TYPE _____ PROGRAM CODES _____/_____ MEAL CODE _____SDAP_____

I certify that the above named reservist completed drills as specified.

_____
Supervisor Signature

_____
Supervisor Name, Rank, (printed)

MEMBER ENDORSEMENT

I certify that I have performed the drill(s) as indicated above.

_____
Members Signature

Note: Ensure this Endorsement On Orders is signed by your supervisor and given to your unit ADMIN office for Direct Access input.

Example of Amendment to IDT Drill Order Letter

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

Commanding Officer
United States Coast Guard
Unit Name

Unit Address

Phone: ( )
FAX: ( )

1321/1326
Date

MEMORANDUM

From: J. B. Smith
"Unit"

Reply to
Attn of:

To: "Unit Name" Reservists

Subj: AMENDMENT TO DRILL (IDT) ORDERS

Ref: (a) Inactive Duty for Training Drill Orders of _____
(date)

1. Your orders contained in reference (a) are hereby amended to read as indicated below.

Drill Dates Drill Times Drill Location .

1. If you are unable to perform duty on the time and dates directed, you must notify your supervisor no less than 24 hours prior to the start of duty.

#

Encl: (1) Order Endorsements

IDT Certification Sheet This sheet may be used to report drill completions

IDT CERTIFICATION SHEET

Name *(last, first, MI)*:	SSN *(last four only)*	Rank/Rate:
Unit:	Cat Class *(i.e. RQA)*:	Total Paid Drills this FY *(excluding below)*:

INSTRUCTIONS: This Inactive Duty for Training (IDT) Certification Sheet may be utilized to report/record when a member drills "as directed", without their usual group. Once the Certifying Official signs this form immediately deliver it & a copy of the IDT Orders directly to the Direct Access Input Official (Unit or SPO)

Drill Date	Attendance Code	Program Code #1	Program Code #2	SDAP Code	Date of Direct Access Input
1.					
2.					
3.					
4.					
5.					
6.					
7.					

Attendance Codes	Operational Program Codes	Support Program Codes	Cont. & Surge Ops Program Codes
S – Single Drill (w/pay) M – Multiple Drill (w/pay) E – Single Drill (w/o pay) D – Multiple Drill (w/o pay) A – RPM (Appropriate Duty) w/pay N - RPM (Appropriate Duty) w/o pay P – Unexcused absence - Single Q – Unexcused absence – Multiple T - Excused Absence – Training X - Excused Absence – Other F - Single Drill w/pay & a Single Drill w/o pay	AN – Short Range ATON BA – Boating Safety Activities DO – Defense Operations IO – Ice Operations LE – Law Enforcement ME – Environment Protection MI – Merchant Vessel Inspection & Documentation MP – Marine Licensing, Personnel & Casualty Investigations NR - Radio Navigation PS – Port Safety & Security SR – Search & Rescue VT – Vessel Traffic Services	AQ – Acquisition – General AB – Public & International Affairs AC – Contingency Preparedness AD – Research & Development AE – Engineering & Logistics AF – Financial Mgt, Supply & Inventory AT – Structured Training – General AH – Civil Rights – General AI – Security, CMC, Pubs AK – Health Services AL – Legal – General AG – Operational Intelligence AP – Personnel Support AS – Safety & Occupational Health AW – Command, Control & Comms	BC – Boating Safety DC – Defense LC – Law Enforcement LC – Environmental NC – Aids to Navigation PC – Port Safety & Security SC – Search & Rescue GL – Great Lakes – Summer Stock SP – Space Program Support OC – Olympic Games Support 1996

CERTIFYING OFFICIAL SIGNATURE: I certify that this member performed training on the date(s) indicated above. I further certify in accordance with 37 U.S.C. 402(b) that this member received commuted rations while performing Inactive Duty for Training in at least eight hours on the above date(s) and that the above meals were not available to the member either from a government mess or through commercial procurement.

Signature of Certifying Official *(Include Name, Rank and Title)*:	Date:

Waiver of Pension/Disability Compensation or Retired Pay

Introduction

Reservists who, by virtue of prior military service, are receiving compensation such as:

- a pension
- a disability compensation
- a disability allowance
- retired pay

are not entitled to receive military pay and allowances for periods of active duty, active duty for training or inactive duty unless they elect a waiver of VA compensation.

References

(a) PAYMAN, Paragraph 12-B-4
(b) 10 U.S.C. 12316

Form for waiving VA compensation

The Notice of Waiver of VA Compensation or Pension to Receive Military Pay and Allowances (VA Form 21-8951) is used to elect a waiver of VA compensation.

- The VA Form 21-8951 is a onetime waiver of VA compensation and, once completed, remains in effect as long as the reservist is assigned to the ready reserve.

Compensation adjustment

Compensation waived is on the basis of 1 day of compensation for every inactive duty drill and/or for each day of active duty.

- Compensation will be adjusted after the end of each fiscal year.

Continued on next page

Waiver of Pension/Disability Compensation or Retired Pay,
Continued

The waiver process

This is how the process for waiving pension/disability compensation or retired pay works.

Stage	Who does it	What happens
1	Dept. of Veterans Affairs (VA)	Mails a VA Form 21-8951 to active reserve members who, at the end of the fiscal year are receiving VA compensation, and do not have a waiver on file
2	Member	Completes VA Form 21-8951 and forwards to local VA office
3	PSC	Verifies the number of drills and active duty periods the member performed Provides totals to VA
4	VA	Adjusts member's VA compensation

Annual Reserve Retirement Point Statement

Discussion

Annually, each member of the SELRES is issued an Annual Reserve Retirement Point Statement (CG-4175A). These statements are produced and distributed by PSC (mas) monthly. The monthly run produces a CG-4175A for selected reservists whose anniversary month is three months past. For example, in February 2008, PSC (mas) issues CG-4175As to all selected reservists whose anniversary month is in November 2007.

References

(a) RPM, Section 8.C.10
(b) PDR Manual
(c) JUMPS Analysis Manual, PSCINST M5230.3 (series)
Note: PSC (mas) no longer provides copies of CG-4175A forms to SPOs. The data (used to produce the form) is available in JUMPS and can be accessed by the SPO following the procedures in reference (c). SPOs are no longer required to maintain a copy of the CG-4175A in the member's SPO PDR. This policy will be reflected in the next change to reference (b).

Discrepancies on the CG-4175A

Instructions on the CG-4175A advise the reservist to verify the entries on the CG-4175A. If an entry is incorrect, the reservist is instructed to identify the discrepancy, and:

If	Then
there is any discrepancy:	• The discrepancy will be submitted by the member and sent to his/her servicing SPO. • The SPO will take appropriate action to correct the discrepancy. For instance submitting out of range IDT Drills. **Note:** The following supporting documentation should be sent with the request: • Endorsed ADT/IDT orders, • CGHQ-4973A, • CG-4175A, • Correspondence course completion letters, • Any other supporting documentation

Continued on next page

Annual Reserve Retirement Point Statement, Continued

CG-4175A not received by the member

If the member does not receive the CG-4175A or the member is requesting a copy of the CG-4175A, then the member should request a copy from his/her servicing SPO. All SPOs have the capability of viewing and printing the CG-4175A by using the JUMPS database.

Disability Processing

Introduction

Disability processing applies to reservists who incur or aggravate an injury, illness, or disease in the line of duty while performing, or traveling to, active duty for 30 days or less or inactive duty training (IDT).

References

(a) RPM, Chapter 6A
(b) PAYMAN, Chapter 12, Reserve Pay and Allowances
(c) Administrative Investigations Manual, COMDTINST M5830.1

Process

Below are the stages of disability processing.

Stage	Who Does It	What Happens
1	Member	Becomes disabled
2	Member/ CO	Ensures a medical exam by proper authorities is completed
3	CO	Issues line-of-duty determination
4	CO	Obtains medical documentation
5	CO	Notifies ISC (pf) via letter of the member's injury. Letter shall include the following information: • Member's full name, rate and SSN; • Duty status (AD, IDT, traveling to or from duty site) at the time injury occurred, and the time and dates of the duty period; • Date, time, place and circumstances of the injury; • Nature of the injury, estimated period of impairment, and anticipated disposition; • If hospitalized, estimated period of impairment, and anticipated disposition; date, time, place, and estimated period of hospitalization along with address of hospital, name of attending physician, and admission diagnosis; • If not hospitalized, name and address of clinic or physician's office where member was treated and when treatment occurred; name of attending physician, diagnosis, physician's prescribed treatment, including follow-up treatment; • Opinion as to whether the injury was incurred in the line of duty; • Complete home and work address and phone number of the member; and • Name and phone number of the member's civilian employment supervisor.

Continued on next page

Disability Processing, Continued

Process (continued)

Stage	Who Does It	What Happens
6	ISC (pf)	Issues Notice of Incapacitation Benefits if the member will not be FFD by the end of the active duty/IDT period
7	ISC (pf)	Coordinated with CO to initiate an Initial Medical Board if treatment will extend beyond 10 weeks
8	ISC (pf)	Coordinates payment of the member with PSC (SES) **Note:** Members are entitled to active duty pay and allowances less any earned income from nonmilitary employment or self-employment.
9	Member	Submits certificates to PSC (SES) every two weeks.
10	ISC (pf)	Terminates Incapacitation Benefits

Certificates

A certificate of claim for compensation and a certificate of physical condition shall support a Notice of Incapacitation Benefits by medical authority. The certificates must be prepared on plain bond paper and attached to the NOE.

Example of certificate of claim for compensation

Information can be found in Ref. (a).

Disability processing for reservists on active duty greater than 30 days

When a reservist is injured while on active duty for greater than 30 days, the above procedures do not apply. In this case, the reservist will be continued on active duty until fit for full duty or separated. The commanding officer shall coordinate with ISC (pf) who shall contact the servicing SPO who will provide an extension of the member's active duty orders.

This page intentionally left blank

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user-friendly job aid for starting and stopping special pay and allowances. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Special Pay	7-A-1
B	Allowances	7-B-1
C	Savings Deposit Program	7-C-1
D	Bonuses	7-D-1

Section Overview

Introduction

This section provides the information needed to understand how the different kinds of special pay work, who is entitled to them, and how to get members paid.

In this section

Topic	See Page
Aviation Career Incentive Pay (ACIP)	7-A-2
Hazardous Duty Incentive Pay (HDIP)	7-A-3
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)	7-A-5
Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)	7-A-6
Funeral Honors Duty Allowance for Reservists	7-A-8
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams	7-A-9
Combat-Related Injury Rehabilitation Pay	7-A-11
Foreign Language Proficiency Pay	7-A-13

Aviation Career Incentive Pay (ACIP)

Introduction

Aviation Career Incentive Pay (ACIP) is authorized for rated/designated officers, and officers in flight training. Aviation service information used to establish an aviator's JUMPS record is contained in the PAYMAN, Chapter 5.

Reference

(a) PAYMAN, Section 5-A, Aviation Career Incentive Pay (ACIP) for Rated/Designated Officers
(b) Direct Access Online Manual, Aviation Career Incentive Pay (ACIP)

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Procedures

Follow these procedures to start, stop, suspend, and reinstate ACIP.

If	And	Then
Officer becomes first eligible for ACIP	prior aviation service	enclose documentation to substantiate flying time/status and notify SPO to start entitlement. SPO will enter an ***Establish officer as an aviator*** (earnings code "ESACIP") transaction and another transaction to start ACIP based on the officer's PCS orders.
	without prior aviation service	notify SPO to start entitlement. SPO will enter an ***Establish officer as an aviator*** (earnings code "ESACIP") transaction and another transaction to start ACIP based on the officer's PCS orders.
Aviator fails to qualify for continuous ACIP		notify SPO to stop entitlement
	member later qualifies	notify SPO to start entitlement
Reinstating ACIP for aviators with over 25 years aviation service	performing flying duty	notify SPO to start entitlement
	not performing flying duty	JUMPS automatically stops entitlement
Reporting suspension from flight status	affects eligibility for ACIP	notify SPO to stop entitlement
	does not affect eligibility for ACIP	no action taken to stop entitlement
Reporting errors in ACIP	inaccurate information on LES	send letter to PSC (mas) via SPO. Include supporting documentation from aviation flight record, PDR and/or member's file

Note: USCGR officers ordered to active duty are only entitled to ACIP if the officer is assigned to flight status (DIFOPS).

Hazardous Duty Incentive Pay (HDIP)

Introduction

Members issued flight orders in accordance with the PERSMAN and meeting all requirements of the PAYMAN are entitled to Hazardous Duty Incentive Pay (HDIP).

Reference

(a) PAYMAN, Section 5-B, Hazardous Duty Incentive Pay for Enlisted Members and nonrated or nondesignated Officers
(b) PERSMAN
Article 6-A-4, Technical Observers
Article 6-B-4, Flight Orders for Enlisted Personnel
(c) Direct Access Online Manual, Aviation Crew/Non-Crew Hazardous Duty Incentive Pay

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

How to start HDIP

To start HDIP forward copies of flight orders to the SPO.

When to stop HDIP

To stop HDIP forward a letter to the SPO if one of these situations occur:

- Member's order is revoked
- Member fails to meet minimum flying time
- Member is suspended from flying

Note: HDIP automatically stops on a PCS departure.

Flight Deck Hazardous Duty Incentive Pay (FDHDIP)

Introduction

Flight Deck Hazardous Duty Incentive Pay (FDHDIP) is an entitlement to members assigned to duty involving frequent and regular participation in flight operations on the flight deck of a cutter.

Reference

(a) PAYMAN, Section 5-C, Flight Deck Hazardous Duty Incentive Pay (FDHDIP)
(b) Direct Access Online Manual, Flight Deck Hazardous Duty Incentive Pay

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Procedures to start FDHDIP

Use these procedures to start FDHDIP.

Step	Action	
1	Complete letter authorizing payment **Note**: Unit commanding officer must sign authorization	
2	Ensure authorization contains a start and stop date using this criteria:	
	If	**Then**
	the entitlement is for a full month, and the start date will be the first of the month,	the stop date will be the last day of the month.
	the entitlement is for part of the month,	provide the appropriate start and stop dates.
3	Forward authorization to SPO.	

High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)

Introduction

High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP) is an entitlement to qualified Coast Guard Divers serving under Duty Involving Diving Orders (DUID) and who meet the special conditions described in the CG Pay Manual.

Reference

(a) PAYMAN, Section 5-D, High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)
(b) Direct Access Online Manual, Hazardous Duty Incentive Pay for High Pressure Chamber

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Payments

Payments for HPCHDIP are made on a monthly basis.

- Members must qualify for HPCHDIP on a monthly basis.
- HPCHDIP may be prorated to adjust for issuance or revocation of DUID orders.

Procedure

Each month that the member is qualified for HPCHDIP the unit commanding officer will send a letter to the SPO authorizing payment.

- If the member was not serving under DUID orders for the entire month, indicate the date of issuance or revocation of the DUID orders.

Amount of HDIP

See reference (a) for current rates.

Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)

Introduction

Special pay for Duty Subject to Hostile Fire or Imminent Danger (HF/ID) is an entitlement to members who meet the special conditions described in the CG Pay Manual. This special pay is in addition to any other pay and allowances a member may be entitled.

Reference

(a) PAYMAN, Section 4-H, Special Pay - Duty Subject to Hostile Fire or Imminent Danger
(b) Direct Access Online Manual, Imminent Danger (Hostile Fire) Pay

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Qualified Areas for HF/ID Pay

Areas designated as qualifying for HF/ID pay are listed in the PAYMAN, Figure 4-11. The listing of qualified areas may be modified, from time to time, via ALCOAST messages.

Rules for HF/ID Pay

The following rules apply when determining entitlement to HF/ID Pay:

- A member who serves on official duty in one of the designated areas for any part of a month is entitled to imminent danger pay for the entire month;
- In those areas where airspace is designated, personnel who fly through the area are eligible for payment if the members are assigned to official temporary duty to the airspace of the combat zone.
- Some members entitled to Imminent Danger Pay may be entitled to Income Tax Exclusion due to their location. Refer to the PAYMAN, Section 8-G-2 to verify income tax exclusion locations.

Amount of HF/ID Pay

See PAYMAN, Section 4-H for current rates.

Continued on next page

Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID) Continued

Procedure for payment of HF/ID Pay

This is the procedure utilized when a member qualifies for or loses an entitlement to HF/ID pay. Notification of eligibility for HF/ID pay will normally be included with a notification of eligibility for combat tax exclusion. See page 8-B-11 of this manual for the procedures for reporting entitlement to HF/ID and, if applicable Combat Servicemembers' Group Life Insurance (SGLI) Allowance. See page 7-B-10 of this manual for Combat SGLI procedures.

Step	Action	
1	The unit commanding officer sends a letter or message to the SPO authorizing HF/ID. In addition to the name, rank, SSN and designated HF/ID area, include one of these entitlements in the letter:	
	Entitlement	**Description**
	Continuing	If starting, include: • Date the event occurred (e.g., reporting date) • Statement indicating the member is entitled on an ongoing basis. • If stopping, include: • Date the event occurred (e.g., departing date) • Statement indicating the exact nature for termination.
	One time	Include: • Date the event occurred (e.g., date member entered a designated HF/ID area) • Statement indicating the member is entitled on a one-time basis.
2	The SPO Submits a Direct Access Start Pay transaction for imminent danger pay. There are two options available: Option 1: HF/ID pay for a single month only Option 2: Continuous HF/ID pay until submission of a subsequent stop transaction.	

Funeral Honors Duty Allowance for Reservists

Introduction

The fiscal year 2000 Legislative Pay Change created an entitlement for Reservists performing funeral honors duty. The entitlement grants the member one retirement point and a daily allowance of $50. This section provides procedures for processing the funeral duty pay and points.

Reference

(a) PAYMAN, Section 12
(b) RPM, Chapter 2
(c) Direct Access Online Manual, Schedule/Approve Drills

Procedures

All members of the Ready Reserve may volunteer to perform funeral honors duty. If the member performs at least two hours of funeral duty, including any associated training and travel time, the drill is recorded in Direct-Access as described in Section 6-D of this Manual. Reimbursement for travel expenses require separate TDY orders to be issued and claims filed in accordance with Section 2-B of this manual.

Amount of Funeral Duty Pay for Reservists

See PAYMAN, Section 12-O, Funeral Honors Duty Allowance for the current rate.

Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS)

Introduction

Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS) is an entitlement to members participating in maritime interdiction operations boardings taking place within a designated combat theatre of operations.

Reference

(a) ALCOAST 353/04
(b) ALSPO N/04
(c) Direct Access Online Manual, HDIP-VBSS

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Procedures to start HDIP-VBSS

Use these procedures to start HDIP-VBSS.

Step	Action
1	Member completes at least three eligible boarding evolutions in a calendar month. **Notes** Members may not receive concurrent payment of FDHDIP and HDIP-VBSS. Members must be assigned to an authorized HDIP-VBSS eligible billet. See Ref. (a) for additional qualifications.

Continued on next page

Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS), Continued

Procedures to start HDIP-VBSS, Continued

Step	Action
2	Each calendar month that the member is qualified for HDIP-VBSS the unit commanding officer will send a letter, message or e-mail to the SPO authorizing payment. The authorization must include the name, rank, EMPLID, date of boardings and designated HDIP-VBSS areas. Below is a sample format:
	Subj: QUALIFICATION FOR HDIP-VBSS Ref: (a) ALCOAST 353/04 1. I certify that the member listed below has completed three operational HDIP-VBSS boardings during the calendar month of _____. The member is assigned an authorized HDIP-VBSS eligible billet. The following information is provided: Rate/Name: _____ EMPLID: _____ HDIP-VBSS Location: Boarding Dates: _____ _____ _____ _____ _____ _____ 2. Process transaction in Direct Access (earn code VBS) to credit member for one month HDIP-VBSS as per Ref. (a).
	Note: A new authorization is required for each calendar month the member is qualified to receive HDIP-VBSS.
3	Forward authorization to SPO for input into Direct Access.

Combat-Related Injury Rehabilitation Pay

Introduction

This section provides the procedures for payment of Combat-Related Injury Rehabilitation Pay (CIP).

About CIP

ALCOAST 002/07 implemented Section 642 of the National Defense Authorization Act for Fiscal Year 2006, which amended Title 37 U.S.C. Section 328, to authorize monthly special pay to a member of the armed forces who, while in the line of duty, incurs a wound, injury, or illness in a combat operation or combat zone designated by the Secretary of Defense (SECDEF) and is evacuated from the theater of the combat operation or from the combat zone for medical treatment.

CIP may be paid in addition to any other pay and allowances to which the member is entitled or authorized. CIP will be paid at the full monthly rate for any month in which the member is eligible for the pay in the full amount. The monthly amount of CIP shall equal $430 less any payment of Hostile Fire/Imminent Danger Pay received by the member for the same month.

Entitlement

A member, who is hospitalized for a wound, injury, or illness as a result of hostile action, is entitled to CIP for each month that hospitalization continues and the member does not meet termination criteria described below:

- CIP will terminate at the end of the first month during which any of the following applies:

  (1) The member is paid a benefit under Traumatic Servicemembers Group Life Insurance (T-SGLI), or

  (2) The member receives notification of the eligibility to T-SGLI and a period of 30 days expires after the date of such notification, or

  (3) The member is no longer hospitalized in a military treatment facility or a facility under the auspices of the military health care system.

- Once the member loses entitlement to CIP and if a military member is re-hospitalized for the same injury, wound, or illness, eligibility for CIP cannot be reestablished.

Continued on next page

Combat-Related Injury Rehabilitation Pay, Continued

Procedure

The member's Commanding Officer shall notify Commandant (CG-1222) and the Personnel Service Center (mas), via message, to commence payment of monthly CIP to an eligible member when the member is evacuated from the theater of the combat operation or the combat zone for medical treatment.

Personnel Service Center (mas) will commence payment of CIP the month beginning after the date on which the member is eligible.

Foreign Language Proficiency Pay (FLPP)

Introduction

This section provides the procedures for entitlement to Foreign Language Proficiency Pay (FLPP).

References

(a) ALCOAST 585/05
(b) ALCOAST 275/06
(c) Direct Access Online Manual; Foreign Language Test Results (ESO)
(d) Direct Access Online Manual; Foreign Language Proficiency Pay (SPO)
(e) Direct Access Online Manual; Schedule Drills (Commands and SPOs)

Discussion

Reference (a) authorizes payment of FLPP, Phase I, effective 1 January 2006 for members meeting the eligibility criteria. Reference (b) addresses Foreign Language Proficiency Pay (FLPP) at the **Linguist** level. Reference (a) identified seven languages of strategic importance to Coast Guard missions. Reference (b) added Arabic, French, Indonesian, Portuguese and Tagalog.

Process

This is the process for authorizing Active Duty and Reserve Component members' entitlement to FLPP or Foreign Language Proficiency Bonus (FLPB), for Reservists on IDT.

Stage	Description
1	The Foreign Language Program Manger (CG-132-2) designates authorized Linguist positions (billets) and Unit Collateral Duty Interpreter (UCDI) Allocations. • UCDI Allocations are listed in reference (a), para. 4. • Linguist positions are listed in reference (b), para. 2.
2	Member completes and obtains qualifying scores on the Defense Language Proficiency Test (DLPT) for an eligible language skill.
3	Unit Educational Services Officer (ESO) enters DLPT results in Direct-Access. • The menu item is Develop Workforce > Manage Competencies (GBL) > Use > **Foreign Language Test Results**. It is only accessible to users with the ESO (CGFTESO) user role. Unit ESOs may request the role by completing a Direct-Access User Authorization Form (CG-PSC-7421/2) and forwarding it to PSC Customer Care for account update.

Continued on next page

Foreign Language Proficiency Pay (FLPP), Continued

Process **(continued)**

Stage	Description
3 (cont'd)	ESO Procedures are available in reference (c).
4	**For FLPP-Linguist:** • Ensure qualified member is assigned to a position designated by CG-132 as requiring linguist skills. **For FLPP/FLPB-Interpreter:** • Unit Commanding Officer designates qualified member to occupy a command interpreter allocation and forwards a copy of the designation to the SPO. Note: For Reservists on Active Duty for less than 140 days ADT/181 days ADOT, orders must specifically authorize FLPP.
5	For Active Duty members and Reservists on Active Duty, the SPO enters the start FLPP transaction using the Employee Entitlements Component in Direct-Access. • SPO Procedures are available in reference (d). For Reservists on IDT or RMP, the Unit "Reserve IDT" or "Command User" (user roles in Direct-Access) records FLPB entitlement using the Schedule Drills (*Individual*) Component in Direct-Access. • IDT/RMP drill pay procedures are available in reference (e).

Continued on next page

Foreign Language Proficiency Pay (FLPP), Continued

Terminating FLPP

FLPP will automatically stop when the:

- Member is separated from active duty.
- Member departs on PCS orders.
- Member's certification lapses (shown as the Expiration date in the member's Licenses & Certifications in Direct Access for the language skill). Members must retest annually to maintain their eligibility for FLPP. If a member's FLPP is automatically stopped, a new transaction must be input in Direct-Access to restart it after the member's test scores are entered.

FLPP must be manually stopped when the member is no longer performing interpreter/linguist duties or when the command wishes to designate other qualified members to fill unit allocations.

This page left blank intentionally

Section Overview

Introduction

This section will guide you through the procedures for payment of Basic Allowance for Subsistence, Family Separation Allowance, Overseas Housing Allowance, Family Subsistence Supplemental Allowance, and Officer Uniform Allowance.

In this section

Topic	See Page
Refund for Missed Meals – Discounted Meal Rate (DMR)	7-B-2
Family Separation Allowance (FSA)	7-B-3
Overseas Housing Allowances (OHA)	7-B-7
Family Subsistence Supplemental Allowance (FSSA)	7-B-8
Officer Uniform Allowance Claim Worksheet (CG PSC-5100)	7-B-9
Combat SGLI Allowance	7-B-10

Refund for Missed Meals – Discounted Meal Rate (DMR)

Introduction

This section provides procedures for crediting Discount Meal rate charges to a member who is unable to eat meals normally furnished at a government dining facility.

Reference

(a) PAYMAN, Section 3-B
(b) Direct Access Online Manual, Refund of DMR for Missed Meals

Direct Access Path (SPO)

Home > Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Discounted Meal Rate Credits

This is the procedure utilized for crediting Discount Meal Rate charges to a member who is assigned to a mandatory messing unit and the member's duties, or dining facility exigencies, prevent government furnished meals from being provided.

Step	Action
1	Log meals throughout the month
2	Forward the following information to the SPO at the end of the month: Subj: CERTIFICATION OF MISSED MEALS Ref: (a) CG Pay Manual, Section 3-B, Basic Allowance for Subsistence (BAS - Enlisted) 1. I certify that the member listed below was assigned to a mandatory messing unit and their duties or dining facility exigencies prevented government furnished meals (including box lunches) from being provided as follows: Rate/Name: _____ EMPLID: _____ Date(s) / Breakfast / Lunch / Dinner 2/14/02 / / x / / 2/15/02 / x / / / 2/18/02 / / x / / 2. Process transaction in Direct Access (earn code RMM) to credit the member for the missed meals per reference (b).

Family Separation Allowance (FSA)

Introduction

This is provided to assist in the process of starting and stopping Family Separation Allowance (FSA) and Family Separation Housing (FSH).

Reference

(a) PAYMAN, Section 3-G, Family Separation Allowance (FSA)
(b) Direct Access Online Manual, Family Separation Allowance (FSA)
(c) CG PSC-2035 (FSA Worksheet)

Types of FSA

See PAYMAN, Section 3-G, Family Separation Allowance (FSA).

Eligibility of FSA Entitlement

Refer to PAYMAN, Section 3-G-5 for detailed information concerning "with dependent" requirements for FSA.

Verification of FSA on the FSA Worksheet

FSA entitlement verification will be completed on the FSA Worksheet (CG PSC-2035), which is available on PSC's web site at: http://www.uscg.mil/hq/psc/forms/psc2035.pdf.

Procedures for Family Separation Housing (FSH)

For members who are entitled to Family Separation Housing (See PAYMAN, Section 3-G-3, entitlement rules), use the following procedure:

Step	Action
1	The member must complete an FSA Worksheet when he/she becomes entitled to FSH.
2	The unit will endorse the FSA Worksheet and forward to the SPO.
3	Upon Receipt of the FSA Worksheet the SPO will: 1. Submit a BAH transaction on the member to start BAH W/dependents using the zip code of the member's dependents. 2. Forward the FSA Worksheet to PSC (mas), via fax to (785) 339-3760.
4	PSC (mas) will start the member's FSH entitlement in a monthly amount equal to the BAH or OHA payable (for the PDS) to a member without dependents in the same pay grade.

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-R

Use the following procedures if the member becomes entitled to FSA-R:

Step	Action
1	The member must complete an FSA Worksheet when he/she becomes entitled to FSA-R.
2	The unit will endorse the FSA Worksheet and forward to the SPO. An E-mail may be sent by the unit to the SPO to notify the SPO that this entitlement needs to be started on the member (this will allow the SPO to start the entitlement on the member in a timely manner). However, the unit must still submit the FSA Worksheet to the SPO).
3	Upon Receipt of the FSA Worksheet or E-mail, the SPO will submit a FSA transaction on the member to start FSA-R. **Note:** After the FSA transaction has been submitted, the SPO will ensure that a FSA Worksheet has been received by the unit, if an E-mail was sent by the unit.

Procedures for FSA-S 60 days or less

For ship deployments of 60 days or less, use the following procedures:

Step	Action
1	The unit must ensure that each eligible member has completed an FSA Worksheet for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). • If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility. • If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member. **Note:** This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Upon return of the ship to homeport, the unit will notify the SPO by message or E-mail with the names and Employee ID Numbers of the members entitled to FSA-S. The start and stop dates of FSA-S must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
3	Upon receipt of the message or E-mail, the SPO will submit a single FSA transaction for each member to establish a one time credit of FSA-S.

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-S over 60 days

For ship deployments of over 60 days, use the following procedures:

Step	On the 31st day away from homeport
1	The unit must ensure that each member that is eligible has completed a FSA Worksheet for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). • If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility. • If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member. **Note:** This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Unit notifies SPO by message of start date and member's names and SSNs (last six digits) who are entitled to FSA-S.
3	Upon receipt of the message, the SPO will submit a single FSA transaction for each member to establish a start of FSA-S.
	Upon return to homeport
4	Upon return of the ship to homeport, the unit will notify the SPO by message or E-mail with the names and SSNs (last 6 digits) of the members. The date FSA-S ends must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
5	Upon receipt of the message or E-mail, the SPO will submit a single FSA transaction for each member to establish a stop of FSA-S.

Procedures for FSA-T 60 days or less

For members who are TAD for 60 days or less, use the following procedures:

Step	Action
1	Upon return to the unit from TAD, the member will complete a FSA Worksheet.
2	The unit will endorse the FSA Worksheet and forward it with a copy of the TAD/TEMDU orders to the SPO.
3	Upon Receipt of the FSA Worksheet and copy of TAD/TEMDU orders, the SPO will submit a FSA transaction on the member to establish a one time credit of FSA-T. **Note:** SPOs should verify FSA entitlement dates when a copy of the travel claim and/or summary sheet is received from PSC (TVL).

Continued on next page

Family Separation Allowance (FSA), Continued

Procedures for FSA-T over 60 days

For members who are TAD for over 60 days, use the following procedures:

Step	On the 31st day away from unit
1	The member must complete a FSA Worksheet.
2	The TAD unit will endorse the FSA Worksheet and send it with a copy of the TAD/TEMDU orders to the SPO servicing the member.
3	Upon receipt of the FSA Worksheet and copy of the TAD/TEMDU orders, the SPO will submit a single FSA transaction on the member to establish a start of FSA-T.
	Upon return to unit
4	Upon return of TAD, the member will complete a new FSA Worksheet.
5	The unit will endorse the FSA Worksheet and send it with a copy of the TAD/TEMDU orders to the SPO.
6	Upon receipt of the FSA Worksheet and copy of the TAD/TEMDU orders, the SPO will submit a single FSA transaction on the member to establish a stop of FSA-T. Note: SPOs should verify FSA entitlement dates when a copy of the travel claim and/or summary sheet is received by PSC (TVL).

FSA-T entitlements for reserves on active duty

Reservists (with dependents) on active duty greater than 30 days, but less than 140 days, who are stationed away from their home drilling unit, and whose dependents do not accompany them to the active duty site, are entitled to FSA-T.

Overseas Housing Allowance (OHA)

Introduction

This is provided to assist in the process of starting Overseas Housing Allowance (OHA) and requesting Move-In Housing Allowance (MIHA). MIHA provides a one-time payment for move-in costs while stationed in an OHA locale.

Reference

(a) JFTR, Chapter 9
Appendix K, Overseas Housing Allowance
Appendix N, Move-In Housing Allowance
(b) Direct Access Online Manual, Oversseas Housing Allowance (OHA)

Direct Access Path (SPO)

Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

Starting OHA

To start OHA complete the following forms and forward to the SPO with a copy of the lease/purchase agreement:

- Sign an Overseas Housing Allowance Briefing Sheet (found in the JFTR, Appendix K)
- Complete an Individual Overseas Housing Allowance form (DD Form 2367)

Requesting MIHA

MIHA is requested by completing a Move-In Housing Allowance Claim form (DD Form 2556) and forwarding it to the SPO. A second payment of MIHA may be paid only after approval from Commandant (CG-1222).

Family Subsistence Supplemental Allowance (FSSA)

Introduction

This section provides procedures for payment of the Family Subsistence Supplemental Allowance (FSSA).

Reference

(a) PAYMAN, Section 3-N
(b) CG PSC-2075 (Family Subsistence Supplemental Allowance Application,

Definition

See reference (a) for definitions, background information and limitations to FSSA.

Application

Applications for FSSA can be obtained from the PSC web site: http://www.uscg.mil/hq/psc/forms/ (CG PSC-2075).

Or call PSC Customer Service @ (866) 772-8724. Customer Service will fax or mail you a copy of the form and USDA Monthly Income Eligibility Limits.

Submission of the FSSA Application can be done by mail or fax:

Fax to (785) 339-3760

Mail to: Commanding Officer (mas)
Coast Guard PSC
444 SE Quincy
Topeka, KS 66683-3593.

Recertification

See reference (a), 3-M-10.

Officer Uniform Allowance Claim Worksheet (CG PSC-5100)

Introduction

The CG PSC-5100 is used to substantiate payment of uniform allowances to Coast Guard regular and reserve officers.

Reference

(a) PAYMAN
Section 3-I, Clothing Allowances for Officers
Section 3-K, Uniform Allowances for Reserve Officers

Procedure

A copy of the CG PSC-5100 can be found at http://www.uscg.mil/hq/psc/forms.

Officers who are appointed:

- Upon graduating from the CG Academy; or
- Upon graduating from OCS; or
- To Warrant Officer from Enlisted status;

Will automatically be paid the appropriate Officer Uniform Allowance by the CG Pay System. A CG PSC 5100 need not be completed, and no Direct Access input should be completed.

If an Officer is entitled to a Uniform Allowance due to:

- Direct Commission; or
- Completion of at least 14 days Active duty as a member of a Reserve component; or
- Completion of 14 periods of Reserve IDT;

Then complete an Officer Uniform Allowance Claim Worksheet (CG PSC-5100) and forward to the SPO.

Combat SGLI (Servicemembers Group Life Insurance) Allowance

Introduction

This section provides the procedures for payment of Combat Servicemembers' Group Life Insurance (SGLI) Allowance.

Reference

(a) National Defense Authorization Act for Fiscal Year 2007 (Public Law 109-364)
(b) ALCOAST 523/06
(c) Direct Access User Online Manual, Combat SGLI Allowance

Discussion

Per references (a) and (b), members serving in Operations Enduring Freedom or Iraqi Freedom Theaters or serving outside the U.S. on orders in support of Operations Enduring Freedom or Iraqi Freedom shall receive an allowance equal to the amount of the cost for the maximum SGLI coverage plus the cost of Traumatic SGLI coverage.

Rules for Entitlement to Combat SGLI Allowance

A member must be serving in Operations Enduring Freedom or Iraqi Freedom Theaters or be serving outside the U.S. on orders in support of Operations Enduring Freedom or Iraqi Freedom in order to be eligible for Combat SGLI Allowance.

- Orders in support of Operations Enduring Freedom or Iraqi Freedom may be specific orders to the member, or general tasking to an entire unit such as a ship. The member must be outside the U.S. for at least part of the month. No minimum part of a month is defined.

Combat SGLI Allowance can be recorded as a one-time entitlement (allowance for a single month only) or as a continuous entitlement (allowance will continue until submission of a stop transaction). Entries for entitlement to Combat SGLI and Combat Tax Exclusion must match:

- If a member is entitled to Combat Tax Exclusion for one month only, then the entry for Combat SGLI must also be for one month only.

- If a member is entitled to Combat Tax Exclusion continuously, then the entry for Combat SGLI must also be for a continuous entitlement and a stop transaction must be entered when the stop Combat Tax Exclusion is entered.

Continued on next page

Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

Amount of Combat SGLI Allowance

Combat SGLI Allowance is equal to the monthly cost of $400,000 SGLI coverage plus the cost of Traumatic SGLI coverage. The cost of $400,000 SGLI coverage is currently $28.00 per month and the cost of Traumatic SGLI coverage is $1.00. The total Combat SGLI Allowance is $29.00.

Combat SGLI Allowance entitlements will appear in JUMPS Segment 23 "Miscellaneous Allowances" (Note: The title of Segment 23 has changed, it was previously titled "Personal Money Allowance").

Combat SGLI Allowance for members with no or less than $400,000 SGLI coverage

Members with SGLI coverage elections of $0 (declined) or any other amount less than the maximum coverage available, who become entitled to Combat SGLI Allowance, will temporarily have their SGLI coverage increased to $400,000 for the duration of the entitlement to Combat SGLI Allowance. The member's previous SGLI coverage resumes the first day of the month following the month the member's entitlement to Combat SGLI Allowance ends, unless the member submits a new SGLI or SGLI Family election.

JUMPS will open a new Segment 32 to increase the member's SGLI coverage to $400,000 when a start Combat SGLI Allowance transaction processes. The temporary increase is effective the first day of the month in which the member is entitled to Combat SGLI and ends the last day of the month the entitlement to Combat SGLI stops. The letter "S" will appear in the "Combat Code" field of any Segment 32 opened by JUMPS to record a temporary SGLI coverage increase.

- Temporary SGLI coverage changes, made in JUMPS, due to receipt of Combat SGLI allowance will not appear in the member's SGLI elections in DA (Compensate Employees > Administer Base Benefits > **Life and AD/D Benefits).**

Continued on next page

Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

Unit Procedures

Notify the SPO, via letter or message, when a member qualifies for or loses entitlement to Combat SGLI Allowance. When starting Combat SGLI Allowance, include a statement indicating the member is entitled on either a:

- Continuous basis (tax exclusion will continue until submission of a subsequent stop transaction) or on a,
- One time basis (tax exclusion for a single month only).

Notification of eligibility for Combat SGLI Allowance will be included with a notification of eligibility for Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID). See page 7-A-6 of this manual for the procedures for reporting entitlement to HF/ID and Combat Tax Exclusion. See page 8-B-11 for procedures for reporting entitlement to Combat Tax Exclusion.

SPO Action

SPOs shall record entitlement to Combat SGLI Allowance in Direct-Access for any eligible member. Procedures for recording entitlement to Combat SGLI Allowance are in reference (c).

SPOs are reminded to submit Combat SGLI Allowance transactions in connection with Combat Tax Exclusion transactions. Currently, any member who is entitled to Combat Tax Exclusion while serving in Operations Enduring Freedom or Iraqi Freedom is also entitled for Combat SGLI Allowance.

SGLI Beneficiary Designations and FSGLI Elections

When starting Combat SGLI Allowance SPOs shall also:

- Review member's current SGLI Election and Certificate (form SGLV-8286) for accuracy and completeness. If no SGLV-8286 form is on file, provide the member with a blank form with instructions to complete and return to the SPO as soon as possible.

Continued on next page

Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

SGLI Beneficiary Designations and FSGLI Elections (cont'd)

- Inform married members, who have previously declined SGLI coverage, or have coverage at the $50,000 level, that Family SGLI coverage is available while they are receiving Combat SGLI Allowance. The member must submit a SGLI Family Coverage Election (form SGLV-8286A) and SGLV-8286 form, with a coverage level of at least $100,000, if they desire coverage under the SGLI Family program. Premiums for SGLI and SGLI Family coverage will be deducted from the member's pay and will continue after entitlement to Combat SGLI Allowance ends.

Compare SGLV-8286 (and SGLV-8286A, if applicable) with LES to confirm correct deductions are (or were) in effect.

THIS PAGE BLANK

Section Overview

Introduction

This section provides the procedures for the Savings Deposit Program.

In this section

Topic	See Page
Savings Deposit Program	7-C-2

Savings Deposit Program

Introduction

Uniformed Services members assigned outside of the United States, or its possessions, in support of a contingency operation are authorized to make deposits of their unallotted current pay and allowances to the Savings Deposit Program.

Reference

(a) PAYMAN, Sec 6-F
(b) 10 USC 1035
(c) Department of Defense Financial Management Regulation, Section 5101

Qualified Areas For Savings Deposit Program

The Secretary of Defense designates areas, which are eligible for the Savings Deposit Program. These qualifying areas are prescribed in reference (a), section 6.F.2.

Rules for Savings Deposit Program

See Ref. (a).

Procedures

Members who elect to participate in the Savings Deposit Program may make their deposits into the program via cash remittance to PSC or via allotment from their pay.

An agent with a power of attorney from the member may make deposits, either by allotment or by cash, into the Savings Deposit Program on behalf of the member, if the power of attorney states the authority to establish, change, or stop allotments.

Members desiring to make deposits by cash remittance shall mail their deposit to PSC. A letter providing the member's name, social security number, and duty station shall accompany deposits. A copy of the letter shall be provided to the member's SPO. The member shall make a check or money order payable to U.S. Coast Guard, and mail, along with the cover letter, to:

Commanding Officer (DC)
Coast Guard PSC
444 SE Quincy St
Topeka KS 66683-3591

Continued on next page

Savings Deposit Program, Continued

Procedures (continued)

Members desiring to make deposits via allotment shall complete an Allotment Worksheet (CG-PSC-2040). Complete the CG-PSC-2040 as detailed below, and forward the form to the PSC (MAS) for processing:

- Complete the top 3 blocks titled Employee ID Number, Name, and Permanent Unit.
- In the Purpose of Request section, check the Start block.
- Blanket Code, enter 850.
- Start Amount, show the monthly deposit amount.
- Month of First Deduction, show the first day of the next month.
- In Allotment Type block, enter D.
- Sign and date the form in the Member's Signature and Date blocks.

Once a member's deposit, plus interest, exceeds $10,000, the member may request that the amounts in excess of $10,000 be withdrawn quarterly and deposited to the member's bank account. Requests of this nature shall be in letter/memo form from the member to PSC (MAS), via the member's commanding officer and SPO.

Members departing a contingency operation area will be required to withdraw their funds from the Savings Deposit Program within 90 days of the member's return to the U.S. The member may submit a written request for repayment to PSC (MAS), via the member's commanding officer and Personnel Reporting Unit, upon departure from the overseas duty station. If no letter is received within 90 days of departure from the permanent duty station, PSC (MAS) shall automatically refund the member via electronic funds transfer to the member's bank account.

Members requiring an emergency withdrawal of Savings Deposit funds while stationed in the contingency operation area shall submit a letter request to PSC (MAS) via the member's commanding officer and Personnel Reporting Unit. The request shall provide the reason motivating the withdrawal and the dollar amount of withdrawal requested. Upon receipt of an approved request, PSC (MAS) shall issue refund to member's bank account via electronic funds transfer.

This page left blank intentionally.

Section Overview

Introduction

This section will guide you through the procedures for issuing **a Career Status Bonus.**

In this section

Topic	See Page
Career Status Bonus (CSB)	7-D-2

Career Status Bonus (CSB)

Introduction

Under the National Defense Authorization Act for Fiscal Year 2000 members who initially entered a uniformed service on or after 1 August 1986 may elect, upon completion of fifteen years of active duty, to receive a $30,000 Career Status Bonus (CSB).

Reference

(a) PAYMAN, Section 5-E

Procedures

This table describes the CSB election process.

When	Who Does It	What Happens
Six months prior to member's fifteenth active duty anniversary	PSC (MAS)	Sends CSB Election Form, CG PSC-2426 and a Fact Sheet of Information for Eligible Career Status Bonus Members to member's unit
Upon receipt of CSB Election Form (CG PSC-2426)	Command	Reviews and verifies Sections I and II of CG PSC-2426. If member is ineligible to complete twenty years of active service (for disciplinary, medical, or other reasons), the command shall correct block 7 of the CG PSC-2426 and initial beside the correction.
Not later than date member reaches fifteen years active service (or no later than six months after issuance of the CG PSC-2426)	Member	Completes Section III, IV, or V of the CG PSC-2426 to indicate his/her election. The commanding officer or his/her designee shall witness member's signature.
After member signs CG PSC-2426	Command	Distributes form: **1.** Original to PSC (MAS) **2.** Copy to member **3.** Copy to SPO for filing in Section 2: (Career Documentation of the SPO PDR)

Continued on next page

Career Status Bonus (CSB), Continued

Process (continued)

When	Who Does It	What Happens
Not later than the third month after the member completes fifteen years active service	PSC (MAS)	Issues CSB payment to the member.
Each year in January	PSC (MAS)	Issues CSB installment payments as appropriate.
Member retires upon completion of twenty or more years active service	SPO	▪ Sends documents from SPO PDR to CGPC (adm-3) as prescribed in Encl (8) of the PDR Manual. The CG PSC-2426 shall be one of these documents. ▪ Sends copy of PSC-2426 to PSC (RAS)
	PSC (RAS)	Files copy of CG PSC-2426 in member's retired pay file. Retired pay is calculated per member's election on the CG PSC-2426.
Member separates prior to completion of twenty years active service	PSC (SES)	Recoups CSB as appropriate.

This page left blank intentionally.

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid or starting, stopping, or changing an allotment or bond, claiming non-receipt of an allotment or bond, and changing a member's tax status. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Allotments and Bonds	8-A-1
B	Taxes	8-B-1
C	Thrift Savings Plan (TSP)	8-C-1

This page left blank intentionally.

Section Overview

Introduction

This section provides you with the procedures needed to start, stop or change an allotment or bond and for submitting a claim for non-receipt of an allotment or bond.

In this section

Topic	See Page
Allotments and Bonds	8-A-2
Allotment Checklist	8-A-4
Nonreceipt of an Allotment or Bond	8-A-5

Allotments and Bonds

Introduction

The allotment system is a convenience provided to active duty members (or reservists on active duty for 140 days or more) for deductions from their monthly pay. These deductions can be used for savings, loans, insurance, U.S. Savings Bonds, charities, support of dependents, education, CG associated dues, and any other legal purpose.

Reference

(a) PAYMAN, Section 7, Allotments From Pay
(b) Direct Access Guide, Allotments and Bonds Overview
(c) PPPM, Enclosure (1)

Direct Access Path

Self Service: Home > Self-Service > Employee > Tasks > Allotments

or

SPO: Home > Compensate Employees > Maintain Payroll Data (US) > Use > Allotments

Procedures

To start, change or stop an allotment or a bond:

- Direct the member to use the Self Service option in Direct Access to start, stop, or change the following types of allotments and bonds:
  1) CG Association Dues
  2) Contributions to CG Mutual Assistance
  3) Insurance Premiums, including Navy Mutual Aid Insurance
  4) Loan repayment to financial institution (other than, CG Mutual Assistance, American Red Cross, Armed Forces Relief, and government debts)
  5) Personal savings/checking accounts
  6) Series EE. U.S. Saving Bonds
  7) Series I, U.S. Saving Bonds
  8) Support of Dependents
- **Self Service users read Ref. (b) for instructions.**
- For all other types of allotments/bonds and for members without access to Direct Access:
  - Submit an Allotment Worksheet (CG PSC-2040), or a Bond Worksheet (CG PSC-2060), or if starting a CFC allotment, submit the CFC pledge card (provided with CFC fund raising materials) to the SPO,
  - Or, make a pen and ink changes to the LES. (See next page).

Continued on next page

Allotments and Bonds, continued

Pen and ink change to the LES

Make the following pen and ink changes to the LES when stopping or changing an allotment or bond.

Step	Action
1	Line out the allotment information affected.
2	Enter the new allotment information in the same block.
3	Sign and date beside the new information.
4	Make a copy for your files.

Disposition

Forward to the SPO.

Allotment Check List

Introduction This checklist provides a job aid to be used when a unit/SPO is completing necessary tasks for starting, changing, or stopping allotments. It is designed to be reproduced locally.

Checklist Standard procedures for allotments.

Step	Item	Applies To	Check Off
1	Allotment must be for an authorized purpose. Refer to PAYMAN, Section 7-A or the reverse side of the Allotment Worksheet (CG-PSC-2040) for allotment rules.	Starts	
2	• A member is permitted to have only one current allotment of the following types: • Combined Federal Campaign Fund • One education allotment (either Veteran's Education Assistance or Montgomery GI Bill) • MGIB Additional Amount • Loan Repay-CG Mutual Assistance • Navy Mutual Aid Insurance	Starts	
3	A member may have multiple allotments to the same payee provided each allotment has a unique account number.	Starts	
4	Member must have enough projected pay to cover new allotment amount.	Starts Changes	
5	Allotment starts and changes must process in JUMPS prior to mid-month compute; e.g., an allotment start effective 1 June must process in JUMPS prior to mid-month June compute cycle cutoff. **See the Direct Access Allotment Overview for compute cycle cutoff dates.**	Starts Changes	
6	Allotment stops must process in JUMPS prior to end-month compute of the following month; e.g., an allotment stop effective 30 June must process in JUMPS prior to the July end-month compute cycle.	Stops	
7	Allotments may not be submitted more than two months in advance of desired action.	Starts Changes Stops	

Nonreceipt of an Allotment or Bond

Introduction This job aid explains the process for reporting nonreceipt of an allotment, or the loss, theft, or destruction of a savings bond.

Reference (a) PAYMAN, Section 7, Allotments from Pay

Procedures Follow these procedures for claiming nonreceipt of an allotment or savings bond.

When Allotment Type is	Then the....	Does This....

An allotment other than a Savings Bond	Member or Admin unit	• Verifies with financial institution ACH Department that allotment payment has not been received by electronic fund transfer (EFT).
		• Sends an E-Mail message to PSC-Customercare@uscg.mil or submit an online trouble ticket with the following information:
		  • member's EMPLID
		  • member's name (last, first, mi)
		  • member's rank
		  • member's unit
		  • member's phone number
		  • date of missing allotment payment
		  • name of financial institution
		  • allotment amount
		  • allotment account number

	PSC (mas)	• Locates original payment or makes special EFT payment, normally within 3 business days

Continued on next page

Nonreceipt of an Allotment or Bond, Continued

Procedures (continued)

<table>
<tr><th>When Allotment Type is</th><th>Then the....</th><th>Does This....</th></tr>
<tr><td rowspan="5">Savings Bond</td><td rowspan="4">Member</td><td>For non-receipt of savings bonds, members must wait 30 days from expected delivery date then:
• Send an E-mail message to PSC (mas-dc) using the CG Network E-mail address --“PSC-DG BONDS” with the following information:
• Member’s EMPLID
• Member’s name (last, first, mi)
• Member’s rank
• Member’s unit
• Approximate issue date of bond
• Face value of bond
• Name and SSN of bond owner (if the member is not the owner)
• Mailing address of lost bond
• Correct mailing address
<table>
<tr><th>If</th><th>Then</th><th>And</th></tr>
<tr><td>The member does not have access to E-mail</td><td>Complete a Nonreceipt Worksheet, CG PSC-2050</td><td>Mail to PSC (mas-dc)</td></tr>
</table></td></tr>
<tr><td>For lost, stolen, or mutilated savings bonds:
• Obtain Bureau of the Public Debt (BPD) Form PD-1048, Claim for Lost, Stolen or Destroyed United States Savings Bonds, from any banking institution, or PSC (dc)
• Forward completed PD-1048 to BPD (instructions and address are on the form)</td></tr>
<tr><td>PSC (dc)</td><td>• Verifies bond information and provides Bond serial number
• Forwards appropriate BPD form to member</td></tr>
<tr><td>Member</td><td>• Completes form and forwards directly to BPD</td></tr>
</table>

Section Overview

Introduction

This section provides information needed to change federal tax withholding, apply for advance of federal earned income credit, change state tax withholding, or state of legal residence, and report entitlement to Combat Tax Exclusion. This section will also assist you in requesting a duplicate or corrected W-2 form.

In this section

Topic	See Page
Federal Income Tax Withholding and Advance EIC	8-B-2
State Income Tax Withholding	8-B-3
Changing State of Legal Residence	8-B-3
State Tax Listing	8-B-4
Income Tax Exclusion for Duty in Combat Zone	8-B-10
Information About the W-2 Form and How to Request a Duplicate or Corrected W-2 Form	8-B-12
Request for Federal or State Tax Adjustments	8-B-15

Federal Income Tax Withholding and Advance EIC

Introduction

Every member is required to file an IRS Form W-4 when a pay account is initially opened. Once the tax withholding is started there are times when it needs to be changed. This provides a job aid in assisting a member who is changing their tax withholding.

Reference

(a) PAYMAN:
Section 8-A, Withholding of Federal Income Tax
Section 8-E, Advance Payment of EIC

Federal Income Tax Withholding

To change federal income tax withholding, the member must:

Step	Action
1	Complete IRS Form W-4 (http://www.irs.gov/pub/irs-pdf/fw4.pdf)
2	If you have access to Direct Access (DA), complete change in Self-Service "W-4 Tax Information" application; otherwise, forward IRS Form W-4 to SPO for completion in "Employee Tax Data" in DA. For DA self-service procedures see: http://www.uscg.mil/hq/psc/ps/self_service/members/change_federal_or_state_tax_withholding.htm

Advance of Federal Earned Income Credit (EIC)

To begin receiving or change status for advance Earned Income Credit (EIC), the member must complete an IRS Form W-5 (http://www.irs.gov/pub/irs-pdf/fw5.pdf) and forward it to the SPO for completion in "Employee Tax Data" Direct Access application. SPO procedures can be found at: http://www.uscg.mil/hq/psc/ps/spo/employee_tax_data_information.htm.

State Income Tax Withholding and State of Legal Residence

Introduction

Every member, who is a resident of a state authorized to have state income tax withheld from military pay, is required to file the appropriate state tax-withholding document (or IRS form W4 (http://www.irs.gov/pub/irs-pdf/fw4.pdf) annotated with "*FOR STATE TAX WITHHOLDING PURPOSES ONLY*") when a pay account is initially opened. Once the tax withholding is started there are times when it may need to be changed. This provides a job aid in assisting a member who is changing their tax withholding.

Reference

(a) PAYMAN, Section 8-B, Withholding of State and Local Tax

State Income Tax Withholding

To change state income tax withholding, the member must:

Step	Action
1	Complete the appropriate State tax form (or IRS form W4 (http://www.irs.gov/pub/irs-pdf/fw4.pdf) annotated with "*FOR STATE TAX WITHHOLDING PURPOSES ONLY*" see State Tax Listing beginning on page 8-B-4)
2	If only changing marital status, number of exemptions, or additional amount to be withheld, and the member has access to Direct Access, complete change in the Self Service "State Tax Data" application (For DA self-service procedures see: http://www.uscg.mil/hq/psc/ps/self_service/members/change_federal_or_state_tax_withholding.htm); otherwise, forward to SPO for completion in DA's "Employee Tax Data". SPO procedures can be found at: http://www.uscg.mil/hq/psc/ps/spo/employee_tax_data_information.htm.

Changing State of Legal Residence

To change his/her state of legal residency the member must complete a DD Form 2058 (CG) and submit to the SPO. The SPO will enter the change in "Employee Tax Data" in Direct Access.

- DD Form 2058 (CG) is available at: http://www.uscg.mil/hq/psc/forms/dd-2058.pdf
- SPO procedures for processing a change of state of legal residence can be found in the Direct-Access Online Manual at: http://www.uscg.mil/hq/psc/ps/spo/employee_tax_data_information.htm

State Tax Listing

Introduction

The two charts below provide valuable information to the member on each state concerning withholding requirements, tax forms addresses, phone numbers and internet addresses. The first chart separately lists those states which offer internet addresses and tax forms available on-line for downloading.

State	Internet Address
Alabama	http://www.ador.state.al.us/
Alaska	http://www.revenue.state.ak.us/
Arizona	http://www.azdor.gov/
Arkansas	http://www.state.ar.us/dfa/dfa_taxes.html
California	http://www.ftb.ca.gov/
Colorado	http://www.revenue.state.co.us/
Connecticut	http://www.ct.gov/drs
Delaware	http://www.state.de.us/revenue
D.C.	http://cfo.dc.gov/otr/site/default.asp
Florida	http://www.state.fl.us/dor/
Georgia	http://www.etax.dor.ga.gov/
Hawaii	http://www.state.hi.us/tax/
Idaho	http://tax.idaho.gov/
Illinois	http://www.revenue.state.il.us/
Indiana	http://www.state.in.us/dor/
Iowa	http://www.state.ia.us/tax/index.html
Kansas	http://www.ink.org/public/kdor/
Kentucky	http://revenue.ky.gov/
Louisiana	http://www.rev.state.la.us/
Maine	http://www.state.me.us/revenue/homepage.html
Maryland	http://www.comp.state.md.us/
Massachusetts	http://www.state.ma.us/dor
Michigan	http://www.michigan.gov/treasury
Minnesota	http://www.taxes.state.mn.us/
Mississippi	http://www.mstc.state.ms.us/ Form: http://www.mstc.state.ms.us/taxareas/withhold/89350001.pdf

Continued on next page

State Tax Listing, Continued

Missouri	http://www.dor.mo.gov/index.htm
Montana	http://www.state.mt.us/revenue/
Nebraska	http://www.revenue.state.ne.us/
Nevada	http://www.tax.state.nv.us/
New Hampshire	http://www.state.nh.us/revenue/
New Jersey	http://www.state.nj.us/treasury/taxation/
New Mexico	http://www.state.nm.us/tax/
New York	http://www.tax.state.ny.us/
No. Carolina	http://www.dor.state.nc.us/
No. Dakota	http://www.nd.gov/tax/
Ohio	http://tax.ohio.gov/
Oklahoma	http://www.oktax.state.ok.us/
Oregon	http://www.oregon.gov/dor/
Pennsylvania	http://www.revenue.state.pa.us/
Puerto Rico	http://www.hacienda.gobierno.pr/
Rhode Island	http://www.doa.state.ri.us/
So. Carolina	http://www.sctax.org/
So. Dakota	http://www.state.sd.us/drr2/revenue.html
Tennessee	http://www.state.tn.us/revenue
Texas	http://www.window.state.tx.us/
Utah	http://www.tax.utah.gov/
Vermont	http://www.state.vt.us/tax/
Virginia	http://www.virginia.gov/cmsportal2/residents_4096/residents'_services_4099/taxes_resources.html
Washington	http://www.dor.wa.gov/
W. Virginia	http://www.state.wv.us/taxdiv
Wisconsin	http://www.dor.state.wi.us/
Wyoming	http://revenue.state.wy.us/

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Alabama (334) 242-1170	Yes	State Form A-4	Alabama Department of Revenue Individual & Corporate Tax Division PO Box 327465 Montgomery, AL 36132-7465
Alaska (907) 465-2300	NO STATE INCOME TAX		
Arizona (602) 255-3381	Yes (Exempts all military pay)	State Form A-4 or A-4M	Arizona Department of Revenue Taxpayer Information & Assistance PO Box 29086 Phoenix, AZ 85038-9086
Exemption to state withholding: Effective tax year 2006, Arizona exempts all active duty and reserve income.			
Arkansas (501) 682-7104	Yes	State Form AR-4EC	Arkansas Department of Finance and Administration Individual Income Tax Section Rm 138, Ledbetter Building Little Rock, AR 72203
California 800-338-0505 (automated) 800-852-5711	Yes	State Form EDD DE4*	California Franchise Tax Board PO Box 942840 Sacramento, CA 94240-0040
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Colorado 303-238-7378	Yes	Federal Form W-4 *	Colorado Department of Revenue 1375 Sherman Street Denver, CO 80261
Connecticut 800-382-9463 (in state) (860)297-5962(out of state)	Yes	State Form CT-W4	Taxpayer Services Division Department of Revenue Services 25 Sigourney Street Hartford, CT 06106-5032
Conditions for exemption from state tax: If the member does not maintain a permanent place of abode in the state, AND maintains a permanent place of abode outside the state, AND spends not more that 30 days in the state during the tax year. Members occupying single-type government quarters are NOT considered to be maintaining a permanent place of abode in the state.			
Delaware (302) 577-8200	Yes	Federal Form W-4 *	Delaware Division of Revenue 820 N. French Street Wilmington, DE 19801
District of Columbia (202) 727-4829	Yes	State Form D-4	DC Government Office of Tax & Revenue 941 Capitol St. NE Washington, DC 20002
Florida (850) 922-4827/4826	NO STATE INCOME TAX		
Georgia (404) 417-2300	Yes	State Form G-4	Georgia Department of Revenue 270 Washington St. SW Atlanta, GA 30334
Hawaii 800 222-3229	Yes	State Form HW-4	Hawaii Department of Taxation PO Box 3559 Honolulu, HI 96811-3559

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Idaho (208) 334-7660 800-972-7660 Conditions for exemption from state tax: If member is on active service and is stationed outside the state.	Yes	Federal Form W-4*	Taxpayer Services Idaho State Tax Commission PO Box 36 Boise, ID 83722-0036
Illinois 800-732-8866	No (exempts all active duty military pay)		Illinois Department of Revenue Taxpayer Correspondence PO Box 19044 Springfield, IL 62794-9044
Indiana (317) 233-4016	Yes	State Form WH-4	Indiana Department of Revenue Taxpayer Services Division Indiana Government Center 100 N. Senate Avenue, No. 105 Indianapolis, IN 96811
Iowa 800-367-3388 (in state) (515) 281-3114 (out of state)	Yes	State Form IA-W4	Finance Taxpayer Services and Iowa Department of Revenue PO Box 10457 Des Moines, IA 50306-0457
Kansas (785) 368-8222	Yes	Federal Form W-4 *	Kansas Department of Revenue Taxpayer Assistance Bureau 915 SW Harrison Street Topeka, KS 66625-0001
Kentucky (502) 564-4581	Yes	State Form K-4	Kentucky Revenue Cabinet Taxpayer Assistance 200 Fair Oaks Lane Frankfort, KY 40620
Louisiana (225) 219-2448	Yes	Federal Form W-4 *	Louisiana Department of Revenue PO Box 201 Baton Rouge, LA 70821
Maine (207) 626-8475	Yes	State Form W-4ME	Maine Revenue Services Income/Estate Tax Division 24 State House Station Augusta, ME 04333-0024
Maryland (410) 260-7980 (Central MD) 800-638-2937 (Others)	Yes	State Form MW-507	Maryland Taxpayer Service 110 Carroll St Annapolis, MD 21411
Massachusetts (617) 887-6367 or 800-392-6089	Yes	State Form M-4	Massachusetts Taxpayers Assistance 200 Arlington St Chelsea, MA 02150
Michigan 800-487-7000	No (exempts all active duty military Pay)		Michigan Department of the Treasury Treasury Building Lansing, MI 48922
Minnesota (651) 296-3781 800-652-9094 Conditions for exemption from state tax: If member is on active service and is stationed outside the state.	Yes	Federal Form W-4 *	Minnesota Department of Revenue Individual Income Tax Division Mail Station 5510 St. Paul, MN 55146-5510

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Mississippi (601) 923-7393	Yes	State Form 62-420	Mississippi State Tax Commission PO Box 1033 Jackson, MS 39215-3338
Use form: http://www.mstc.state.ms.us/taxareas/withhold/89350001.pdf			
Missouri (573) 751-7200	Yes	State Form MO W-4	Taxpayer Services Missouri Department of Revenue PO Box 3300 Jefferson City, MO 65105
Conditions for exemption from state tax: See the rules for Connecticut.			
Montana (406) 444-6900:	Yes (exempts all active duty military pay)	Federal Form W-4 *	Montana Department of Revenue PO Box 5805 Helena, MT 59604
Conditions for exemption from state tax	If member performs active duty in the Regular Armed Forces, is legal resident of Montana, and entered into active duty from Montana. However, members serving in Reserve components should have state income taxes withheld. Active duty personnel must file a return even if qualified for an exemption.		
Nebraska 800-742-7474	Yes	Federal Form W-4 *	Nebraska Department of Revenue 301 Centennial Mall S. PO Box 94818 Lincoln, NE 68509-4818
Nevada (775) 687-4892	NO STATE INCOME TAX		
New Hampshire (603) 271-2186	NO STATE INCOME TAX		
New Jersey (609) 292-6400	Yes	Federal Form W-4 *	Division of Taxation PO Box 266 Trenton, NJ 08695-0266
Conditions for exemption from state tax: See the rules for Connecticut.			
New Mexico (505) 827-0822	Yes (effective 1/1/07, exempts all active duty military pay)	Federal Form W-4 *	Taxation and Revenue Department PO Box 25122 Santa Fe, NM 87504-5122
Conditions for exemption from state tax: See rules for Montana			
New York 800-443-3200	Yes	Federal Form W-4 *	Correspondence Unit W.A. Harriman Campus Albany, NY 12227
Conditions for exemption from state tax: See the rules for Connecticut			
North Carolina (919) 733-2332 or 877-252-4052	Yes	State Form NC-4	Department of Revenue PO Box 25000 Raleigh, NC 27640-0640
North Dakota 800-638-2901 (In state) (701) 328-3450 (Out of state)	Yes	Federal Form W-4 *	State the Tax Commissioner State Capitol 600 E Boulevard Avenue Bismarck, ND 58505-0599
Ohio 800-282-1780	Yes	State Form IT-4*	Taxpayer Services Division 830 Freeway Drive N Columbus, OH 43229
Conditions for exemption from state tax: Effective with tax year 2007, if member is on active service and is stationed outside the state. Member should complete form IT 4 MIL, Military Employee Withholding Exemption Certificate – 2007, to claim the exemption and forward it to their SPO. SPO will enter exemption in DA. http://tax.ohio.gov/documents/forms/ohio_individual/individual/2007/IT_IT4MIL.pdf			
Oklahoma (405) 521-3160	Yes	Federal Form W-4 *	Taxpayer Assistance Division 2501 Lincoln Boulevard Oklahoma City, OK 73194
Oregon 800-356-4222 (In state) (503) 378-4988 (All others)	Yes	Federal Form W-4 *	Revenue Building Tax Help, Room 135 955 Center Street NE Salem, OR 97310-2555
Conditions for exemption from state tax: See rules for Connecticut.			

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

State Tax Listing, Continued

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Pennsylvania (717) 787-8201 888-728-2937	Yes	Federal Form W-4 *	Bureau of Individual Taxes Taxpayer Inquiry Unit 5th Floor, Strawberry Square Harrisburg, PA 17128
Conditions for exemption from state tax: See rules for Connecticut.			
Puerto Rico (787)721-2020	Yes (If stationed outside the U.S.)	Form 499R-4.1	Director, Income Tax Division Treasury Department PO Box S-4515 San Juan, PR 00901
Note: Filing of a tax return and payment of personal income tax may be required. It is the member's responsibility to contact the state tax authority to determine tax liability.			
Rhode Island (401) 574-8829	Yes	Federal Form W-4 *	Rhode Island Division of Taxation 1 Capitol Hill Providence, RI 02908
South Carolina (803) 898-5709	Yes	Federal Form W-4 *	South Carolina Department of Revenue PO Box 125 Columbia, SC 29214
South Dakota 800-829-9188	NO STATE INCOME TAX		
Tennessee 800-342-1003 (In state) (615) 253-0600	No (exempts all active duty military pay)		Department of Revenue Jackson State Office Building 500 Deaderick St Nashville, TN 37242
Texas 800-662-4335	NO STATE INCOME TAX		
Utah 800-662-4335	Yes	Federal Form W-4 *	Utah State Tax Commission 210 N 1950 W Salt Lake City, UT 84134
Vermont 866-828-2865 (In state) (802) 828-2865	Yes	State Form W-4VT	Vermont Department of Taxes Taxpayer Services Division 109 State Street Montpelier, VT 05609
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Virginia (804) 367-8031	Yes	State Form VA-4	Customer Services Section PO Box 1115 Richmond, VA 23218-1115
Washington 800-647-7706	NO STATE INCOME TAX		
West Virginia 800-982-8297 (304) 558-3333	No		Department of Tax & Revenue Taxpayer Services Division PO Box 3784 Charleston, WV 25337-3784
Note: Filing of a tax return and payment of personal income tax may be required. It is the member's responsibility to contact the state tax authority to determine tax liability.			
Wisconsin (608) 266-2486	Yes	Federal Form W-4 *	Wisconsin Department of Revenue PO Box 8903 Madison, WI 53708
Wyoming (307) 777-7961	NO STATE INCOME TAX		

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Income Tax Exclusion for Duty in Combat Zone

Introduction

Certain income earned by members of the Armed Forces while in a combat zone designated by the President is not subject to withholding of federal or state income tax.

Qualified Areas for Combat Tax Exclusion

Section 8-G-2 of the PAYMAN designates combat zones, which qualify for federal income tax exclusion. The listing of qualified areas may be modified from time to time via ALCOAST messages.

Rules for Combat Tax Exclusion

The following rules apply when determining income tax exclusion for duty in a combat zone.

- A member who is present on official duty in a combat zone, no matter how brief, qualifies for combat tax exclusion for that month.
- When the airspace over a combat zone is specifically included as part of the zone, members who pass over or through the combat zone during the course of a trip between two points, both of which lie outside the zone, are entitled to an exclusion.
- If the airspace over a combat zone is not specifically included as a part of the zone this exclusion is valid only if the members are assigned to the airspace of the combat zone on official temporary duty, or if the members otherwise qualify for hostile fire/imminent danger pay as a result of the flight.
- Members performing military duties in areas outside a designated combat zone in support of military operations in a combat zone, who qualify for imminent danger pay, also qualify for combat tax exclusion.

Continued on next page

Income Tax Exclusion for Duty in Combat Zone, Continued

Amount of Combat Tax Exclusion

For enlisted members and warrant officers, all taxable military pay items earned by a member during a month while serving in a combat zone are excluded from federal taxation.

For officers O-1 and above, the first $6,529.20 per month of taxable military pay items is excluded from federal taxation.

Note 1: The $6,529.20 figure increases annually to match the current base pay rate for an E-10 plus Imminent Danger Pay

Note 2: Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)(if entitled) is not included in the $6,529.20 ceiling.

Members entitled to combat tax exclusion will not have any Federal income tax withheld from the exempted amount of their pay. Members may voluntarily elect to have taxes withheld. Check specific state regulations regarding state withholding.

Extension of filing date for tax returns

Members serving in a combat zone are allowed an extension of up to 180 days to file their federal income tax return.

The due date for filing state tax returns is regulated by each state. Members serving in a combat zone should contact their state tax office regarding the postponement of filing state tax returns

Procedures

Notify the servicing SPO, via letter or message, when a member qualifies for or loses entitlement to combat tax exclusion. When starting combat tax exclusion, include a statement indicating the member is entitled on either a:

- Continuous basis (tax exclusion will continue until submission of a subsequent stop transaction) or on a,
- One time basis (tax exclusion for a single month only).

Notification of eligibility for combat tax exclusion will be included with a notification of eligibility for Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID). See page 7-A-6 of this manual for the procedures for reporting entitlement to HF/ID and, if applicable Combat Servicemember's Group Life Insurance (SGLI) Allowance. See page 7-B-10 of this manual for Combat SGLI procedures.

Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form

Mailing of IRS Form W-2

IRS Form W-2s are mailed no later than 31 January of each year. To allow for reasonable mailing and forwarding due to address changes, reporting of lost or missing W-2 forms is after 15 February.

Ensuring Tax Mailing Address is correct

To furnish the member with a timely IRS Form W-2, all active duty, reserve and retired personnel must:

- Continuously keep his/her home mailing address up to date in Direct Access.
- Notify Post Office in late December, so W-2 can be forwarded.
- Ensure all addresses comply with prescribed postal address standards.

Note: Information about mailing addresses:

- To comply with Postal regulations and to receive mailing discounts, addresses contained in JUMPS are run through a monthly postal standard address conversion program.
- The postal database does not recognize that numerous Coast Guard units may reside at a given address. For instance, in Portsmouth, there are several units located at 4000 Coast Guard Blvd. For single members living in barracks or shipboard berthing, the unit's name may be part of the address.
- To ensure proper delivery, the unit's name must be entered at the BEGINNING of the street information on the Tax Mailing Address transaction and the accurate 9-digit zip code must also be entered.
- If the unit's name is at the end of the street information or as part of the city/town information or the 9-digit zip code was not entered, the unit's name will be deleted by the monthly postal address conversion program.

Example of Good Address: ISC (BEQ) 4000 CG Blvd
Portsmouth, VA 23703-2199

Example of Bad Address: 4000 CG Blvd ISC (BEQ)
Portsmouth, VA 23703-2199

Continued on next page

Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

For members entering the Coast Guard late in the calendar year

If transactions to access a member into Direct Access do not properly process until after the end month compute December polling cutoff, the member will not receive a W-2 for the year member entered the Coast Guard.

For example: A member enlists on 16 December 2007, but was not paid by until 15 January 2008. The member will not receive a W-2 for 2007. The taxable wages earned by the member during calendar year 2007 will be reported on the member's 2008 IRS Form W-2 (as per IRS regulations).

Taxable wages are reported when paid vice when earned

For example, an E-5 serves aboard a Career Sea Pay eligible vessel from 12 to 16 December 2007, but the member does not receive payment for the Career Sea Pay earned in 2007 until 15 January 2008. Per IRS regulations, the taxable income is reported on the IRS Form W-2 for 2008.

General information regarding the IRS Form W-2

General information regarding each block on the IRS Form W-2 can be found on the reverse of "Copy C for Employee's Records". Below is information concerning blocks 12.T and 15 of the IRS Form W-2.

Block	Information about the block
12.T	Adoption Assistance Benefits. Qualified adoption expenses paid by the Coast Guard are not subject to federal income tax withholding.
15	• For active duty members, IRS regulations require the "Retirement Plan" block be checked. • For reserve members, the "Retirement Plan" block will only be checked if the member served on active duty, other than for training, for more than 90 days. If the cumulative active service during the calendar year was less than 91 days, the "Retirement Plan" block will not be checked on the reserve member's IRS Form W-2.

Continued on next page

Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

How to request a duplicate IRS Form W-2

To receive a duplicate W-2 form for the previous year, the member must:

Step	Action	
1	Review address on December LES (Block #22).	
	If	**Then**
	Correct	The unit submits a request (E-mail, FAX, letter, etc.) to PSC (ses) after 15 February indicating: • Lost, destroyed or did not receive. • Member's name, and SSN/EMPLID
	Incorrect	• Contact prior unit/residence and request the W-2 form be forwarded. • Update current mailing address.
2	If after 15 February the W-2 has not been located or is lost; the member's unit or SPO submits request (E-mail, FAX, letter, etc..) to PSC (ses) including: • Member's name and SSN. • Mailing address for duplicate W-2. • Reason why block #22 was not updated with current address and action taken to update address or • If W-2 was lost or destroyed indicate "lost".	
3	PSC (ses) will reissue W-2 within 7 days of receipt of request.	

How to request a corrected IRS Form W-2

Follow the procedures below when questioning a figure reported on the IRS Form W-2:

Stage	Who Does It	What Happens
1	Member	Notifies unit admin office with the following: • Item on W-2 suspected to be in error • What the member thinks is the right amount and why • Calculations
2	Unit	• Review member's calculations and supporting documentation, i.e., LES
3	SPO	• Verify calculations provided by member/unit • Notify PSC (ses) via E-mail and provide calculations.

Request for Federal or State Tax Adjustments

Request for Federal or State Tax Adjustments

It is the member's responsibility to ensure that his/her federal or state tax information is kept current and up-to-date. If through administrative error (i.e., SPO received a tax adjustment request from the member, but failed to act on member's request), a retroactive adjustment may be requested. If there is no administrative error, a retroactive adjustment will not be made.

Example: The state of California permits the member to be exempt from state taxation while on active duty and stationed outside the state. If a member who is stationed in California and is a legal resident of California, transfers PCS to Florida, the member is responsible for ensuring he/she is exempt from state withholding. If the member does not initiate action to change his/her state tax until several months later, the member will not receive the SITW previously withheld. The member will have to collect any overpaid state taxes from the state of California.

If an adjustment needs to be made to the member's FITW or SITW then the member must:

If the Member is	Then
Active Duty, Reserve, or NOAA	A request (i.e., **Memo**, E-mail) for an adjustment must be submitted via the servicing SPO, with supporting documentation (i.e., DD Form 2058), to PSC (ses). **Note:** The request must be received at PSC prior to 10 December of the current tax year. Per IRS regulations, requests for refunds of FITW or SITW for a prior tax year will not be processed. For a prior tax year, the member will have to collect any overpaid FITW or SITW from the IRS or the state.
Retired (or their annuitants)	A request must be submitted to PSC (ras). **Note:** The request must be received at PSC prior to 10 November of the current tax year. Per IRS regulations, requests for refunds of FITW for a prior tax year will not be processed. For a prior tax year, the member will have to collect any overpaid FITW from the IRS.

Continued on next page

Request for Federal or State Tax Adjustments, Continued

IRS Form W-2c

A statement of Corrected Income and Tax Amounts (IRS Form W-2c) is prepared by PSC (ses) in cases where it becomes necessary to report corrected tax information. PSC (ses) will issue a IRS Form W-2c when the member was qualified for Combat Tax Exclusion for duty in a combat zone.

For example: A member was eligible for Combat Tax Exclusion for the month of October 2007. On 15 February 2008, the member receives the W-2 and becomes aware that the appropriate transactions were not submitted by the SPO for tax exclusion. After the appropriate transactions are submitted by the SPO through JUMPS, PSC (ses) will issue the member an IRS Form W-2c to adjust the member's taxable wages and Earned Income Credit (EIC) (blocks 1 and 13C).

Note: Per IRS regulations, since the tax year has ended, PSC cannot refund the FITW or SITW that was withheld in October 207. Since the year has ended and all withholdings have been reported and paid to the IRS and/or applicable state, the member will collect any overpaid FITW or SITW when he/she files a return or an amended return.

For the purpose of making adjustments for prior period W-2s, all tax returns are considered to be filed on 15 April of the year after the close of the tax year, and any adjustments to a W-2 may only be made within 3 years of that date.

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

Commanding Officer
U. S. Coast Guard
Personnel Service Center

444 SE Quincy ST.
Topeka, KS 66683-3591
Staff Symbol: (SES)
Phone: 785/339-2200
Fax: 785/339-3784

Delivered via facsimile to (785) 339-3784

5000
Date:_____

Commanding Officer (SES)
U. S. Coast Guard Personnel Service Center
444 S E Quincy St
Topeka, KS 6683-3591

I request a replacement copy of my IRS Form W-2, Wage and Tax Statement, for tax year:

2006 *(Do not submit requests for 2006 W-2 before 15 February 2007, requests received prior to 15 February 2007 will not be processed and must be resubmitted on or after that date)*

The original form was ☐ not received. ☐ received, but subsequently lost or destroyed.

Information to aid in processing my request is attached as enclosure (1), CG Personnel Service Center, W-2 Request Worksheet.

I hereby certify that **I was a member of the United States Coast Guard or United States Coast Guard Reserve** during the calendar year for which the replacement IRS Form W-2 is requested.

Sincerely,

_____
SIGNATURE, PRINTED NAME and
RANK or RATE

Encl: (1) CG PSC W-2 Request Worksheet Completed With my Signature.

UNITED STATES COAST GUARD
Department of Homeland Security

U.S. COAST GUARD Personnel Service Center

IRS W-2 Form Request

Print this page and fax it to PSC (SES-AA) at 785-339-3784 or mail to the address below.

Social Security Number: _____ Today's Date: _____

Last Name: _____ First Name: _____ MI: ____

Address _____

City _____ State _____ Zip Code: _____

Daytime Phone # :

Member Status

___Active Duty

___Separated

___Deceased

___Reservist

___Retired (If 2005 or before, you need a 1099 form from our **Retired pay section**)

This worksheet is used to request W-2 forms for employment as a member of the United States Coast Guard or United States Coast Guard Reserve only. Do not sumbit this form to the United States Coast Guard if you (or the deceased) were not a member of the United States Coast Guard or United States Coast Guard Reserve during the calendar year for which the replacement IRS Form W-2 is requested.

Year Desired for W-2

___2006 ___2005 ___2004 ___2003 ___2002 ___Other Year _____

Signature: _____ SIGN HERE

Fax completed form to: PSC **(SES-AA) 785-339-3784 or mail to**:

Commanding Officer (SES-AA)
U.S. Coast Guard
Personnel Service Center
444 SE Quincy St.
Topeka, KS 66683-3591

Enter your fax number here if you would like us to fax a copy to you: _____

During the busy tax season (Feb. 15 thru April 15) there is no guarantee that PSC can fax a W-2.

Return to PSC home page

Section Overview

Introduction

This section provides the guidelines and procedures for the Thrift Savings Plan (TSP).

In this section

Topic	See Page
Thrift Savings Plan (TSP) Overview	8-C-2
TSP Enrollment	8-C-5
Account Maintenance/Contribution Changes	8-C-7
TSP Catch-Up Program	8-C-9

TSP Overview

Introduction

This section provides an overview of the TSP. Information that is more detailed can be found in the references listed below.

References

The following provide detailed information on the policy and procedures for the TSP.

- http://www.tsp.gov/ TSP website
- Coast Guard Pay Manual Chapter 6, section G, Policy Governing TSP

TSP Description

Thrift Savings Plan (TSP) is a Federal Government-sponsored retirement savings and investment plan for federal employees and members of the uniformed services. It is similar to private 401(k) by offering a member the same type of savings and tax benefits that many private corporations offer their employees.

Participation in the TSP is voluntary. Contributions are deducted from a member's pay before taxes are computed. In addition, TSP earnings are tax-deferred.

Employer Matching Contributions

At the present time, the Coast Guard does NOT make matching contributions to military TSP accounts.

Pay that can be contributed to TSP

Members may contribute up to 100% of their basic pay into the Thrift Savings Plan (TSP). Members who elect to contribute from basic pay may also elect to contribute up to 100% of incentive pay, special pay, and bonuses.

Base pay for active duty is defined in 37 U.S.C. section 204; pay for Ready Reserves (e.g., inactive duty for training (IDT) pay) is defined in 37 U.S.C. section 206.

Contributions to TSP remain subject to Internal Revenue Code elective deferral limits. For 2006, the maximum IRS limit for members less than age 50 is $15,000.

Members age 50 and over, or who will reach age 50 on or prior to 31 December, are eligible to invest an additional $5,000 into TSP under the TSP catch-up program. (See TSP Catch Up Program on page 9 of this section).

Continued on next page

TSP Overview, Continued

Withdrawals

The TSP is a long-term retirement savings plan that provides special tax advantages. Limitations on in-service withdrawals help ensure that retirement savings will be used for their intended purpose. Therefore, TSP participants who are still members of the uniformed services, are limited to the following two types of in-service withdrawals:

- Age-based in-service withdrawals for participants who are 59½ or older.
- Financial hardship in-service withdrawals for participants who can certify that they have a financial hardship.

When a member makes an in-service withdrawal, they cannot return or repay the money.

The member may use the Account Access section of the TSP Web site (http://www.tsp.gov) or complete Form TSP-U-75, Age-Based In-Service Withdrawal Request, or Form TSP-U-76, Financial Hardship In-Service Withdrawal Request, depending on the type of withdrawal requested. Both forms are available from the TSP Web site.

Before making an in-service withdrawal a member should evaluate options to see if a TSP loan would be more beneficial. (See TSP Loan Program below).

TSP Loan Program

The TSP loan program gives members access to the money they have contributed to their TSP account and the earnings on that money. The member must be in pay status to obtain a loan, because regular monthly loan payments are made through payroll deductions.

The **minimum** loan amount is $1,000. Therefore, the member must have at least $1,000 of their own contributions and attributable earnings on those contributions in their TSP account to apply for a loan. The **maximum** loan amount is $50,000, depending on the amount the member has contributed, any outstanding TSP loans, and limits set by the Internal Revenue Code.

The member may use the Account Access section of the TSP Web site (http://www.tsp.gov) or complete (Form TSP-U-20) Loan Application.

Continued on next page

TSP Overview, Continued

TSP Contribution Limits and Rules

The IRS imposes a limit on the total amount of all contributions a participant can contribute for a year.

The Internal Revenue Code places an annual limit on elective deferrals, e.g., tax-deferred employee contributions to the TSP. For 2007, the elective deferral limit is $15,500.

Note: ELIGIBLE participants who expect to contribute larger amounts of special, incentive, or bonus pay need to pay particular attention to this limit.

- Members age 50 and over, or who will reach age 50 on or prior to 31 December of the current tax year, are eligible to invest an additional $5,000 into TSP under the TSP catch-up program.

- Members serving in a combat zone are subject to a special elective deferral limit. The limit for 2007 is $45,000 or 100% of compensation, whichever is less. This limit applies to all TSP contributions, including tax-exempt contributions. If contributions are also made to a civilian TSP account, the total of all contributions cannot exceed this limit.

TSP Enrollment

Introduction

This section provides the procedure for enrolling in TSP.

Reference

(a) PAYMAN, Chapter 6, section G, Policy Governing TSP

Before You Begin

Members may enroll within 60 days if one of the following applies:

- Joining the Coast Guard
- Reservist recalled to active duty
- Member changing components (i.e. reserve to regular)

Enrollments and un-enrollments cannot be entered in DA using self-service.

Coast Guard Academy cadets and non-prior service CG Naval Academy Preparatory School (NAPS) cadets are not eligible to participate in TSP until they are commissioned or reverted to enlisted status.

Process

This is the process for enrolling in TSP.

Step	Who Does It	Action
1	Member	Completes a TSP-U-1 form. This form can be obtained from the tsp website http://www.tsp.gov/. under Forms and Publications from the **Uniformed Services** section **Note:** Members should not fill out the *TSP-1 election form*. This is the civilian TSP election form and is not to be used by military members. Fax the completed form to PSC (mas-tsp) at (785) 339-3760 or mail it to: Commanding Officer (MAS-TSP) Coast Guard Personnel Service Center 444 SE Quincy Street Topeka, KS 66683-3591

Continued on next page

TSP Enrollment, Continued

Step	Who Does It	Action
2	Member	Completes a TSP-U-3 Designation of Beneficiary Form. This form can be obtained from the tsp website http://www.tsp.gov/. under Forms and Publications from the **Uniformed Services** section. The TSP-U-3 must be mailed to the TSP Service office: Thrift Savings Plan Service Office P.O. Box 385021 Birmingham, AL 35238
3	PSC (MAS-TSP)	Upon receipt of Form TSP-U-1, will enter the form in Direct Access so that it can be processed in member's pay account in JUMPS. Once this processes in JUMPS, the member will receive a LES Remark reading: "Your TSP Election of __% Base Pay, __% Special Pay, __% Incentive Pay and __% Bonus begins _____." **Note:** If a member sees a TSP error on his/her LES, or on IRS Form W-2, the member should contact PSC Customer Care at (785)-339-2200 or by submitting an online trouble –ticket at http://www.uscg.mil/hq/psc/customerservice.shtm.
4	NFC	Opens the member's TSP account and sends a Personal Identification Number (PIN) to the member via mail. See Ref. (a), Article 6-G-10-b for additional details.
5	Member	After receipt of the PIN, the member specifies how he/she wants their TSP contributions to be invested among the TSP funds. See Ref. (a), Article 6-G-10-c for additional details. ***Note:*** It will take approximately 30-35 days after initial enrollment before the Pin# is mailed out to the member. Please make sure the address (mailing address in Direct-Access) is current.

Account Maintenance/Contribution Changes

Introduction

This section provides the procedures for maintenance of a member's TSP account data.

TSP Address Changes

For Active Duty and Reserve members: TSP will automatically receive new address information from the U. S. Coast Guard on the first of the month following the month in which the member's address is changed in Direct-Access.

Separated and former members: Please follow the procedures in TSP Fact Sheet ***"Your TSP Account Address"*** (http://www.tsp.gov/cgi-bin/byteserver.cgi/forms/oc96-4.pdf).

Contribution Changes

Open seasons were eliminated effective 1 July 2005. This means that participants may file contribution elections at any time.

A member may change the way money already invested in a TSP account is invested by requesting an inter-fund transfer, by one of the following means:

- Using the TSP web site http://www.tsp.gov/.
- Calling the Thriftline's automated telephone service at (504) 255-8777.
- Submitting Form TSP-U-50 to the TSP Service Office, National Finance Center, P.O. Box 61500, New Orleans, LA 70161-1500.

Members currently enrolled in TSP who desire to change their contribution percentage can do so through the Direct Access Self-Service application (http://www.uscg.mil/hq/psc/ps/self_service/members/thrift_savings_plan.htm) or by completing Form TSP-U-1 (http://tsp.gov/uniserv/forms/tsp-u-1.pdf) and mailing or faxing it to:

Commanding Officer (MAS-TSP)
Coast Guard Personnel Service Center
444 SE Quincy Street
Topeka, KS 66683-3591
Fax: (785) 339-3760

Note: Members can only make one change a month using Direct-Access self-service. If the need arises to make another change during the current month, complete Form TSP-U-1 and forward it PSC (MAS-TSP) as described above.

Continued on next page

Account Maintenance/Contribution Changes, Continued

TSP Separation Notification

If a member was participating in the TSP and is separating from the Coast Guard (Discharge, RELAD or Retirement), the Personnel Service Center (PSC) needs to notify the TSP Service Office. The member will not be able to withdraw funds from their account until the TSP Service Office has been notified, by the Coast Guard, of the separation.

The member must complete a TSP Separation Notification form (http://www.uscg.mil/hq/psc/forms/tspsepform.pdf), and forward it to PSC (MAS-TSP). The *TSP Separation Notification form* is attached to the Career Intentions Worksheet (CG PSC-2045) file.

Fax the completed form to PSC (MAS-TSP) at (785) 339-3760 or mail it to:

Commanding Officer (MAS-TSP)
Coast Guard Personnel Service Center
444 SE Quincy Street
Topeka, KS 66683-3591

TSP Questions:

For questions on enrollment, un-enrollment, deductions or form completion, contact PSC Customer Service via phone (785-339-2200) or via the web form at http://www.uscg.mil/hq/psc/customerservice.shtm. .

Question on TSP investments, loans, and PINS, contact TSP Thrift Line via phone (1-877-968-3778).

TSP Catch-Up Program

Introduction

This section provides procedures for members desiring to participate in the TSP Catch-Up program.

Catch-Up Program Rules

The TSP Catch-Up program applies to members over age 50 or turning age 50 prior to the end of the calendar year. The member must be contributing the maximum amount of regular TSP contributions before any contribution can be made to the Catch-Up program. The TSP Catch-up limits are:

YEAR	LIMIT
2006	$5,000
2007 and after	5,000 + Inflation

- Catch-up contributions are separate from regular contributions, but are combined with regular contributions on the W-2.
- Catch-up contributions are in whole dollar amounts (versus a percentage) and are a deduction from basic pay.
- Elections for catch-up contributions expire on 31 December of each year.
- If a member stops regular contributions, catch-up contributions are also stopped.
- Catch-up contributions are on a pre-tax basis like other TSP contributions.

Enrollment/ Contribution Changes

Enrollments and changes to catch up contributions must be submitted to PSC (MAS/TSP).

Catch-up elections are made on Form TSP-U-1-C (http://tsp.gov/uniserv/forms/tsp-u-1-c.pdf). Fax the completed form to PSC (MAS-TSP) at (785) 339-3760 or mail it to:

Commanding Officer (MAS-TSP)
Coast Guard Personnel Service Center
444 SE Quincy Street
Topeka, KS 66683-3591

This page left blank intentionally

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for collecting an in-service debt, counseling a member on an overpayment, and requesting a remission or waiver. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Collection	9-A-1
B	Remissions and Waivers	9-B-1

Section Overview

Introduction

This section provides you with the procedures for collecting an in-service debt and counseling a member on an overpayment.

Cash deposits

If a member desires to repay part or all of an in-service debt, mail a check, made out to U.S. Coast Guard, to PSC (dc) with a copy of the LES or Notice of Overpayment (NOP).

Interest, administrative fees, and penalties

Interest will be applied to all overpayments that occur earlier than the current JUMPS processing period, and on all non-payroll debts to the Coast Guard unless waived by CO, PSC. No interest will be applied if debt is paid in full prior to the start of collection action. A 30-day notice will be provided to the member with interest being applied from the date of notification.

- Administrative fees and penalties will be applied on a case by case basis in accordance with 4 C.F.R., and the CG Pay Manual.

In this section

Topic	See Page
Collection of JUMPS Overpayments	9-A-2
Collection of Other Debts	9-A-4

Collection of JUMPS Overpayments

Introduction

An overpayment of pay and allowances is the result of errors or delays in processing pay-related transactions. This will assist the unit when counseling a member on an overpayment.

Reference

(a) PAYMAN, Chapter 11, In-Service Debt Collection

How a member is notified of an overpayment

PSC (mas) will provide a Notice of Overpayment (NOP) letter for each member with a debt of $751 or more. Members with debts of $750 or less will be notified by a message on the LES.

Action upon receipt of a Notice of Overpayment letter

Upon receipt of a Notice of Overpayment (NOP) letter the member's commanding officer shall:

- provide a copy of the NOP letter to the member.
- counsel the member regarding the debt and the collection procedure.

Overpayment collection – Reserves not on active duty

Overpayments to selected reservists (SELRES) will be collected from future drill/ADT/active duty pay earned by the reservist. Collection will be established at 20% of the reservist's future available pay if the overpayment was through no fault of the member. The member's commanding officer may propose collection at a lower percentage if collection of 20% of available pay would cause a financial hardship.

Continued on next page

Collection of JUMPS Overpayments, Continued

Overpayment collection process

Use this table when counseling the member on overpayment collection procedures.

Note: The standard procedures described below do not apply if the time remaining before the member's scheduled date of separation is not sufficient to complete collection. Every effort will be made to collect debts prior to separation.

If overpayment is	Then collection will be
less than $150	taken during current month if sufficient net pay exists, with a remark on the LES **Note**: If sufficient net pay does not exist, then the member will be advanced the overpayment amount and collection will start the next month
$150 to $750	scheduled for automatic repayment at a rate not to exceed $150 a month starting the next month with a remark on the LES
$751 to $1999	scheduled in 5 equal monthly installments 30 days after unit CO receives written notice of member's debt
$2000 or greater	scheduled as 20% available pay if overpayment was through no fault of the member or $400 per month whichever is greater unless: • 20% of available pay makes repayment less than 5 months, collection will be set at 5 months • repayment exceeds 12 months then repayment rate will be 1/12 of debt, provided it doesn't exceed available pay • if 12 equal installments exceed available pay, then repayment will be amount of available pay

Requesting a different repayment schedule

The member's commanding officer may propose a different repayment schedule based upon the member's financial status, as long as repayment is completed prior to separation. Repayment of less than 10% of available pay will only be approved in cases of legitimate financial hardship. If a financial hardship exists, a Financial Statement, CG-5489B, (from Enclosure (1) to this manual) must be completed and forwarded to PSC (mas) for review and approval.

Collection of Other Debts

Introduction There are several types of debts that a member may incur that can be collected directly from their pay.

Reference (a) PAYMAN, Chapter 11, In-Service Debt Collection

Types of debts This table lists several types of debts that can be collected from a member's pay.

Type	Who does it	Action taken
Unliquidated Travel Advance	PSC (tvl)	Issues *dunning letter to member.
	FINCEN	Initiates collection (Active duty members).
	PSC (dc)	Initiates collection (Reserve members).
IRS Tax Levy	Unit	• Forwards notice of levy to PSC (mas) • Notifies originating IRS unit that notice of levy has been forwarded.
	PSC (mas)	Initiates collection.
Garnishment Involuntary Allotment	Unit	Upon receipt of a court order for garnishment returns order to sender with a letter informing them that the order must be sent directly to PSC (lgl) for action.
	PSC (lgl)	Prior to starting an involuntary allotment, PSC (lgl) will forward documentation to both the member and the member's commanding officer, notifying them that automatic processing will occur if a response is not received within 90 days from the date PSC mailed the documentation. Specific procedures to be followed by the member and the command will be included with the documentation provided by PSC.
Private Damages	Unit	Submits the report of investigation to PSC (dc).
	PSC (dc)	Initiates collection.

*dunning – "An important demand for payment"

Continued on next page

Collection of Other Debts, Continued

Type of Debts
(continued)

Type	Who Does It	Action Taken
Bankruptcy	Unit	Forwards notice of bankruptcy to PSC (LGL)
	PSC (LGL)	Initiates collection
Clothing & Small Store Checkage	Unit	The Uniform Distribution Center, Woodbine, NJ, will deduct payment for uniforms purchased through UDC Woodbine from member's pay via JUMPS input. Emergency uniform issuances (e.g., to member's returned from unauthorized absence) are collected from a member's pay via submission of a Pay Adjustment Authorization (PAA), DD Form 139, by the Unit to PSC (DC).
Duplicate Payments	PSC (DC)	Forwards a dunning letter to member
Debts Owed to Coast Guard Mutual Assistance (CGMA)	Unit	Notifies SPO of debts owed to CGMA to be collected from member's available final pay
	SPO	Notifies PSC (SES) and Mutual Assistance Office in Headquarters. The notification must contain: • name, SSN, EMPLID • scheduled date of separation, • CGMA office that processed loan, • loan balance, • blanket code and • whether the member has consented in writing to voluntary collection of the debt, • or if the member has not consented to voluntary checkage, the date on which the member was provided written notice of the debt and planned involuntary collection action
	PSC (SES)	Initiates deduction from separation pay and forwards payment to CGMA

Continued on next page

Collection of Other Debts, Continued

Types of Debts (continued)

Type	Who Does It	Action Taken
Debts Owed Other Service Relief Society	Other Armed Service	Forwards PAA
	PSC (SES)	Initiates deduction from separation pay
Unpaid DOD Hospital Charges	Care Provider	Forwards statement of charges to PSC (DC)
	PSC (DC)	Initiates collection
Damage to Government Quarters	Housing Officer	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Bad Check/ Defaulted Payment Plan	NAFA/AAFES	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Bad Check to CG	FINCEN	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Tuition Assistance Recoupment	Navy	Forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Delinquent Government Travel Card	CITIBANK	Forwards PAA to HQ (CFM-3)
	HQ	Reviews and forwards PAA to PSC (DC)
	PSC (DC)	Initiates collection
Health & Comfort Items	Exchange	Forwards PAA and DD-504 to PSC (DC)
	PSC (DC)	Initiates collection

Section Overview

Introduction

This section will guide you through the procedures for requesting a remission or waiver.

In this section

Topic	See Page
Remissions	9-B-2
Waivers	9-B-3

Remissions

Introduction

To cancel an uncollected amount of indebtedness to the U.S. Government, a member must request a remission of that debt. This will assist you with requesting a remission. Remission Application forms (CG-5489-1) are located on PSC's web site at http://www.uscg.mil/hq/psc/forms.

References

(a) PAYMAN, Section 11-G, Remission of Indebtedness for Enlisted Members

Who can apply

Any enlisted member on active duty can request a remission.

Note to deploying or deployed units

If on a cutter 210' or larger, preparing to deploy or deployed when a member receives a notice of overpayment the unit may request suspension of collection action by notifying the SPO and PSC-Customercare@uscg.mil, indicating date application is to be forwarded (must be submitted within 60 days).

Applying for a remission

Use this table when completing an application for a remission.

Stage	Who Does It	What Happens	Action to be Taken
1	Member	• **Completes CG-5489-1** • Completes CG-5489B, (if a financial hardship exists)	• Within 15 days of receipt of notice of overpayment
2	CO of Unit	• **Completes, Unit Information and Command Endorsement, CG-5489-1** • Completes Part II, CG-5489B	• Within 5 working days of receipt of CG-5489-1 from member
3	PSC (mas)	• Suspends collection of indebtedness • Forwards application and endorsements to COMDT (CG-1222) • Notifies member of action taken	• Within 3 working days of receipt of CG-5489-1

Waivers

Introduction

An erroneous payment to a member is subject to collection when detected. A member may request cancellation of this debt by submitting a request for waiver. This will assist you with requesting a waiver. The Waiver Application form (CG-5489-2) is located on PSC's web site at http://www.uscg.mil/hq/psc/forms

References

(a) PAYMAN, Section 11-F, Waiver of Claims for Erroneous Payment

Who can apply

Any present or former member of the U.S. Coast Guard and recipients of pay and/or allowances on behalf of members or former members may apply for a waiver of a debt.

Applying for a waiver

Members on active duty or serving in the selected reserve must use this procedure when submitting an application for a waiver.

Step	Who Does It	What Happens	Action to be Taken
1	Member	• Completes member section of CG-5489-2	• Within 15 days of receipt of notice of overpayment
2	CO of Unit	• Completes Unit Information and Command Endorsement of CG-5489-2	• Within 5 working days of receipt of CG-5489-2 from member
3	PSC (MAS)	• Forwards application and endorsements to COMDT (CG-1222) • Notifies member of action taken	• Within 3 working days of receipt of CG-5489-2

Note: Former members of the U.S. Coast Guard, and recipients of pay and/or allowances on behalf of a member or a former member should contact PSC (ccb) for information on waiver requests.

This page left blank intentionally.

Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid for completing administrative remarks, recording medals and awards, reporting completion of NJP or courts-martial proceedings, reporting unauthorized absence or deserter status and reporting return from unauthorized absence or deserter status. This chapter provides checklist, guides, and information required to complete these tasks.

In this chapter

Section	Description	See Page
A	Performance	10-A-1
B	Discipline	10-B-1

This page left blank intentionally

Section Overview

Introduction

This section will help you to locate the policies and procedures for completing an administrative remark entry, guide you through the procedures for reporting medals and awards, and aid you in completing and reviewing an Enlisted Employee Review Worksheet (EERW).

In this section

Topic	See Page
Administrative Remarks (CG-3307)	10-A-2
Reporting Medals and Awards	10-A-3
How to Complete Enlisted Employee Review Worksheet for Units Without Access to Direct Access	10-A-4
Administrative Review of the Enlisted Employee Review Worksheet	10-A-9

Administrative Remarks (CG-3307)

Introduction

The CG-3307 provides a means of recording miscellaneous entries, which are not recorded elsewhere in a Personnel Data Record (PDR). Administrative Remarks entries are made, to document counseling, or to record any other information required by current directives, or considered to be of historical value.

Reference

(a) COMDTINST 1000.14 (series), (Preparation and Submission of Administrative Remarks
(b) PPPM, Enclosure 6

Policies and procedures

- The only authorized CG-3307 entries are those listed in Enclosure (6) to this manual.
- The policies governing the use of the CG-3307 can be found in Ref. (a).

Example entries

See Reference (b) for examples.

Reporting Medals and Awards

Introduction

All medals and awards that have been presented to the member must be reported to the SPO for entry into Direct Access.

References

Direct Access Guide, Honors and Awards

Reporting Awards

When a member receives a medal or award, forward a copy of the certificate or other documentation to the Direct Access input office (SPO or Unit).
A listing of all Award Codes can be found in an Excel spreadsheet on the PSC Website: http://www.uscg.mil/hq/psc/3pm.htm.

Direct Access Path

Home > Develop Workforce > Manage Competencies (GBL) > Use > Honors and Awards

Processing Good Conduct Awards

Process table for active duty and reserve Good Conduct Awards.

Stage	Who Does It	What Happens
1	SPO	Forwards a list to the unit of members who are eligible for awards between the 15th of the current month to the 14th of the next month
2	Unit/SPO (See note)	Prepares Good Conduct Award Certificate for the unit commanding officer's signature
3	Unit	Completes Direct Access transaction or forwards a copy of the signed award certificate or documentation to SPO for Direct Access input
4	SPO	Completes Direct Access transaction if unit is unable to enter the data

Note: If unit has no administrative support attached, the SPO will complete the Good Conduct Award Certificate and forward to the unit.

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access

Purpose

The objective of this section is to provide a concise, user-friendly job aid for completing Enlisted Employee Review Worksheet (EERW). Refer to Chapter 10-B of the PERSMAN, for information about the Enlisted Employee Review System.

Discussion

The EERW should only be used for personnel assigned to commands without access to Direct Access. Some examples of affected commands are:

- CG Recruiting Offices
- CG personnel assigned at MEPS
- Underway vessels (to be input upon return to homeport)
- Detached duty.

Direct Access does not allow input of Employee Reviews older than one year. In that case the unit must submit the completed EERW and forward to PSC (adv) for processing.

Process

This is the process used for submission of Enlisted Employee Review Worksheets.

Stage	Who Does It	What Happens
1	Unit	• Determines members that need to be evaluated. • Obtains the EERW from parent command (forms are available on the PSC website at the following location http://www.uscg.mil/hq/psc/forms). Vessels anticipating underway periods during a period ending date should have sufficient copies prior to sailing. • Ensures member signs EERW within 21 days of period ending date. • Mails completed EERW to parent command for data entry into EERS.
2	SPO	• Enters information from EERW into Direct Access. • Prints Enlisted Employee Review Summary (EERS) from Direct Access. • Returns counseling sheet to Unit.
3	Unit	• Verifies EERS for accuracy, counsels member, gets signature, and files summary sheet in member's record.

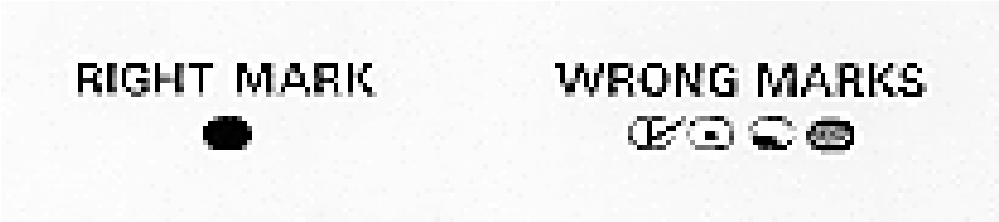
How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

Before you begin

EERW's must be used for all Enlisted Employee Reviews (EER) submitted with a period end date later than 1AUG02 when applicable or if connectivity issues prevent entry into Direct Access. All EER's must be submitted online.

A properly completed EERW is required for entry by parent command. Incorrect forms will be sent back to the unit for corrections.

- Keep these important rules in mind while completing EERW's.
  - Use a pen or pencil
  - Darken the ovals completely, as in this example:



-

Continued on next page

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

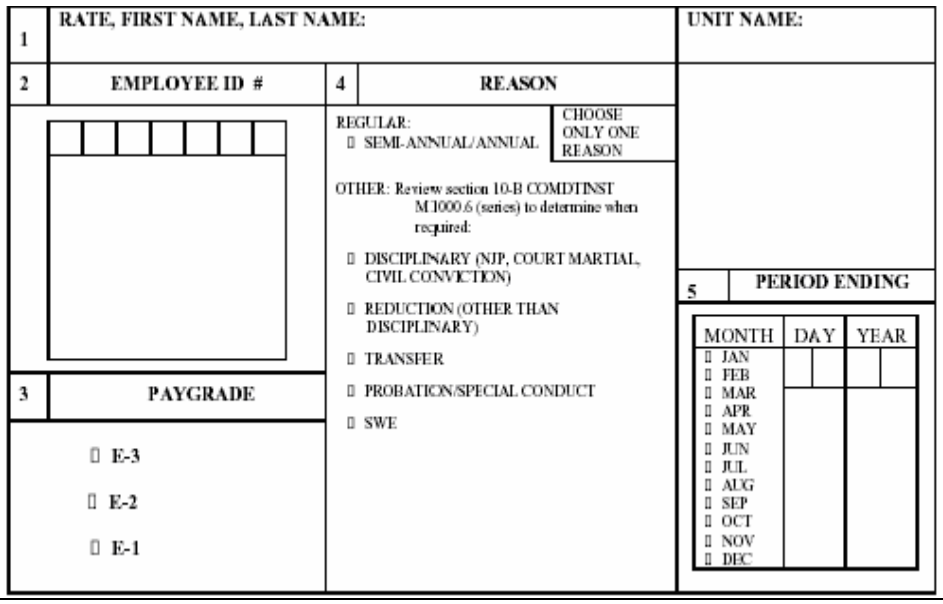
Completing the EERW

Follow these steps and examples to complete the EERW.

Note: If you have any questions after reading these directions, please contact PSC (ADV) at 785-339-3400 for assistance, before attempting to complete the form.

Step	Action
1	Determine the reason for evaluation.
2	Please darken the correct ovals in blocks 1-5.

Block	Enter
1	Print member's full name/rate and unit
2	Enter member's Employee Id
3	Darken the oval for the appropriate pay grade
4	Enter the correct reason code for the evaluation
5	Enter the correct period ending date



Continued on next page

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

Completing the EERW (cont'd)

Step	Action
3	Darken the ovals that properly evaluate the member. • Use only one mark per field. • The supervisor and marking official should use a pencil and enter a mark in the oval, which can be erased if necessary. • The approving official agrees/disagrees and darkens the appropriate oval.
4	All marks of: • 1; • 2; • 7; • Not Recommended; or • Unsatisfactory in Conduct Must have supporting documentation attached to the EERW.
5	LEADERSHIP POTENTIAL Provide written documentation for all personnel E-6 and above describing in detail their potential for future leadership responsibilities.
6	Darken the correct Conduct oval. **CONDUCT** COMPETENCY CONDUCT The degree to which this member, through personal behavior, conformed to the rules, regulations, and military standards, on and off duty. UNSATISFACTORY ◯ Failed to meet minimum standards as evidenced by NJP, CM, or civil conviction; or brought discredit to the Coast Guard as evidenced by adverse CG-3307 entries including financial irresponsibility, non-support of dependents, or alcohol incidents; or failed to conform to civilian and military rules, regulations, and standards. SATISFACTORY ◯ No NJP, CM, or civil conviction; and promoted and supported respect for rules, regulations, and civilian and military standards as evidenced by no adverse CG-3307 entries. A mark of unsatisfactory requires adverse supporting documentation.

Continued on next page

How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

Completing the EERW (cont'd)

Step	Action
7	The supervisor, marking official and approving official must darken in one oval for a mark of not recommended or recommended. SUPERVISOR: ◯ Not Recommended ◯ Recommended MARKING OFFICIAL: ◯ Not Recommended ◯ Recommended APPROVING OFFICIAL: ◯ Not Recommended ◯ Recommended • All members marked Not Recommended will not receive a SWE nor be allowed placement on a supplemental advancement or striker list. Personnel receiving a Not Recommended will also be removed from any and all current advancement lists. • All evaluations completed in the spring are for the November SWE cycle. • Evaluations completed in the fall are for the May SWE cycle. • Reservists are evaluated IAW the submission schedule located in 10-B-5 of the PERSMAN for participation in the October RSWE cycle.
8	The EERW must have four signatures for processing. 1. The supervisor 2. Marking official 3. Approving official 4. Member SUPERVISOR: ◯ Not Recommended ◯ Recommended — I CERTIFY THAT I HAVE EVALUATED THIS MEMBER AGAINST THE WRITTEN PERFORMANCE STANDARDS AND HAVE PROVIDED WRITTEN DOCUMENTATION FOR SUPPORT OF EACH MARK OF 1, 2, 7, OR UNSATISFACTORY CONDUCT AND TERMINATION OF GOOD CONDUCT ELIGIBILITY. Signature Rate/Rank Date MARKING OFFICIAL: ◯ Not Recommended ◯ Recommended — I CERTIFY THAT I HAVE EVALUATED THIS MEMBER AGAINST THE WRITTEN PERFORMANCE STANDARDS AND HAVE PROVIDED WRITTEN DOCUMENTATION FOR SUPPORT OF EACH MARK OF 1, 2, 7, OR UNSATISFACTORY CONDUCT AND TERMINATION OF GOOD CONDUCT ELIGIBILITY. Signature Rate/Rank Date APPROVING OFFICIAL: ◯ Not Recommended ◯ Recommended — ◯ Concur ◯ Do not concur, changes made ◯ Counseling/ Documentation for 1, 2, and 7's required ◯ Counseling required (specify areas) Signature Rate/Rank Date MEMBER: I ACKNOWLEDGE HAVING BEEN COUNSELED ON AND HAVE REVIEWED MY ENLISTED PERFORMANCE FORM FOR THIS PERIOD. I HAVE BEEN BRIEFED ON AND FULLY UNDERSTAND THE SIGNIFICANCE THAT THE ASSIGNED MARKS HAVE ON MY GOOD CONDUCT ELIGIBILITY. I UNDERSTAND THAT I HAVE 15 CALENDAR DAYS IN WHICH TO SUBMIT A MARKS APPEAL. I HAVE BEEN BRIEFED ON AND FULLY UNDERSTAND THE ACTION TAKEN ON MY ADVANCEMENT POTENTIAL. Signature Date

Continued on next page

Administrative Review of the Enlisted Employee Review Worksheet

Introduction

Everyone involved in the enlisted evaluation process has a responsibility to ensure the form is properly completed. An audit of the worksheet will ensure it is processed properly the first time.

Remember the critical nature of the EERW demands that members, commands, parent commands, and processing points adhere strictly to these guidelines to provide the best service to the member being evaluated.

Reasons the EERW rejects

Listed below are several reasons the EERW will be rejected by your parent command. Pay special attention to these areas during your review of each worksheet.

1. Wrong period ending date/wrong evaluation reason.
2. Too many marks in field -- Occurs when the rating chain properly changes a factor mark but fails to erase the original mark completely.
3. No marks in field -- One oval per factor must be darkened.
4. Need supporting documentation.
5. Pay grade does not match -- The unit marks the member for semi-annual evaluation when in fact the member advanced at an earlier date.
6. No signature -- The supervisor, marking official, approving official, and the member must sign the worksheet.

Note: If for some reason the member will be unavailable at the end of the marking period, ensure enough lead-time in EERW preparation to obtain the signature by mail if necessary. This guidance applies to the evaluation of Reserve personnel in particular.

Unit Responsibility

Any worksheet that is improperly completed will be returned to the unit for correction.

Note: If the member has transferred; it is the unit's responsibility to forward the EERW to the new command.

For more information or assistance

Any questions concerning the Enlisted Employee Review Worksheet should be referred to PSC (ADV) at 785-339-3400. You can also e-mail Advancements at: PSC-DG-ADV@.uscg.mil.

This page left blank intentionally.

Section Overview

Introduction

This section will guide you through the procedures following NJP or courts-martial proceedings, reporting a member UA or a deserter, and reporting a member who has returned after being absent or declared a deserter.

In this section

Topic	See Page
Nonjudicial Punishment (NJP) Checklist	10-B-2
Courts-Martial Checklist	10-B-3
Confinement Processing	10-B-4a
Appellate Processing	10-B-4d
Unauthorized Absence	10-B-5
Desertion	10-B-8
Reporting Return of Absentee or Deserter	10-B-11
Reporting Civil Arrest or Conviction	10-B-14

Nonjudicial Punishment (NJP) Checklist

Introduction

This checklist has been provided as a job aid to assist the unit/HRS/SPO in completing all necessary tasks required after NJP proceedings. This job aid is designed to be reproduced locally.

Reference

(a) MJM, Article 1-G-3, Personnel Record Entries
(b) Direct Access Online Manual, EER Instructions
(c) PERSMAN
(d) Military Personnel Security Program, COMDTINST M5520.12(series)

NJP checklist

Follow these procedures after NJP proceedings.

Step	Action	Reference	Date
1	Forward a copy of the CG 4910 to the SPO	MJM	
2	Complete an Enlisted Employee Review in Direct Access. Use "Discipline" for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2 Direct Access Enlisted Employee Review Instructions	
3	File the original Report Of Offense And Disposition (CG-4910), Acknowledgment of Rights Acceptance of NJP, PIO's report and appeals in the unit punishment log.	MJM, 1 -G-4	
4	Initiate report to COMDT (CG-862).	PERSEC, 2-V	

Courts-Martial Checklists

Introduction

These checklists have been provided as a job aid to assist the unit/HRS/SPO in completing all necessary tasks required after a courts-martial. This job aid is designed to be reproduced locally.

Reference

(a) MJM,
Section 5-G, Courts-Martial Action and Review
Section 5-E, Suspension of Sentence
(b) PERSMAN
(c) PERSEC

Summary courts-martial

Follow these procedures after the convening authority has acted on a summary courts-martial where the member was found guilty.

Step	Action	Reference	Date
1	Forward to the servicing HRS/SPO: • Copy of DD-Form 2329 • Acknowledgment of Rights • Copy of Supplementary Promulgating Order	MJM	
2	Complete an Enlisted Employee Review in Direct Access. Use "Discipline" for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2 Direct Access Enlisted Employee Review Instructions	
3	Initiate report to COMDT (CG-862).	PERSEC, 2-V	

Continued on next page

Courts-Martial Checklists, Continued

Special or general courts-martial

Follow these procedures after the convening authority has acted on a special or general courts-martial.

Step	Action	Reference	Date
1	• Forward copy of promulgating order to servicing HRS/SPO	MJM	
2	Notify servicing HRS/SPO of member's fine repayment intentions (if fine imposed)	MJM	
3	Complete an Enlisted Employee Review in Direct Access. Use "Discipline" for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2 Direct Access Enlisted Employee Review Instructions	
4	Initiate report to COMDT (CG-862).	PERSEC, 2-V	

Confinement Processing

Introduction

This section has been provided as a job aid to assist the unit and SPO in completing all necessary tasks required when a member is sentenced to confinement.

References

(a) PERSMAN, Articles 8-F-4 and 7-A-21

Confinement for 90 days or less with no punitive discharge

When a member is sentenced to confinement for 90 days or less with no punitive discharge the unit will:

1. Make notification in accordance with Personnel Manual, 8.F.4.K.
2. Issue TDY orders to confinement facility.

The SPO will:

1. Stop pay entitlements as applicable. A member in military confinement may lose entitlement to BAS, BAH, COLA, Hardship Duty Pay-Location, Career Sea Pay/Premium, Crew & Noncrew Flight Pay, Imminent Danger Pay, SDAP, ACIP, Board PYA Pay, HDIP-VBSS, FLPP, or Diving Duty Pay. See Figure 3-2, 4-2, 4-4, and 4-5 of the CG Pay Manual for more information.
2. BAH Entitlements are member specific (i.e. with dependents and without dependents). Refer to court documents for stopping BAH. BAH with dependents may continue to run for 6 months depending on judge's ruling.
3. Enter Court Memorandum. Reported Date is date of courts-martial. Action Date is 14 days after date of courts-martial.
4. Place member in a confinement status (Administer Workforce > Monitor Absence(GBL) > Use > General Absence). Start Date/Time will be date of courts-martial unless the member was in pre-trial confinement. If member was in pre-trial confinement, the start date/time will be the date member was placed in pre-trial confinement.
5. Return member from confinement status and restart pay entitlement, as applicable, upon the member's release from confinement.

Continued on next page

Confinement Processing, Continued

Confinement for over 90 days or confinement with an unsuspended punitive discharge approved by the convening authority

Coast Guard members with sentences to confinement of 90 days or more, or with an unsuspended punitive discharge approved by the convening authority, shall be assigned to the Personnel Service Center, Topeka, KS, for administrative control. Members will also be administratively assigned to PSC if the assignment authority considers it unlikely that the offender will be ordered to return to his or her parent command after release from confinement.

This is the process:

When Member	Then the ...	Does This ...
Is sentenced to 90 days or more confinement or confinement with an unsuspended punitive discharge (approved by the convening authority)	Unit	Makes notification in accordance with Personnel Manual, 8.F.4.K.
	SPO	Obtains the Results of Trial letter. This letter contains the member's adjudged sentence. Completes the following transactions in Direct Access: • Stop pay entitlements as applicable. A member in military confinement may lose entitlement to BAS, BAH, COLA, Hardship Duty Pay-Location, Career Sea Pay/Premium, Crew & Noncrew Flight Pay, Imminent Danger Pay, SDAP, ACIP, Board PYA Pay, HDIP-VBSS, FLPP, or Diving Duty Pay. See Figure 3-2, 4-2, 4-4, and 4-5 of the CG Pay Manual for more information. • Enters Court Memorandum. Reported Date is date of courts-martial. Action Date is 14 days after date of courts-martial. • Places member in a confinement status (Administer Workforce > Monitor Absence(GBL) > Use > General Absence). Start Date/Time will be date of courts-martial unless the member was in pre-trial confinement. If member was in pre-trial confinement, the start date/time will be the date member was placed in pre-trial confinement.

Note: If discharges are upgraded by convening authority, the member's record will be transferred back to the original unit for discharge processing.
If allotment amounts exceed the total amount of 2/3rds pay after forfeiture for special courts-martial, then the allotments are stopped.

Continued on next page

Confinement Processing, Continued

Confinement for over 90 days or confinement with an unsuspended punitive discharge approved by the convening authority (continued)

When Member	Then the ...	Does This ...
Is sentenced to 90 days or more confinement or confinement with an unsuspended punitive discharge (approved by the convening authority)	SPO	• Mails the SPO PDR to PSC (pers). The Medical PDR will be maintained by the assigned brig. • Faxes a copy of Court Memorandum to PSC (pers) at (785)339-3790.
	PSC SPO (PERS)	Transfers member to confinement facility: 1. Obtains the Department ID and Position number for facility (Develop Workforce > Manage Positions > Inquire > Positions at a Dept) 2. Issues PCS order to transfer member to Department/Position obtained above (Develop Workforce > Plan Successions(GBL) > Use > Succession Plan) • Effective date of PCS is the day before confinement begins. • Next Succession Plan Date is day of confinement. 3. Completes PCS Endorsements (Administer Workforce > Track Global Assignments(GBL) > Use > PCS Orders) • Actual Depart Date is same as Court Memorandum. • Updates DEERS/RAPIDS with confinement status. • Enters member into the Confinement/Appellate database. • Ensures entitlements have stopped and court memorandum has been entered. o If total forfeiture of pay and allowance is awarded, stops SGLI after the 31st day of confinement. Use Benefit Plan code "Y". o Changes BAH accordingly. Effective date will be date of confinement. (BAH-F) o Enlisted - Stops BAS entitlement. Starts BAS minus DMR. o Officer – Continues BAS entitlement. o Changes COLA to PSC zip code (66683). o Changes special pay and allowances accordingly (e.g. Flight Pay, HDIP, etc)

Note: Appellate Leave issues are maintained by PSC (pers).

Appellate Processing

When Member is released from confinement	Then the ...	Does This ...
Transfer member from confinement into appellate leave status	Member	• Completes and signs DD Form 2717 (DOD Voluntary/Involuntary Appellate Leave Action) and SGLI form SGLV-8286. Both forms are faxed to PSC SPO
	PSC SPO (PERS)	• Follows procedures in PSC Appellate Leave Checklist. • Ensure Retention contract is updated every 6 months. • Final pay will be determined upon transfer to appellate leave status. DD-214 is issued when discharge authority is provided by CGPC(epm/opm).

Unauthorized Absence

Introduction

This has been provided as a job aid in determining the procedures when a member is in an unauthorized absence (UA) status.

References

(a) PERSMAN, Articles 8-C-1 and 8-C-2

UA for less than 24 hours

When a member has been UA for less than 24 hours, the unit is responsible for initiating any and all disciplinary action.

UA for over 24 hours

Use this table when a member fails to report and is placed in unauthorized absence status.

When Member	Then the ...	Does This ...
Fails to report in PCS	Receiving unit	• Contacts unit from which transferred to determine if orders were amended or canceled • Notifies HRS/SPO • Notifies and directs the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation
Fails to report TDY to unit or enters UA while TDY	TDY unit	• Notifies permanent unit
	Permanent unit	• Notifies HRS/SPO that maintains PDR • Notifies and directs the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation
Fails to report for normal duty	Permanent unit	• Notifies HRS/SPO • Notifies and directs the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation

Note: If member is an officer also notify CGPC (opm).

Continued on next page

Unauthorized Absence, Continued

UA for 10 days

When the member has been UA or 10 days, notify the next of kin by letter as follows:

> I regret the necessity of informing you that your (son/daughter/other relationship as appropriate), (insert full name and rate), who enlisted in the Coast Guard on (date of enlistment) and was attached to this unit has been on unauthorized absence since (date). Should you know the whereabouts of your (son/daughter/other relationship), I suggest that you urge your (son/daughter/other relationship) to surrender to the nearest Coast Guard or other military activity immediately since the gravity of the military offense increases with each day of absence. Should your (son/daughter/other relationship) remain absent for 30 days, your (son/daughter/other relationship) will be declared a deserter, and a federal warrant will be issued. Additionally, information concerning the unauthorized absence will be provided to the National Crime Information Center. This information will be available to all law enforcement agencies throughout the country.

For member in paygrade E-4 (less than 4 years service) or more junior, with dependents add the following paragraph in letters to the dependents.

> If your (appropriate relationship) remains in an unauthorized absence status for more than 29 days, you may be entitled to Basic Allowance for Housing (BAH), not to exceed 2 months. To be eligible for BAH you must not be assigned to Government Quarters, and cannot be residing with the member. Your request for BAH must be submitted within 3 months of the date that your (appropriate relationship)'s absence commenced. Please include a statement indicating that you are not residing with your (appropriate relationship).
>
> Submit your request to:
>
> COMMANDING OFFICER (MAS)
> COAST GUARD PERSONNEL SERVICE CENTER
> 444 S. E. QUINCY STREET
> TOPEKA, KS 66683-3591
>
> If you have any questions, contact (local unit) for assistance.

- If the member is E-4 (less than 4 years service) or more junior and dependents are residing with a guardian, send a separate letter to the guardian.

Continued on next page

Unauthorized Absence, Continued

UA at time of sailing

Follow these procedures when a member is UA at time of sailing.

Step	Action
1	Complete the following CG-3307 entry (P&D-5) Missed sailing of this vessel from (place of sailing) on (date) on route to (destination). Member had knowledge of the time movement was scheduled. **Note**: Make a notation on the sailing list.
2	If the vessel deploys for 10 or more days: • Administratively transfer the absentee TDY to the nearest HRS/SPO ashore • Complete a CG-3307 (P&D-5) showing unit transferred to and disposition of records and personal effects • Forward original CG-3307 immediately to CGPC (adm-3), copy to HRS/SPO and unit file
3	Inventory absentee's personal effects and coordinate with the Transportation Officer for shipment of absentee's personal effects **Note**: Shipment will be charged against the member's pay.
4	If member is absent while the vessel is in a foreign port, report absence to the nearest US consulate. Include instructions for disposition of the absentee if apprehended.
5	Notify and direct the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation.

Desertion

Introduction

This has been provided to assist you through the procedures for declaring a member to be a deserter.

Reference

(a) PERSMAN,
Article 8-A-2b, Deserter
Article 8-A-7, Disposition of Personnel Effects of Absentees or Deserters

Procedure for declaring a member a deserter

Use this procedure when declaring a member to be a deserter.

Step	Action
1	Issue DD Form 553 normally the 31st day of absence. • You may declare the member a deserter before the 31st day when the member's intentions are known. **Note**: In cases where a member was declared a deserter early, issue DD Form 553 on the day member was declared a deserter.
2	Send original DD Form 553 to CGPC (adm-3) Distribute signed copies of DD Form 553 to: • Member's HRS/SPO • District Commander (o) of the district that the member is absent from • District Commander (o) of the district of the absentee's home of record • CG Personnel Command (epm/opm) • Recruiting office nearest to the home of record • Next of kin via certified mail, return receipt requested, deliver to addressee only • Mayor (or chief of police) of the home of record and of any town to which the absentee may have proceeded

Continued on next page

Desertion, Continued

Procedure for declaring a member a deserter (continued)

Step	Action
2 C o n t i n u e d	• Commanding Officer of the Coast Guard unit and the Armed Forces Police establishment nearest the home of record and any area the absentee may have proceeded to • In the case of an alien believed to be in a foreign country: DEPARTMENT OF STATE ATTN VISA OFFICER-SCA/VO STATE ANNEX NO 2, WASHINGTON, DC 20520 • In the case of an U.S. citizen believed to be in a foreign country: DEPARTMENT OF STATE PASSPORT OFFICE/PTLS 1425 K STREET NW WASHINGTON, DC 20524
3	Forward PDR's to the SPO within 2 days
4	Inventory and transfer deserter's personal effects
5	If member is mentally irresponsible at the time of absence from a hospital, inform CGPC (epm), via chain-of-command, by letter

Continued on next page

Desertion, Continued

Procedure for declaring a member a deserter (continued)

Step	Action
6	Notify next of kin by letter with the following: I regret the necessity of informing you that your (son/daughter/other relationship as appropriate) (full name and rate), who enlisted in the Coast Guard at (place of enlistment) on (date of enlistment), and was attached to this unit, has been on unauthorized absence since (date) and is being declared a deserter from the U. S. Coast Guard effective (date). Should you know the whereabouts of your (son/daughter/other relationship), I suggest that you urge your (son/daughter/other relationship) to surrender to the nearest U. S. Coast Guard activity immediately since the gravity of this offense increases with each day of absence. If you have been issued a Uniformed Services Identification and Privilege Card (DD-1173), the privileges of this card are no longer available to you due to desertion of your (son/daughter/other relationship). You should return this card to the nearest U. S. Coast Guard unit.

Reporting Return of Absentee or Deserter

Introduction

This has been provided to assist you through the procedure for reporting the return of an absentee or deserter.

Reference

(a) PERSMAN, Article 8-C-3, Return of Absentee or Deserter

Delivery by civil authorities

Follow these procedures when reporting the return of absentee/deserter.

Step	Action
1	Before accepting delivery by civil authorities ensure: • That no criminal charges are pending • If charges are pending, forward a full report to CGPC (epm/opm) • Take no action pending receipt of instructions
2	If civil charges are made after custody has been accepted, the provisions of the Manual for Courts-Martial apply.
3	Give civil authorities no assurance that an absentee or deserter will be tried by military court for violations of Federal or State laws, or that any individual will be retained in or discharged from the service.

Adequate facilities for retention

Before accepting delivery of an absentee or deserter ensure your unit is considered an adequate facility IAW Ref (a), 8.C.3.b. To be considered an adequate facility for retention of absentees or deserters, the facility must meet these requirements:

- Shore unit – must be equal to or exceed those of a Coast Guard station.
- Afloat unit – must be equal to or exceed those of a WLM class cutter.

- Note: If your unit does not meet these requirements, you should request instruction from district commander (o).

Continued on next page

Reporting Return of Absentee or Deserter, Continued

Report of Return of Absentee, DD Form 616

If the member has been declared a deserter, prepare and distribute the DD Form 616 to each addressee who was previously sent a DD Form 553.

Reporting return

Notify the proper authority as shown in the reporting return table.

Notification will contain:

- Name and SSN of the member
- Date, hour, and circumstances of return
- Summary of any pending civil charges

Information regarding the date and hour of absence may be obtained from the absentee only after compliance with Article 31(b) of the UCMJ.

Reporting return table

Notify the proper authority as shown in the table below.

When return is to	And unit is	Then report to
Unit from which absent		District commander, Info: CGPC (epm) or CGPC (opm)
Unit other than from which absent	under the operational control of a section or group	Section or group commander by telephone or other rapid means Section or group will take action according to the Uniform Code of Military Justice
Unit in same district	not under the operational control of a section or group	District commander, Info: CGPC (epm), or CGPC (opm) Unit from which absent
Unit outside district	not under the operational control of a section or group	District commander from which absent, Info: CGPC (epm) or CGPC (opm) Unit from which absent **Note**: If absentee was apprehended or delivered (vs surrendered), report return to CGPC (epm) or CGPC (opm) Info: Local district commander Unit from which absent

Continued on next page

Reporting Return of Absentee or Deserter, Continued

District responsibility

When notified of the return of an absentee or deserter, the district commander for the homeport/permanent duty station from which the member is absent will:

- Direct the return of an absentee or deserter to a unit in the district for disciplinary action.
- Request assignment instruction from CGPC (epm) or CGPC (opm) if the member has been temporarily assigned to a unit other than the unit from which the member is absent for disciplinary action.
- Coordinate with PSC (dc) for checkage of the member's pay account for travel costs.

Absentee or deserter from other branch of the Armed Forces

Follow these procedures for reporting the return of an absentee or deserter from another branch of the U. S. Armed Forces.

Step	Action
1	Immediately notify the commanding officer of the parent organization by message and request instructions.
2	Included the following as info addressees as appropriate: • CGPC (epm) or CGPC (opm) • Adjutant General, Department of the Army • Chief of Naval Personnel • Air Adjutant General, Department of the Air Force • Commandant, Marine Corps
3	Prepare a statement in triplicate that includes the following: • Time date and place taken into CG custody. • Circumstances of return (whether surrendered, delivered, or apprehended). • Name and address of person or agency effecting apprehension or delivery.
4	• Provide an original and one copy of the statement to the representative of the agency taking custody of the member.

Reporting Civil Arrest or Conviction

Introduction

The arrest or conviction of a Coast Guard member (active or reserve) by civil authorities must be reported in accordance with the following references.

Reference

(a) PERSMAN, Article 8-B
(b) PAYMAN, Articles 2-C-4 thru 2-C-6
(c) PERSEC, Article 2-V

Process Overview

This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references.

Stage	Who Does It	When	What Happens	References
1	Unit	Upon learning of a member's arrest or detention by civil authorities	• Notifies cognizant Security Officer (For units below the Group level this will be the Group Security Officer). • Notifies servicing HRS/SPO if the member is not entitled to service credit while in the custody of civil authorities.	PERSMAN, Article 8-B PAYMAN, Articles 2-C-4 thru 2-C-6
2	Security Officer	Upon notification of member's arrest	• Completes a Personnel Security Action Request (CG-5588) (The form is available in the "USCG Adobe Forms Library" program). • Sends completed CG-5588 to COMDT (CG-862). • Sends copies of the report to: CGPC (epm) or (opm) and (adm-3). • Sends a copy of the report to the district or area security officer (if not collocated).	PERSEC, Article 2-V

Continued on next page

Reporting Civil Arrest or Conviction, Continued

Process Overview, Continued

This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references, continued.

Stage	Who Does It	When	What Happens	References
3	SPO/ISC	Upon notification of member's arrest and detention beyond the normal expiration of authorized leave or liberty	• Completes a "General Absence" Transaction in Direct Access. Direct Access path: Administer Workforce > Monitor Absence (GBL) > Use > General Absence • Upon the member's return to duty, completes a "General Absence" Transaction" and "Employee Entitlements" transaction to start allowances. Direct Access path: Home > Compensate Employees > Maintain Entitlements > Use > Employee Entitlements	PAYMAN, 2-C-4 Direct Access Guides, General Absence and Employee Entitlements
4	Security Officer	Upon notification of member's arrest and detention and every 60 days until final disposition of the case is known	• Submits an interim report to COMDT (CG-862) using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3). Note: PERSMAN, 8-B-2 specifies 30 days as the interval for interim reports, however PERSEC, 2-V (dtd 04 Sep 2001), which was issued after the most recent change to the PERSMAN, page 8-B-2 (Ch 30 dtd. 19 Mar 1999), specifies 60 days.	PERSEC, 2-V
5	Security Officer	Upon notification of the final disposition of the case	• Submits a Final report to COMDT (CG-862), using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).	PERSEC, 2-V

This page left blank intentionally.

Chapter Overview

Introduction

This chapter provides pay and personnel procedures for reserve mobilization. This chapter also provides checklists, guides, and information required to complete the tasks associated with reserve mobilization.

Use of This Chapter for Mobilization Planning

The process for mobilizing Reservists will be exceptionally smoother if units use this chapter as a guide in training members on mobilization entitlements, and utilize the provided checklists for ensuring necessary paperwork has been completed to make a member medically and legally ready for mobilization.

In This Chapter

The following topics are covered in this chapter.

Topic	See Page
The Mobilization Process	11-2
Types of Mobilization	11-5
Mobilization Orders	11-6
Pay Entitlements When Mobilized	11-9
Travel Entitlements When Mobilized	11-18
Other Entitlements When Mobilized	11-22
Mobilization Checklist	11-24
SPO Mobilization Procedures	11-27
Recall of Retired Members	11-31
Travel Claims During Mobilization Status	11-34
Monthly Verification Procedures	11-45
Continuance On Active Duty	11-46
The Demobilization Process	11-48
Unit Demobilization Checklist	11-50
Medical Readiness	11-51
SPO Demobilization Procedures	11-52
TRICARE Benefits	11-54

The Mobilization Process

Introduction

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

Reference

(a) Direct Access Online Manual, Reserve Orders
(b) Coast Guard Manpower Mobilization And Support Plan, COMDTINST M3061.1

Process

This table provides an overview of the mobilization process.

Stage	Who Does It	What Happens
1	Commandant	A mobilization message is issued.
2	District, ISC (fot) and Field Units	Coordinate mobilization needs to identify reserve members for mobilization. Provide clear information on berthing and messing facilities at the Mobilization Site.
3	ISC (pf)	Receives direction from operational command (district or area commander) to supply mobilization resources. Coordinates with units to identify Reservists to meet mobilization needs.
3	Source Command/ Detailer	If possible, creates the Request for Reserve Orders in Direct Access, otherwise information may be sent directly to SPO for orders generation.
3	ISC (pf)	Provides information on Berthing and Messing at Mobilization Site to SPO/Field for order preparation.
4	Unit	• Screens member for mobilization/medical fitness. • Verifies all personal information is current. • Verifies no other duty/drills are scheduled during timeframe desired. • Ensures member has enough obligated service. • Assists member in making travel arrangements to mobilization site. • Sends letter to member's employer notifying of the recall status. • Mails member's medical record to the mobilization unit.

Continued on next page

The Mobilization Process, Continued

Stage	Who Does It	What Happens
5	Member's Regularly Assigned SPO	Prepares Reserve orders in Direct Access and routes to ISC (pf) for approval.
6	Servicing ISC (pf)	Approves the orders and routes back to the SPO for endorsement.
7	Member's Regularly Assigned SPO	• Prints the Reserve orders. • Signs the Reserve orders. • Mails the Reserve orders to the member. • Coordinates any service obligation paperwork. • Coordinates processing of travel advance requests. • Completes endorsements on Reserve Orders in Direct Access • Starts BAS and BAH • Forwards SPO PDR to the SPO that will be servicing the member at the mobilization site.
8	Member	• Reports for mobilization duty. • Completes check-in paperwork. • Prepares travel claim. • Verifies SGLI for self and spouse. • Updates mailing/e-mail address and direct deposit information in Direct Access (if applicable) [if access to the intranet is unavailable, requests that SPO input mailing address / direct deposit information].
9	Mobilization Site	Reports member aboard. Notifies member's regularly assigned SPO of any unique pay entitlements (SDAP for example).
10	Member's Regularly Assigned SPO	Prepares Direct Access transactions to start pay entitlements
11	PSC (tvl)	Processes requests for travel advances.
12	SPO / PSC	Maintains pay and leave accounts during mobilization.
13	Member	Submits periodic travel claims (normally monthly) if entitled to per diem while in mobilization status.

Continued on next page

The Mobilization Process, Continued

Process (cont'd)

Stage	Who does it	What Happens
14	PSC (tvl)	Processes travel claims.
15	Mobilization Site & ISC (pf)	Coordinate demobilization in advance with member and SPO.
16	Mobilization Site	Ensure member is physically qualified for demobilization. Notifies SPO of any uncollected CG Mutual Assistance loan(s) that need to be collected from member's final active duty pay.
17	Member	Notifies SPO of desires concerning disposition of accrued leave (at least 50 days prior to demobilization unless exigent circumstances exist) via a Career Intentions Worksheet.
18	Member's Regularly Assigned SPO	• Inputs Statement of Intent in Direct Access (at least 45 days prior to demobilization unless exigent circumstances exist). • Prepares Certificate of Release or Discharge from Active Duty (DD-214) and mails to Mobilization Site for delivery to member. • Verifies member's Personnel Data Information File (PDIF) and inputs any missing competencies earned, awards issued or school completions in Direct Access.
19	Mobilization Site	• Delivers demobilization documents to member (DD-214 and instructions for filing travel claim). • Mails member's medical record back to the member's regularly assigned unit.
20	Member's Regularly Assigned SPO	• Verifies the member's leave balances. • Prepares Direct Access transactions to record the member's release from active duty (RELAD). • Forwards SPO PDR back to the SPO for the member's regularly assigned unit.
21	Member	Updates mailing/e-mail address and bank account information in Direct Access, if they are changing (if access to the CG intranet is unavailable, requests that SPO input mailing address / direct deposit information). Submits updated SGLI election forms if SGLI coverage was converted to the maximum level during mobilization, and less than maximum coverage is desired after demobilization.
22	PSC (ses)	Processes final active duty payment to member. Collects CG Mutual Assistance debts.

Types of Mobilization

Introduction

Members of the Reserve Component may be mobilized under several different legislative authorities. The legislative authority used has implications on the members' pay and travel entitlements.

Legislative Authority

The legislative authorities under which a member may be mobilized are listed below.

Citation	Enabling Authority	In Response to:	Type & Limitations
14 U.S.C. 712	Secretary of Department of Homeland Security	Serious natural or manmade disasters, accidents or catastrophes or prior to an incident or event to aid in prevention of an imminent catastrophe, act of terrorism, or transportation security incident.	Involuntary (Title 14) Not more than 60 days per four-month period or 120 per two year period
10 U.S.C. 12301(a)	Congress	War or National emergency declared by Congress	Involuntary (Title 10) Duration of war or national emergency plus six months.
10 U.S.C. 12301(d)	Designated Authority	Any Event or request for EAD, ADSW, Retired recall, etc.	Voluntary (ADSW-AC) Retain only with member consent
10 U.S.C. 12302	President	National Emergency declared by the President	An involuntary call to active duty under 10 U.S.C. 12302 for the Global War on Terror may not exceed 24 consecutive months per set of orders. Note: Reservists involuntarily called to active duty will typically serve no more than 12 months under a set of involuntary active duty orders. Urgent service need identified by operational commanders could result in extension of orders, consistent with the time limits provided by Title 10. However, the extension of involuntary orders beyond 12 months to address this urgent service need must be approved by the Headquarters Office of Reserve Affairs COMDT (CG-131).
10 U.S.C. 12304	President	SELRES Augmentation for any mission deemed necessary by President	Involuntary (Title 10) Not more than 270 days.

Mobilization Orders

Introduction

The mobilization orders authorized by the ISC (pf) drive travel and per diem entitlements. Orders issued in conjunction with mobilization shall specifically state that the member is on active duty in support of a contingency operation.

Reference

(a) Direct Access Online Manual, Reserve Orders
(b) Coast Guard Manpower Mobilization And Support Plan, COMDTINST M3061.1
(c) ALCOAST 381/07; Changes to Reserve Mobilization Policy

Duration and Document Type Of Mobilization Orders

Citation	Type & Limitations	Travel Document Type Recommended
14 U.S.C. 712	Involuntary. Not more than 60 days per four-month period or 120 per two year period	11 – Standard TDY Orders if 30 or less days 13 – Blanket TDY Orders if 31 to 60 days
10 U.S.C. 12301(a)	Involuntary. Duration of war or national emergency plus six months.	13 – Blanket TDY Orders
10 U.S.C. 12301(d)	Voluntary (ADSW-AC) Retain only with member consent	13 – Blanket TDY Orders
10 U.S.C. 12302	Involuntary. Not more than 24 consecutive months.	13 – Blanket TDY Orders
10 U.S.C. 12304	Involuntary. Not more than 270 days.	13 – Blanket TDY Orders

Continued on next page

Mobilization Orders, Continued

Order "Notes" / Standard Remarks

Orders issued under Title 10 or Title 14 require the following entries in the remarks section (e. g. Order "Notes" in Direct Access):

- A statement that the order to active duty is in "Support of a Contingency Operation." And the name of the operation being supported (e.g., Noble Eagle, Enduring Freedom, Iraqi Freedom for Title 10 orders), (Hurricane *Katrina* Recovery Response for Title 14 orders).
-
- All mobilization orders shall contain the following statement: **"**If you have any questions regarding your employment/reemployment rights, you may call 1-800-336-4590 (National Committee for Employer Support Of the Guard and Reserve), check online at http://www.esgr.org/ or the CG Legal Fact Sheet about The Soldiers' and Sailors' Civil Relief Act (SSCRA) - http://www.uscg.mil/legal/la/topics/sscra/about_the_sscra.htm"

- In the case where the reporting location is not within commuting distance of the member's home, add a statement that the call to active duty is in a temporary duty status (TDY).

Continued on next page

Mobilization Orders, Continued

Order "Notes" / Standard Remarks **(continued)**

- The applicable legal authority (statute) under which the member is serving (Note: It is not necessary to include the terms "voluntary" or "involuntary" active duty within these orders):

  (a) 14 U.S.C. 712 (Title 14 orders for members called active duty involuntarily)

  (b) 10 U.S.C. 12302 (Title 10 orders for members called to active duty involuntarily), and reference to "Executive Order 13223, dated September 14, 2001." The period of service is exempt from the five-year limit as provided in 38 U.S.C. 4312(c)(4)(A).

  (c) 10 U.S.C. 12301(d) (ADSW-AC for members serving voluntarily) the Secretaries of the Military Departments have each determined the period of service as exempt from the five year limit as provided in 38 U.S.C. 4312(c)(4)(B).

  (d) Involuntary recall orders must specify the dates for unit training and for post-deployment leave periods

Pay Entitlements When Mobilized

Introduction Pay entitlements depend on the legislative authority under which the orders are issued (Title 10 or Title 14, U.S. Code).

References
(a) PAYMAN
(b) JFTR

Summary This table is a summary of mobilization pay entitlements:

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Basic Pay	Basic Pay	Basic Pay	PAYMAN Figure 2-1
Officer Basic Allowance for Subsistence (BAS)	OFF BAS	OFF BAS	PAYMAN Section 3-A
Enlisted Basic Allowance for Subsistence (BAS)	**Ashore unit:**	**Ashore unit:**	
	ENL BAS No government dining facility available	ENL BAS No government dining facility available	PAYMAN Section 3-B-4.b
	ENL BAS minus Discount Meal Rate (ESM or EUM)	ENL BAS minus Discount Meal Rate (ESM or EUM)	PAYMAN Section 3-B-5
	Afloat unit with an established dining facility:	**Afloat unit with an established dining facility:**	
	ENL BAS minus DISCOUNT MEAL RATE (ESM)	ENL BAS minus DISCOUNT MEAL RATE	PAYMAN Section 3-B-5.b
Reserve Income Replacement Program	Member must complete 18 continuous months of service; or complete 24 months of active duty during the previous 60 months; or is involuntarily mobilized for service on active duty for a period of 180 days or more within 6 months or less following the member's separation from a previous period of involuntary active duty for a period of 180 days or more.	Not Applicable	37 U.S.C. 910. (See http://www.defenselink.mil/ra/ for policy guidance and application form. Applications (DD Form 2919) should be submitted to PSC (MAS) via the member's command and SPO.)

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Basic Allowance For Housing (BAH)	Member with dependents. BAH is based upon the principal place of residence from which recalled, *unless* authorized transportation of household goods, then BAH is authorized for duty station location Member without dependents. BAH is based upon the principal place of residence from which recalled, if the member is ordered to a duty locale where member is unable to occupy their principal residence and was not authorized special storage of household goods. Military member married to another military member. See Figure 3-12, reference (a).	BAH-RC (if active duty orders are for 30 days or less). Locality-Based (active duty orders for 31 days or more) or OHA (if outside the U.S.) based upon the principal place of residence from which recalled. A member retains entitlement to locality-based BAH even if RELAD before completion of the initial period of duty so long as the orders were initially issued for 31 or more days of consecutive active duty. If the member receives an order modification/extension, and the member serves more than 30 days from the date the orders are extended, the member's BAH entitlement changes from BAH-RC to full BAH effective the date the orders are officially modified Otherwise, BAH-RC remains the housing allowance entitlement.	PAYMAN Section 3-C-10 Figure 3-7 Figure 3-8 Figure 3-12 ALCOAST 462/06
Cost-of-Living Allowance in CONUS (CONUS COLA).	CONUS COLA is payable at the rate prescribed for the location of the member's principal place of residence.	Not payable.	JFTR Para U8011,

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Overseas Housing Allowance (OHA)	OHA is only payable when ordered to active duty from an OUTCONUS residence. The OHA rate payable will be based on the location of the member's primary residence.	OHA is only payable when ordered to active duty from an OUTCONUS residence and the orders are for more than 30 days. The OHA rate payable will be based on the location of the member's primary residence.	JFTR, Para U7150-H
Overseas Cost of Living Allowance (OUTCONUS COLA)	OUTCONUS COLA is only payable when ordered to active duty from an OUTCONUS residence. The OUTCONUS COLA rate will be based on the location of the member's primary residence.	OUTCONUS COLA is only payable when ordered to active duty from an OUTCONUS location and there is no per diem entitlement and the orders are for greater than 30 days.	JFTR, Para U7150-H
Family Separation Allowance (FSA)	Member with dependents. FSA- T if assigned in a TDY status *OR* FSA-S to a ship away from dependents for a continuous period of 31 days or more. NOTES: (1) A member must be away for 30 continuous days without family visits at the onset of the mobilization. (2) After the first 30 days, reasonable visits are permissible provided visits are of a temporary nature not exceeding 30 consecutive days in duration.	Member with dependents. FSA- T if assigned in a TDY status *OR* FSA-S to a ship away from dependents for a continuous period of 31 days or more. NOTES: (1) A member must be away for 30 continuous days without family visits at the onset of the mobilization. (2) After the first 30 days, reasonable visits are permissible provided visits are of a temporary nature not exceeding 30 consecutive days in duration.	PAYMAN Section 3.G
Family Supplemental Subsistence Allowance (FSSA)	FSSA is payable when the household income is less than 130% of the federal poverty level and the member is normally eligible for food stamps.	FSSA is payable when the household income is less than 130% of the federal poverty level and the member is normally eligible for food stamps.	PAYMAN Section 3-N

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Enlisted Uniform Issue	If recalled from the IRR or Retired Reserve, an enlisted member may be entitled to an issuance of uniforms depending on time elapsed since retirement or transfer to IRR. Rules vary consult with G-WTR for guidance.	No entitlement	ALCOAST 418/01
Enlisted Clothing Maintenance Allowance	BMA if receiving RBMA prior to mobilization. SMA if receiving RSMA prior to mobilization.	Continues to receive RBMA or RSMA while on active duty. For orders greater than 30 days, the entitlement is BMA or SMA	PAYMAN Figure 3-26
Civilian Clothing Monetary Allowance	STADCMA-CIV Use PSC-5150	STADCMA-CIV (period is 30 days in duration) Use PSC-5150	PAYMAN Figure 3-23 Rules 10 & 11
Officer Uniform Allowance	Additional Officer Uniform Allowance is payable if the active duty period is more than 90 days duration, and the officer has not served on another period of active duty of more than 90 days within the past 2 years.	Not payable (since active duty orders are for less than 91 days).	PAYMAN Section 3.K.3
Hardship Duty Pay for Location (HDP-L)	If mobilized to a designated Hardship Duty Location for over 30 consecutive days.	If mobilized to a designated Hardship Duty Location for **over 30 consecutive days.**	PAYMAN Figure 4-3
Career Sea Pay (CSEAPAY)	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level I rate or the Level-3 rate if operating in-theater.	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level I rate or the Level-3 rate if operating in-theater.	PAYMAN Figure 4-6
Diving Duty Pay	When assigned by orders to diving duty.	When assigned by orders to diving duty.	PAYMAN Figure 4-7
Imminent Danger Pay	When on official duty in a designated imminent danger pay area.	When on official duty in a designated imminent danger pay area.	PAYMAN Figure 4-9
Board Certified Pay for Physician Assistants	Officers designated as physician assistants.	Officers designated as physician assistants.	PAYMAN Section 4-J

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Combat Tax Exclusion	If in an active duty status in a designated combat zone.		PAYMAN Section 8-G
Combat SGLI Allowance	Must be serving in Operations Enduring Freedom or Iraqi Freedom Theaters or be serving outside the U.S. on orders in support of Operations Enduring Freedom or Iraqi Freedom		PPPM Chap 8-B
Special Duty Assignment Pay (SDAP) Enlisted	If ordered to duties which qualify for SDAP. Orders must state entitlement to SDAP.	If ordered to duties which qualify for SDAP. Orders must state entitlement to SDAP.	PAYMAN Section 4-I COMDTINST 1430.1 (series)
Hazardous Duty Incentive Pay (HDIP)	When under flight orders as a non-crew member or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is not payable.)	When under flight orders as a non-crew member or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is not payable.)	PAYMAN Section 5-B
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	When assigned to duty involving participation in flight operations on the flight deck of a ship and if appropriate orders are issued and minimum evolution requirements are met.	When assigned to duty involving participation in flight operations on the flight deck of a ship and if appropriate orders are issued and minimum evolution requirements are met.	PAYMAN Section 5-C
Leave	When on active duty for 30 or more consecutive days, members accrue 2.5 days of leave per month.	If member: Is RELAD before completing 30 days AD — Then: No leave is accrued. If member: Is RELAD on the 30th day of AD — Then: 2.5 days leave is accrued.	PAYMAN Article 7.A.11 ALCOAST 449/05 ALCOAST 462/06
Lump Sum Leave Payment Exempt from limit 60-Day Career Maximum	Upon demobilization, remaining leave balances may be sold, even if the member previously sold 60 days of annual leave during his/her career.	Lump sum payment IS subject to the 60-day career maximum if orders are for 30 days. If more than 30 days, then lump sum payment is not subject to the 60 day career max.	PAYMAN (10-A-1.a.(2) for members on Title 10). (10-A-1.a.(2)

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Servicemembers' Group Life Insurance (SGLI)	When ordered to active duty for more than 30 days - *automatically* insures Member SGLI for $400,000 and Spouse SGLI for $100,000. If the member does not desire maximum SGLI / Spouse SGLI coverage, *must execute a new* election for reduced or no coverage. Also entitled to Child SGLI coverage, $10,000 per child at no cost. Note: SGLI Coverage *does not* revert back to original SELRES designation upon demobilization.	Continues prior level of SGLI / Family SGLI coverage while on active duty for 30 days or less. If orders are for 31 or more days – See Title 10 Orders column.	PAYMAN Section 6-A ALCOAST 462/06
Savings Deposit Program	When assigned to a qualifying combat area is entitled to deposit up to $10,000 in a Savings Deposit Program earning 10% interest per year, compounded quarterly.	Not applicable.	PAYMAN Section 6-F
Advance Pay / BAH / OHA	When recalled to active duty is not entitled to advance pay or advance BAH / OHA.	Not applicable.	PAYMAN Section 9-D-3
Hazardous Duty Incentive pay for Visit, Board Search and Seizure Boarding Teams (HDIP-VBSS)	When assigned to a designated boarding team billet within a designated combat theatre of operations and a minimum of three boardings are made during a calendar months.	When assigned to a designated boarding team billet within a designated combat theatre of operations and a minimum of three boardings are made during a calendar months.	ALCOAST 353/04
FLPP Interpreter FLPP Linguist	Same allowances as Active duty component.	Same allowances as Active duty component.	ALCOAST 585/05 ALCOAST 275/06

Continued on next page

Pay Entitlements When Mobilized, Continued

Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Thrift Savings Plan (TSP)	If called to active duty for a period of more than 30 days, a member of the Ready Reserve may make a new/revised TSP election within 60 days of being called to active duty. Current TSP election will remain in effect.	Not applicable for orders of 30 days or less. Same as Title 10 for orders of more than 30 days. Current TSP election will remain in effect.	PAYMAN Section 6-G ALCOAST 462/06 TSP Web site http://www.tsp.gov/
TRICARE Dental Program	Reservists enrolled in TRICARE Dental for themselves and/or their families prior to mobilization are automatically converted to the lower active duty rate(s) while in a mobilized status. Reservists not enrolled in TRICARE Dental prior to mobilization may enroll their family while on active duty. Upon demobilization: (1) the family will be automatically converted to the higher reserve rate; and (2) the Reservist has the opportunity to enroll in TRICARE Dental for him/herself.	Member continues prior level of TRICARE Dental Program coverage if orders are 30 or less days.	PAYMAN Section 6-C ALCOAST 462/06 United Concordia Web Site @ http://www.ucci.com/ or United Concordia Customer Service @ 1-800-866-8499

Continued on next page

Title 10 Reserve Mobilization Pay and Allowance Matrix

	Paid To		Eligibility &/or Rate Based Upon							
Entitlement	**All**	**Some**	**Pay Grade**	**Longevity**	**Dep Status**	**Unit Type**	**Duty Locale**	**Home Locale**	**Nature of Orders**	**Note(s)**
Basic Pay	X		X	X						Key Longevity Date is Pay Base Date (LES Block 5)
Basic Allowance for Subsistence	X		X			X				
Basic Allowance for Housing	X		X		X			X		Not pd if OHA paid. Special Mbr to Mbr. www.dtic.mil/perdiem/
INCONUS Cost of Living Allowance		X	X	X	X			X		Special mbr to mbr rules. www.dtic.mil/perdiem
Overseas Housing Allowance		X	X		X			X		ONLY if Residense OUTCONUS www.dtic.mil/perdiem/
OUTCONUS Cost of Living Allowance		X	X	X	X			X		ONLY if Residense OUTCONUS www.dtic.mil/perdiem/
Family Separation Allowance		X			X	X	X	X		Away from deps TDY or afloat for > 30 Days. $250 per month
Family Supplemental Subsistence Allow		X			X					Income qualifies for food stamps. www.dmdc.osd.mil/fssa/
Enlisted Clothing Maintenance Allow	X		X	X						
Enlisted Clothing Issue to IRR/Retired		X	X						X	Recalled IRR & retired mbrs are auth issuance on CG-3019(A)
Additional Officer Uniform Allowance		X	X							$200 each acdu > 90 DAYS. Not payable > once within 2 years
Hardship Duty Pay for Location		X					X			$50-$150. www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/

	Paid To		Eligibility &/or Rate Based Upon							
Entitlement	**All**	**Some**	**Pay Grade**	**Longevity**	**Dep Status**	**Unit Type**	**Duty Locale**	**Home Locale**	**Nature of Orders**	Note(s)
Career Sea Pay		X	X	X		X				$20-$610. Payable at Level 1 rate only as temp assignment unless operating in-theater, then Level 3 rate
Diving Duty Pay		X	X						X	$150-$240. www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2
Imminent Danger Pay		X					X			$225. Assigned (including TDY) to 1 of 45 qualify areas.
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS)		X				X			X	$150.00. Minimum of 3 operational boarding in combat theatre.
Board Certified Pay Physician Assts		X		X					X	$166-416 per month. For PYAs certified by (G-WKH)
Combat Tax Exclusion		X					X			Assigned (including TDY) to 1 of 6 qualifying areas.
Special Duty Assignment Pay		X	X			X			X	$75-$375.
Non-Crew HDIP Flight Pay		X	X			X			X	$150-$250. non-crew mbr or tech observer military aircraft
Flight Deck Hazardous Duty Pay		X				X			X	$150. On ship launching, recovering, refueling aircraft.
Leave Accrual & Lump Sum Leave	X									Earn 2.5 days per month. Can sell leave > 60 days in career.
Servicemembers' Group Life Insurance	X				X					$400K/$100K/$10K automatic coverage unless decline.
Thrift Savings Plan	X								X	60 days to enroll or change election if called to acdu > 30 days Current TSP election will remain in effect – member has option to change
TRICARE Dental Program	X								X	See enrollment rules at www.ucci.com
Savings Deposit Program		X					X			$10,000@10% interest. Only 6 qual'g areas. Must withdraw.
FLPP Intepreter		X				X				Linguist - $150.00, Interpreter - $100.00, Interim - $50.00. See ALCOAST 585/05 & 275/06
FLPP Linguist			X				X			

Travel Entitlements When Mobilized

Introduction

Members mobilized on active duty are entitled to temporary duty (TDY) travel entitlements. When not provided with government/ contracted berthing and messing, the member is entitled to lodging plus per diem (meals and incidental expenses, M&IE). Mobilized members are not entitled to permanent change of station (PCS) entitlements.

Note: It is Coast Guard policy that mobilized members shall be provided Government or contracted berthing and messing to the maximum extent possible.

References

(a) JFTR
(b) Lodging Plus Per Diem rates online at https://secureapp2.hqda.pentagon.mil/perdiem/pdrates.html
(c) ALCOAST 544/02

Important Rules, Which Prohibit the Payment of Per Diem

Payment of per diem is not authorized when the member:

1. Commutes between his/her home and his/her duty station, even if the residence lies outside the local reasonable commuting distance.
2. Is on leave.

Travel Advances on Blanket orders (13 document type)

Advances drawn for periods of TDY under blanket orders will only be liquidated against the member's final claim (either at the end of TDY or the end of the Fiscal Year, which ever occurs first). Members should only take one advance during a TDY/Recall period and only annotate the advance (in block 10) on the final TDY claim. This method will eliminate the need for multiple advances during the TDY period, while ensuring adequate funds are available to execute orders. The final claim will serve to liquidate the advance.

Continued on next page

Travel Entitlements When Mobilized, Continued

Summary The table below summarizes the travel entitlements of mobilized members:

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
Mileage	Authorized reimbursement for one round trip from residence to/from TDY site unless the residence and TDY site are in the same city/town corporate limits.	Current local mileage rate not to exceed the cost of Government-procured transportation.	JFTR U7150
Local Mileage	The Order Issuing Official may authorize local mileage for travel between lodging, duty site and dining facility.	Current local mileage rate.	JFTR U3510
Lodging, Meals, And Incidental Expenses (M&IE)	Only authorized if: (1) not provided government quarters; and (2) not assigned to a career sea pay eligible vessel; and (3) member does not commute between home and duty station. Notes: (1) If government quarters are not available, by regulation, government messing is considered not available. (2) If mobilized on TDY orders to another location, and required to procure and maintain quarters at both locations, the member may be entitled to dual lodging. The orders must specifically authorize dual lodging and state the location and period of time. (3) M&IE is payable for whole days except for the departure and return day, which are payable at 75% of the appropriate M&IE rate.	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	JFTR U7150

Continued on next page

Travel Entitlements When Mobilized, Continued

Summary (cont'd)

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
On Base & Proportional Per Diem	At an INCONUS military installation with quarters and messing (all 3 meals) -- Government Base M&IE. At a location with berthing but only one or two meals are available -- Proportional Per Diem. Note: Travel claims for proportional per diem must be submitted manually to PSC (tvl). They cannot be processed through the T-PAX system.	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	JFTR U4125

Continued on next page

Travel Entitlements When Mobilized, Continued

Special Rules When Lodging Is Obtained On a Monthly Basis

Mobilized members, who obtain lodging on a monthly basis and take short periods of leave, may be reimbursed the monthly lodging charge. However, per reference (b), they are not entitled to meals and incidental expenses (M&IE) on leave days. The monthly lodging reimbursement (including utilities and maintenance) may not exceed the daily lodging per diem for the total days of per diem.

Examples:

- The monthly lodging cost is $1,200 in a $50 lodging area. Takes 5 days of leave. The monthly lodging reimbursement will be calculated by dividing the remaining days (25 days) into the monthly lodging cost of $1,200 to arrive at $48 per day. Since $48 is below the maximum daily limit (of $50), the member would be reimbursed the full monthly $1,200 lodging cost.

- The monthly lodging cost is $1,200 in a $50 lodging area.
  Takes 10 days of leave. The monthly lodging reimbursement will be calculated by dividing the remaining days (20 days) into the monthly lodging cost of $1,200 to arrive at $60 per day. Since $60 exceeds the maximum daily limit (of $50), the member would only be reimbursed $1,000 ($50 times 20 entitled days).

In both of the above examples, the member is NOT entitled to M&IE on leave days. Leave must be indicated on the travel claim even if monthly calculation for lodging is used.

Other Entitlements When Mobilized

Introduction

Mobilized members have other entitlements and benefits in addition to pay and travel.

References

(a) JFTR
(b) DOD Instruction 1000.13, Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals available online at: http://www.dtic.mil/whs/directives/corres/pdf/i100013_120597/i100013p.pdf
(c) Coast Guard Medical Manual, COMDTINST M6000.1B (series)
(d) PAYMAN
(e) RPM
(f) ALCOAST 307/02
(g) ALCOAST 153/03

Summary

The table below summarizes other entitlements:

Entitlement	Summary	Reference
Transportation	Members recalled under 10 U.S.C. 12302 are entitled special temporary household goods storage, including privately owned vehicles (POVs). Authority must be requested from Commandant (G-1222). Members without dependents that are authorized special storage of household goods (but no POV) lose entitlement to BAH-I.	Ref. (a), U4470-B and U5466-A.2
Identification Card (ID Card)	Members recalled to active duty for more than 30 days are entitled to an active duty ID card. Members and their eligible dependents are afforded full commissary, exchange, and MWR privileges.	Ref. (b)
Civilian Reemployment	Detailed in the following web sites: • http://www.uscg.mil/hq/reserve/recall/recall.htm • http://www.esgr.org/	
Educational Assistance	On or after September 11, 2001, a member of a reserve component is entitled to educational assistance under this chapter if the member served on active duty in support of a contingency operation for 90 consecutive days or more.	10 USC 1607

Continued on next page

Other Entitlements When Mobilized, Continued

Summary (cont'd)

Entitlement	Summary	Reference
Legal Readiness	Members who are a substantial distance from home might consider executing a Power of Attorney to give another individual the right to act on the member's behalf. A Special Deployment Power of Attorney is recommended over a General Power of Attorney. Members should ensure they have an up to date will for distribution of assets and care of dependents in the event of death. Members may want to set up a Living Will or Advanced Health Care Directive to advise the medical profession on the level of life support to be provided in the event the member is terminally ill. These documents can also identify individuals who may make health care decisions for a member, and provide direction to medical professionals about a member's willingness to donate organs.	Consult local Legal Assistance Office, or see the HQ Reserve Web site @ http://www.uscg.mil/hq/reserve/Recall/Recall.htm
Medical / Dental	Members recalled for more than 30 days to support a contingency operation are authorized medical and dental benefits while on active duty. Dependents of members on active duty for 31-179 days are entitled to: (a) TRICARE Standard; (b) TRICARE Extra; (c) Space-available treatment in military medical treatment and (d) Are eligible to apply for enrollment in TRICARE Prime as well. Demobilized members are entitled to transitional health-care benefits based on their total active military service: • Members with less than six years of service (and dependents) are eligible for 60 days of medical coverage under the TRICARE Transitional Health Care Demonstration Project. • Members with more than six years active duty are entitled to 120 days of coverage for themselves and their dependents. Visit this web site for more TRICARE information specific to reserve mobilization: http://www.tricare.osd.mil/reserve/ Members who incur a disability while on active duty shall follow procedures outlined in reference (e). **See page 11-54, TRICARE Benefits section for additional entitlements to mobilized Reservists.**	Ref (c), 12-Q Ref (d) Ref (g), 7-E Ref (e) Ref (f) TRICARE Website, http://www.tricare.osd.mil/ DOD News Release, No. 1084-04 PPPM, Chap 11, TRICARE Benefits

Mobilization Checklist

Introduction

This checklist provides a listing of tasks to be completed by the member's unit or units (both the regularly assigned unit and the unit the member is reporting to) required when a Reservist is mobilized on active duty.

Unit Checklist

Step	Action	Date
1	Send letter to member's employer concerning mobilization status (see sample on page 11-26).	
2	Counsel member to ensure legal documents are up to date (will, power of attorney, and legal support documents). See previous page.	
3	Ensure member has enough obligated service.	
4	Ensure member's dependents have a telephone number for reaching the member during mobilization, as well as the process for contacting the Red Cross in an emergency situation.	
5	Ensure member and his/her dependent/s are issued active duty ID card/s. If the member's mailing address is changing, update address in DEERS through local DEERS site or by calling the DEERS support office (Phone: 1-800-538-9552 except in CA, HI, and AK; for CA 1-800-334-4162; for HI and AK 1-800-527-5602).	
6	Advise member to update mailing/e-mail address and direct deposit information in Direct Access if they are changing. If member does not have access to the CG intranet, supply address and direct deposit information to SPO for data entry into Direct Access.	
7	Advise member that changes in marital or dependency status while in a mobilization status need to be immediately reported to the SPO to avoid potential overpayments/underpayments.	
8	Upon reporting to the mobilization site, ensure member's orders are endorsed to show date member reported, the mobilization unit's subsistence status, the quarters the member will occupy during mobilization, and the member's current dependent status. Ensure endorsed orders are forwarded to SPO.	
9	If the member is assigned outside his/her state of legal residence, and that state does not tax military pay while assigned outside the state (i.e., applies to residents of AZ, CA, CT, ID, MN, MO, MT, NJ, NY, OH, OR, PA, VT, PR), advise the member that he/she may submit a state tax withholding form to claim exemption from state tax withholding.	
10	Ensure member completes travel claim. Administratively review & approve the travel claim and forward to PSC (tvl).	

Continued on next page

Mobilization Checklist, Continued

Unit Checklist (cont'd)

Step	Action	Date
11	Conduct appropriate security briefing. (i.e. Vehicle/Access Passes and Information/Clearances)	
12	Ensure member has physical exam if he/she has not had a physical within the past 5 years (within past 12 months if over age 50).	
13	Ensure member verifies dependency information on the Direct Access generated BAH/Dependency Data form. Members can update this information by submitting a Dependency Worksheet (CG PSC-2020) to their SPO.	
14	Ensure member verifies beneficiaries on the Designation of Beneficiaries form (CG PSC-2020D). Submit a new form to the SPO if updates are needed.	
15	Ensure member verifies their Emergency Data in Direct Access. SPOs and/or the member can make changes to the emergency data as needed via Direct Access.	
16	Counsel member concerning SGLI benefits during mobilization (as detailed on page 11-14). If member has spouse, have member complete Form SGLV-8286A (Spouse SGLI Election). Ensure member reviews Form SGLV-8286 (Member SGLI Election) to verify that beneficiaries are correct; have member complete new SGLV-8286 if maximum Member SGLI coverage is not desired. Forward updated/new Forms SGLV-8286 and SGLV-8286A to SPO.	
17	Counsel member concerning available Work Life Resources (Employee Assistance Program, Relocation Assistance Program, Transition Assistance Program, Special Needs Program).	
18	Counsel member concerning financial responsibilities. Advise member that if he/she has child support garnishments being deducted from his/her civilian pay, the member needs to make arrangements for payment of such obligations while in a mobilization status; delinquent child support payments will be subject to involuntary collection from the member's military pay under the Treasury Offset Program.	
19	Member affirms that he/she is not in receipt of a claim for disability compensation, pension or retired pay from the DVA. If so, the member is responsible for waiving the amount of compensation he/she has received on days in which they received military pay.	
20	Counsel member on availability of the Tricare Reserve Select Program (ALCOAST 189/05)	
21	Counsel member on Educational Assistance (if served on active duty in support of a contingency operation for 90 consecutive days or more).	
22	Counsel member on the Reserve Income Replacement Program. Member must complete 18 continuous months of service; or complete 24 months of active duty during the previous 60 months; or is involuntarily mobilized for service on active duty for a period of 180 days or more within 6 months or less following the member's separation from a previous period of involuntary active duty for a period of 180 days or more. Eligible members must complete DD Form 2919 and forward it to PSC (MAS) via their command and SPO. See http://www.defenselink.mil/ra/ for more information.	

Continued on next page

Mobilization Checklist, Continued

SAMPLE LETTER

TO BE SENT TO EMPLOYER OF MOBILIZED RESERVIST

Dear Sir or Madam:

I am writing this letter to thank **the Employer** for its past support of **Member's Full Name's** participation as a valued member of U.S. Coast Guard **Unit – Long Title**. It is only with positive support from our reserve members' families and employers that the United States military services are able to protect the national interests of our country.

At this time I need to advise you that – due to recent events – **member** has been involuntarily called to active duty with our unit under Title **10/14** of the United States Code. As **a Yeoman Second Class** at **unit**, he/she will be deployed either within the United States or overseas as directed by proper authority. The orders are for a period of **###** days.

I am enclosing some information from the Employer Support of the Guard and Reserve (ESGR) that might answer questions that you have concerning your rights and the employee's rights under the law, and provide some resources to answer others. I'd also like you to feel comfortable in contacting me personally, at **Phone Number / E-mail address**, should you still have questions or concerns.

Once again, my personal thanks for the part your organization is playing in helping to keep America strong.

Sincerely,
Commanding Officer

SPO Mobilization Procedures

Introduction The following checklists provide listings of the transactions to be completed by the servicing SPO when a Reservist is mobilized.

Title 10 Checklist Utilize this checklist when processing Title 10 mobilizations.

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Required	Reserve Orders in Direct Access.	Direct Access Guide, Reserve Orders
Required if primary residence is INCONUS	Change BAH. Be sure the transaction shows: Postal Code = zip code of primary place of residence as prescribed on page 11-10 of this chapter.	Direct Access Guide, BAH
Required if principal residence is INCONUS	Start CONUS COLA. Be sure the transaction shows: Postal Code = zip code of member's principal place of residence as prescribed on page 11-10 of this chapter.	Direct Access Guide, COLA
Required if member is enlisted	Start Subsistence Allowance. Be sure the transaction starts the appropriate subsistence prescribed on page 11-9 of this chapter.	Direct Access Guide, BAS
Optional	FSA-T or FSA-S. Submit only if a member with dependents meets requirements prescribed on page 11-11 of this chapter.	Direct Access Guide, FSA
Optional	Start OHA. Submit only if ordered to active duty from OUTCONUS residence. Be sure the transaction starts OHA based on the location of the primary residence.	Direct Access Guide, OHA
Optional	Start OUTCONUS COLA. Submit only if ordered to active duty from OUTCONUS residence.	Direct Access Guide, COLA

Continued on next page

SPO Mobilization Procedures, Continued

Title 10 Checklist (cont'd)

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Optional	Enlisted Uniform Issue for Members Recalled From IRR or Retired Reserve. Fax Form CG-3019 or CG-3019A, with a copy of the mobilization orders, to COMDT (G-WTR) at 202-267-4243.	ALCOAST 418/01
Optional	Additional Reserve Officer Uniform Allowance. Submit only if the officer meets requirements prescribed on page 11-12 of this chapter.	Direct Access Guide, Officer Uniform Allowance
Optional	Start Hardship Duty Pay – Location. Start Career Sea Pay. Start Diving Duty Pay. Start Imminent Danger Pay. Start Combat Tax Exclusion/Combat SGLI Allowance Start Special Duty Assignment Pay. Start Non-crew Flight Pay. Start Flight Deck Hazardous Duty Incentive Pay. Start Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams. Foreign Language Proficiency Pay Submit only if member meets the requirements prescribed on pages 11-11 and 11-12 of this chapter.	Direct Access Guide, Employee Entitlements PAYMAN
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PSC (mas).	PPPM, 7-B-8
Optional	Board Certified Pay for Physician Assistants. If meets the requirements prescribed on page 11-12 of this chapter, fax copy of orders to PSC (mas) at 785-339-3760.	PAYMAN, 4.J.2
Optional	Thrift Savings Plan. Fax Form TSP-U-1 and TSP-U-1-C (if appropriate) to PSC (mas) at 785-339-3760.	PPPM, 8-C
Optional	TRICARE Dental Program. Enrollment changes are made directly through United Concordia, the TRICARE dental contractor.	PPPM, 5-B-4

Continued on next page

SPO Mobilization Procedures, Continued

Title 10 Checklist (cont'd)

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Optional	Servicemembers' Group Life Insurance. Members will be insured for the maximum $400,000 SGLI coverage during mobilization status unless an election for lesser coverage is submitted. Required for Retired Recall.	PPPM, 5-A-7 Direct Access Guide, SGLI
Optional	Spouse SGLI. Spouses will be insured for the maximum $100,000 Spouse SGLI coverage during mobilization status unless an election for lesser coverage is submitted. Required for Retired Recall if has Spouse.	PPPM, 5-A-14 Direct Access Guide, SGLI
Optional	Direct Deposit Account Change. If the member is unable to enter transaction in Direct Access then the SPO will complete it. Required for Retire Recall.	Direct Access Guide, Direct Deposit Change
Optional	Mailing Address Change. If the member is unable to enter the transaction in Direct Access then the SPO will complete it. Required for Retire Recall.	Direct Access Guide, Mailing Address Change
Optional Retired Recall Required	State Tax Change, if the member is assigned to duty outside his/her state of legal residence and requests that state tax withholding be stopped because his/her state does not tax military pay while stationed outside the state.	Direct Access Guide, State Tax Change
Optional	Change in Dependency/Emergency Data if there is a change in dependents or beneficiaries. Required for Retire Recall	Direct Access Guide, Dependency/ Emergency Data
Required at beginning of mobilization	Reserve Orders in Direct Access.	Direct Access Guide, Reserve Orders

SPO Mobilization Procedures, Continued

Title 14 Checklist Utilize this checklist when processing Title 14 mobilizations.

Checklist For Title 14 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Optional	If member is ordered to active duty from an OUTCONUS residence and entitled to OUTCONUS COLA, two transactions shall be submitted: • Start OUTCONUS COLA transaction at beginning of active duty period. • Stop OUTCONUS COLA transaction at end of active duty period.	Direct Access Guide, OUTCONUS COLA
Optional	If member meets the requirements prescribed on Pages 11-11 and 11-12 of this chapter, the below pay entitlements shall be started at the beginning of the active duty period, and stopped at the end of the active duty period. • Career Sea • Diving Duty Pay • Imminent Danger Pay • Combat Tax Exclusion/Combat SGLI Allowance • Special Duty Assignment Pay • Non-crew Flight Pay • Flight Deck Hazardous Duty Incentive Pay • Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams • Foreign Language Proficiency Pay	Direct Access Guide, Special and Incentive Pays
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PSC (mas).	PPPM, 7-B-8
Optional	Board Certified Pay for Physician Assistants. If member meets the requirements prescribed on page 11-12 of this chapter, fax copy of orders to PSC (mas) at 785-339-3760.	PAYMAN, 4.J.2
Optional	Change in Dependency/Emergency Data if the member has a change in dependents or beneficiaries.	Direct Access Guide, Dependency/ Emergency Data

Recall of Retired Members

Introduction

During a mobilization, reserve retirees may be called to active duty. This includes both retired with pay (RET-1) and retired awaiting pay at age 60 (RET-2). The process/procedures for mobilizing recalled reserve retirees are described below

Process

This is the process for recalling a reserve retiree.

Stage	Who does it	What Happens
1	CG Personnel Command (rpm) / (opm) / (epm)	Issues recall from retirement orders. Coordinates travel needs with the recalled member.
2	Member	Reports for mobilization duty. Prepares travel claim.
3	Unit	Reports member aboard for mobilization. Arranges for member to be issued active duty ID card and Dependent Application. If reaches 60 prior to end of orders submit Age Waiver Request to COMDT (G-WTR-1) as soon as possible.
4	SPO	Access member's recall orders, via the Airport Terminal or Track Global Assignments menu, and completes the Depart/Report members tab. This will generate transactions to record the recall from retirement. If retired awaiting pay at age 60 (RET-2), prepares transactions to transfer the member out of RET-2 status.
5	PSC (ras)	If retired with pay (RET-1), stops retired pay.
6	Member	Enters mailing address, emergency contact and direct deposit information in Direct Access. (If access to the CG intranet is unavailable, requests that SPO input.)
7	PSC (tvl)	Processes travel claims and requests for travel advances.
8	Unit	Ensures member is physically qualified for demobilization.
9	Member	Notifies Unit and SPO of desires concerning disposition of accrued leave (at least 50 days prior to demobilization unless exigent circumstances exist).
10	SPO	Inputs Statement of Intent in Direct Access (at least 45 days prior to demobilization unless exigent circumstances exist).
11	SPO	Prepares Certificate of Release or Discharge from Active Duty (DD-214) and mails to unit.

Continued on next page

Recall of Retired Members, Continued

Process (cont'd)

Stage	Who does it	What Happens
12	Unit	Delivers demobilization documents (DD-214 and instructions to file travel claim). Notifies SPO if uncollected CG Mutual Assistance loan(s) need to be collected from final active duty pay.
13	SPO	Prepares Direct Access transactions to record release from active duty (RELAD). E-mails PSC-RAS and PSC-Customercare@uscg.mil notifying completion of recall, including effective date of last day of active service. If retired awaiting pay at age 60 (RET-2), prepare transactions to transfer back to RET-2 status.
14	PSC (ses)	Processes final active duty payment. Collects CG Mutual Assistance debts if requested.
15	PSC (ras)	If retired with pay (RET-1) or reached 60th birthday during mobilization, starts/restarts retired pay.

Recall of Retired Members, Continued

Mobilization Checklist

The unit shall follow the mobilization checklist on page 11-24 of this chapter.

SPO Procedures

The SPO shall prepare the following transactions to record recall of a retired reserve under Title 10:

Checklist For Title 10 Mobilization Of Recalled Retiree		
Required/ Optional	**Transaction / Input**	**Reference**
Required	Direct Access Recruit Workforce Transaction: Complete the following transactions in Direct Access the instructions in the Directed Access reference for processing a "Rehire" transaction. • Applicant Data Transaction • Identification Data Transaction • Applicant Contract Data Transaction • Complete PCS Departing/Reporting only if there was delay enroute. Note: The PCS Departing/Reporting transaction is input and processed by the assignment officer. SPOs will need to modify the transaction only if authorized delay was required to report to PCS unit.	Direct Access Guide, Accessions
Required	Send an E-Mail to PSC-Customercare@uscg.mil and PSC-RAS providing: • Name, Rank, and SSN of recalled retiree • Effective date and period of recall • TONO under which the recall is being effected • Reference the letter/message from CGPC (rpm)/(opm)/(epm) which authorizes the recall.	PPPM, Sections 3-A-4 and 3-A-5
The SPO shall also prepare the transactions prescribed on pages 11-27 thru 11-30 of this chapter, with the following exceptions: (1) The Reserve Orders transaction on page 11-27 shall not be prepared. (2) The first six transactions on page 11-27 are *required* transactions for a recalled retiree.		

Travel Claims During Mobilization Status

Introduction

Members submit travel claims to be reimbursed for travel, lodging, meals, and incidental expenses.

Reference

(a) The Travel Claim Quick Reference Guide, available on-line at http://www.uscg.mil/hq/PSC/Travel/qrg.pdf, provides assistance in preparing travel claims.

Methods for Submitting Travel Claims

Travel claims may be submitted by 2 methods:

- Travel Preparation and Examination System (T-PAX) – the preferred method.
- Hardcopy DD Form 1351-2.

Supporting Documentation

Travel claims shall be supported by the documentation listed below:

- Original itemized receipt for lodging expenses
- Original receipts for transportation expenses (airline, rental car, etc.)
- Any original receipts for reimbursable expenses required by the Joint Federal Travel Regulations (JFTR) – Volume 1 – generally, any expense that is $75.00 or more.

On T-PAX claims, this documentation shall be provided to the approving official; for manually submitted claims, this documentation shall be sent to PSC (tvl) with DD Form 1351-2.

Recording of Leave Taken

Members shall indicate all leave days used on the TDY travel claim. The leave shall be indicated as follows:

- In T-PAX, on the Itinerary and Exceptions-To-Daily-Expense screens. See sample on pages 11-35 thru 11-37.
- On DD Form 1351-2, in Block 29 (Remarks) on page 2.

Note: (1) Do not start or end a T-PAX claim in a leave status.
(2) Mobilized Reservists are entitled to Per Diem for lodging while on leave.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample T-PAX Travel Claim – Leave Taken

UTS FILE NO. 27472

TRAVEL VOUCHER OR SUBVOUCHER

Read privacy act statement, penalty statement and instructions on back before completing form. Use typewriter ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed continue in Remarks.

1. PAYMENT REQUIRED BY (X one)
X Electronic Funds Transfer (EFT) [ ] Payment By Check
[ ] Split Disbursement: Amt to Govt. Tvl Charge Card $

2. TYPE OF PAYMENT (X as applicable)
X TDY X Member/ Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

FOR D.O. USE ONLY
3. D.O. VOUCHER NUMBER

4. NAME (Last, First, Middle Initial) (print or type): PERFORMANCE, STELLA R
5. GRADE: E6
6. SSN: 987-65-4321
SUBVOUCHER NUMBER

7. ADDRESS a. NUMBER AND STREET: 12 ELM STREET
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66609
c. PAID BY

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-339-2250
9. TRAVEL ORDER NUMBER: 1303000003374000
10. PREVIOUS GOVERNMENT PAYMENT /ADVANCES (Do not include ATM Advances)

11. ORGANIZATION AND STATION: 5347400 - CG HUMAN RESOURCES SERVICE & INFORMATION CTR

12. DEPENDENTS (X and complete as applicable)
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME (Last, First, Middle Initial)	b. RELATIONSHIP	c. Date of Birth or Marriage

13. DEPENDENTS ADDRESS ON RECEIPT of ORDERS (include Zip Code)

14. Have Household Goods Been Shipped? (X one) [ ] YES [ ] NO (Explain in Remarks)

d. COMPUTATIONS

15. ITINERARY

a. DATE 02		b. PLACE (home,office,base,activity,city and state,city and country, etc.)	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
11/1	DEP	SAINT LOUIS ; MISSOURI	PA			
11/1	ARR	TOPEKA ; KANSAS;		TD		270
11/10	DEP	TOPEKA ; KANSAS	CA		63.00	
11/10	ARR	LAWRENCE ; KANSAS;		LV		0
11/13	DEP	LAWRENCE ; KANSAS	CA		0.00	
11/13	ARR	TOPEKA ; KANSAS;		TD		0
11/30	DEP	TOPEKA ; KANSAS	GA		63.00	
11/30	ARR	TOPEKA ; KANSAS;		MC		0
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT
(1) Per diem
(2) Actual Expenses Allowance
(3) Mileage
(4) Dependent Travel
(5) DLA
(6) Reimbursable Expenses
(7) Total
(8) Less Advance
(9) Amount Owed
(10)Amount Due

16. POC TRAVEL (X one) X OWN/OPERATE [ ] PASSENGER

DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
X MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
11/1/02	AUTO MILEAGE	360 MI	360 MI
11/1/02	TOLLS	2.20	2.20
11/1/02	LAUNDRY SERVICES	60.00	60.00
11/1/02	PARKING	30.00	30.00
11/1/02	LODGING TAX-CONUS/US TERR	240.00	240.00
11/1/02	LODGING/TONO-2-TONO TRANSI	63.00	63.00
11/1/02	PER DIEM (25%) TONO-TO-TON	7.50	7.50

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS
	(SEE DAILY EXPENSES)		

20.a. CLAIMANT SIGNATURE: STELLA R PERFORMANCE
b. DATE: 01/06/2003
21.a. APPROVING OFFICER SIGNATURE: NOT YET APPROVED
b. DATE

22. ACCOUNTING CLASSIFICATION
2 3 301 132300 EC 51282 2151

23. COLLECTION DATA

24. COMPUTED BY	25. AUDITED BY	26. Travel Order Posted by	27. RECEIVED (Payee Signature and Date or Check No.)	28. AMOUNT PAID

UTS GENERATED FORM 1351-2, AUG 1997 (EG)

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample T-PAX Travel Claim – Leave Taken

PRIVACY ACT STATEMENT

AUTHORITY: 5 USC 5701, 37 USC 404-427, and EO 9397.

PRINCIPAL PURPOSE(S): Used for reviewing, approving, accounting and disbursing for official travel. SSN is used to maintain a numerical identification system for individual claims.

ROUTINE USE(S): To substantiate claims for reimbursement for official travel.

DISCLOSURE: Voluntary; however, failure to furnish information requested may result in total or partial denial of amount claimed.

PENALTY STATEMENT

There are severe criminal and civil penalties for knowingly submitting a false, fictitious, or fraudulent claim (U.S. Code, Title 18, Section 287 and 1001 and Title 31, Section 3729).

INSTRUCTIONS

ITEM 1 - PAYMENT
Member must be on electronic funds (EFT) to participate in split disbursement. Split disbursement is a payment method by which you may elect to pay your official travel card bill and forward the remaining settlement dollars to your predesignated account. For example: $250.00 in the "Amount to Government Travel Charge Card" block means that $250.00 of your travel settlement will be electronically sent to the charge card company. Any dollars remaining on this settlement will automatically be sent to your predesignated account. Should you elect to send more dollars than you are entitled, "all" of the settlement will be forwarded to the charge card company. Notification: you will receive your regular monthly billing statement from the Government Travel Charge Card contractor; it will state: paid by Government $250.00, 0 due. If you forwarded less dollars than you owe, the statement will read as: paid by Government, $250.00, $15.00 now due. Payment by check is made to travelers only when EFT payment is not directed.

USCG TRAVEL PAYMENT STATUS AND DEBT/OVERPAYMENT COLLECTION
- When Industrial Site accounting used - contact the accounting office that funded travel.
- For all others - contact the CG Finance Center at 1-800-564-5504 and follow the prompts. For personal assistance and instructions for repayments or rescheduling of travel debts call (757) 523-6940. A Due Process debt notification letter w/instructions will be sent to you.
- If no payment status is indicated call HRSIC Travel at 1-888-USCG-TVL.

REQUIRED ATTACHMENTS FOR TRAVEL VOUCHER AUDIT SUBMISSIONS
Claims will be audited based on a random sampling plan or because the net entitlement of the travel equaled or exceeded $2,500.00.
Assemble your claim as follows:
1. (Top) Travel Voucher, Continuation Page, and Daily Expense Record, DOD or UTS record.
2. Original of all travel orders and amendments, as applicable.
3. Dependent and/or other family member travel authorizations or claim documentation.
4. Required Receipts: Hotel/motel receipts and any item of expense claimed in the amount of $75.00 or more. (Ticketless Travel records require a method of purchase statement).
When directed, submit the above in an envelope addressed to HRSIC (TVL) marked "Audit".

ITEM 15. ITINERARY - SYMBOLS
15c. MEANS/MODE OF TRAVEL (Use two letters)

GTR/TKT	- T	Automobile	- A
Government Transportation	- G	Motorcycle	- M
Commercial Transportation (Own Expense)	- C	Bus	- B
		Plane	- P
Privately Owned Convenience (POC)	- P	Rail	- R
		Vessel	- V
Alaska Ferry System	- AF		
Change Status	- CS		

15d. REASON FOR STOP

Authorized Delay	- AD	Change of Home Port	- HP
Awaiting Transportation	- AT	Leave En Route	- LV
Continuous OS Travel	- CT	Mission Complete	- MC
Designated Location	- DL	Pick Up Passengers	- PP
Drop Off Passengers	- DP	Pick Up Vehicle	- PV
Drop Off Vehicle	- DV	Sick Leave	- SL
Enroute Stop Over	- ES	Temporary Duty	- TD
House Hunting	- HH	Voluntary Return	- VR

15e. LODGING COST
UTS requires the entry of the per-day (daily) cost of Lodging. Place and claim INCONUS lodging taxes in the reimbursable expense section.

ITEM 19 - DEDUCTIBLE MEALS
Use the UTS "Exception" button to enter deductible meals. Meals consumed by a member when furnished with or without charge incident to an official assignment by sources other than a government mess (see JFTR, par. U4125-A3g and JTR, par. C4554-B for definition and deductible meals). Meals furnished on commercial aircraft or by private individuals are not considered deductible meals.

29. REMARKS

EMPLOYEES: INDICATE DATES ON WHICH LEAVE TAKEN FOR MORE THAN ONE-HALF OF PRESCRIBED DAILY WORKING HOURS

UNIFORMED MEMBERS: INDICATE DATES ON WHICH LEAVE WAS TAKEN

Receipts Required:

HOTEL RECEIPT(S) FOR TOPEKA ; KANSAS

UTS GENERATED FORM 1351-2 (BACK), AUG 1997

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample T-PAX Travel Claim – Leave Taken

TRAVEL VOUCHER OR SUBVOUCHER
(Daily Expenses)

PAGE 3 OF 3 PAGES

4. NAME (Last, First, Middle Initial)
PERFORMANCE, STELLA R

Date	Day Type	Daily Lodging	Computed Meal Types Br	Lu	Dn	Claimed Meal Types Br	Lu	Dn	Actual Expenses Claimed Br	Lu	Dn	Inc
11/01/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/02/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/03/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/04/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/05/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/06/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/07/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/08/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/09/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/10/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/11/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/12/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/13/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/14/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/15/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/16/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/17/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/18/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/19/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/20/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/21/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/22/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/23/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/24/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/25/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/26/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/27/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/28/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/29/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/30/2002	LDP	0.00	CM	CM	CM	CM	CM	CM				

Day Types
LDP = Lodging Plus, OB = OnBoard Ship, FD = Field Duty, SD = Sea Duty, LV = Leave, AE = Actual Expense, AELP = Actual Expense/Meals LDP
GRP = Group Travel, FLT = Flat Per Diem, RED = Reduced Per Diem, AF = Alaskan Ferry, NP = No Per Diem, SAE = 300 % AE, SAELP = 300 % AELP

Continued on next page

Travel Claims During Mobilization Status, Continued

Liquidation of Advance Funds

Advances are to be claimed for the same travel period as they are received.

Advance funds are recorded on the travel claim in the block entitled "Previous Government Payments/Advances" (Block 9 in T-PAX; block 10 for manual claims).

ONLY electronic deposit advances (PSC processed), or advances made in the form of traveler's checks are to be reported on the travel claim. DO NOT report prior settlement payments or cash advances from credit cards.

If an advance of funds has been requested/processed through T-PAX for a specific TONO, it is already posted. DO NOT place this advance on a T-PAX settlement as the T-PAX system automatically applies this to the settlement and deducts from total reimbursable entitlement(s).

Special Procedures For Long-Term Mobilization Status

For members on long-term mobilization orders, who are entitled to per diem, it is beneficial to file a travel claim every 30 days. For a travel claim to be properly processed each 30 days, it is necessary that the orders be designated as Document Type 13 (Blanket TDY Orders) and not Document Type 11 (Standard TDY Orders) and submitted as a new claim each time.

The first travel claim under blanket orders should be filled out normally, except the traveler should request the additional Reserve Continued Lodging and the 25% per diem for the last day of the claim in block 18 (reimbursable expenses). See sample on page 11-40.

Continued on next page

Travel Claims During Mobilization Status, Continued

Special Procedures For Long-Term Mobilization Status

Subsequent claims under blanket orders should be completed as follows:

- On the first line of block 15b, enter: "Continuation of Recall" with the location of the TDY site.
- In block 18, claim reimbursement for the additional 25% per diem for the first and last day of the claim.

Example: Claim was from 4/04/01 through 05/04/01. Reservist would claim reimbursement for the additional 25% per diem for 04/04/01 and 05/04/01.

For the last claim filed under the blanket orders, on the first line of block 15b, enter: "Continuation of Recall". In block 18, request reimbursement for the additional 25% per diem for the first day of this claim. See sample on page 11-41.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample Travel Claim – (Claim 1) Long Term Mobilization Status with split TONOs

TRAVEL VOUCHER OR SUBVOUCHER

Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.

1. PAYMENT
[ ] Electronic Fund Transfer (EFT) [ ] Payment by Check
Split Disbursement: Amt to Govt Tvl Charge Card $

2. TYPE OF PAYMENT *(X as applicable)*
[X] TDY [ ] Member/Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

3. FOR D.O. USE ONLY
a. D.O. VOUCHER NUMBER
b. SUBVOUCHER NUMBER
c. PAID BY
d. COMPUTATIONS

4. NAME *(Last, First, Middle Initial) (Print or type)*: SMITH, JOHN D
5. GRADE: E7
6. SSN: 123456789

7. ADDRESS. a. NUMBER AND STREET: 444 SE QUINCY ST
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66683

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-555-1234
9. TRAVEL ORDER NUMBER: 1302XXXXXXXXX000
10. PREVIOUS GOVERNMENT PAYMENTS/ ADVANCES: NON ELECTRONIC ADVANCE $ AMOUNT PLACED HERE
11. ORGANIZATION AND STATION: CG HRSIC

12. DEPENDENT(S) *(X and complete as applicable)*
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME *(Last, First, Middle Initial)*	b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE

13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS *(Include Zip Code)*

14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? *(X one)* [ ] Yes [ ] No *(Explain in Remarks)*

15. ITINERARY

a. DATE 2002		b. PLACE *(Home, Office, Base, Activity, City and State; City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
1/01	DEP	TOPEKA, KS (SHAWNEE)	CP			
1/01	ARR	MANHATTAN, NY(COUNTY)		TD	120.00	70
1/09	DEP		CA			
1/09	ARR	BOSTON, MA (COUNTY)		MC		
1/14	DEP		CA			
1/14	ARR	MANHATTAN, NY (COUNTY)		TD	120.00	
1/31	DEP		CP			
1/31	ARR	CONTINUATION OF RECALL		MC		
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT

(1) Per Diem	
(2) Actual Expense Allowance	
(3) Mileage	
(4) Dependent Travel	
(5) DLA	
(6) Reimbursable Expenses	
(7) Total	
(8) Less Advance	
(9) Amount Owed	
(10) Amount Due	

16. POC TRAVEL *(X one)* [X] OWN/OPERATE [ ] PASSENGER

17. DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
[X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
1/09/02	25% PERDIEM	11.25	11.25
1/14/02	25% PERDIEM	11.25	11.25
1/31/02	25% PERDIEM	11.25	11.25
1/31/02	LODGING TAX	396.00	396.00
1/09-13	DUAL LODGING	600.00	600.00
1/01/02	AIRFARE	375.00	375.00
1/01/02	AIRFARE SVC FEE	35.00	35.00
1/31/02	LAUNDRY ($2/DAY)	62.00	62.00
1/31/02	TONO-TONO LODGING	120.00	120.00

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS

20.a. CLAIMANT SIGNATURE | **b. DATE** | **c. SUPERVISOR SIGNATURE** | **d. DATE**

21.a. APPROVING OFFICER SIGNATURE | **b. DATE**

22. ACCOUNTING CLASSIFICATION
This example is a manual claim of Beginning Recall, Mbr TAD is sent TAD under seperate tono, dual lodging, and how to show continuation of recall. Mileage is for the trip to airport.

23. COLLECTION DATA

24. COMPUTED BY | **25. AUDITED BY** | **26. TRAVEL ORDER POSTED BY** | **27. RECEIVED** *(Payee Signature and Date or Check No.)* | **28. AMOUNT PAID**

DD FORM 1351-2, MAR 2000 PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample Travel Claim – (Claim 2) Long Term Mobilization Status with split TONOs

TRAVEL VOUCHER OR SUBVOUCHER

Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.

1. PAYMENT
[ ] Electronic Fund Transfer (EFT) [ ] Payment by Check
[ ] Split Disbursement: Amt to Govt Tvl Charge Card $

2. TYPE OF PAYMENT *(X as applicable)*
[X] TDY [ ] Member/ Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

3. FOR D.O. USE ONLY
a. D.O. VOUCHER NUMBER
b. SUBVOUCHER NUMBER
c. PAID BY

4. NAME *(Last, First, Middle Initial) (Print or type)**:** SMITH, JOHN D

5. GRADE: E7

6. SSN: 123456789

7. ADDRESS. a. NUMBER AND STREET: 444 SE QUINCY ST
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66683

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-555-1234

9. TRAVEL ORDER NUMBER: 1102XXXXXXXXX000

10. PREVIOUS GOVERNMENT PAYMENTS/ ADVANCES
NON ELECTRONIC ADVANCE
$ AMOUNT PLACED HERE

11. ORGANIZATION AND STATION: CG HRSIC

12. DEPENDENT(S) *(X and complete as applicable)*
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME *(Last, First, Middle Initial)*	b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE

13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS *(Include Zip Code)*

14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? *(X one)* [ ] Yes [ ] No *(Explain in Remarks)*

d. COMPUTATIONS

15. ITINERARY

a. DATE 2002		b. PLACE *(Home, Office, Base, Activity, City and State; City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
1/10	DEP	MANHATTAN, NY (COUNTY)	CA			
1/10	ARR	BOSTON, MA (COUNTY)- TAD		TD	159.00	
1/13	DEP	WITHIN TAD UNDER SEP TONO	CA			
1/13	ARR	MANHATTAN, NY (COUNTY) -		MC		
	DEP	CONT UNDER SEP TONO				
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT

(1) Per Diem	
(2) Actual Expense Allowance	
(3) Mileage	
(4) Dependent Travel	
(5) DLA	
(6) Reimbursable Expenses	
(7) Total	
(8) Less Advance	
(9) Amount Owed	
(10) Amount Due	

16. POC TRAVEL *(X one)* [X] OWN/OPERATE [ ] PASSENGER

17. DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
[X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
1/10/02	25% PERDIEM	12.50	12.50
1/13/02	25% PERDIEM	12.50	12.50
1/13/02	LODGING TAX	69.96	69.96
1/13/02	TONO-TONO LODGING	159.00	159.00
1/13/02	RENTAL CAR	227.59	227.59
1/13/02	RENTAL FUEL	27.00	27.00

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS

20.a. CLAIMANT SIGNATURE | **b. DATE** | **c. SUPERVISOR SIGNATURE** | **d. DATE**

21.a. APPROVING OFFICER SIGNATURE | **b. DATE**

22. ACCOUNTING CLASSIFICATION
This is an example of a manual claim for the second TAD taken while in a TAD status under a seperate Tono.

23. COLLECTION DATA

24. COMPUTED BY | **25. AUDITED BY** | **26. TRAVEL ORDER POSTED BY** | **27. RECEIVED** *(Payee Signature and Date or Check No.)* | **28. AMOUNT PAID**

DD FORM 1351-2, MAR 2000 PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page

Travel Claims During Mobilization Status, Continued

Sample Travel Claim – (Claim 3) Long Term Mobilization Status with split TONOs

TRAVEL VOUCHER OR SUBVOUCHER

Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.

1. PAYMENT
[ ] Electronic Fund Transfer (EFT) [ ] Payment by Check
[ ] Split Disbursement: Amt to Govt Tvl Charge Card $ _____

2. TYPE OF PAYMENT *(X as applicable)*
[X] TDY [ ] Member/ Employee [ ] PCS
[ ] Other [ ] Dependent(s) [ ] DLA

3. FOR D.O. USE ONLY
a. D.O. VOUCHER NUMBER
b. SUBVOUCHER NUMBER
c. PAID BY
d. COMPUTATIONS

4. NAME *(Last, First, Middle Initial) (Print or type)**:** SMITH, JOHN D

5. GRADE: E7

6. SSN: 123456789

7. ADDRESS. a. NUMBER AND STREET: 444 SE QUINCY ST
b. CITY: TOPEKA
c. STATE: KS
d. ZIP CODE: 66683

8. DAYTIME TELEPHONE NUMBER & AREA CODE: 785-555-1234

9. TRAVEL ORDER NUMBER: 1302XXXXXXXXX000

10. PREVIOUS GOVERNMENT PAYMENTS/ ADVANCES: NON ELECTRONIC ADVANCE $ AMOUNT PLACED HERE

11. ORGANIZATION AND STATION: CG HRSIC

12. DEPENDENT(S) *(X and complete as applicable)*
[ ] ACCOMPANIED [ ] UNACCOMPANIED

a. NAME *(Last, First, Middle Initial)*	b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE

13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS *(Include Zip Code)*

14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? *(X one)* [ ] Yes [ ] No *(Explain in Remarks)*

15. ITINERARY

a. DATE 2002		b. PLACE *(Home, Office, Base, Activity, City and State; City and Country, etc.)*	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES
2/01	DEP	CONTINUATION OF RECALL	CP			
2/01	ARR	MANHATTAN, NY(COUNTY)		TD	120.00	
2/10	DEP		CP			
2/10	ARR	TOPEKA, KS (SHAWNEE)		LV		
2/18	DEP		CP			
2/18	ARR	MANHATTAN, NY (COUNTY)		TD	120.00	
2/28	DEP		CP			
2/28	ARR	TOPEKA, KS (SHAWNEE) END		MC		
	DEP	OF RECALL				
	ARR					
	DEP	.				
	ARR					
	DEP					
	ARR					

e. SUMMARY OF PAYMENT

(1) Per Diem	
(2) Actual Expense Allowance	
(3) Mileage	
(4) Dependent Travel	
(5) DLA	
(6) Reimbursable Expenses	
(7) Total	
(8) Less Advance	
(9) Amount Owed	
(10) Amount Due	

16. POC TRAVEL *(X one)* [X] OWN/OPERATE [ ] PASSENGER

17. DURATION OF TDY TRAVEL
[ ] 12 HOURS OR LESS
[ ] MORE THAN 12 HOURS BUT 24 HOURS OR LESS
[X] MORE THAN 24 HOURS

18. REIMBURSABLE EXPENSES

a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED
2/01/02	25% PERDIEM	11.25	11.25
2/10/02	LODGING	120.00	120.00
2/28/02	LODGING TAX	250.80	250.80
2/28/02	AIRFARE	275.00	275.00
2/28/02	AIRFARE SVC FEE	35.00	35.00
2/28/02	LAUNDRY ($2*21 DAYS)	42.00	42.00

19. GOVERNMENT/DEDUCTIBLE MEALS

a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS

20.a. CLAIMANT SIGNATURE **b.** DATE **c.** SUPERVISOR SIGNATURE **d.** DATE

21.a. APPROVING OFFICER SIGNATURE **b.** DATE

22. ACCOUNTING CLASSIFICATION
Manual claim example showing cont of recall, how to annotate LV within claim, and end of recall. Mbr must show last day of work as 1st day of leave to be paid perdiem for work day.

23. COLLECTION DATA

24. COMPUTED BY **25.** AUDITED BY **26.** TRAVEL ORDER POSTED BY **27.** RECEIVED *(Payee Signature and Date or Check No.)* **28.** AMOUNT PAID

DD FORM 1351-2, MAR 2000 PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page

Travel Claims During Mobilization Status, Continued

Special Procedures for Overlapping TDY Periods

Mobilized members on temporary duty (TDY) may be issued a second set of TDY orders to another location. This results in overlapping TDY periods involving multiple TONO(s) and requires special procedures.
Members with overlapping travel TONO's need to submit multiple travel claims.

Example:
A member has TDY orders for period 1/1/02 to 2/28/02 in New York City. The member has commercial lodging and messing.

The member is sent TDY to Boston from 1/10/02 to 1/13/02. The member is required to procure commercial lodging in Boston and maintain the lodging in New York City.

Upon completion of the Boston TDY period, the member returns to New York to complete the original TDY period.

This member will need to submit *3 separate travel claims* as detailed on the next page.

Continued on next page

Travel Claims During Mobilization Status, Continued

Special Procedures for Overlapping TDY (cont'd)

First Claim. The first claim will be submitted to cover the period 1/1/02 to 1/9/02. The claim should be submitted as Mission Complete (MC). The member needs to claim the additional 25 percent of M&IE for 1/9/02 as a Reimbursable item (under the Reimbursable Expenses Column in T-PAX, or in Block 18 of DD Form 1351).

Second Claim. The second claim will cover the TDY period to Boston and return trip to New York City. With the exception of the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2, this claim will be submitted as any other claim. In the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2, the member needs to claim the additional 25 percent M&IE for the first and last days of travel, in this case 1/10/02 and 1/13/02.

Third Claim. The third claim will be submitted for the period of TDY upon return to New York. The member will need to claim the additional 25 percent per diem for 1/14/02 in the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2. In addition, if the member is required to procure or maintain quarters at both locations, the member could be entitled to dual lodging. In this case, the member needs to claim the lodging costs for maintaining the New York quarters during the Boston TDY period as dual lodging in the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2. The member's TDY orders to New York will have to be amended to authorize dual lodging. The amendment to authorize dual lodging must be location and date specific.

Monthly Verification Procedures

Introduction

Mobilized members are required to review and validate their monthly Leave and Earnings Statement (LES). Units are required to validate a roster of mobilized members each month.

Validation of LES's

Members have the responsibility to review their LES each month and report any discrepancies via the chain of command. The member must report any instance where:

- The LES shows a pay entitlement to which the member is not entitled (under pages 11-9 through 11-15 of this chapter).
- The member continues to be paid pay and allowances after being released from active duty.

Members who are overpaid pay and allowances will be required to repay such overpayments, plus interest. Any overpayments will be collected in lump sum from a member's final separation pay, and from future ADT or IDT earnings to which the member is entitled after release from active duty.

Unit Verification of Mobilized Reservists

Units shall maintain a monthly roster of recalled members to ensure those members are timely removed from a mobilization status and not overpaid.

Continuance on Active Duty

Introduction

A mobilized member's orders may be extended by the ISC (pf). Alternatively, a member may complete the initial mobilization assignment and be issued new long-term or short-term AD orders (ADT, ADSW, Title 14, EAD, etc.).

Procedure

If a member's orders are extended, or the member is to be issued new orders immediately following completion of the recall orders, the ISC (pf) shall notify the member and the servicing SPO.

The Servicing SPO shall record the extension in Direct Access as follows:

If	Submit	Reference
Reservist is extended under Involuntary Title 10 orders	Modify the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. Note: This process is used only if amending the end date of the original orders and there is no change in the member's status.	Direct Access Guide, Reserve Orders
Reservist is extended under Voluntary Title 10 orders (ADSW-AC)	Modify the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. Note: This process is used only if amending the end date of the original orders and there is no change in the member's status. If the status changes, e.g. Title 10 to EAD a new set of orders must be created.	Direct Access Guide, Reserve Orders ALPERSRU P/03
Reservist is released from Title 10 orders and immediately placed, under a different set of orders, on further active duty for a period of more than 180 days ADOT or 139 days ADT	Process a new set of Reserve Orders in Direct Access to record the new reserve period. The new orders must have an effective date of the day after release from Title 10 orders. Change BAH transaction. If the member will not be assigned government quarters, be sure the transaction shows a BAH Postal Code of the member's duty station locale (not the postal code of the member's principal place of residence). Change INCONUS COLA transaction. Be sure the transaction shows a Postal Code of the member's duty station locale (not the postal code of the member's principal place of residence).	Direct Access Guide, Report Additional Active Duty Authorized Direct Access Guide, Reserve Orders ALPERSRU P/03 Direct Access Guide, BAH Direct Access Guide, COLA

Continued on next page

Continuance on Active Duty, Continued

If	Submit	Reference
Reservist is released from Title 10 orders and immediately placed on active duty under a different set of orders for a period of less than 181 days ADOT or less than 140 days ADT	Process a new set of Reserve Orders in Direct Access to record the new reserve period. The new orders must have an effective date of the day after release from Title 10 orders **Note: Back-to-Back Reserve Orders:** **Short-term** AD orders are normally issued with the "Partial Entitlements" option marked on the first tab of the reserve orders. However, if the member is just finishing up a **long-term** AD order, or the combined period of the two sets of orders will be greater than 181 days, the "Full Entitlements" option must be used on the new orders. IAW 3.C.10.a CG PAYMAN, these members are entitled to BAH. 1. If the new orders are for duty at the same department ID the system will close out the old orders and generate an Amend Active Duty Termination Date transaction, based on the end date of the new orders, this will continue the member's pay and allowances. Unlike a *standalone* short-term order **you will need to RELAD** the member at the end of the duty period unless another set of orders or an extension is authorized. 2. If the new orders are for a different department ID, you'll need to RELAD the member from the old orders (the system will prompt you when you try to endorse the new orders), before you can complete the Actual Duty End and Begin Dates on the new orders. In this situation, you'll need to go to the Employee Entitlements section (after the RELAD is approved) to restart BAH and other entitlements as applicable for the new duty station.	Direct Access Guide, Report Additional Active Duty Authorized

The Demobilization Process

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

Reference: (a) ALCOAST 349/04

Release Site Per, Chapter 6.C.1(a) of CG Manpower Mobilization Support Plan, COMDTINST M3061.1, recalled Reservists shall be RELAD at the same site at which they were initially ordered to report. Exceptions may be granted on a **'case-by-case'** basis. ISC (pf)s shall be the approving level for these exceptions as requested by units.

Process This table describes the process.

Note: If member will be continuing on AD (e. g. Immediately begins a new set of orders following completion of mobilization orders), the demobilization process does not begin until the new orders are completed. See Continuance on Active Duty.)

When	Who does it	What Happens
Member is identified for demobilization	Mobilization Unit (Unit member is serving at while on Active Duty)	Coordinates demobilization and transfer to unit from which the member was initially ordered to report (RELAD Unit) with ISC (pf) and SPO. • Ensures member is physically qualified for demobilization. • Notifies SPO if the member has uncollected CG Mutual Assistance loan(s) that need to be collected from final active duty pay. Coordinates repayment plan with CGMA headquarters if lump-sum deduction from member's final pay is not appropriate.
	Member	Completes Career Intentions Worksheet (CG PSC-2045) to denote desires concerning disposition of accrued leave. Forwards to Mobilization Unit Servicing SPO.
	Mobilization Unit (or servicing SPO if unit has limited administrative capabilities)	Records in Direct Access any medals/awards/competencies earned by the member while in a mobilization status.

Continued on next page

The Demobilization Process, Continued

Process (cont'd)

When	Who Does it	What Happens
Upon receipt of Career Intentions Worksheet from member	Member's Regularly Assigned SPO	Inputs Statement of Intent in Direct Access at least 45 days prior to Demobilization or member's scheduled departure date on terminal leave. Note: Use Career Intentions Reason -- 'SELRES Deactivation'.
Member transfers to RELAD Unit		Forwards SPO PDR back to the SPO of the member's regularly assigned unit RELAD Unit.
At least 30 days prior to demobilization	Member	Updates mailing/e-mail address (and bank account information if changing) in Direct Access. (If access to the internet is unavailable, unit or SPO will input mailing address/direct deposit information.)
At least 15 days prior to demobilization	Member's Regularly Assigned SPO	Prepares, Personnel Data Information File (PDIF) and Certificate of Release or Discharge from Active Duty (DD-214) and mails to unit for delivery to member. Complete a special "MEMO" evaluation prior to departure if member is a mobilized Reservist TDY from parent unit and it has been more than 92 days since member's last review and member has been mobilized for more than 92 days and is returning to permanent command.
Upon Receipt from SPO	Member, with assistance of Unit	Verifies information on PDIF (competencies, awards, etc.), and DD-214, notifies SPO of any discrepancies.
Date of release from active duty	RELAD Unit	Delivers the Certificate of Release or Discharge From Active Duty (DD-214) and instructions for filing the final travel claim to the member. Mails member's medical record back to member's regularly assigned unit.
Date of release from active duty or Date of departure on terminal leave	Member's Regularly Assigned SPO	**Transmits separation transactions as prescribed on pages 11-52 and 11-53.**
Date of release from active duty	PSC (ses)	If SPO submits SOI as prescribed in this section, then JUMPS will automatically pay the member their final active duty pay on the payday following their demobilization date. If not, then PSC (ses) will have to manually calculate and process the final active duty payment.

Continued on next page

Unit Demobilization Checklist

Introduction

This checklist provides a job aid to assist the unit in completing the necessary tasks required for separating a mobilized Reservist from active duty. It should be used along with the Checklist for Separations and the Checklist for RELAD in section 3-B of this manual.

Checklist

Action when releasing a Reservist from active duty:

Step	Action	Date
1	Ensure member is physically qualified for release from active duty. A physical examination is required if one has not been done within the past 12 months. If one has been done within 12 months, a Health Screening Assessment (DD Form 2697) is required. Ensure all medical problems are documented in the member's health record, and that a line of duty determination is made if there is a medical problem. Ensure compliance with the Post-Deployment Health Assessment Program IAW ALCOAST 245/03	
2	Ensure member has notified SPO of desires concerning disposition of accrued leave via completion of a **Career Intentions Worksheet (CG PSC-2045) at least 45 days prior to separation or departure on terminal leave (whichever occurs first).**	
3	Verify that member (and dependents) have the appropriate (reserve versus active duty) military ID card.	
4	Counsel member concerning transitional health-care benefits – see page 11-23 of this chapter. Ensure transitional health-care benefits are recorded in the DEERS database.	
5	Counsel member concerning civilian reemployment rights – see page 11-22 of this chapter.	
6	Counsel member that, if SGLI and/or Family SGLI coverage were automatically increased to the maximum upon mobilization, and the member does not desire continued maximum coverage after demobilization, the member must submit a new SGLV-8286 / 8286A to elect reduced Member / Spouse SGLI coverage. Forward completed SGLV form(s) to SPO for Direct Access data entry.	
7	Ensure that any medals/awards, competencies and school completions earned by the member are recorded in Direct Access.	
8	Complete a special "MEMO" evaluation prior to departure if member is a mobilized Reservist TDY from parent unit and it has been more than 92 days since member's last review and member has been mobilized for more than 92 days and is returning to permanent command.	
9	If the member's mailing address is changing, update address in DEERS through local DEERS site or by calling the DEERS support office (Phone: 1-800-538-9552 except in CA, HI, and AK; for CA 1-800-334-4162; for HI and AK 1-800-527-5602)	
10	Advise member to update mailing address and direct deposit information in Direct Access if they are changing. If member does not have access to the system, supply address and direct deposit information to SPO for data entry.	
11	Ensure member has instructions for filing final travel claim.	
12	Ensure member does not have pending UCMJ action.	
13	Conduct appropriate security debriefing. (i.e. Vehicle / Access Passes)	
14	Ensure that SPO is notified if member has uncollected CG Mutual Assistance loan(s) that need to be collected from final active duty pay.	
15	Ensure supporting CDA/ESO provide all Reservists being RELAD with copy of CG Education Quick Reference Guide (http://www.uscg.mil/d7/d7r/rp/EducationGuide.doc)	
16	Deliver DD-214 to member.	
17	Counsel member on time-critical requirements of continuance in the Tricare Reserve Select Program (ALCOAST 189/05).	

Medical Readiness

Introduction

There are two situations that may arise near the conclusion of a member's mobilization status:
A member may be physically fit for military duty, but require further medical evaluation or treatment prior to release from active duty.
A member may be found not physically qualified for separation or retention and not physically qualified for military duty.

Reference

(a) RPM
(b) ALCOAST 245/03

Post-Deployment Health Assessment

Per reference (b), all Reservists called to active duty for 30 days or longer in support of any CG operation will have Post-Deployment Health Assessment (PDHA) accomplished at the time of redeployment/RELAD. Directed requirements contained in the PDHA program include:

- Completion of the four-page, revised DD form 2796 Post-Deployment Questionnaire.
- A face-to-face health assessment with a trained health care provider.
- A blood sample from all redeploying personnel.
- A quality assurance program to ensure compliance.

Process

A member on active duty orders of 31 days or more who incurs or aggravates an injury, illness or disease in the line of duty shall not be released from active duty without his or her consent. He or she shall be extended on active duty pending resolution of a medical condition or pending completion of the physical evaluation board process.
Members who consent to be retained on active duty shall be continued under their original Title 10 orders. If the member's Title 10 orders are due to expire, the SPO shall extend such orders by adjusting the Reserve Orders, Order End Date in Direct Access.
Members who do not consent to be retained on active duty shall be issued a Notice of Eligibility (NOE) for medical benefits upon release from active duty, and if eligible, shall be entitled to incapacitation pay as outlined in the Reserve Policy Manual.

SPO Demobilization Procedures

Introduction

The below checklist is provided as a job aid to assist the SPO in completing the necessary transactions to release a member from active duty. It should be used along with the Checklist for Separations and the Checklist for RELAD in section 3-B of this manual.

Checklist

Transactions required to release a mobilized member (including a recalled retiree) are listed below.

Note: Only the DD-214 (step 5) is required for a member who was mobilized under 14 U.S.C. 712.

Note: If member will be continuing on AD (e. g. Immediately begins a new set of orders following completion of mobilization orders), the demobilization process does not begin until the new orders are completed. See Continuance on Active Duty.).

Personnel released from active duty following call-up, partial mobilization, or full mobilization: Personnel ordered to active duty in time of national emergency declared by either the President or Congress, or in time of war declared by Congress, shall be issued a DD-214 upon release from active duty, regardless of the length of active service.

Step	Action/Transaction	Reference	Date
1	Statement of Intent (SOI) transaction shall be submitted in Direct Access 45 days prior to demobilization or member's departure on terminal leave. Use Career Intentions Reason—'SELRES Deactivation' Be sure that the SOI disposes of all leave earned during mobilization and shows any leave being sold. Note: Leave sold by a member that was mobilized under 10 U.S.C.12302 is not subject to the 60 day career maximum. If notification of demobilization is received late, and is within 20 days of the member's release date, *in addition to submitting an electronic SOI,* an E-Mail SOI will ALSO need to be submitted as prescribed in Exhibit 3-B-1, PPPM. If member's intentions change within 15 days of the sep/DEMOB date notify PSC (ses) via email.	Direct Access Guide, SOI ALPERSRU P/03 and AD/02 ALCOAST 349/04 ALCOAST 449/05	
2	Family Separation Allowance stop transaction (if applicable).	PAYMAN, figure 3-22 Direct Access Guide, Entitlements	

Continued on next page

SPO Demobilization Procedures, Continued

Step	Action/Transaction	Reference	Date
3	Direct Access Separation transaction *Reminder*: Members with a remaining SELRES drill obligation may not be assigned to the IRR or ISL.	Direct Access Guide, Reserve RELAD ALPERSRU W/02 PAYMAN, 2.K.3	
4	Complete a special "MEMO" evaluation if applicable.	ALCOAST 077/04	
5	Certification of Release or Discharge From Active Duty (DD Form 214). A DD-214 shall be issued to all members upon completion of a period of mobilization. (However, if a member is being immediately ordered to further active duty upon demobilization, the DD-214 shall not be issued until the end of that additional active duty, i.e., when the member is separated.) Block 18 (Remarks) of the DD Form 214 shall be annotated to include the following information: That the member was recalled under Title 10 and participated in a contingency operation and the title (s) of operations the member participated in (e.g. "Operation Enduring Freedom") The member's duty location (s) while on active duty The dates, if any, of service in a designated imminent danger pay area All medals/awards received by the member while on active duty Total cumulative career active duty service for retirement Note: If the member has 18 or more years of active duty, contact CGPC (rpm) prior to separating the member.	DD 214 Manual	
6	Member Competencies. Input any competencies, awards or school completions earned by the member in Direct Access.	PPPM Chap 4-C Direct Access Competencies Guide	
7	SGLI and Family Member SGLI Elections: The member may wish to decrease or elect no SGLI coverage upon RELAD, ensure new elections are entered in Direct Access.	SGLV Form 8286 and/or 8286A Direct Access SGLI/SGLV Guide	

TRICARE Benefits

Introduction

The National Defense Authorization Act for fiscal 2005, signed by the President, 28 October 2004, improves significantly the overall health benefits available to guardsmen, Reservists and their families and makes permanent several of the TRICARE benefits authorized "temporarily" under previous defense legislations while extending secretarial authorization for others.

Reference

(a) TRICARE Website, http://www.tricare.osd.mil/
WWW.TRICARE.OSD.MIL/FACTSHEETS/VIEWFACTSHEET.CFM?ID=328
(b) DOD News Release, No. 1084-04
(c) ALCOAST, 189/05 TRICARE Reserve Select Program
(d) Reserve Family Member Benefits Handbook,
http://www.defenselink.mil/ra/documents/family/benefitshandbook.pdf
(e) TRS Website, http://www.tricare.osd.mil/reserve/reserveselect/index.cfm
(f) ALCOAST, 251/06 TRICARE Early Identification Program (E-ID)

TRICARE Benefit	Procedures
(1) Pre-mobilization coverage (E-ID). Coverage begins the later of: (a) date mobilization orders are issued; or (b) 90 days before active duty commences.	Reservist provides copy of orders to DEERS/RAPIDS site. DEERS/RAPIDS site issues member ID card and records TRICARE benefit. • See reference (f).
(2) Post-mobilization coverage (free of charge). Coverage for 180 days from the date the Reservist is released from active duty. [P.L. 108-375, Sec 706]	Reservist reports to DEERS/ RAPIDS site upon demobilization. DEERS/ RAPIDS site records that member served on a contingency operation; such recording extends member's TRICARE eligibility for 180 days.
(3) TRICARE RESERVE SELECT (TRS), (Optional post-mobilization coverage (premium-based)). Coverage available after the 180-day post mobilization benefit expires. Coverage is available to any Reservist who was mobilized since 9/11/01 and served on active duty for at least 90 days (less if the member was disabled). Prior to demobilization, Reservist must sign an agreement to continue to serve in the SELRES for one or more years following demobilization. Coverage period is the lesser of: (a) one year for each period of 90 days continuous active duty served; or (b) number of whole years Reservist agrees to continue to serve in the SELRES. [P.L. 108-375, Sec 701]	• Reservist enters into a service agreement before leaving active duty. • Those electing to participate must complete DD Form 2895 (Agreement to Serve in the Selected Reserve for TRICARE Select Reserve). • Retain copy in the member's SPO PDR. • Send the original DD Form 2895 to the servicing ISC. • ISC DEERS/RAPIDS sites transmit the DD Form 2895 data to DMDC using the WEB application NLT 30 days prior to expiration of the members TAMP period. • Reservist submits initial premium payment NLT 30 before the first day of the month in which the TRS is to start.

Standard Abbreviations for Transfer of Personnel

Purpose This is a listing of approved standard abbreviations associated with the transfer of Coast Guard personnel. These abbreviations shall be used to the maximum extent possible when preparing transfer related messages and orders.

ABBREVIATION	MEANING
ACCTDATA	Accounting data
ACDIFOPS	Active duty in a flying status involving operational or training flights.
ACDIFINSOPS	Active duty under instruction in a flying status involving operational or training flights.
ACDU	Active duty.
ACDUINS	Active duty under instruction
ADASGN	For administrative, disciplinary, and accounting purposes
ADASGN REMAINS	While assigned to this duty your reporting unit for administrative, disciplinary, and personnel accounting purposes remains (unit).
ADCON	Advise all concerned.
ADCONSEN	With the advice and consent of the Senate.
ADDELREP	Provided no excess leave involved, authorized ____ days additional delay in reporting to count as leave.
ADDPLA	(And) to such additional places as may be necessary.
ADDU	Additional duty.
ADSTADIS	Advise status and/or disposition
ADTAKE	Advise what action taken.
AEX	Agreement to extend enlistment.
APPN	Appropriation.
ARI	Arithmetic test.
ARREP	Arrival report.
ASAP	As soon as practicable.
ASGN	Assign.
ASGNMT	Assignment
ATTNDIR	Attention directed.
ATTNINV	Attention invited.
AUTH	Authorized or authority.
AUTHAB	Authorized abbreviation.
AUTHPERSMAN	Authorized in accordance with Personnel Manual, Article ___.
AUTHGR	Authority granted.
AUTHPROBOUT	Authorized to proceed on or about (date).

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
AUTHTRAV	Authorized to perform such travel via commercial and/or Government transportation as may be necessary in proper performance of duties. While traveling via Government air outside CONUS, class three priority is certified. Cost of this travel chargeable to (appropriation designated).
AUTHTRAV-NOPENSE	In carrying out these orders, authorized to travel via any means desired with the understanding that there will be no entitlement to additional travel time, mileage or expense in excess of that allowed by the above orders. In case you do not desire to bear this expense, regard this authorization as canceled.
BAGAIR	(Number of pounds indicated) baggage to accompany authorized for air travel outside CONUS.
BI	Background investigation.
BTB	Basic Test Battery.
CADD	Current active duty date.
CARBAGAIR	While traveling via air outside the United States, 66 pounds baggage to accompany authorized, and an additional (number of pounds indicated) baggage is authorized as air cargo for shipment under the same class priority.
CARBASORD	Carry out remainder basic orders.
CIRCUITROUTE	Authorized travel by elected circuitous route with understanding not entitled mileage or expense in excess that allowed by orders, and any additional travel time will count as part of authorized delay. If member does not desire to bear this expense consider the authorization as canceled. Orders to be endorsed by detaching command as to transportation that would have been available at time of detachment to CONUS via shortest usually traveled route.
CLCVN	Class convening
CLER	Clerical aptitude test
CMD	Command.
COG	Convenience of the Government, cognizance.
COI	Course of instruction.
COMLAIRDIR	Where Government aircraft is not available, travel via commercial aircraft is directed.

Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
COMLAIRAUTH	Where Government aircraft is not available, travel via commercial aircraft is authorized where necessary to expedite completion of duty.
COMLTRANS-AUTHEXPED	Where Government transportation not available, travel via commercial transportation authorized where necessary to expedite completion of duty.
COMPL	Upon completion thereof
COMPRET	Upon completion return duty station and resume regular duties.
COMPTEMDIRDET	Upon completion temporary duty and when directed detached.
COMPTRADIRDET	Upon completion training and when directed detached.
COMPVANTRADET	Upon completion advanced training detached
CONPRESDU	Continue present duties.
CONTREAT	Continue treatment.
CONUS	Continental United States.
CONVATE	Connection reactivation.
CONVERS	Connection conversion.
COTA	Confirming telephone or message authority of (date indicated).
CX	Canceled.
DDALV	Days en route authorized chargeable as leave.
DEF SEC BRIEF REQ	You are directed to contact your commanding officer for defensive security briefing
DECOM	Upon decommissioning (ship indicated).
DELREP	Provided no excess leave involved authorized to delay (number of days or until date specified) in reporting, to count as leave.
DELREPGRAD	Authorized to delay (number of days or until date specified) in reporting, to count as graduation leave. Total amount of graduation leave shall not exceed 30 days and must be taken within 3 months of date of graduation; otherwise delay counts as advance leave.
DEPN	Dependent(s).
DEPNOTAUTH	Dependents not authorized overseas duty station. For entitlements transportation of dependents and shipment HHG see JFTR, paragraphs U5222-D and U5350-E.
DIFDEN	Duty in a flying status not involving flying.
DIFDENRELAS	Duty in a flying status involving flying as his/her relief.
DIFINSOPS	Duty under instruction in a flying status involving operational or training flights.

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
DIRBY	When directed by the commanding officer (or commander designated). (Date on or about which these orders are effective may be indicated.)
DIRDET	When directed, detached (duty indicated). (Date on or about which these orders are effective may be indicated.)
DIRLAUTH	Direct liaison authorized.
DIRPRO	When directed proceed.
DISESTAB	Upon disestablishment.
DISTREAT	Upon discharge treatment.
DUCON	Duty connection.
DUINS	Duty under instruction.
DURELAS	Duty as his/her relief.
DUSIGN	To duty assigned by.
EAOS	Expiration active obligated service.
EDA	Estimated date of arrival.
EFPROUT	In effecting promotion, procedure outlined in _____ will be followed.
ENL	Enlisted.
ENLORDS	Enlisted orders.
ETO	Enlisted transfer order
FAIRTRANS	(Via) first available air transportation.
FASDU	For assignment to duty.
FATRANS	(Via) first available transportation.
FFA	For further assignment.
FFT	For further transfer.
FURORDMOD	Orders (identified by date or message reference numbers following) further modified.
GCT	General classification test.
GOVAIRAUTHVAIL	Travel via Government aircraft authorized outside CONUS where available. Class ____ priority is certified.
GOVAIRDIRVAIL	Travel via Government aircraft directed outside CONUS where available. Class ____ priority is certified.
GOVCOMLAIRAUTH	Travel via Government and/or commercial aircraft as may be elected by him/her directed where necessary to expedite completion of this duty. Class ____ priority certified for travel via Government aircraft.

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
DIFOPS	Duty in a flying status involving operational or training flights.
DIFOPSDORSE	Detailed to duty in a flying status involving operational or training flights effective such date as endorsed hereon.
DIFOPSREPT	Detailed to duty in a flying status involving operational or training flights effective upon reporting.
DIFPRO	Duty in a flying status involving proficiency flying.
DIFTECH	Duty in a flying status involving operational or training flights as a crewmember.
GOVTRANSDIROUT	Travel via Government transportation directed outside CONUS.
GOVTRANSDIRVAIL	Travel via Government transportation directed outside CONUS where available. Class ____ priority certified for travel via Government aircraft.
GREEMAIN	Orders contingent upon agreement remain on active duty until (date specified). Execution of these orders constitutes your agreement to serve until date indicated. Member notifies issuing authority if he/she does not desire to execute these orders.
HEDALOT	Headquarters allotment.
HELREC	Health record(s).
HELTRA	Helicopter training.
HERDET	Hereby detached (duty indicated).
HHG	Household goods.
HHGLIMIT	Shipment HHG to overseas duty station limited to 2,000 net pounds or 25 percent of weight limitation authorized by the JFTR, Vol. 1, whichever is greater. This limitation does not apply to unaccompanied baggage and professional items.
HOR	Home of record.
HS	High school.
HUMS	Humanitarian reasons.
IAW	In accordance with.
ICW	In connection with.
IMMUN	Obtain appropriate immunization.
IMREP	Immediately report.
INACT	Upon inactivation of (ship or station indicated).

Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
JFTR	Joint Federal Travel Regulations.
LIMDU	Limited duty.
LOCTRAV/TAXLAUTH	Local travel via streetcar, bus, subway, street railway, train, etc., is authorized. The use of taxicabs at your temporary additional duty station is authorized subject to restrictions outlined in the U.S. Coast Guard Travel Manual, COMDTINST M4600.12 (series).
NAC	National agency check.
NARANO	Name, rate, and social security number
NET	Not earlier than.
NLT	Not later than.
NOCOST	This authorization issued with the understanding that you will not be entitled to reimbursement for expense in connection with these orders. In case you do not desire to bear this expense consider this authorization canceled.
NONEG	Negative replies neither required nor desired.
NOPROCAN	If not already proceeded, orders (identified by date or date-time group which follows) canceled
NORMSHOR	Normal tour of shore duty.
NOTAL	Not to all.
OA	On or about.
OBLISERV	Obligated active service of (number of months indicated) required.
ONBOWCOM	On board that vessel when placed in commission.
ONBOWSERV	On board that vessel when placed in service.
ORDAB	Hold orders in abeyance.
ORDCAN	Orders (identified by date or message reference numbers following) canceled.
ORDMOD	Orders (identified by date or message reference numbers following) modified.
OUTCONUS	Outside continental United States.
PAHEL	Pay record(s) and health record(s).

Continued on next page

Standard Abbreviations for Transfer of Personnel,
Continued

ABBREVIATION	MEANING
PALCRU	Pay and allowances accrue from.
PANDL	Pay and allowances.
PANDLCHAR	Pay and allowances chargeable (appropriation and identifying numbers designated).
PARA	Paragraph.
PAREC	Pay record(s).
PASEP	Being passed separately.
PCS	Permanent change of station.
PEREF	Personal effects.
PERGRA	Permission granted.
PERNOGRA	Permission not granted.
PHYSEXAM	Physical examination.
PHYSQUAL	Request report physical examination and any physical defects, which disqualify from performing military service of following individual(s) (name, grade, and social security number/designator).
POC	Privately owned conveyance.
POTT	Personnel, orders, transfer, travel.
POV	Privately owned vehicle.
PRIAUTH	Authorized travel via privately owned conveyance with understanding no additional cost to Government involved.
PRO	Proceed.
PROBOUT	Proceed on or about.
PROWDELREP	Proceed without delay (location of ship, commander, or station designated by group(s) immediately following), report duty or purpose indicated.
PROIMREP	Proceed immediately and report.
PROREP	Proceed and report.
PROTIMEREP	Proceed in time report (activity or station designated by group(s) immediately following) (hour and/or date indicated).

Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
PROVMAIN	Other provisions basic orders remain in effect.
PRODELREP	Proceed without delay and report.
RDLTR	Rapidraft letter.
RELAD	Release(d) from active duty.
RELADTR	Release(d) from active duty for training.
RELBY	When relieved by.
RETAT	It is requested that.
RETULSIGN	Retain on board until ultimate assignment received.
REVAR	Authorized revisit above-mentioned places and vary itinerary as necessary
SECTANSFIND	The Secretary of Transportation has found that this permanent change of station is required by the exigencies of the Service.
SEPCORR	Member/subject matter will be subject of separate correspondence.
SEPROS	Separation processing
SERANDA	Service record(s), health record(s), pay account(s), and personal effects.
SERVHEL	Service record(s) and health record(s).
SERVPA	Service record(s) and pay record(s).
SERVPAHEL	Service record(s), pay record(s), and health record(s).
SERVREC	Service record(s).
SNM	Subject named member.
SUBCONSENT	This assignment to active service subject to consent.
SVCM	Serviceman.
TAD	Temporary additional duty.
TEMAC	Temporary active duty.
TADCON	Temporary additional duty in connection with.
TADINS	Temporary additional duty under instruction.
TEMDIFINSOPS	Temporary duty under instruction in a flying status involving operational or training flights.
TEMDIFOPS	Temporary duty in a flying status involving operation or training flights

.

Continued on next page

Standard Abbreviations for Transfer of Personnel,

Continued

ABBREVIATION	MEANING
TEMDU	Temporary duty.
TEMDUCON	Temporary duty in connection with.
TEMDUINS	Temporary duty under instruction.
TEMPLINACT	Temporary duty pending disciplinary action.
TEMSEPRAD	Temporary duty connection separation processing. Upon completion and when directed detached; proceed home for release from active duty accordance instructions.
TEMWAIT	Temporary duty awaiting.
TETO	Training enlisted transfer order.
TPA	Travel via privately owned conveyance authorized.
TRACEN	Coast Guard Training Center.
TRAFOLPERS	Transfer following enlisted personnel
TRAVCHAR	Cost travel chargeable (appropriation or identifying numerals may be added).
TRF	Transfer
TVL	Travel.
TVLMAN	Coast Guard Travel Manual.
ULTSIGN	Ultimate assignment.
UNODIR	Unless otherwise directed.
UNORDCAN	Unexecuted portion of orders (identified by date or message reference numbers following) canceled.
UTNOTREQ	Utilization of Government facilities not required as it is considered such utilization would adversely affect performance of assigned temporary duty.
USCGA	United States Coast Guard Academy.
WHAP	Where/when applicable.
WITHOUTACCTDATA	Issuance this order is without accounting data since it appears order can be executed without cost. If costs or entitlements will accrue member must request and receive written authorization including accounting data from order issuing authority prior execution.

This page left blank intentionally

Overview

Introduction

This enclosure will guide you through the process of completing block 12 of the CG-4251 (TAD Travel Order).

Reference

The following references were used to develop the examples shown in this enclosure. These references set policy for the use of the examples. You will need to refer to these references from time to time.

- Joint Federal Travel Regulations, Vol I
- Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17(series)
- Travel Charge Card Program, COMDTINST 4600.14(series)
- Use of Travelers checks for Travel Advances, COMDTINST 4600.16(series)
- Management and Administration of Aviation Incentive Pays, COMDTINST 7220.39(series)

Note: The presence of example remarks entries does not relieve the order issuing authority or the order preparer of the responsibility of being thoroughly familiar with these references.

In this Enclosure

Description	Page
Purpose and Justification of travel	E-3-1
Mode of Travel	E-3-4
Use of a Privately Owned Conveyance	E-3-6
Example Entries for Mode of Travel	E-3-8
Miscellaneous Entries (advances, flight orders)	E-3-17
Example Entries for Availability/Non-availability of Government Quarters	E-3-18

Purpose and Justification of Travel

Introduction

Every TAD order must describe

- why the travel is being performed and,
- what is to be accomplished during the TAD period.

Describing why the travel is being performed

There are three general WHY descriptions. The descriptions are:

DESCRIPTION	USED TO DESCRIBE
DEPLOYMENT TRAVEL	Temporary duty with forces deployed either on land or aboard ship away from the ship's homeport
TRAINING TRAVEL	Temporary duty in a formal curriculum, whether or not run by the military, to include alcohol/drug rehabilitation
BUSINESS TRAVEL	All other temporary duty travel to include site visits, attendance at information meetings or conferences, delivery of speeches or presentations, special mission travel, emergency leave, medical travel

Describing what is to be accomplished

To describe what is to be accomplished during the TAD period enter a brief statement, explaining what the traveler is expected to do.

Continued on next page

Purpose and Justification of Travel, Continued

Examples

Examples documenting the purpose (WHY) and justification (WHAT) of TAD are shown below.

- "BUSINESS TRAVEL to attend the XYZ Conference",
- "TRAINING TRAVEL to attend YN A School",
- "BUSINESS TRAVEL to conduct sites visits at the (locations named elsewhere on the order/following locations:)"
- "DEPLOYMENT TRAVEL as crew replacement aboard USCGC EVERSAIL".

A more expansive statement of WHY and WHAT might include the accomplishments being directed or specific activities to be conducted/attended.

- "BUSINESS TRAVEL to attend the workshops on harbor navigation at the XYZ Conference, and to acquire not less than three copies of each set of briefing materials if possible."

Mode of Travel

General

The TAD order needs to be as clear as possible as to what the order issuing authority wants the traveler to do (directs). The TAD order needs to be equally clear as to what latitude the traveler has - without the need to seek additional authority from the order issuing command (options or authorization). When there is a mix of travel directions and authorizations, the TAD order needs to be clear as to what applies to what.

Considerations

The description of the Mode of Travel on the TAD order is probably the most complex component.

- It addresses the transportation to be provided to the member to perform the mission directed by the TAD order.
- It is complicated by
  - the number of possible transportation methods (e.g., air, train, bus, ship, privately owned conveyance, taxi, bus, etc.),
  - the number of owners of those transportation methods (e.g., Government, private industry, personally owned),
  - the flexibility desired by the order issuer or needed by the traveler(e.g., directed versus authorized mode of transportation),
  - and the several laws, regulations, contracts, and policy that impact transportation (e.g., Fly America Act, reimbursement limitations, contract city pairs for airline use, Travel Management Center use, etc.).

Two important terms

There are two specific words related to transportation that must be used very carefully. Those words are DIRECT(ED) and AUTHORIZE(D).

Continued on next page

Mode of Travel, Continued

Directed defined

If an order DIRECTS a mode of transportation, the member has no option. That mode has been ORDERED and must be used. There is NO REIMBURSEMENT for an alternative means of transportation unless the appropriate authority - named on the order - endorses the order that the directed mode isn't available.

> **Note**: TAD travelers cannot be directed to travel using their personally owned privately owned conveyances (cars, motorcycles, planes, etc.). TAD travelers cannot be directed to use "special conveyances", a term that includes rental cars. (See JFTR, Appendix A, for definitions of PRIVATELY OWNED CONVEYANCE and SPECIAL CONVEYANCE.

Authorized defined

If an order AUTHORIZES a mode of transportation, the member has some transportation options BUT there is a limitation on the reimbursement (and the potential that leave days will be used to cover travel). The TAD order would need to contain the estimated cost of the (authorized) transportation. If the member chooses to use some other transportation means, the reimbursement would be THE LESSER of whatever the member spent or whatever the authorized mode would have cost.

Use of a Privately Owned Conveyance (POC)

General

Use of a privately owned conveyance (POC) for TAD travel may be permitted either as being:

- Advantageous to the Government, or
- For the convenience of the member.

POC travel on a TAD order CANNOT be directed.

Note: Often it is less expensive to authorize a rental car - always specifying the size - than to authorize POC travel.

Conditions for use of POC as advantageous to the Government

For POC transportation to be determined to be advantageous to the Government the following items must be considered:

- The circumstances of the ordered TAD travel,
- Comparison of the costs of the various transportation alternatives, and
- Other qualitative information.

Costs Comparison

When POC travel is determined to be advantageous to the Government,

- travel days are allowed as for PCS travel and
- per diem expenses are paid for travel days (at the locality rate for the overnight lodging).

POC transportation can be concluded to be advantageous to the Government if the total cost of the transportation (and per diem) for POC transportation (including reimbursement for any travel in and around the TAD location that would be authorized in the order) exceeds the total cost of common carrier transportation (at city-pair fares if available) and appropriate per diem PLUS the cost of a rental car (if one would otherwise be authorized in the order) and gas for the rental car.

Note: The cost of transportation between home and a common carrier terminal and between a common carrier terminal and the TAD location is not specifically considered. Non-inclusion of these costs may affect the quantitative outcome, but the costs often aren't known and can vary widely.

Continued on next page

Use of a Privately Owned Conveyance (POC), Continued

Other considerations

There are times when the quantitative (cost) comparison could lead to a conclusion that POC transportation is NOT advantageous;

HOWEVER, other qualitative (subjective) reasons overcome the cost consideration.

Example: If a member has significant materials to transport, it may be less expensive for the member to use common carrier and ship the materials but far more cumbersome to move them between common carrier terminal and lodging than to simply use a POC in which the materials can be easily transported.

Use of POC for travel in and around the TAD location

If a POC is authorized as advantageous to the Government, there is no guarantee that reimbursement for POC travel in and around the TAD location(s) will be reimbursed unless the order permits the reimbursement.

Decision should be documented

Each decision to permit POC travel as advantageous to the Government should be documented in some manner. This enables after-the-fact questions about the POC travel decision to be factually addressed.

Entitlements when use of POC is authorized for the convenience of the member

If transportation by POC is authorized for the convenience of the member, reimbursement for POC use and per diem while traveling is limited to what the member would have been reimbursed for transportation and per diem had the authorized transportation method been used.

Example Entries for Mode of Travel

Introduction

A number of examples will be provided. One or more of these examples may apply to any given order.

Directing the use of Government transportation

Use this example to direct travel via Government Transportation methods

Note: Government transportation via air (including Air Mobility Command (AMC) procured air seating) is usable for transportation to/from/between locations outside the CONUS. When other forms of Government transportation are available (e.g., car, bus, command aircraft, etc.), Government transportation can be directed in CONUS.

Example: "You are directed to use Government transportation to travel (from (location) to (location)) or (for all transportation). If Government transportation isn't available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other transportation used.

If Government transportation isn't available, you are directed to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). If Government procured transportation isn't available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other transportation used.

If neither Government transportation nor Government procured transportation is available, you are directed to procure common carrier (non contract city-pair) transportation at personal expense directly from a TMC or a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. If neither Government transportation nor Government procured transportation is available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other transportation used."

Continued on next page

Example Entries for Mode of Travel, Continued

Directing the use of Government procured transportation

Use this example to direct travel via Government procured transportation.

- This is the preferred transportation option for TAD travel involving common carrier transportation. Coast Guard policy is that Government procured transportation is arranged through a Travel Management Center and makes extensive use of city-pair contract fares.

Example: "You are directed to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). If Government procured transportation is not available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other forms of transportation used.

If Government procured transportation is not available, you are directed to procure common carrier (non contract city-pair) transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent must not be used, or you will NOT be reimbursed for transportation. If common carrier transportation via (appropriate entry of air, train, etc.) is not available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other forms of transportation used."

Continued on next page

Example Entries for Mode of Travel, Continued

Directing the member to personally procure common carrier transportation

Use this example to direct the member to personally procure common carrier transportation.

- This is not the preferred mode of directed transportation for TAD travel involving common carrier transportation. This DIRECTED transportation method is used when there is no access to a Travel Management Center (TMC).

Note 1: Transportation procured directly by the member from a common carrier typically results in higher cost to the command than does Government procured transportation using a TMC.

Note 2: A travel agent, other than a TMC, CANNOT, by law, be used or reimbursement CANNOT be made for transportation.

Example: "Government procured transportation is not available to you. You are directed to procure common carrier (non-contract city-pair) transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent must not be used, or you will NOT be reimbursed for transportation. If common carrier transportation via (appropriate entry of air, train, etc.) is not available, you must have this order endorsed by (XXX) or reimbursement CANNOT be made for other forms of transportation used."

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize travel via Government procured transportation

Use the example to authorize the member to travel by Government procured transportation.

- Coast Guard policy is that Government procured transportation is arranged through a Travel Management Center (TMC) and makes extensive use of city-pair contract fares.

Note: A travel agent, other than a TMC, CANNOT, by law, be used or reimbursement CANNOT be made for transportation.

Example: "You are authorized to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). The approximate Government procured transportation cost (excluding per diem) is ($__). If you use an alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of Government procured transportation and applicable per diem. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. If the alternative transportation method results in use of more days than the authorized mode for travel, those days are days of leave."

Authorize the member to personally procure common carrier transportation

Use this example to authorized the member to personally procure common carrier transportation.

- This is not the preferred mode of authorized transportation for TAD travel involving common carrier transportation.
- This authorized transportation method is used when there is no access to a Travel Management Center (TMC).
- Transportation procured directly by the member from a common carrier typically results in higher cost to the command than does Government procured transportation using a TMC.

Note: A travel agent, other than a TMC, CANNOT, by law, be used or reimbursement CANNOT be made for transportation

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize the member to personally procure common carrier transportation (continued)

Example: "Government procured transportation is not available to you. You are authorized to procure common carrier (non-contract city-pair) transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. The approximate common carrier transportation cost (excluding per diem) is ($___). If you use an alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of common carrier transportation at the lowest available commercial fare and applicable per diem. If the alternative transportation method results in use of more days than the authorized mode for travel, those additional days are days of leave."

Maximum transportation flexibility for a member traveling on a Blanket Travel Order

Use this example to provide maximum transportation flexibility to the member due to the nature of the duty being performed (e.g., virtually no-notice transportation requirements to locations remote from the permanent duty station location) and the member's need to make rapid situational decisions as to the appropriate transportation method.

Example: "For the purpose of travel under this order, you are authorized to select the transportation method that, in your judgment, best meets the needs of the travel circumstances at the lowest cost to the Coast Guard. If POC transportation is used, it is advantageous to the Government. You will be reimbursed based on the transportation method you select. If common carrier at personal expense is used, your reimbursement will be based on Government procured transportation NOT being available. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation."

"If available to meet your transportation needs, your first choice for transportation arrangements should always be to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates."

Continued on next page

Example Entries for Mode of Travel, Continued

Limited transportation flexibility for a member traveling on a Blanket Travel Order

Use this example provide limited transportation flexibility to the member due to the nature of the duty being performed (e.g., reasonable lead times for transportation reservations to be made) and the member's lack of need to make rapid situational decisions as to the appropriate transportation method.

Example: "For the purpose of travel under this order, you are authorized to procure common carrier (non contract city-pair) transportation at personal expense. When that is done, Government procured transportation is not available to you. You are authorized to procure common carrier transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation."

"If available to meet your transportation needs, your first choice for transportation arrangements should be to use Government procured transportation. This transportation is best arranged by your Travel Management Center (phone #) making use of contract city-pair rates."

"If you use a transportation method other than personally procured common carrier or Government procured transportation, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of personally procured (non contract city-pair) common carrier transportation at the lowest available commercial fare and applicable per diem. You must document the lowest commercial fare at the time of travel. If the alternative transportation method results in use of additional days for travel, those additional days are days of leave."

"If the circumstances of the specific travel justify the use of an alternate transportation method, forward your travel claim via (order-issuing authority) with an explanation. If the justification is adequate, the transportation method actually used will be approved as being the appropriate method for that specific travel period."

Continued on next page

Example Entries for Mode of Travel, Continued

Normal transportation flexibility for a member traveling on a Blanket Travel Order

Use this example to provide normal transportation flexibility to the member.

Example: "You are authorized to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available. If you use an alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of Government procured transportation and applicable per diem. You must document on your travel voucher the approximate Government procured transportation cost (excluding per diem) for each travel leg made by other than Government procured transportation. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. If the alternative transportation method results in use more days than the authorized mode those days are days of leave."

"If the circumstances of the specific travel justify the use of an alternate transportation method, forward your travel claim via (order-issuing authority) with an explanation. If the justification is adequate, the transportation method actually used will be approved as being the appropriate method for that specific travel period."

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize travel by POC as advantageous to the Government

Travel by POC as advantageous to the Government may be authorized with or without authority for reimbursement for local travel.

Example: "You are authorized to travel by privately owned conveyance (POC) as advantageous to the Government (include one of the following statements):

- You are not authorized reimbursement for any POC travel in and around the TAD location(s)."
- You are authorized reimbursement for POC travel in and around the TAD location(s) while on official business. You must provide an accurate record of the miles driven in and around the TAD location(s) to enable correct reimbursement."

Authorize travel by POC for the convenience of the member

Travel by POC for the convenience of the member may be authorized with or without authority for reimbursement for local travel.

- The authorized transportation method MUST be on the order together with the cost of that method. Inclusion of the cost information enables the after-the-fact comparisons needed for correct reimbursement.

Example 1 (for authorized Government procured transportation): "You are authorized to use Government procured transportation using your Travel Management Center (phone #) to make reservations and making use of contract city-pair rates if available to travel (from (location) to (location)) or (for all transportation). The approximate Government procured transportation cost (excluding per diem) is ($_____).

You are authorized to use POC transportation for your personal convenience. If you use POC transportation or any other alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of Government procured transportation and applicable per diem. A travel agent other than a TMC must not be used, or you will NOT be reimbursed for transportation. If the alternative transportation method results in use of additional days for travel, those additional days are days of leave. (include one of the following statements)...

Continued on next page

Example Entries for Mode of Travel, Continued

Authorize travel by POC for the convenience of the member (continued)

Example 1 (cont'd)

- No reimbursement is authorized for POC travel in and around the TAD location(s) (or)
- You are authorized reimbursement for any POC travel in and around the TAD location(s). You must provide an accurate record of the miles driven in and around the TAD location(s) to enable correct reimbursement."

Example 2 (For authorized personally procured common carrier transportation): "Government procured transportation is not available to you. You are authorized to procure common carrier transportation at personal expense directly from a common carrier at the lowest available commercial fare. You will be reimbursed. A travel agent, other than a TMC, must not be used, or you will NOT be reimbursed for transportation. The approximate common carrier transportation cost (excluding per diem) is ($____).

You are authorized to use POC transportation for your personal convenience. If you use POC transportation or any other alternate transportation method, your reimbursement for transportation and per diem for travel between locations will not exceed the cost of common carrier transportation at the lowest available commercial fare and applicable per diem. If the alternative transportation method results in use of additional days for travel, those additional days are days of leave." (include one of the following statements)...

- No reimbursement is authorized for POC travel in and around the TAD location(s) (or)
- You are authorized reimbursement for any POC travel in and around the TAD location(s). You must provide an accurate record of the miles driven in and around the TAD location(s) to enable correct reimbursement."

Miscellaneous Entries

Travel Advances

Select and enter one of the following remarks if appropriate.

- "Travel charge card holder, member authorized (amount) in travelers checks charged against travel charge card."
- "No travel charge card, member authorized (amount) in travelers checks charged against Coast Guard."
- "Travel charge card not required, member authorized (amount) in travelers checks charged against the Coast Guard."

Issuing and terminating flight orders

Select and enter one of the following remarks if appropriate.

- "These orders constitute duty involving operational flying (DIFOPS) from (date) through (date)" [and, if the aviator is entitled to monthly ACIP], "All flight time accrued under these flight orders must be certified by the appropriate unit official as and endorsement on these orders".
- "These orders constitute periodic (noncrew member/crew member/flight surgeon) flight orders from (date) through (date). You are placed in a monthly aviation incentive pay (MAIP) status from (date) through (date) [does not apply to flight surgeons]. All flight time accrued under these flight orders must be certified by the appropriate unit official as an endorsement on these orders".

Special Provisions/ Remarks

If applicable enter:

- Justification of non-contract carrier use.
- Authorization for Actual Expense Allowance (cite and attach a copy of the AEA authorization provided by the Commanding Officer.
- Enter any data or information required in other blocks of the travel order when the space provided in the blocks is inadequate.

Example Entries for Availability/Nonavailability of Government Quarters

Background

Commands must ensure that available adequate government quarters and government mess are used by military members on TDY/TAD to the maximum extent practical (when their use would not adversely affect the performance of the assigned mission).

When the use of Government Quarters/Mess must be directed

The use of adequate government quarters and government mess must be directed in travel orders when:

- The order-issuing authority requires that adequate government quarters be used.
- Personnel are ordered TDY/TAD to ships or other deployed units.
- Personnel are ordered TDY/TAD to formal courses of instruction at schools (including PCS/TEMDU) held at military installations of any service.

Requirements when TDY/TAD is at a military installation

If the member is traveling to a military installation the order-issuing authority must enter a statement on the member's TDY/TAD order regarding the availability of government quarters and government mess at the TDY/TAD site.

The statement must also indicate whether or not the member is directed to use the government quarters and mess at the TDY/TAD site or if a determination has been made that their use would adversely affect the performance of the assigned mission.

Example entries for use when government quarters/mess are available

Use this example to direct the use of available adequate government quarters and mess.

Example: "You are directed to utilize government quarters and mess, the availability of which has been confirmed by [enter the name and phone number of the point of contact for the command controlling the adequate government quarters/government mess at the TDY/TAD site, provide any confirmation numbers or other references as appropriate]. Reimbursement for commercial lodging expenses will not be authorized without verifiable certification of nonavailability on your travel claim."

Continued on next page

Example Entries for Availability/Nonavailability of Government Quarters, Continued

Example entries for use when government quarters/mess are available (continued)

Use this example when the order-issuing authority determines that the use of government quarters/mess would adversely affect the performance of the assigned mission.

Example: "A determination has been made by [enter the title of the official authorized to make such determinations] that the use of available government quarters and mess would adversely affect the performance of the assigned mission. Reimbursement for commercial lodging expenses is authorized."

Example entry for use when government quarters/mess are not available

Use this example when it has been determined that adequate government quarters/mess are not available.

Example: "Per [enter the name and phone number of the point of contact for the command controlling the adequate government quarters/government mess at the TDY/TAD site, provide any confirmation numbers or other references as appropriate], adequate government quarters and mess are not available. Reimbursement for commercial lodging expenses is authorized."

This page left blank intentionally

Contents

Nondisability Retirements 2
Survivor Benefit Plan Election Requirements 3
Spousal Notification/Concurrence Letter 4
Separation Pay (member due money) 6
Separation Pay (member owes money) 7
Information Regarding Active Duty Separation Status 8
Release from Active Duty and Transfer to the IRR 10
Reserve Civilian Employer Thank You Letter 11

Nondisability Retirements

1900
15 May 2004

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: SEPARATION PAYMENT UPON RETIREMENT FROM ACTIVE DUTY

1. The separation payment provided to you upon your retirement from active duty represents 100 percent of your final pay as calculated by JUMPS. Please be advised that this payment may be over or under the final pay due you as a result of clerical or administrative errors or delays in processing pay transactions, or changes in the planned disposition of your leave.

2. Any additional payment to you will be paid by the Coast Guard Coast Guard Personnel Service Center (PSC) after your separation transactions have processed in JUMPS and a final review of your pay account is made. This will normally be within 45 days after your date of retirement. You will also be sent a final Leave and Earnings Statement (LES) within 45 days after retirement.

3. If an overpayment is discovered upon final review of your active duty pay account, PSC will initiate action to collect the overpayment from your retired pay.

4. Your final LES and any additional payment will be mailed to the address you provided on the Career Intentions Worksheet (CG-PSC-2045) at the time of separation processing. If you wish to receive your final LES and any additional payment at a different address, you must notify PSC (ses) in writing within 20 days. Your letter must include your name, Employee Identification number (EMPLID) and the address you want the payment sent to. Please address your correspondence to:

COMMANDING OFFICER (SES)
COAST GUARD PERSONNEL SERVICE CENTER
444 SE QUINCY STREET
TOPEKA KS 66683-3591

5. Your IRS form W-2 for calendar year 20__ will be mailed by PSC to the address indicated on the Career Intentions Worksheet (CG-PSC-2045) unless PSC (ses) is notified otherwise in writing. Your IRS form W-2 will be mailed by 31 January next year.

6. Any questions concerning the final LES, additional payment, the IRS form W-2, retirement travel entitlements or settlement of travel claims should be coordinated with PSC (ccb) at 1-866-PSCUSCG (1-866-772-8724).

#

Survivor Benefit Plan Election Requirements

1900
15 May 2004

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones, GMC

Subj: SURVIVOR BENEFIT PLAN

1. As a concerned commanding officer, I am writing this letter to ensure that you are fully aware of the Survivor Benefit Plan (SBP).

2. As you near retirement, it is important that you fully understand SBP.

- If you do not make an election, you will be automatically enrolled at maximum level.
- You may elect coverage at less than maximum or not to participate at all.
- You will have a one-year period, beginning two years after the commencement of retired pay, to voluntarily terminate SBP coverage. You will be notified when you reach your second anniversary of retired pay, and if you wish to terminate SBP you should contact PSC (ras) for the disenrollment form. Once participation is discontinued under these provisions, no benefits may be paid in conjunction with your previous participation. No refund of any premiums properly collected shall be made and you may not resume participation in SBP for any category or beneficiary.
- The decision not to participate at retirement in SBP is irrevocable.

3. If you do not elect coverage at the maximum level, your spouse must concur with your election.

- You are required to advise your spouse of your election.
- Your spouse may indicate concurrence with your SBP election by signing part VII of the Retired Pay Account Worksheet and Survivor benefit Election (CG PSC-4700).
- If your spouse does not concur with your decision or is not available for signature, I am required by Public Law 99-145 to advise your spouse of their options. Your spouse can concur with your election of less than maximum. However, if your spouse does not concur or should not respond to my letter prior to your retirement, **you will be enrolled at the maximum level of participation**.

4. Your election is to be made on CG PSC-4700 (http://www.uscg.mil/hq/psc/forms/psc4700.pdf) and should be completed approximately 60 days prior to your retirement or date of departure on terminal leave. Failure to return a completed election will result in you being enrolled in the SBP at maximum level of participation, **regardless of your wishes**.

5. If you have any questions concerning the Survivor Benefit Plan, (enter name of local work-life Career Information Specialist or unit contact and phone number), or the staff at Coast Guard Personnel Service Center, Retiree and Annuitant Services (RAS) at 1-800-PSCUSCG (800-772-8724) or (785-339-3415) are available to assist you and your spouse.

M. R. ROBERTS
CG GP Somewhere

Spousal Notification/Concurrence Letter

CERTIFIED MAIL - RETURN RECEIPT REQUESTED

(Mr./Mrs.) Date:

Dear (Mr./Mrs.) _____:

I am writing to tell you about the Survivor Benefit Plan (SBP) and a decision your spouse has made about participation in the SBP. It is important that you understand this, so please read it carefully.

In the event of your spouse's death, their Coast Guard retired pay automatically stops. Under SBP, your spouse can provide an annuity of up to 55 percent of their retired pay to you and /or your children. In order for you to receive the SBP annuity, your spouse must designate a "base amount" of $300.00 up to the full amount of their monthly- retired pay. Your annuity would be 55 percent. The premium costs to participate in SBP are a small percentage of the designated base amount, and would be deducted from your spouse's monthly-retired pay.

Under this plan, your spouse must choose one of the following options before retirement:

a. To cover both you and your children at the maximum level possible (full retired pay). This means you (or your children) would receive 55 percent of your spouse's retired pay after their death.

b. To cover only you, or only your children, at the maximum level possible.

c. To cover you or your children or both, at less than the maximum level. This means you (or your children) would only receive an annuity of 55 percent of this reduced "base amount."

d. Not to participate in SBP at all, which means you (and your children) would receive no annuity in the event of your spouse's death.

Your spouse has elected option (b, c, or d). They have elected to choose the appropriate option below that corresponds to the member's election in blocks 8 and 9 of CG PSC 4700.

(cover only your children at the maximum base amount and not cover you).

or (cover you and your children but only at a reduced base amount of $XXX.XX).

or (cover only you at a reduced base amount of $XXX.XX).

or (cover only your children at a reduced base amount of $XXX.XX).

or (not participate in SBP at all).

Continued on next page

Under Public Law 99-145, your written consent is required before the above election made by your spouse can be effective. It is important that you understand the decision not to participate in SPB at retirement is irrevocable, meaning it cannot be changed. The only exception to this may occur if there is an open season for election into the SBP.

After election into the Plan at any level, there is one opportunity to disenroll. This occurs two years after the commencement of retired pay, when your spouse will have a one year opportunity to voluntarily terminate SBP coverage. As His/Her spouse, you must also concur with that election if made. The decision to terminate SBP coverage during this one-year period is also irrevocable, and once participation is discontinued, no benefits may be paid in conjunction with previous participation, no refunds of any premiums properly collected shall be made and (he/she) may not resume participation in SBP for any category of beneficiary. Your choices at this time are as follows:

a. Concur with your spouse's election; or

b. Not concur with your spouse's election, in which case your spouse will be enrolled in SBP at the maximum level (based on full retired pay); or

c. Not respond to this letter, in which case, your spouse will be enrolled in the SBP at the maximum level (based on full retired pay).

Your signature and that of at least one witness is required on the endorsement below. Return this letter and your endorsement to this Command. If your response to this letter is not received by (30 days prior to date of member's retirement), we will assume that you have chosen not to respond to this letter.

If you or your spouse have any questions about SBP, please write or call me at _____. I will be pleased to discuss this issue with you further and help you arrange the SBP coverage you both desire.

Sincerely,

Commanding Officer's Signature

RETURN ENDORSEMENT

I,_____(spouse's name)_____, (wife/husband) of Retiree's Name, rank/rate and SSN have been advised that my (husband/wife) has made the following election under the Survivor Benefit Plan: (enter retiree's election--should be identical to the fourth paragraph of the above letter).

(Check only on block below:)

_____ I consent to my spouse's election.

_____ I do not consent to my spouse's election.

Signature

Witness: (over 18 and not a family member):

Signature _____ Address _____

Separation Pay (member due money)

1900
15 May 2004

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: SEPARATION PAY AND RELATED DOCUMENTS

1. The separation payment provided to you upon your separation from active duty represents a substantial portion of your final pay and includes payment for any unused leave due you through your date of separation from the Coast Guard. Please be advised that this payment may be over or under the final pay due you as a result of clerical or administrative errors or delays in processing pay transactions, or changes in the planned disposition of your leave.

2. Any additional payment due you will be paid by the Coast Guard Personnel Service Center (PSC) after your separation transactions have processed in Direct Access/JUMPS and a final review of your pay account is made. This will normally be within 90 days after your date of separation. You will also be sent a final Leave and Earnings Statement (LES) within 90 days after separation.

3. The final LES and final separation payment will be mailed to your home address as listed in Direct Access.

4. Your IRS Form W-2 for this year will be mailed by PSC to the address indicated on your Leave and Earnings Statement (LES) unless PSC (ses) is notified otherwise in writing. Your IRS Form W-2 will be mailed by 31 January next year.

5. Any questions concerning the final LES, additional payment, the IRS form W-2, separation travel entitlements or settlement of travel claims after separation can be answered by PSC Customer Care (CCB) at 1-866-PSC-USCG/(785) 339-2200. Claims for reimbursement of Do it Yourself (DITY) Moves can be answered by Coast Guard Finance Center at 1-800-564-5504.

#

Separation Pay (member owes money)

1900
xx xxx 20xx

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: SEPARATION PAY AND RELATED DOCUMENTS

1. The Coast Guard Personnel Service Center (PSC) has determined that you are not entitled to any final payment upon your separation from the Coast Guard

2. A final review of your pay account will be made by PSC (ses) after your separation transactions have been processed in Direct Access/JUMPS. If this review indicates that you have been overpaid, you will be notified in writing of the nature and amount of any indebtedness. If the review indicates that you are entitled to additional moneys, a special check payment will be sent to you by PSC (ses). The payment should be mailed to you within 90 days after your date of separation. You will also be sent a final Leave and Earnings Statement (LES) within 90 days after separation.

3. The final LES and final separation payment (or notification of overpayment letter, if indebted) will be mailed to your home address as listed in Direct Access.

4. Your IRS Form W-2 for this calendar year will be mailed by PSC to the address indicated your LES unless PSC (ses) is notified otherwise in writing. Your IRS Form W-2 will be mailed by 31 January next year.

5. Any questions concerning the final LES, additional payment, the IRS form W-2, separation travel entitlements or settlement of travel claims after separation can be answered by PSC Customer Care (CCB) at 1-866-PSC-USCG/(785) 339-2200. Claims for reimbursement of Do it Yourself (DITY) Moves can be answered by Coast Guard Finance Center at 1-800-564-5504.

#

Information Regarding Active Duty Separation Status

1900
xx xxx 20xx

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS

1. You have been given DD Form 214, Certificate of Release or Discharge from Active duty. We recommend that you store it in a safe place, as you will undoubtedly have need for it at some future date. The purpose of the DD Form 214 is to provide separated personnel with a concise record of data pertaining to active service within the Armed Forces for the purpose of obtaining civilian employment commensurate with service qualifications and experience. The DD Form 214 is also necessary for obtaining such benefits as may accrue under various federal and state legislatures as the result of active service in the Armed Forces. In the event the original of the DD Form 214 contains an erroneous entry, you may obtain a correction by addressing a request to Commander (adm-3) Coast Guard Personnel Command, 2100 2nd Street SW, Washington, DC. 20593-0001. If your DD Form 214 is lost, or you require a copy of your medical records, you may obtain a copy of them at the above address within the first six months of your separation. Once you have been separated for more than six months, you may obtain a copy of your DD Form 214 by addressing a request to National Personnel Record Center, Military Records, 9700 Page Blvd, St. Louis, MO 63132-5100. The Department of Veterans Affairs will maintain your medical record, and you may obtain a copy by writing to the VA Records Management Center, PO Box 5020, St Louis, MO 63115. Any such request as noted above must include your full name, rank, social security number, date of separation, and reason for request.

2. Upon separation from the U.S. Coast Guard, all persons are required to surrender all identification cards that may be in their possession, including your Armed forces Identification and Privilege Cards for yourself and all dependents.

3. The "Ex-servicemen's Unemployment Compensation Act of 1958" (Public Law 85-848) authorized unemployment insurance protection of ex-servicemen of all ranks who began their active service in the Armed Forces after 31 January 1955. The Department of Labor has prepared an informative pamphlet concerning the provisions of the Act. The pamphlet is available through normal source of supply.

4. Enclosed are travel vouchers for you and dependents (if applicable). Failure to submit these claims will result in you not receiving the per diem portion of your travel entitlements. When submitting these claims you are required to submit a copy of the original DD Form 214. You are required to complete the travel claims and submit them in the self-addressed envelope to: Commanding Officer (TVL), Coast Guard Personnel Service Center, 444 SE Quincy Street, Topeka, KS 66683-3591.

5. If you have Servicemember's Group Life Insurance (SGLI) in force, you may convert to Veteran's Group Life Insurance (VGLI) for a 5-year period commencing with the post-service SGLI coverage, which is the 121st day after separation. Applications, payments and inquires concerning SGLI and VGLI should be sent to: Office of Servicemember's Group Life Insurance, 212 Washington Street, Newark, NJ 07102. Any Veterans Administration Office can supply information and forms.

Continued on the next page.

Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS 1900
xx xxx 20xx

6. If you have contributed to the Thrift Savings Plan (TSP) during your career, you need to make a withdrawal option once you separate from the Coast Guard. You will need to complete Form TSP-U-70, Withdrawal Request, to specify the TSP withdrawal option you want. Mail the form to the TSP Service Office on the form. After your separation, the National Finance Center will be your primary contact for information about your account and withdrawal procedures.

#

Encl: (1) Travel Vouchers

Release from Active Duty and Transfer to the IRR

1900
xx xxx 20xx

MEMORANDUM

From: M. R. Roberts CAPT
CG GP Somewhere

To: John P. Jones GMC
Thru: B. M. Chief
CG STA Anywhere

Subj: TERMINATION OF ACTIVE DUTY IN THE REGULAR COAST GUARD AND TRANSFER TO THE COAST GUARD **INDIVIDUAL READY** RESERVE **(IRR)**

Ref: (a) 10 USC 651

1. Effective (**insert date of separation**) your active duty in the regular Coast Guard is hereby terminated by reason of expiration of enlistment. You are hereby immediately transferred to the Coast Guard Individual Ready Reserve (IRR) and concurrently released to inactive duty. You will be required to serve in the Coast Guard Individual Ready Reserve until (**insert expected loss date**), unless sooner discharged by competent authority.

2. During the period of your obligated service in the Coast Guard Individual Ready Reserve you shall be subject to such additional training as may now or hereafter be prescribed by law for such Reserve. Failure to fulfill all or any part of your service obligation may result in trial by appropriate authorities of the United States for violation of reference (a). Additionally, all members in the Ready Reserve or Standby Reserve, Active Status who are retirement qualified, except for having reached sixty years of age, must accrue a minimum of 50 retirement points in an anniversary year to remain in an active status (see Section 4.B.5).

3. You have stated that your mailing address is: **(insert correct final address)**

4. Subsequent to this date, your new unit will be **Coast Guard Personnel Command (rpm), Suite 900, Arlington, VA 22203, (202) 493-1723**. This command will advise you fully as to your obligations and other matters connected with your service in the Coast Guard Individual Ready Reserve. **You will keep this command informed of any change of address and any physical condition or other factor that would affect your immediate availability for active military service. You must promptly answer all official correspondence. You must maintain physical fitness and weight standards. Your initial uniform issue must be kept for a period of four years.** Any information you desire regarding your reserve obligation or status should be requested from your Commanding Officer or your unit administration office

#

Copy: **(provide copy to ISC (fot) responsible for geographic area which member will reside after separation)**

Reserve Civilian Employer Thank You Letter

Civilian Employer
Attn:
1234 Anywhere St
Elsewhere, KS 66601-0001
Dear Sir or Madam:

I am writing this letter to thank Civilian Employer for its past support of John Smith's participation as a valued member of U. S. Coast Guard Unit. It is only with positive support from our reserve members' family and employers that the United States military services are able to protect the national interests of our country.

At this time I need to advise you that – due to recent events – John Smith has been involuntarily called to active duty with Unit under Title 10 of the United States Code. As a Yeoman Second Class (YN2) at Unit, he will be deployed either within the United States or overseas as directed by proper authority. These orders are for a period of 1 Year, but it is impossible to tell at this time if they might be shortened or lengthened.

I am enclosing some information from the Employer Support of the Guard and Reserve (ESGR) that might answer questions that you have concerning your rights and the employee's rights under the law, and provide some resources to answer others. I'd also like you to feel comfortable in contacting me personally, at (**insert phone number)**, should you still have questions or concerns.

Once again, my personal thanks for the part your organization is playing in helping to keep America strong.

Sincerely,

RICHARD H. SMITH
Captain
U. S. Coast Guard

This page left blank intentionally

Administrative Remarks

Introduction

This enclosure will guide you through the process of drafting Administrative Remarks (CG-3307).

Reference

The Pg-7 Instruction (COMDTINST 1000.14(series)) establishes policy and standards for preparation and submission of Administrative Remarks (CG-3307) entries and applies to all personnel involved in this process.

In this Enclosure

Description	Page
Preparation and Distribution of CG-3307	E-6-2
General Instructions for Use and Preparation of CG-3307's	E-6-3
Accession	E-6-4
Assignment and Transfer	E-6-8
Advancement and Reduction	E-6-12
Performance and Discipline	E-6-16
Separation	E-6-36
Selective Reenlistment Bonus (SRB)	E-6-46
Selective Reserve (SELRES) Enlisted Bonus Programs	E-6-49

Preparation and Distribution of CG-3307

Preparation Complete Administrative Remarks (CG-3307) as follows:

Block	Entry
Text Area	Text of entry per the examples in this enclosure. Include 1. Entry Type: 2. Reference: 3. Responsible Level: 4. Entry: 5. Signature 6. Member's Acknowledgement (if required) (See discussion on the following page for more information)
1	Member's permanent unit.
2	Name of unit preparing form, may be left blank if same as item #1. Note: If a unit other than the member's current permanent duty station is preparing the CG-3307 entry, that unit name MUST also appear beneath the typed signature block (see discussion on the following page for more information).
3	Member's name in Last, First, Middle Initial format.
4	Member's Social Security Number. Note: Use of Employee ID Numbers for this block is not authorized at this time due to electronic filing procedures.
5	Officer's Grade (ENS, LTJG, etc.) or Enlisted member's Rate (SN, BM2, MKC, etc.)
6	Leave blank

Distribution The CG-3307 must be prepared in original and one copy as follows:

1. The original is filed in the SPO PDR, and the copy is mailed to Commander (CGPC-adm-3) for electronic imaging into the Headquarters PDR.

Note: If sending photocopies to CGPC, ensure the original document is signed before copying. Alternatively, original signatures may appear on both the original and copy.

2. There are two exceptions to the distribution of CG-3307's:

a. For evaluations not completed in Direct Access - An additional copy of the CG-3307 to document counseling related to enlisted evaluations must be placed inside the original Enlisted Performance Evaluation Form (CG-3788 (series)) and forwarded to PSC (adv).

b. Original CG-3307's remaining at time of separation/reenlistment must be attached to either the original Discharge and Reenlistment Contract or DD-214 as directed in PDR Manual.

General Instructions for Use and Preparation of CG-3307's

1. Administrative Remark entries are broken down into the following “types”:
   a. Accession (ACC-#)
   b. Assignment and Transfer (A&T-#)
   c. Advancement and Reduction (A&R-#)
   d. Performance and Discipline (P&D-#)

   Note: Includes indebtedness, non-support of dependents, general (positive/negative), evaluations, good conduct eligibility, and weight

   e. Separation (SEP-#)
   f. Selective Reenlistment Bonus (SRB-#)
   g. Selective Reserve (SELRES) Enlisted Bonus Programs (BON-#)

2. Each of the sample entries consists of the following information:
   a. Entry type and number
   b. The reference providing the requirement to complete the CG-3307 entry.
   c. The responsible level for completing the entry, i.e., SPO or Unit.
   d. The entry itself. The entry should be modified to fit the circumstances as necessary.
   e. When and where applicable, a member’s acknowledge entry

   Note: It has been determined that items a. thru c. are valuable for tracking authorized entries and therefore MUST be included as part of the Administrative Remark entry when actually preparing a CG-3307.

3. If a unit other than the member’s current permanent duty station is preparing the CG-3307 entry, that unit name MUST appear beneath the typed signature block, e.g.:

A.B. SEA, CAPT. USCG
Commanding Officer
USCGC JARVIS (WHEC 725)

CG-3307's for Accession

Click here for Word CG-3307 (ACC-2)
Entry Type: Accession (ACC-2)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): Honorably discharged from the USCGR Delayed Enlistment Program (DEP) for the Convenience of the Government to enlist in the Coast Guard on _____ having served in the DEP since _____. Time spent in the DEP is creditable toward completion of the eight-year military obligation, but is not creditable for purposes of longevity or pay and allowances.

J.P. JONES

Click here for Word CG-3307 (ACC-3)
Entry Type: Accession (ACC-3)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I have been advised that the illegal use or possession of drugs constitutes a serious breach of discipline; this will not be tolerated. In addition, illegal drug use or possession is counter to team spirit and mission performance and jeopardizes safety. No member will use, possess, or distribute illegal drugs or drug paraphernalia.

I also understand on reporting to recruit training, I will be tested by urinalysis for the presence of illegal drugs. If my urine test detects the presence of illegal drugs, I may be subject to discharge and receive a general discharge.

J. P. JONES

Click here for Word CG-3307 (ACC-4)
Entry Type: Accession (ACC-4)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I am aware that upon arrival at the Recruit Training Center, Cape May, I will receive a complete, thorough pretraining physical examination, including a dental examination, which I must pass to enter recruit training.

J. P. JONES

Continued on next page

CG-3307's for Accession, Continued

Click here for Word CG-3307 (ACC-5)
Entry Type: Accession (ACC-5)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I do not yet possess a Social Security Card although I have applied for issuance/replacement of one on form SS-5. The Social Security Administration has advised me that the number being issued to me is _____-____-_____. I authorize the Commander, Coast Guard Personnel Command (CGPC) to see my social security card for number identification purposes before sending it to me.

J. P. JONES

Click here for Word CG-3307 (ACC-6)
Entry Type: Accession (ACC-6)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I certify that I am a resident alien and my number is:

_____

J. P. JONES

Click here for Word CG-3307 (ACC-7)
Entry Type: Accession (ACC-7)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I understand I will not be eligible for re-enlistment, may enter only the DC, EM, FS, HS, MK, MST, SK, or YN rating, and will not be eligible to attend Officer Candidate School or become a Chief Warrant Officer until I become a United States citizen.

J. P. JONES

Continued on next page

CG-3307's for Accession, Continued

Click here for Word CG-3307 (ACC-8)
Entry Type: Accession (ACC-8)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I have been advised that my medical examination revealed that I do not have normal color vision. If I enlist in the Coast Guard or (Coast Guard Reserve), I understand I will not be permitted to enter the following ratings: AET, AMT, AST, BM, EM, ET, GM, IT, IV, HS, MK, OS, or PS during this period or subsequent enlistments. I am also aware if I enter the MST rating, I will not be able to advance to CWO (BOSN or MSS). Furthermore, I have been advised that my defective color vision will prevent my application for an officer commission.

J. P. JONES

Click here for Word CG-3307 (ACC-10)
Entry Type: Accession (ACC-10)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I have been advised, per Article 5-C-33, Personnel Manual, COMDTINST M1000.6 (series), that I may be eligible for advancement to pay grade E-4, in my formerly held rating, without having to attend class "A" school or compete in the servicewide exam, if I am found eligible in all respects and I am recommended for advancement. I must serve a minimum of 6 months on my present enlistment, and either hold a designator or have been rated at the time of my last separation from active duty. My commanding officer's recommendation must be submitted within 5 years of my latest separation from active duty. If I am ineligible or not recommended for advancement under this program, I understand I must compete for advancement to pay grade E-4.

J. P. JONES

Click here for Word CG-3307 (ACC-11)
Entry Type: Accession (Reserve) (ACC-11)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I hereby certify all information on my enlistment documents is current and accurate. I have not been involved with the police or had any changes in dependency/finances other than what I reported to my recruiter. I understand withholding information is punishable under the Uniform Code of Military Justice and may result in a less than honorable discharge for fraudulent enlistment.

J. P. JONES

Continued on next page

CG-3307's for Accession, Continued

Click here for Word CG-3307 (ACC-14)
Entry Type: Accession (Reserve) (ACC-14)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): (for all reserve applicants except RP & RK) I understand that inability to satisfy the swimming requirement detailed in Military Requirements (MRN) l.L.201 of the Enlisted Performance Qualifications Manual, COMDTINST M1414.8 (series), will adversely affect my career. I have been advised that the possible effects include: prohibition from advancement, reenlistment, or an afloat duty assignment; or involuntary transfer to the IRR, or discharge.

J. P. JONES

Click here for Word CG-3307 (ACC-16)
Entry Type: Accession (ACC-16)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I understand I am accepted for enlistment with a spouse and _____ dependents. My spouse is an active duty Coast Guard member in the grade of _____. The Coast Guard shall make every attempt to co-locate me with my spouse, but such co-location is not guaranteed.

_____
Enlistee's Signature

Click here for Word CG-3307 (ACC-17)
Entry Type: Accession (ACC-17)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
(DATE): I understand I am accepted for commissioning with a spouse and _____ dependents. My spouse is an active duty Coast Guard member in the grade of _____. The Coast Guard shall make every attempt to co-locate me with my spouse, but such co-location is not guaranteed.

_____
Candidate's Signature

Continued on next page

CG-3307's for Assignment and Transfer

Click here for Word CG-3307 (A&T-1)
Entry Type: Assignment and Transfer (A&T-1)
Reference: Section 4-A, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): I have been counseled on the requirement of Article 4-A-6, Personnel Manual, COMDTINST M1000.6 (series) regarding my availability for unrestricted worldwide assignment. I further certify that the situation, which occasioned my original request, in my letter 1326, dated (date), has been completely alleviated and I am now available for unrestricted worldwide assignment.

J. P. JONES

Click here for Word CG-3307 (A&T-2)
Entry Type: Assignment and Transfer (A&T-2)
Reference: Section 4-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Received orders for Humanitarian assignment (HUMS) under the provisions of Article 4-B-11, Personnel Manual, COMDTINST M1000.6 (series). Instructions concerning nonentitlement to expenses incurred in the execution of these orders have been explained to me this date. In view of a permissive travel authorization for HUMS to a new permanent duty station being issued, I understand that under no circumstances will I be reenlisted or extended without Commandant approval. I must present clear documentation that my hardship situation is completely resolved, and that I am available for unrestricted reassignment in accordance with service needs, for Commandant approval to be granted.

J. P. JONES

Click here for Word CG-3307 (A&T-3)
Entry Type: Assignment and Transfer (A&T-3)
Reference: Section 4-E, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Found to be unsuitable as (enter assigned special duty) due to (state reasons and specifics) per Article 4-E-4, Personnel Manual, COMDTINST M1000.6 (series). Commander (CGPC-EPM) notified this date and reassignment requested.

A. B. SEA, CAPT, USCG
Commanding Officer
(DATE): I have been counseled and understand the reason(s) for the above action.

J. P. JONES

Continued on next page

CG-3307's for Assignment and Transfer, Continued

Click here for Word CG-3307 (A&T-4)
Entry Type: Assignment and Transfer (A&T-4)
Reference: Section 4-C, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 4-C-11, Personnel Manual, COMDTINST M1000.6 (series), relating to suitability of members to serve on icebreaker duty. Neither I nor my dependents possess any physical or mental abnormalities, except as indicated, which might result in a determination that I be disqualified for such duty: (state disqualification or indicate “none to my knowledge"). I consider myself fully qualified for icebreaker duty.

J. P. JONES

(DATE): Compliance with the provisions of Article **4-C-11**, Personnel Manual, COMDTINST M1000.6 (series), is certified. John Paul Jones is considered to be suitable in all respects for icebreaker duty.

A. B. LIST, CWO4, USCG
Personnel Officer

Click here for Word CG-3307 (A&T-5)
Entry Type: Assignment and Transfer (A&T-5)
Reference: Section 4-H, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): I understand that neither my spouse nor I will be considered for reassignment under the provisions of Article 4-H-8b, Personnel Manual, COMDTINST M1000.6 (series), until eligible for normal rotation.

JOHN PAUL JONES

Continued on next page

CG-3307's for Assignment and Transfer, Continued

Click here for Word CG-3307 (A&T-6)
Entry Type: Assignment and Transfer (A&T-6)
Reference: Section 4-H, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
OVERSEAS SCREENING

(DATE): I, _____, am aware that failure to divulge disqualifying information, or amplifying information (medical, dental, psychological, physical, or educational problem(s)) pertaining to the questions on the checklist for overseas screening, may ultimately result in disciplinary action punishable under the UCMJ.

_____
member (signature) DATE member (name, rank/rate)

_____
spouse (signature) DATE

On the basis of all available information, I endorse/I do not endorse (circle one) the member's orders to the overseas assignment. (A copy of the completed checklist will be forwarded to the receiving command.)

CO/OIC (signature) DATE CO/OIC (name, rank)

Click here for Word CG-3307 (A&T-9)
Entry Type: Assignment and Transfer (A&T-9)
Reference: Section 4-E, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry
(DATE): I hereby request assignment to a non-rescue swimmer tour of duty as the needs of the service allow. I understand that two consecutive non-rescue swimmer tours of duty or an extension of a non-rescue swimmer tour are prohibited. If I decide not to return as an operational rescue swimmer, I must have over 18 years of active service and apply for retirement; obtain a change in rating; or request voluntary discharge. I also understand I will not be eligible for rescue swimmer Special Duty Assignment Pay during this non-rescue swimmer assignment.

J. P. JONES

(DATE): Witness this date

A. B. LIST, CWO4, USCG
Personnel Officer

Continued on next page

CG-3307's for Assignment and Transfer, Continued

Click here for Word CG-3307 (A&T-10)
Entry Type: Assignment and Transfer (A&T-10)
Reference: Section 5.B, Reserve Policy Manual, COMDTINST M1001.28(series)
Responsible Level: Unit
Entry:
(DATE): You are hereby transferred to the Inactive Ready Reserve (IRR) at your request. You do/do not have a reserve obligation and are/are not required to return to the SELRES. Any future request to return to the SELRES from the IRR will be at the discretion of the receiving command and CGPC (rpm).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have been counseled and understand the reason(s) for the above action.

J. P. JONES

CG-3307's for Advancement and Reduction

Click here for Word CG-3307 (A&R-1)
Entry Type: Advancement and Reduction (A&R-1)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): YN2 Jones informed this date that he is a candidate for reduction in rate by reason of incompetence per Article 5-C-38, Personnel Manual, COMDTINST M1000.6 (series). YN2 Jones' mark(s) (provide specifics on which mark(s) meet the reduction in rate criteria) for the period ending (date). Advised that he has three months from this date to demonstrate satisfactory progress and meet the requirements or Article 5-C-38 in order to retain his present rate, and that failure to do so will result in reduction in rate to YN3. A special performance evaluation will be completed at that time for the purpose of determining competency, particular areas that require improvement are: (provide specifics, etc.).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have read and understand the above entry.

J. P. JONES

Click here for Word CG-3307 (A&R-2)
Entry Type: Advancement and Reduction (A&R-2)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): As a result of being above the cutoff for advancement to (E-7, E-8, or E-9) I understand that I will be required to meet the two year obligated service requirement per Article 5-C-25, Personnel Manual, COMDTINST M1000.6 (series). I agree not to request voluntary retirement or early release to be effected prior to completion of required obligated service as stated above.

J. P. JONES

Continued on next page

CG-3307's for Advancement and Reduction, Continued

Click here for Word CG-3307 (A&R-3)
Entry Type: Advancement and Reduction (A&R-3)
Reference: Article 5-C-8, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Correspondence course waived for the (date) servicewide competition due to non-availability of course as certified by CO, CG Institute letter of (date). When courses not previously available are developed, the Commanding Officer, Coast Guard Institute will publish the servicewide competition date for which the course will be available. This availability will be announced to all Educational Services Officers (ESO) as a change to the Correspondence Course Manual and to all units in the Commandant's Bulletin.

A. B. LIST, CWO4, USCG
Personnel Officer

Continued on next page

CG-3307's for Advancement and Reduction, Continued

Click here for Word CG-3307 (A&R-4)
Entry Type: Advancement and Reduction (A&R-4)
Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): YN2 Jones' three-month observation period to satisfy the requirements of Article 5-C-38, Personnel Manual, COMDTINST M1000.6 (series), completed this date. YN2 Jones has been determined to be incompetent in the rate of YN2. The required special evaluation was completed this date. Effective this date, YN2 Jones is being reduced to YN3.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I have read and understand the action taken to reduce me in rate effective this date.

J. P. JONES

Click here for Word CG-3307 (A&R-5)
Entry Type: Advancement and Reduction (A&R-5)
Reference: Article 5-C-4e, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Recommendation and nomination for advancement and participation in the (month and year) servicewide competition for (rate) is withdrawn. (explain reason)

A. B. SEA, CAPT, USCG
Commanding Officer

Continued on next page

CG-3307's for Advancement and Reduction, Continued

Click here for Word CG-3307 (A&R-6)
Entry Type: Advancement and Reduction (A&R-6)
Reference: Article 1-D-10, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 1-D-10c, Personnel Manual, COMDTINST M1000.6 (series). I voluntarily elect to be removed from the eligibility lists for appointment to warrant grade. I understand that I will not be eligible to be a candidate for appointment to warrant grade for (2 or 5 (whichever is applicable)) years from the anniversary date of this election. I understand that I will be eligible to reapply as a candidate for appointment to warrant grade on or about (date).

J. P. JONES

Click here for Word CG-3307 (A&R-7)
Entry Type: Advancement and Reduction (A&R-7)
Reference: Article 1-D-10, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 1-D-10c, Personnel Manual, COMDTINST M1000.6 (series). I voluntarily elect to be removed from the eligibility lists for appointment to warrant grade. I understand that I will not be eligible to be a candidate for appointment to warrant grade until my personal hardship has been resolved.

J. P. JONES

Click here for Word CG-3307 (A&R-8)
Entry Type: Advancement and Reduction (A&R-8)
Reference: Article 5-C-25, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): I have read and understand Article 5-C-25f, Personnel Manual, COMDTINST M1000.6 (series). I voluntarily elect to be removed from the eligibility lists for advancement to _____ (state specific rate). I understand that I will not be eligible to participate in the Servicewide Exam for one year from the date of this election.

J. P. JONES

CG-3307's for Performance and Discipline

Click here for Word CG-3307 (P&D-1)
Entry Type: Performance and Discipline (Weight) (P&D-1)
Reference: Sec. 2.F., COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:
(DATE): On this date, you have been determined to be _____ pounds overweight. Your measurements are: Height: _____ (inches), Wrist Size: _____ (inches), Weight: _____ (pounds), Waist: _____ (inches), Neck: _____ (inches), Buttocks (females only): _____ (inches). Your age is: _____ and your percent body fat is: _____. In accordance with Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8 (series), your probationary period would require greater than 35 weeks by weight calculation and more than 8 months by body fat standards. Therefore, you are hereby notified that, instead of probation, you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service). By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry and have been afforded the opportunity to review COMDTINST M1020.8 (series) and fully understand the action required.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-1A)
Entry Type: Performance and Discipline (Weight) (P&D-1)
Reference: Sec. 3.A., COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:
Your probationary period is held in abeyance this date pending your return to an "available for full-duty status", not to exceed thirty days, in accordance with paragraph 3.A. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series). You are hereby notified that the day following a determination that you are available for full duty or a decision by medical authority to lift the abeyance, your probationary period shall be restarted with the length of the probationary period based on your weight at the time the original probationary period started. In addition, at that point you are to resume participation in your detailed fitness plan, mandatory fitness activity, and monthly mandatory fitness assessment until your probationary period ends. If you fail to reach compliance by the end of this new probationary period, you will be recommended for separation (if active duty), recommended for transfer to the ISL (if a Reservist), or recommended to return to the Department of Health and Human Services (if Public Health Service). By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review COMDTINST M1020.8(series) and fully understand the action required.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-1B)
Entry Type: Performance and Discipline (Weight) (P&D-1)
Reference: Sec. 2.F., COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:

(DATE): You have this date been determined to be _____ pounds overweight. However, in accordance with section 3.C. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby granted a one-time, six month abeyance to support you in your quest to stop using tobacco. You are strongly encouraged to complete a personal wellness profile and aggressively pursue your basic fitness plan. At any time during this period if it is determined that you are using tobacco, this abeyance period will immediately be lifted, and you will be reweighed and placed on probation if appropriate. If you fail to reach compliance by the end of your probationary period, you will be recommended for separation (if active duty), recommended for transfer to the ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).

By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review COMDTINST M1020.8(series) and fully understand the action required.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-1C)
Entry Type: Performance and Discipline (Weight) (P&D-1)
Reference: Sec. 3.B., COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:
(DATE): You have this date been determined to be exempt from the Weight and Body Fat standards during your pregnancy, in accordance with paragraph 3.B. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series). This exemption will remain in force for a period of six months from the date of delivery or termination of pregnancy. An additional six month exemption period will be granted if nursing, but in no cases shall the total exemption period exceed twelve months from date of delivery. You will not be measured to determine weight and body fat standards until the end of the exemption period. If, at the end of the exemption period, you are determined to exceed both your weight and body fat standards, you will be subject to section 2.F. of COMDTINST M1020.8(series). During your pregnancy, you are reminded that you must maintain a neat military appearance. By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry and have been afforded the opportunity to review COMDTINST M1020.8 (series) and fully understand the action required.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-2)
Entry Type: Performance and Discipline (Weight) (P&D-2)
Reference: COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:
(DATE): You have this date been determined to be _____ pounds overweight. Your measurements are: Height: _____ (inches), Wrist Size: _____ (inches), Weight: _____ (pounds), Waist: _____ (inches), Neck: _____ (inches), Buttocks (females only): _____ (inches). Your age is: _____ and your percent body fat is: _____. In accordance with Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8 (series), you are hereby notified that you are required to lose _____ pounds or drop below _____% body fat by _____. In addition, you are to complete both a personal wellness profile and a detailed fitness plan; participate in a mandatory fitness activity at least one hour per day three days per week; and perform a monthly mandatory fitness assessment until your probationary period ends. If you fail to reach compliance by the end of this probationary period, you will be recommended for separation (if active duty), recommended for transfer to the ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service). By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review COMDTINST M1020.8(series) and fully understand the action required.

J. P. JONES

Click here for Word CG-3307 (P&D-3)
Entry Type: Performance and Discipline (Weight) (P&D-3)
Reference: Sec. 2.J., COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:
(DATE): On this date your probationary period has come to an end. You weighed _____ (pounds) or achieved _____% body fat and have successfully met the requirements of the Coast Guard Weight/Physical Fitness Program.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry and understand I have met the requirement of the Coast Guard Weight Program in accordance with COMDTINST M1020.8(series).

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-4)
Entry Type: Performance and Discipline (Weight) (P&D-4)
Reference: Sec. 2.J., COMDTINST M1020.8(series)
Responsible Level: Unit
Entry:
(DATE): On this date your probationary period has come to an end. You weighed _____ (pounds) and calculated _____ % body fat. You have not achieved your maximum allowable weight/%body fat. In accordance with Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby notified that you will be recommended for separation (if active duty), recommended for transfer to the ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry and fully understand the administrative action(s) being initiated because I do not meet the requirements of the Coast Guard Weight Program in accordance with COMDTINST M1020.8(series).

J. P. JONES

Click here for Word CG-3307 (P&D-5)
Entry Type: Performance and Discipline (P&D-5)
Reference: Section 10-B, Personnel and Pay Procedures Manual, PSCINST M1000.2A
Responsible Level: Unit
Entry:
(DATE): Missed sailing of this vessel from (place of sailing) on (date) en route to (destination). Member had knowledge of the time movement was scheduled.

A. B. SEA, CAPT, USCG
Commanding Officer

(if vessel deploys for 10 or more days)
(DATE): Member's records and personal effects transferred to (name of unit).

A. B. SEA, CAPT, USCG
Commanding Officer

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-6)
Entry Type: Performance and Discipline (P&D-6)
Reference: None
Responsible Level: Unit
Entry: (General - positive)
NOTE: Entry must be member specific and describe who, what, when, where, why and how. Blanket entries describing generalities, which are photocopied for inclusion in many members' PDRs, are not authorized.
(DATE): Seaman Jones is commended for ….

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the-above entry.

J. P. JONES

Click here for Word CG-3307 (P&D-7)
Entry-Type: Performance and Discipline (P&D-7)
Reference: None
Responsible Level: Unit
Entry: (General - negative)
NOTE: Entry must be member specific and describe who, what, when, where, why and how. Blanket entries describing generalities, which are photocopied for inclusion in many members' PDRs, are not authorized.
(DATE): Petty Officer Jones was counseled for ….

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the-above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-8)
Entry Type: Performance and Discipline (P&D-8)
Reference: Section 8-A, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Necessary articles of the Uniform Code of Military Justice (UCMJ), and the Code of Conduct explained this date as required by section 8-A, Personnel Manual, COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

Click here for Word CG-3307 (P&D-9)
Entry Type: Performance and Discipline (P&D-9)
Reference: Section 8-M, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Counseled concerning civil and moral obligations to provide continuous and adequate support of lawful dependents.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Click here for Word CG-3307 (P&D-10)
Entry Type: Performance and Discipline (P&D-10)
Reference: Section 8-L, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Unreliable due to failure to pay debts. (Describe circumstances surrounding entry-such as the dates, debts, and actions taken).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-11)
Entry Type: Performance and Discipline (P&D-11)
Reference: Section 8-M, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Unreliable due to unsatisfactory conduct of personal affairs and support of dependents. (State what other actions will be initiated, etc.).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above counseling and understand the actions being initiated.

J. P. JONES

Click here for Word CG-3307 (P&D-12)
Entry Type: Performance and Discipline (P&D-12)
Reference: Article 8-H-6c(2), Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): (document formal counseling pertaining to improper relationships)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-13)
Entry Type: Performance and Discipline (P&D-13)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(Date): On (date) you received an alcohol incident when your abuse of alcohol was determined to be a significant and/or causative factor, (describe what happened).
List (time, dates, place, pertinent information, arrested by, BAC if done, etc.)
You were counseled on USCG policies concerning alcohol use and abuse as well as the serious nature of this incident. The unit CDAR will arrange an appointment with a provider who will determine the nature of your relationship with alcohol. It is recommended that you abstain from the use of alcohol until your screening and assessment is completed. (Note any action pending, if any.)
This is considered your first documented alcohol incident. (Underage drinking violation only: Your command may request removal of this incident from your permanent record after three years if no further incidents occur.) Any further incidents will result in you being processed for separation as per Chapter 20, Personnel Manual COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-14)
Entry Type: Performance and Discipline (P&D-14)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(Date): On (date) you were involved in an alcohol incident. (Describe what happened. List time, dates, place, pertinent information, arrested by, BAC if done, etc.)
You were previously counseled (date) on USCG policies concerning alcohol use and abuse as well as the serious nature of this incident. The unit CDAR will arrange an appointment with a provider who will determine the nature of your relationship with alcohol. It is recommended that you abstain from the use of alcohol until your screening and assessment is completed. (Note any action pending, if any.)
This is considered your (second) documented alcohol incident. You will be processed for separation from the U.S. Coast Guard, as per Chapter 20 of the Personnel Manual COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-15)
Entry Type: Performance and Discipline (P&D-15)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
(Date): On (date) you were involved in an alcohol-related situation. Alcohol was not considered a significant or causative in (describe the circumstances, violations, or actions pending).
This is not considered an alcohol incident, but it is entered for documentation purposes only.
You have been advised of the contents of Chapter 20, Personnel Manual, COMDTINST M1000.6 (series) concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click on the links below for the respective Word CG-3307
Entry Type: Performance and Discipline (P&D-16)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
(Date): Congratulations! On (date) you successfully completed your (3 or 12 month) after care plan as per Chapter 2, Health Promotion Manual, COMDTINST M6200.1
I encourage you to continue to incorporate positive life style changes into your daily routine and remember what you have learned.

(Use this entry for Alcohol Abusive)
If you return to a pattern of alcohol misuse, take the first step and ask for help. Future alcohol misuse or incidents may lead to separation and shall be addressed by your command.

(Use this entry for Alcohol Dependent)
You must abstain from alcohol indefinitely. A relapse or incident may lead to separation or re-instatement of a continued care program.

(Use this entry for Members who self-refer only)
You may now request removal of the screening letter and treatment plan from your Personnel Data Record as per Personnel Manual, COMDTINST M1000.6 (series). A permanent record of the screening and treatment will be kept on your health record in accordance with the Health Promotion Manual, COMDTINST M6200.1 (series).

(Include this entry on all P&D-16 Page 7's)
You have been advised of the contents of Chapter 20, Personnel Manual, COMDTINST M1000.6 (series), concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-17)
Entry Type: Performance and Discipline (P&D-17)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
(Date): On (date) you were screened at (Name of Facility) and determined to be (alcohol abusive or alcohol/drug dependent) as per Diagnostic and Statistical Manual of the American Psychiatric Association (DSM IV) and recommended for (type or treatment or education). You have indicated that you do not want to receive the treatment, which was recommended by medical authority as outlined above. By doing so you waive all right to any future benefits under the Department of Veterans Affairs program for treatment or chemical dependency.
You will be processed for separation per Chapter 20, of the Personnel Manual COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-18)
Entry Type: Performance and Discipline (P&D-18)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
(Date): On (date) you successfully completed (type of treatment) program at (name of facility). Congratulations on your accomplishment and your perseverance for personal recovery.
In accordance with chapter 2 of the Health Promotion Manual, COMDTINST M6200.1 (series), your aftercare (continued care) plan shall consist of, but not limited to:
a. For a period of 90 days, you will abstain from alcohol. This will allow you to incorporate all of the tools you were given to make positive changes in your life.
b. For a period of 90 days, you will meet weekly with your command CDAR, at a time agreed upon by both of you, for the purpose of monitoring and supporting your recovery.
c. For a period of 90 days, participation in a twelve-step or group support program at least twice weekly (unit operations permitting).
Failure to comply with this aftercare plan or involvement in any alcohol incident may result in your separation from the Coast Guard in accordance with chapter 20 of the Personnel Manual, COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-19)
Entry Type: Performance and Discipline (P&D-19)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
(Date): On (date) you successfully completed (type of treatment) program at (name of facility). Congratulations on your accomplishment and your perseverance for personal recovery. This is been a major step in taking charge of your life.
The aftercare (continued care) plan is an important and mandatory segment of the treatment and recovery process. The support your will find in your aftercare program will go far in helping to ensure your success. Your aftercare plan shall consist of, but not limited to:
a. Abstinence from alcohol indefinitely.
b. Weekly meetings with the unit CDAR to monitor and support your recovery for 12 months.
c. Attendance at a minimum to (number specified in aftercare plan) twelve-step or other approved support group meetings per week for 12 months (unit operations permitting).
Failure to comply with this aftercare plan or involvement in any alcohol incident may result in your separation from the Coast Guard in accordance with chapter 20 of the Personnel Manual, COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-20)
Entry Type: Performance and Discipline (P&D-20)
Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
(Date): On (Date) you were screened by (Name) at (Name of Facility) for a (self-referral/command referral/alcohol incident) and it was determined that you meet the criteria for a diagnosis of (Alcohol Abusive/ Dependent or Substance Abusive/Dependent, list drug) as per DSM IV and you have been recommended for (type of treatment).
You will receive your treatment at (name of facility), which begins on (date) at (time).
Until you begin treatment, you shall adhere to a pre-treatment plan, which will consist of the following (alcohol dependent is mandatory, alcohol abusive if recommended by screening facility):
a. Abstaining from consuming alcohol. Any further use of alcohol until you complete treatment and your support plan will lead to further disciplinary action.
b. You will meet with your CDAR once a week, at a time to be agreed on by both of you, for monitoring and support.
c. You must attend at least 2 support group meetings (e.g., Alcoholics Anonymous or other MLC approved support group) each week.
You have been advised of the contents of Chapter 20, Personnel Manual, COMDTINST M1000.6 (series) regarding the policy for (self-referral, command referral, alcohol Incident, drug incident), expected conduct of Coast Guard personnel, and the continued care plans available for those who have problems with alcohol abuse or substance dependency.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-21)
Entry Type: Performance and Discipline (P&D-21)
Reference: Article 12-B-16 and 12-B-18, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): (document formal counseling pertaining to placing a member on probation, prior **to** recommending discharge, per articles 12-B-16 and 12-B-18 of the Personnel Manual)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Click here for Word CG-3307 (P&D-22)
Entry Type: Performance and Discipline (P&D-22)
Reference: Article 12-B-2, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): (summarize the basis for which a general discharge is awarded per section 12-B of the Personnel Manual)

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click on the links below for the re3spective Word CG-3307
Entry Type: Performance and Discipline (P&D-23)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series)
Responsible Level: Unit
Entry:
(DATE): Passed (or Failed) the Deck Watch Officer (DWO) Rules of the Road exam on (date) with a score of _____%

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry

J. P. JONES

Click on the links below for the respective Word CG-3307
Entry Type: Performance and Discipline (P&D-24)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and Personnel Qualification Standard for Officer of the Deck, COMDTINST M3502.5
Responsible Level: Unit
Entry:
(DATE): Completed all prescribed training and oral examinations, and is certified as an underway (inport) Officer of the Deck in accordance with the Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and the OOD PQS, COMDTINST M3502.5

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Performance and Discipline, Continued

Click here for Word CG-3307 (P&D-25)
Entry Type: Performance and Discipline (P&D-25)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and Engineer Officer in Training (EOIT) PQS, COMDTINST M3502.11
Responsible Level: Unit
Entry:
(DATE): Completed all prescribed training and oral examinations, and is certified as an EOIT in accordance with the Cutter Training and Qualification Manual, COMDTINST 3502.4 (series) and the EOIT PQS, COMDTINST 3502.11 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Click on the links below for the respective Word CG-3307
Entry Type: Performance and Discipline (P&D-26)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series), Engineer Officer in Training (EOIT) PQS, COMDTINST M3502.11 (series), and Personnel Qualification Standard (PQS) for Officer of the Deck, COMDTINST M3502.5.
Responsible Level: Unit
Entry:
(DATE): Completed PQS or qualified/certified as (specify watchstation).

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Separation

Click here for Word CG-3307 (SEP-1)
Entry Type: Separation (SEP-1)
Reference: Section 3-B-5, Personnel and Pay Procedures Manual, PSCINST M1000.2 (series)
Responsible Level: Unit
Entry:
(DATE): I agree to allow the withholding of a substantial portion of my final pay on my date of separation. I also understand that I may owe the government money, and the government will initiate collection action for any money due.

J. P. JONES

Click here for Word CG-3307 (SEP-2)
Entry Type: Separation (SEP-2)
Reference: Sections 3-C and 12-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible level: Unit
Entry:
(DATE): I have read and been counseled on the contents of Article 12-B-53 of the Personnel Manual, COMDTINST M1000.6 (series) concerning my rights on separation from the Coast Guard. I understand my rights as described therein and have had all of my questions answered.

I have been advised IAW Article 3-C-5 of the Personnel Manual, COMDTINST M1000.6 (series) that since I am opting for separation at this time, should I later elect to reenlist, I must do so within three (3) months of discharge to be eligible for a Selective Reenlistment Bonus (SRB), provided that on the date of reenlistment my rating has a multiple listed in the ALCOAST then in effect.

J. P. JONES

Click here for Word CG-3307 (SEP-3)
Entry Type: Separation (SEP-3)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): The provisions of Article 12-B-3, Personnel Manual, COMDTINST M1000.6 (series) concerning types of discharge certificates, their basis for issuance, the possible effects of various veterans' benefits and related matters have been explained to me this date.

J. P. JONES

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-4)
Entry Type: Separation (SEP-4)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (series). Member is recommended for reenlistment. Member has stated intentions (not to reenlist) (to reenlist) (undecided). The required E-Resume has been submitted in Direct Access.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

Click here for Word CG-3307 (SEP-5)
Entry Type: Separation (SEP-5)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (series). In accordance with (reference message traffic) you are recommended for reenlistment. You have stated your intention (to reenlist) (to extend) (not to reenlist). You have been counseled that failure to extend or reenlist for _____ years prior to (date) will result in revocation of the reenlistment authorization and separation upon EOE/EAOS is mandatory. Members who are authorized reenlistment and choose not to do so are required to serve any additional obligated service incurred in addition to their original enlistment. You will be discharged/RELAD on (date).

A. B. SEA, CAPT, USCG
Commanding Officer

J. P. JONES

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-6)
Entry Type: Separation (SEP-6)
Reference: Article 12-B-47, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(complete the following entry when a citizen of the Republic of the Philippines reenlists immediately following separation or executes a voluntary extension of enlistment):
(DATE): I have been properly advised and counseled regarding the loss of entitlement to file for U.S. citizenship unless such reenlistment or extension of enlistment actually takes place in the United States or its stated possessions (American Samoa, Swans Island, Guam, Puerto Rico, and the Virgin Islands).

J. P. JONES

Click here for Word CG-3307 (SEP-7)
Entry Type: Separation (SEP-7)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: Unit
Entry:
(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (series). Member is not recommended for reenlistment because (give reason(s)). The required E-Resume has been submitted in Direct Access.

A. B. SEA, CAPT, USCG
Commanding Officer

(DATE): I acknowledge that I have been informed that I am not being recommended for reenlistment and given the reason(s) for this action. I understand that I may submit a written appeal via the chain of command to Commander (CGPC-epm). This appeal must be submitted within 15 days of this notification and my command will furnish clerical assistance, if I desire to submit an appeal.

J. P. JONES

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-8)
Entry Type: Separation (SEP-8)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Discharged from active duty without immediate reenlistment this date by reason of (expiration of enlistment, misconduct, etc.). Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (series). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) Thrift Savings Plan (TSP) withdrawal options and procedures; (3) provisions of COMDTINST 1760.7 (series); and (4) maintaining continuous service status.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Click here for Word CG-3307 (SEP-9)
Entry Type: Separation (SEP-9)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Discharged this date by reason of (expiration of enlistment or convenience of the government) and immediately reenlisted. Certificate of Release or Discharge from Active Duty form (DD-214) not issued. The following information on this enlistment/reenlistment applies:
Period of service.
Reenlistment code.
Separation Program Designator (SPD).
Time lost.
(NOTE: the above data is necessary to compute the final DD-214 since it will cover multiple enlistment/reenlistment periods.)

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-10)
Entry Type: Separation (SEP-10)
Reference: Section 3-C, 12-B & 18-D-4, Personnel Manual, COMDTINST M1000.6 (series), COMDTINST 7220.1 (series), and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Released from active duty due to expiration of enlistment and immediately transferred to the Coast Guard reserve (indicate Unit or IRR) to complete obligation of military service. Member provided Certificate of Release or Discharge from active duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (series).
Member counseled regarding:
(1) reenlistment opportunities including SRB entitlements and Coast Guard reserve opportunities/benefits;
(2) Thrift Savings Plan (TSP) withdrawal options and procedures and/or opportunity to contribute to the TSP within 60 days of joining the Ready Reserve;
(3) the provisions of COMDTINST 1760.7 (series);
(4) liability for SGLI premiums unless member declines coverage or joins the Individual Ready Reserve (IRR);
(5) the requirement to answer official correspondence;
(6) responding to Annual Screening Questionnaires;
(7) maintaining physical fitness and weight standards;
(8) maintaining your initial uniform issue for a period of four years;
(9) the surrendering of your Citibank card prior to departure from active duty;
(10) maintaining continuous service status; and
(11) promptly advising CGPC-rpm if in IRR, or SPO if assigned to a drilling unit of changes of residence and changes of phone number(s) or mailing address and any physical condition or other factor that would affect your immediate availability for active military service.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entries.

J. P. JONES

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-11)
Entry Type: Separation (SEP-11)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Retired from active duty this date and effective (date) placed on the inactive retired rolls. Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (series). Member counseled regarding retirement rights, benefits, and responsibilities.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Click here for Word CG-3307 (SEP-12)
Entry Type: Separation (SEP-12)
Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (series) and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): As outlined in Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (series), I understand that in order to remain in a continuous service status, reenlistment must occur within three months from the date of discharge/separation. However, the rate held at the time of discharge/separation may not be the rate at which reenlisted unless the rate is on the open rate list at the time of reenlistment. I hereby acknowledge receipt of my separation documents.

J. P. JONES

Click here for Word CG-3307 (SEP-13)
Entry Type: Separation (SEP-13)
Reference: Article 12-B-11f, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: SPO
Entry:
(DATE): I [member's name], desire to be separated from the Coast Guard on my normal expiration of active obligated service date. I understand I will not be eligible for further follow-up studies or treatment at a U.S. Uniformed Services medical facility or for disability benefits under laws the Coast Guard administers, and any further treatment or benefits would be under the Veterans' Administration's jurisdiction.

Member sign and date	Officer witness, sign and date

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-14)
Entry Type: Separation (SEP-14)
Reference: Article 12-B-llf, Personnel Manual, COMDTINST M1000.6 (series)
Responsible Level: SPO
Entry:
(DATE): I [member's name], desire to be separated from the Coast Guard despite the fact separation may prejudice any rights or benefits to which I may be entitled as a result of physical evaluation board hearings under 10 U.S.C. 61. I have been duly advised of my rights in this matter and request the Coast Guard to discharge me as soon as possible without further hearing and without disability, retirement, or severance pay and without any compensation whatsoever. I understand I am not required and am under no obligation to give this statement and I hereby certify I give this statement voluntarily.

Member sign and date	Officer witness, sign and date

Click here for Word CG-3307 (SEP-15)
Entry Type: Separation USCGR (Inactive) (SEP-15)
Reference: Sections 3-C and 12-B, Personnel Manual, COMDTINST M1000.6 (series), Section 8-B, Reserve Policy Manual, COMDTINST M1001.28(series), COMDTINST 7220.1 (series), and DD 214 Manual.
Responsible Level: SPO
Entry:
(DATE): Discharged this date from USCGR inactive duty by reason of (fulfillment of service obligation, expiration of enlistment, or convenience of the government) and immediately reenlisted in the (regular or reserve). Member provided USCGR discharge certificate and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (series). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) opportunity to contribute to the Thrift Savings Plan (TSP) within 60 days of joining Active Duty or the Ready Reserve; (3) provisions of COMDTINST 1760.7 (series); and (4) maintaining continuous service status.

(DATE): Reenlisted this date in the (USCG or USCGR).

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entries.

J. P. JONES

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-16)
Entry Type: Separation USCGR (Inactive) (SEP-16)
Reference: Section 8-B, Reserve Policy Manual, COMDTINST M1001.28 (series) and DD 214 Manual.
Responsible Level: RSPO
Entry:
(DATE): Discharged from USCGR inactive duty without immediate reenlistment this date by reason of (fulfillment of service obligation, expiration of enlistment, or convenience of the government). Member provided USCGR discharge certificate and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (series). Documents mailed this date to: (address)

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

Click here for Word CG-3307 (SEP-17)
Entry Type: Separation from Selected Reserve (SELRES)(SEP-17)
Reference: COMDTINST 1001.37 (series)
Responsible Level: RSPO
Entry:
(DATE): Member counseled this date upon assignment to the Individual Ready Reserve (IRR), regarding possible entitlement to/ineligibility to Reserve Transition Benefits (RTB). Commandant (G-RSM) will make final determination of RTB entitlement.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entry.

J. P. JONES

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-18)
Entry Type: Separation (SEP-18)
Reference: COMDTINST 1040.10 (series)
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).
(for E-5 to E-9)
I understand that based on my present pay grade of _____, my Professional Growth Point (PGP) is ____ (#) ____years of military service. My present PGP is ____(date)____. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).
I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (**CGPC**-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

SIGNATURE WITNESS

Click here for Word CG-3307 (SEP-19)
Entry Type: Separation (SEP-19)
Reference: COMDTINST 1040.10 (series)
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).
(for E-3 to E-4)
I understand that based on my present pay grade of _____, my Professional Growth Point (PGP) is 7 years of Coast Guard service or 10 years military service, whichever is greater. My present PGP is _____(date) _____ I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).
I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (**CGPC**-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

SIGNATURE WITNESS

Continued on next page

CG-3307's for Separation, Continued

Click here for Word CG-3307 (SEP-20)
Entry Type: Separation (SEP-20)
Reference: COMDTINST 1040.10 (series)
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).

(for E-2)

I understand that based on my present pay grade of E-2, my Professional Growth Point (PGP) is 4 years of military service. My present PGP is _____(date)_____. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).
I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (CGPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

SIGNATURE WITNESS

Click here for Word CG-3307 (SEP-21)
Entry Type: Separation (SEP-21)
Reference: COMDTINST 1910.1 (series)
Responsible Level: Unit
Entry:
(DATE): As a condition of receiving separation pay under 10 U.S.C. 1174, I hereby agree to enlist or extend in the ready reserve for a period of 3 years following my discharge or release from active duty in addition to any remaining military service obligation. I understand this agreement is made without regard to the reason for my separation or my eligibility for affiliation with the ready reserve. Further, should I be accepted for enlistment or extension in the Coast Guard reserve, I must execute the extension or enlistment contract as a condition of qualifying for separation pay. I understand that if I enlist in the ready reserve I may request to become a member of the selected reserve by applying for affiliation to the chief, readiness and reserve division of the district in which I live. I also agree if accepted that I will keep the district commander (r) in my area informed of any changes in my address, physical status, or dependency status. I understand that if I stay in the reserve and later retire, my retired pay will be reduced by the amount of enlisted separation payments received.

SIGNATURE WITNESS

Continued on next page

CG-3307's for Selective Reenlistment Bonus

Click here for Word CG-3307 (SRB-1)
Entry Type: Selective Reenlistment Bonus (SRB-1)
Reference: COMDTINST M1000.6 (series), Art. 3.C.11.1
Responsible Level: Unit
Entry:
(DATE): I have reviewed Article 3.C.12 of the Personnel Manual entitled "*Frequently Asked SRB Questions and Answers*." I have been informed that:

My current Selective Reenlistment Bonus (SRB) multiple is ____ and is listed in ALCOAST _____, which has been made available for my review.

In accordance with article 12.B.4, I am eligible to reenlist/extend my enlistment for a maximum of _____ years. My SRB will be computed based on _____ years newly obligated service. (If extension/reenlistment is for less than 36 months, enter "00.").

I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

SRB Payment Method Election *(Include if member has an SRB multiple and is going to reenlist/extend on or after 16 July 2007)*

_____ (mbr's initials) **Installments**. The initial payment shall be 50 percent of the total bonus amount and the remainder paid in equal annual installments, on the anniversary date, as determined by the length of the extension or reenlistment. I understand this decision is irrevocable.

Note: An additional 25% is deducted from all SRB payments for tax withholding.

_____ (mbr's initials) **Lump Sum**. I hereby acknowledge that I have elected the lump sum SRB payment option and will receive **ONLY** 85 percent of the installment payment program amount. I understand this decision is irrevocable.

Note 1: An additional 25% is deducted from all SRB payments for tax withholding.

Note 2: *If member elects Lump Sum, the SPO shall fax a copy of this entry to PSC (MAS/Bonus Team) at (785) 339-3760 after the Statement of Intent (SOI) transaction is entered in Direct Access.*

The following SRB policies were unclear to me, but my SRB counselor provided me with the corresponding answers: (list specifics)

_____ (Signature of Member/Date)

_____ (Signature of Counselor)

Continued on next page

CG-3307's for Selective Reenlistment Bonus, Continued

Click here for Word CG-3307 (SRB-2)
Entry Type: Selective Reenlistment Bonus (SRB-2)
Reference: COMDTINST M1000.6 (series), Art. 3.C.5.9 (Special Conditions) & 3.C.11.2
Responsible Level: Unit
Entry:
(DATE): I have reviewed Article 3.C.12 of the Personnel Manual entitled "*Frequently Asked SRB Questions and Answers.*" I have been informed that:

My current Selective Reenlistment Bonus (SRB) multiple is ____ and is listed in ALCOAST _____, which has been made available for my review.

In accordance with article 12.B.4, I am eligible to reenlist/extend my enlistment for a maximum of _____ years. My SRB will be computed based on _____ years newly obligated service. (If extension/reenlistment is for less than 36 months, enter "00.")

I must reenlist 3 months prior to (date), which is my 6 or 10-year active duty anniversary date, in order to receive a Zone (A or B) SRB.

I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

SRB Payment Method Election *(Include if member has an SRB multiple and is going to reenlist/extend on or after 16 July 2007.)*

_____ (mbr's initials) **Installments**. The initial payment shall be 50 percent of the total bonus amount and the remainder paid in equal annual installments, on the anniversary date, as determined by the length of the extension or reenlistment. I understand this decision is irrevocable.

Note: An additional 25% is deducted from all SRB payments for tax withholding.

_____ (mbr's initials) **Lump Sum**. I hereby acknowledge that I have elected the lump sum SRB payment option and will receive **ONLY** 85 percent of the installment payment program amount. I understand this decision is irrevocable.

Note 1: An additional 25% is deducted from all SRB payments for tax withholding.
Note 2: *If member elects Lump Sum, the SPO shall fax a copy of this entry to PSC (MAS/Bonus Team) at (785) 339-3760 after the Statement of Intent (SOI) transaction is entered in Direct Access.*

The following SRB policies were unclear to me, but my SRB counselor provided me with the corresponding answers: (list specifics)

_____ (Signature of Member/Date)

_____ (Signature of Counselor)

Continued on next page

CG-3307's for Selective Reenlistment Bonus, Continued

Click here for Word CG-3307 (SRB-3)
Entry Type: Selective Reenlistment Bonus (SRB-3) (Written Agreements)
Reference: COMDTINST M1000.6 (series), Art. 3.C.3
Responsible Level: Unit
Entry:
(DATE): I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (series) 3.C.
I further acknowledge that I have been advised of the effects on my SRB computation/payment if I enter into an agreement to extend my enlistment.

(Signature of Member/Date)	(Signature of Counselor)

Click here for Word CG-3307 (SRB-4)
Entry Type: Selective Reenlistment Bonus (SRB-4)
Reference: COMDTINST M1000.6 (series), Art. 3.C.5.7 (Special Conditions)
Responsible Level: Unit
Entry:
(DATE): I have been advised and am aware that I will not be eligible and will not begin receiving my SRB payment for my new rating until the operative date of my extension or reenlistment after attaining my new rating.

(Signature of Member/Date)	(Signature of Counselor)

Continued on next page

Selective Reserve (SELRES) Enlisted Bonus Programs

Click here for Word CG-3307 (BON-1)
Entry Type: Selective Reserve Reenlistment/Extension Bonus (BON-1)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I am eligible for a ____ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST _____.

(Signature of Member/Date) (Signature of Counselor)

Click here for Word CG-3307 (BON-2)
Entry Type: Selective Reserve Enlistment Bonus (BON-2)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Recruiting Office
Entry:
(DATE): I have been advised that I am eligible for a ____ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST _____.

(Signature of Member/Date) (Signature of Counselor)

Click here for Word CG-3307 (BON-3)
Entry Type: Selective Reserve Enlistment Bonus (BON-3)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I am eligible for a ____ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST _____.

(Signature of Member/Date) (Signature of Counselor)

Continued on next page

Selective Reserve (SELRES) Enlisted Bonus Programs,
Continued

Click here for Word CG-3307 (BON-4)
Entry Type: Selective Reserve Affiliation Bonus (BON-4)
Reference: COMDTINST 7220.1 (series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I am eligible for a ____ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST _____.

(Signature of Member/Date) (Signature of Counselor)

Click here for Word CG-3307 (BON-5)
Entry Type: Performance and Discipline (BON-5)
Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1(series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I will be placed in a period of authorized absence for 12 months due to involuntary recall to active duty under 10 USC 12302. During this 12-month period, I will retain my current SELRES bonus eligibility.

I further acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1(series).

(Signature of Member/Date) (Signature of Counselor)

Click here for Word CG-3307 (BON-6)
Entry Type: Performance and Discipline (BON-6)
Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1(series)
Responsible Level: Unit
Entry:
(DATE): I have been advised that I will be authorized a period of non-availability and temporarily assigned to the Active Status Pool (ASP) for 12 months due to (temporary medical disability, temporary work conflict, or documented personal hardship).

Upon completion of the 12-month period, I will be required to extend my enlistment in the Ready Reserve to serve my full contract period in the SELRES in order to receive my total bonus entitlement.

Failure to extend for the necessary additional service or continued assignment in the ASP over 12 months will result in my bonus eligibility being adjusted for time spent in the ASP.

I further acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1(series).

(Signature of Member/Date) (Signature of Counselor)

Continued on next page

Selective Reserve (SELRES) Enlisted Bonus Programs,
Continued

Click here for Word CG-3307 (BON-7)
Entry Type: Performance and Discipline (BON-7)
Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1(series)
Responsible Level: Unit
Entry:
(DATE) I have been advised that:

If I fail to complete Class "A" School training, I will immediately be reassigned to an Unbudgeted SELRES position to complete the minimum one year affiliation per 5.B.1 of the Reserve Policy Manual, COMDTINST M1001.28 (series).

I am eligible for an affiliation bonus of _____based on _____months of remaining Initial Military Obligation. The criteria of ALCOAST_____ applies. In addition, the bonus payment is contingent upon successful completion of _____ "A" School and the request for payment will not be submitted by servicing SPO until I have successfully completed _____ "A" School. My eligibility period will commence the day of assignment to the SELRES and commits me to SELRES participation through MM/DD/YY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST___ .

(Signature of Member) (Signature of Counselor)

This page left blank intentionally

Personnel Casualty Report Message

When notified of a Personnel Casualty, IMMEDIATELY call Flag Plot at (202) 267-2100. Send this message within 4 hours of notification.

MESSAGE ROUTING TO REPORT AN ACTIVE DUTY, RESERVE, OR AUXILIARY DEATH, OR THE DEATH OF A MEMBER WHO DIED WITHIN 120 DAYS OF SEPARATION:

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO CCGDNUMBER ANYWHERE US (district where Next Of Kin resides)
COGARD INTSUPRTCOM ANYWHERE USA (ISC where Next Of Kin resides)
CCGDNUMBER ANYWHERE US (district where member's unit is located, if different from "To" line)
COGARD INTSUPRTCOM ANYWHERE USA (ISC where casualty occurs)
COGARD UNIT ANYWHERE US (member's unit, if different than "From" line)
COMDT COGARD WASHINGTON DC//CG-1222/CG-112/CG-2-CGIS// (Omit CG-2-CGIS when death occurs in a hospital due to natural causes)
INFO COGARD PSC TOPEKA KS
COMCOGARD PERSCOM ARLINGTON VA//EPM or OPM//
FHTNC NORFOLK VA (Fleet Home Town News Center)
CCGDNUMBER ANYWHERE US (district where unit sending this msg is located, if different from above)
COGARD MLC ANYWHERE US (if member's unit was a MLC unit)
COGARD MLC LANT NORFOLK VA //KSE//

COMCOGARD TISCOM//HONOR GUARD OPS//

MESSAGE ROUTING TO REPORT A DEPENDENT DEATH

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COMDT COGARD WASHINGTON DC//CG-1222/G-WKW//
COGARD INTSUPRTCOM ANYWHERE USA (ISC where member resides)
INFO COGARD PSC TOPEKA KS

MESSAGE ROUTING TO REPORT A RETIREE DEATH

P 000000Z MON YR (COMCEN enters date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COGARD PSC TOPEKA KS//RAS//
INFO COMDT COGARD WASHINGTON DC//CG-1222//
INFO COMCOGARD PERSCOM ARLINGTON VA//ADM//
COGARD INTSUPRTCOM ANYWHERE USA (ISC for AOR where deceased retiree resided)

Continued on next page

Personnel Casualty Report Message, Continued

ACCT CGW2GARC
BT
UNCLAS FOUO //N01770//
SUBJ: PERSONNEL CASUALTY REPORT
1. THE FOLLOWING INFO IS PROVIDED:

ALPHA. **Name**. Indicate member's full name, rank/rate, SSN, and branch of service. In the case of a dependent's death, first give the dependent's full name and relationship to member, and then give the member's full name, rank/rate, SSN, and branch of service.

BRAVO. **Status.** Indicate person's status, (e.g., active duty, active duty for training (ADT), Inactive Duty for Training (IDT), retired, dependent, absentee since, etc). In the case of reserve members, indicate whether the member was on active duty for training (ADT) or inactive duty for training (IDT), and the period of training authorized including hour and date. If the casualty occurred while traveling to or from training, indicate the time of the member's departure, scheduled arrival time, method of travel, itinerary, and immediate cause of death. Fax a complete copy of the reservist's order immediately to Commandant (G-WPM) @ 202-267-4823.

CHARLIE. **Type of Casualty**. Indicate whether casualty was caused by hostile or non-hostile actions. Also state whether member is Alive, Dead or Missing. If alive give the prognosis in case of illness or injury. If dead, state the cause such as accident, illness, suicide, killed in action, or died of wounds. When applicable, state how identification of remains was established. If missing, give cause of disappearance. Do not use indefinite statements such as "lost overboard" or "missing and presumed dead". If it cannot be determined if member is deceased, see Article 11-A-4, Coast Guard Personnel Manual, COMDTINST M1000.6 (series).

Continued on next page

Personnel Casualty Report Message, Continued

DELTA. Date, Time, Place, Circumstances, and Cause. Give a concise description (avoid gory details) to provide means for explaining the casualty to the family and for processing survivor benefits. Use local time. If the casualty occurred at sea or at a remote area, state latitude and longitude, unless security precludes. If death was caused from injuries, state the cause (i.e. an automobile or plane accident, or other cause.) If possible, give brief additional information to indicate whether or not the injuries were incurred as a result of operational duty, (e.g., accidental electrocution while engaged in repair work aboard ship). If death was caused by gunshot wound, indicate whether accidentally or intentionally caused. If death resulted from drowning, indicate whether due to falling overboard, recreational swimming, etc. If death resulted from flight in a Coast Guard aircraft, report circumstances as follows: status of individual, (e.g., pilot, crewmember, passenger; model of aircraft); and purpose and type of flight, (e.g., whether "operational" or "other than operational"). Whenever a determination of the cause of death is delayed pending an autopsy or toxicological examination, the finding shall be furnished by supplemental message as soon as possible. If the member is missing, include a statement of the status of the search or the impracticability of conducting a search.

ECHO. Location and Disposition of Remains. Give complete name, address, and phone number of morgue or funeral establishment where remains are located. If remains are to be transferred to another establishment, give name, address, and phone number of such establishment, when transfer will be made, and any special disposition instructions the next of kin should know. If remains were not recovered, give the status or the search.

FOXTROT. Full Name, Address, and Relationship of Next of Kin (NOK). Report NOK information as found on the BAH/Dependency/Emergency Data (CG-4170A). If dependents are injured or killed in the same accident, state their present whereabouts and condition if applicable.

GOLF. Notification of Next of Kin (NOK). State Primary NOK – Yes or NO, Secondary NOK – Yes or NO, and the date and local time of contact to indicate whether primary and secondary NOK named on the member's (CG-4170A) have been officially notified. . If notification has not been made, advise what action is being taken to notify next of kin.

HOTEL. Board of Investigation. Enter Yes or No to indicates whether a board of investigation will be convened. Consult Administrative Investigations Manual COMDTINST M5830.1

INDIA. BAH/Dependency/Emergency Data. Indicate date of current BAH/Dependency/Emergency Data (Direct-Access Report) and CG PSC-2020D (Designation of Beneficiaries) executed by member.

Continued on next page

Personnel Casualty Report Message, Continued

JULIETT. Beneficiary for Death Gratuity. Provide name and address of death gratuity beneficiary, as shown on the member's current Designation of Beneficiaries (CG PSC 2020D). State N/A for spouse and dependent deaths.

KILO. Line of Duty Determination. All active duty deaths (illness, disease, accidents, car wrecks, and suicide) are considered to have occurred in the "Line of Duty." State here "Commanding Officer has determined death to be "Line of Duty." Use N/A for spouse and dependent deaths.

LIMA. Servicemembers' Group Life Insurance (SGLI). In the case of a member's death, indicate if the member is covered by SGLI, the amount of coverage, and the beneficiary information listed on the member's most recent VA Form SGLV-8286. Also indicate whether the member was in an AWOL status for 31 days or more at the time of the death. In the case of a Spouse's death, indicate if the member had family SGLI coverage and the amount. In the case of a dependent child's death, indicate if the member had SGLI coverage.

MIKE. Beneficiary for Pay and Allowances. Indicate name and address of beneficiary listed on Designation of Beneficiaries (CG PSC 2020D) for unpaid pay and allowances. Use N/A for spouse and dependent deaths.

NOVEMBER. Predeceased or Prior Spouse Cases. If the member was married, and either (1) the member's spouse predeceased the member, or (2) the member's spouse died in the same accident as the member, or (3) the member is divorced: indicate the member's current marital status, the name of the current spouse, the name of the former spouse(s), and the name of the member's current next of kin. Use N/A for spouse and dependent deaths.

OSCAR. Identification of a Potential Third Party Claim. If the member or the member's dependents are injured and receive medical care at Government expense or through TRICARE, **and** it appears that a third party is at fault, identify the third party involved.

2. [Unit POC and Phone #]
BT
NNN

Next of Kin Notification (NOK)

Coast Guard Policy is to have a Coast Guard member notify the NOK of a deceased member in person. If this is not feasible due to distance, contact state or local police and ask them to notify the NOK. The NOK of a missing or seriously ill member may be notified by phone. Notifications are only made during the hours of 0700 to 2400, unless the NOK may find out through another source. In all situations, notify the NOK by 1) Type out the appropriate letter, listed below, 2) Contact and determine you are talking to the NOK (in person for death, by phone for missing or illness), 3) Move to a private place (Wait until inside the home, if notifying NOK in person or have NOK move to a quiet phone), 4) Read the first paragraph to the NOK, 5) Give or mail the letter to the NOK.

Death of Member - Letter Used to Notify NOK

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

1) I deeply regret to inform you on behalf of the United States Coast Guard that your (specify relationship, rate/rank, SSN) died on (date) at/aboard (place) as a result of (provide a brief description of cause of death). Your (specify relationship) died while in the service of his/her country. Please accept my most heartfelt sympathy in your great loss.

2) We hope we can be of assistance to you in your bereavement. We will transport the remains, with an escort, to any place you designate. Also, we will allow you an amount toward funeral and interment expenses not to exceed $6900, for burial in a private cemetery or $5,500 if remains are consigned to a funeral director prior to interment in a national cemetery or $600 dollars if remains are consigned directly to a national cemetery.

3. (Name and Phone # of CACO or DAO) has been assigned to give you every possible assistance.

4) Please be assured of the heartfelt sympathy and prayers of your (specify relationship) shipmates. A letter setting forth the circumstances of death will follow.

(Name, rate/rank, and title of unit commanding officer)

Continued on next page

Next of Kin Notification (NOK), Continued

Missing - Letter Used to notify NOK

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

1) I deeply regret to inform you on behalf of the United States Coast Guard that your (specify relationship, name, rate/rank, SSN) is missing as a result of (provide brief description of the cause and circumstances concerning missing status). The incident in which your (specify relationship) was involved occurred on (date) at (or in the vicinity of) (show location of incident). Your great anxiety in this situation is understood and when further information is available concerning results of the search now in progress you will be promptly notified.
2) You may be assured that every effort is being made with personnel and facilities available to locate your (specify relationship).
4) 3) (Name and Phone # of CG Contact) has been assigned to give you every possible assistance. Please be assured of the heartfelt sympathy and prayers of your (specify relationship) shipmates at this time of heartache and uncertainty. I join you in prayer for (his/her) eventual recovery alive.

(Name, rate/rank, and title of unit commanding officer)

Continued on next page

Next of Kin Notification (NOK), Continued

Critical Injury or Illness - Letter Used to notify NOK

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

1) With concern I regret to inform you on behalf of the United States Coast Guard that your (specify relationship, name, rate/rank, SSN) is (critically or seriously ill or injured) as a result of (provide brief description of circumstances of illness or injury). This occurred on (date) at (specify location). Your (specify relationship) is presently hospitalized at/on board (show location of place hospitalized) where you are assured that (he/she) is receiving the best possible medical care. Your great anxiety is understood and when further reports are available concerning (his/her) condition you will be informed.

2) (Name and Phone # of CG Contact) has been assigned to give you every possible assistance.

3) Please be assured of the heartfelt concern and prayers of your (specify relationship) shipmates at this time of uncertainty. I join you in prayer for his/her speedy recovery.

(Name, rate/rank, and title of unit commanding officer)

Continued on next page

Next of Kin Notification (NOK), Continued

Commanding Officer's Letter to the Next of Kin **(must be written within 48 hours of the member's death)**

Mr. and Mrs. Jerry Jones
123 Main Street
Somewhere, CA 95123

Dear Mr. and Mrs. Jones

Please accept my deepest sympathy on the death of your (Relationship), (Full Name and Rank of Deceased) and allow me to tell you what we know about the circumstances surrounding (His/her) death. [Provide sufficient facts concerning the casualty, search attempts, medical care, etc. to satisfactorily answer all immediate questions in the minds of the next of kin. See Article 11A-8, Coast Guard Personnel Manual, COMDTINST M1000.6 (series).]

[If member was missing and searches have not located the member's remains, include: "We regret that the extensive search for your (indicate relationship) has met with negative results" or "We regret that the extensive search failed to locate any trace of your (specify relationship)." Do not make any statement concerning termination of any searches.]

If you have any questions or need any assistance, please feel free to contact me at (999) 555-1234.

Sincerely,

M. R. ROBERTS
Lieutenant, U. S. Coast Guard
Commanding Officer

Commanding Officer's Letter Request for Death Determination When Member is Missing and No Conclusive Evidence of Death Exists

1771
15 May 2002

MEMORANDUM

From: M. R. Roberts
CG GP Anywhere

To COMDT (G-L)

Thru: (1) CGD Fourteen (a)
(2) MLCPAC (l)

Subj: INCONCLUSIVE EVIDENCE OF DEATH

Ref: (a) Coast Guard Personnel Manual, COMDTINST M1000.6 (series) 1.

In accordance with reference (a), a death status determination is requested in the case of (indicate rate/rank, name, SSN, branch of service) who is missing. Remains have not been recovered.

2. [Provide summary of circumstances of disappearance.]

3. [Provide all available details surrounding search efforts, including: the area of the search (latitude and longitude, and distance from nearest land); local conditions (such as depth of water, temperatures, other climatic conditions, and terrain); and extent of searches made.]

4. [Provide a summary of statements of survivors or of other personnel who may have pertinent information concerning the circumstances.]

5. [Provide the commanding officer's opinion and recommendation as to the possibility of survival.]

M. R. Roberts
CG GP Anywhere

Encl: (1) Supporting documentation

This page left blank intentionally.

Direct-Access Procedures

Purpose

This enclosure establishes the Direct-Access online manual as the official reference for reporting personnel events and transactions.

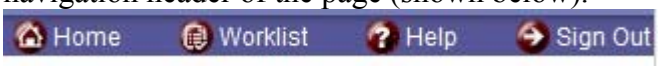
Policy

Direct-Access is a key competent in the U. S. Coast Guard's personnel and pay system. The procedures set forth in the Direct-Access online manual for maintaining personnel data must be followed by all Coast Guard personnel and their supervisors, unit administrative staffs and servicing personnel offices (SPOs).

Accessing the Online Manual

The online manual can be accessed from within the Direct-Access application, via the Coast Guard Data Network (CGDN) or over the Internet.

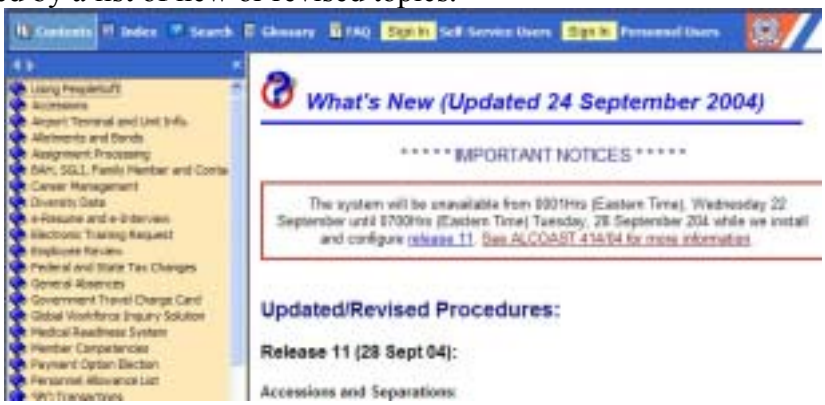
- To access the online manual from within Direct-Access you must first navigate to a data entry page then click on the **Help** link in navigation header of the page (shown below).



- To access the online manual via the CGDN start Internet Explorer and enter http://cgweb.uscg.mil/g-w/psc/ps in the address field.
- To access the online manual over the internet start your web browser and enter http://www.uscg.mil/hq/psc/ps in the address field.

About the Online Manual

The Direct-Access online manual is updated regularly. The first page displays the date the manual. Important notices are posted beneath the revision date, followed by a list of new or revised topics.



Continued on next page

Direct-Access Procedures, Continued

Contents of the Online Manual

Help topics are organized into "books" covering the PeopleSoft modules that have been implemented in Direct-Access. Click on one of the book icons in left panel of this window to explore the topics available. Click on a topic icon to open the topic.

Tip: You only need to click once. The manual is a web page, you don't need to double-click items to open them.

Each book contains a brief introductory topic, explaining the capabilities of the PeopleSoft module. Subsequent topics provide procedures for accomplishing specific tasks or viewing data.

The list below is a sample of the topics listed under the “Using PeopleSoft” book:

- Using PeopleSoft
  - Welcome
  - How to Change Your Password
  - Using this help file
  - Training
  - Tutorials and Demonstrations
  - Tutorials for SPO Users
  - Quick Reference Guides
  - Frequently Asked Questions
  - About Employee ID Numbers
  - Signing In
  - Basic Navigation
  - How to Create Shortcuts
  - Search Tips
  - Keyboard Shortcuts
  - Internet Explorer Keyboard Shortcuts
  - Copying
  - Printing
  - PeopleSoft Action Types
  - Using Effective Dates
  - Operator ID Lookup
  - Guidelines for Granting Command Access
  - SPO Access Guidelines
  - Using Process Scheduler Web Option
  - Menu Paths

Continued on next page

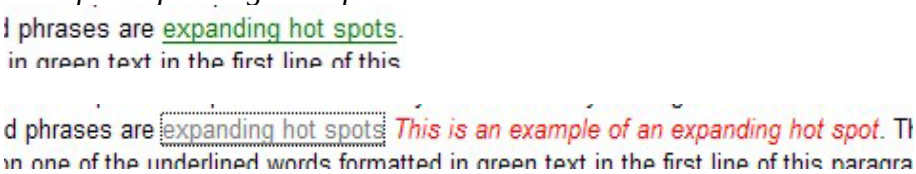
Direct-Access Procedures, Continued

Conventions Used in the Online Manual

Links are formatted as follows:

- Words and phrases in underlined blue letters are links to other parts of the manual or other Internet/Internet web pages. Links to other web pages will open in a new window, while links to other parts of the manual will open in the window you are currently viewing.
- Some underlined words and phrases are expanding hot spots. These are used to introduce terms and acronyms you may not be familiar with. Clicking on one of the underlined words formatted in green text will display the additional information. Clicking on the underlined word again will dismiss the expanded text.

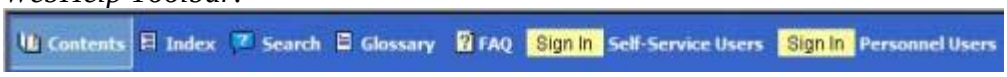
  Example Expanding Hot Spot Text:

Index, Search and Glossary

Use the ***Index, Search and Glossary*** features of the online manual to quickly locate information. These features are accessed via the toolbar at the top left part of your screen:

WebHelp Toolbar:



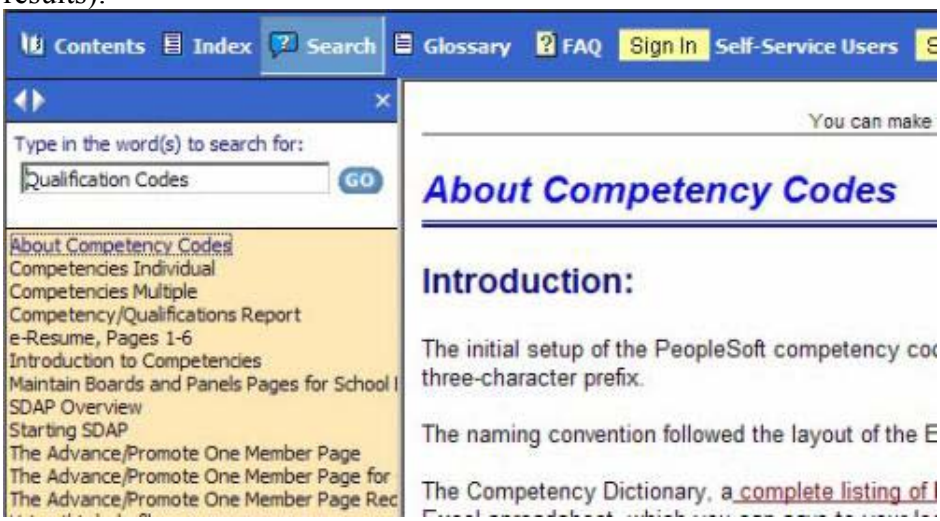
Using Search: Click the button then enter your query in the search text field and click the button. A list of topics matching your search will display in the area below the toolbar. Click on a topic title to view it.

Continued on next page

Direct-Access Procedures, Continued

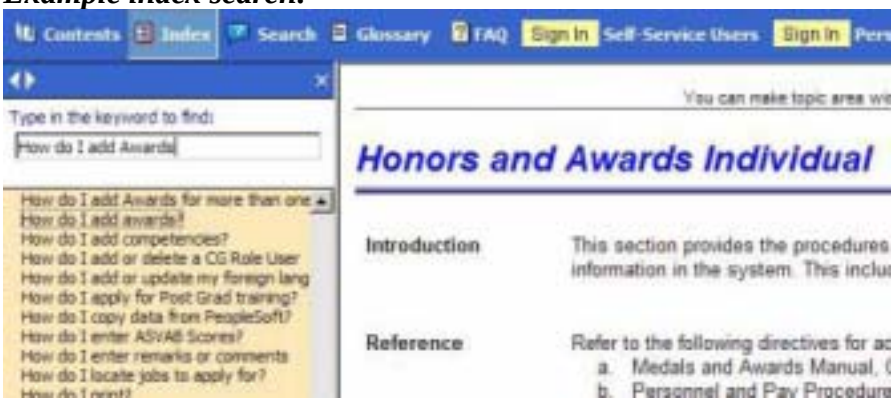
Index, Search and Glossary (cont'd)

Example search and results (Note how we used the old term "Qualification Codes" but were directed to "Competencies" (the new term) in the search results):



Using the Index: The index works much like the search feature. Click the button, type your query into the text filed that appears just beneath the tool bar. You can also scroll through the list without entering a keyword.

Example index search:



Using the Glossary: The Glossary can be used to lookup new terms you may not be familiar with. Simply click the button and scroll through the list of terms displayed just below the toolbar. Select a term and read the definition in the bottom half of the panel.

STATE & U.S. POSSESSION ABBREVIATION CODES

CODE	STATE	CODE	STATE
AL	Alabama	NJ	New Jersey
AK	Alaska	NM	New Mexico
AZ	Arizona	NY	New York
AR	Arkansas	NC	North Carolina
CA	California	ND	North Dakota
CO	Colorado	OH	Ohio
CT	Connecticut	OK	Oklahoma
DE	Delaware	OR	Oregon
DC	District of Columbia	PA	Pennsylvania
FL	Florida	RI	Rhode Island
GA	Georgia	SC	South Carolina
HI	Hawaii	SD	South Dakota
ID	Idaho	TN	Tennessee
IL	Illinois	TX	Texas
IN	Indiana	UT	Utah
IA	Iowa	VT	Vermont
KS	Kansas	VA	Virginia
KY	Kentucky	WI	Wisconsin
LA	Louisiana	WA	Washington
ME	Maine	WV	West Virginia
MD	Maryland	WY	Wyoming
MA	Massachusetts		
MI	Michigan		
MN	Minnesota	AQ	American Samoa
MS	Mississippi	GU	Guam
MO	Missouri	PR	Puerto Rico
MT	Montana	VI	Virgin Islands
NE	Nebraska	AE	European FPOs/APOs
NV	Nevada	AA	Americas FPOs/APOs
NH	New Hampshire	AP	Pacific FPOs/APOs
		OO	All others

FOREIGN COUNTRY ABBREVIATION CODES

CODE	COUNTRY
AF	Afghanistan
AL	Albania
AG	Algeria
AN	Andorra
AO	Angola
AV	Anguilla
AC	Antigua & Barbuda
AR	Argentina
AM	Armenia
AS	Australia
AU	Austria
AJ	Azerbaijan
AZ	Azores
BF	Bahamas
BA	Bahrain
BG	Bangladesh
BB	Barbados
BO	Belarus
BE	Belgium
BH	Belize
BN	Benin
BD	Bermuda
BT	Bhutan
BL	Bolivia
BK	Bosnia & Herzegovina
BC	Botswana
BR	Brazil
BX	Brunei
BU	Bulgaria
UV	Burkina Faso (former Upper Volta)
BM	Burma
BY	Burundi
CB	Cambodia
CM	Cameroon
CA	Canada
CV	Cape Verde
CT	Central African Republic
CD	Chad
CI	Chile
CH	China
CO	Colombia
CN	Comoros
CF	Congo (Brazzaville)
CG	Congo (Kinshasa)
CS	Costa Rica
IV	Cote d'Ivoire
HR	Croatia
CU	Cuba
CY	Cyprus
EZ	Czech Republic
DA	Denmark
DJ	Dijibouti

FOREIGN COUNTRY ABBREVIATION CODES (continued)

CODE	COUNTRY
DO	Dominica
DR	Dominican Republic
EC	Ecuador
EG	Egypt
ES	El Salvador
EK	Equatorial Guinea
ER	Eritrea
EN	Estonia
ET	Ethiopia
FA	Falkland Islands
FJ	Fiji
FI	Finland
FR	France
FG	French Guiana
GB	Gabon
GA	Gambia, The
GG	Georgia
GM	Germany
GH	Ghana
GI	Gibraltar
GR	Greece
GL	Greenland
GJ	Grenada
GT	Guatemala
GV	Guinea
PU	Guinea-Bissau
GY	Guyana
HA	Haiti
VT	Holy See
HO	Honduras
HU	Hungary
IC	Iceland
IN	India
ID	Indonesia
IR	Iran
IZ	Iraq
EI	Ireland
IS	Israel
IT	Italy
JM	Jamaica (and Cayman Islands)
JA	Japan, Okinawa and Ryukyu Islands
JO	Jordan
KZ	Kazakhstan
KE	Kenya
KR	Kiribati
KN	Korea, North
KS	Korea, South
KU	Kuwait
KG	Kyrgyzstan
LA	Laos
LG	Latvia

FOREIGN COUNTRY ABBREVIATION CODES (continued)

CODE	COUNTRY
LE	Lebanon
LT	Lesotho
LI	Liberia
LY	Libya
LS	Liechtenstein
LH	Lituania
LU	Luxembourg
MC	Macau
MK	Macedonia
MA	Madagascar
MI	Malawi
MY	Malaysia
MV	Maldives
ML	Mali
MT	Malta
RM	Marshall Islands
MR	Mauritania
MP	Mauritius
MX	Mexico
FM	Micronesia, Federated States of
MD	Moldova
MN	Monaco
MG	Mongolia
MW	Montenegro
MH	Montserrat
MO	Morocco
MZ	Mozambique
WA	Namibia
NR	Nauru
NP	Nepal
NL	Netherlands
NA	Netherlands Antilles
NC	New Caledonia
NZ	New Zealand
NU	Nicaragua
NG	Niger
NI	Nigeria
NO	Norway
MU	Oman
JA	Okinawa (and Ryukyu Islands)
PK	Pakistan
PS	Palau
PM	Panama
PP	Papua New Guinea
PA	Paraguay
PE	Peru
RP	Philippines
PL	Poland
PO	Portugal
QA	Qatar
RO	Romania

FOREIGN COUNTRY ABBREVIATION CODES (continued)

CODE	COUNTRY
RS	Russia
RW	Rwanda
SC	Saint Kitts and Nevis
ST	Saint Lucia
VC	Saint Vincent and the Grenadines
WS	Samoa
SM	San Marino
TP	Sao Tome and Principe
SA	Saudi Arabia
SG	Senegal
SR	Serbia
SE	Seychelles
SL	Sierra Leone
SN	Singapore
LO	Slovakia
SI	Slovenia
BP	Solomon Islands
SO	Somalia
SF	South Africa
SP	Spain
CE	Sri Lanka (Former Ceylon)
SU	Sudan
NS	Suriname
WZ	Swaziland
SW	Sweden
SZ	Switzerland
SY	Syria
TW	Taiwan
TI	Tajikistan
TZ	Tanzania
TH	Thailand
TO	Togo
TN	Tonga
TD	Trinidad and Tobago
TS	Tunisia
TU	Turkey
TX	Turkmenistan
TV	Tuvala
UG	Uganda
UP	Ukraine
TC	United Arab Emirates
UK	United Kingdom
US	United States
UY	Uruguay
UZ	Uzbekistan
NH	Vanuatu
VE	Venezuela
VM	Vietnam
WS	Western Samoa
YE	Yemen
ZA	Zambia
ZI	Zimbabwe (Former Southern Rhodesia)

COMMENT FORM

The Personnel Service Center needs your input and feedback concerning this Manual. If there are any areas that are not clear, complete or accurate, additional procedures that should be included, or any other recommendations you may have for improvement, PSC would like to know about them. Just copy this form, write your suggestions in the space below, and mail to PSC (PD). Or simply E-mail your suggestion to PSC-PF-PD in the Global Address List.

COMMENTS / RECOMMENDATIONS

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

For details, you can contact me at the following address and phone number:

Date: _____ Phone No: _____ Rank: _____

Print Name (First, Last): _____ Unit: _____

REPRODUCE LOCALLY

Overview

Introduction

This appendix will guide you through the procedures needed to compute service.

In this appendix

Topic	See Page
Introduction	1
Creditable Service	2
Deductible Time	11
Pay Base Date	20
Active Duty Base Date	23
Date of Rank	26
Expiration of Enlistment	35
Creditable Sea Duty	40
Quick Reference Tables	45

Introduction to Computation Procedures

Introduction

In this section you will learn the procedures to compute the following:

- Creditable Service
- Deductible Time
- Pay Base Date
- Active Duty Base Date
- Date of Rank
- Expiration of Enlistment
- Creditable Sea Duty

Procedure Tables

There are procedure tables on each of the above throughout this section. Use the appropriate table on every computation.

Creditable Service

Introduction

In this section we will deal with the rules and procedures for computing creditable service.

Rules

Before you learn the procedures for computing creditable service, you need to know the following:

- In computing creditable service, consider all months to have 30 days. Like pay, creditable service is on a **30 day month basis** with two exceptions:

  1. Active duty for training and/or other active duty for periods of less than 30 consecutive days is always computed day-for-day, and the 31st day of the month is counted.

  2. In deductible time computations, the 31st day of the month is counted when deductible time commences on the 31st day of the month.

- **Never** change the **beginning dates** when doing computations.

- When your ending date is the **last day** of the month and **other** than the **30th**, (as in the 31st or 28th/29th Feb) **change** it to the **30th** , except for computation of Expiration of Enlistment (see page 26).

- When subtracting one date from another date, always **ADD** 1 day for inclusive dates. This puts the beginning date back into the computation.

- When subtracting time from a date, **DO NOT** add a day.

Inclusive Dates

An **inclusive date** is a date that needs to be accounted for in your computation. Inclusive meaning "to include" is a term used for date that form the boundaries of the days that you need to account for. For example if you departed on leave the 4th of April and returned on the 11th of April, you "**inclusive dates**" of leave would be 5 to 10 April. The 5th to 10th of April make up the boundaries of the days you were on leave. So when you determine the "**beginning date**" and "**ending date**" you are establishing the inclusive dates.

Continued on Next Page

Creditable Service, Continued

Adding An Inclusive Day

Using the example on the previous page, it was determined that the inclusive dates of leave were 5 APR to 10 APR. Now if we were to count those days: 5,6,7,8,9,10, we would come up with 6 days. But computations of service are done by subtracting a date (beginning date) from a date (ending date).

```
90 04 10  last day of leave (Ending date)
90 04 05  first day of leave (Beginning date)
      05
```

As you can see when a date is subtracted from another date, the beginning date is lost, due to the subtraction. This is why an "inclusive day" is added to the total, so the inclusive date that was lost (in this case the 5th of April) can be accounted for.

```
90 04 10  Ending date
90 04 05  Beginning date
      05
+     01  Inclusive day
      06
```

Changing Dates

Before you can change a date always ask yourself these four questions:

- Is the date an ending date?
- Is the computation base on Pay (30-day month basis)?
- Is the ending date the last day of the month?
- Is the ending date other than the 30th?

If yes is the answer to **all** of these questions then you must change the date to the 30th. But, if the answer is **no** to just one of these questions do not change the date. Always remember that the answer must be yes to all four questions before you can change the date.

Continued on Next Page

Creditable Service, Continued

February

When using the month of February:

- (a) In a leap year, if ending date is the 29th, change to the 30th when computing for pay.
- (b) If the ending date is 28 February of a leap year, leave it as 28 February since the 28th isn't the last day of the month in a leap year.
- (c) If the ending date is 28 February in a **Non-Leap** year change to the 30th when computing using the **30-Day Rule**.

COMMENT: Leap years come every 4 years.

Continued on Next Page

Creditable Service, Continued

Procedure Table #1 Creditable Service

Use the following steps in computing Creditable Service.

Step	Procedure
1	List the date of release from the Coast Guard or other Service. (Ending Date) **If date of release is the last day of the month and other than the 30th change to the 30th.**
2	Minus the date entered the Coast Guard or other Service. (Beginning Date) **(Never Change)**
3	Plus one day (01) for inclusive date
4	Plus any prior military service **(If applicable)**
5	Minus deductible time for Pay purposes.

Example #1

Let's take an arbitrary enlistment and discharge date and use the rules mentioned earlier to come up with creditable service. In doing creditable service our final answer must be in **Years, Months**, and **Days** not a date. **Seaman Smith enlisted in the Coast Guard on 27 March 1984 and discharged on 24 March 1988.**

- Step 1 - List the date of release from the Coast Guard.

88 03 24 Discharge Date

(Notice the format, Year, Month, Day)

- Step 2 - Minus the date entered the Coast Guard.

88 03 24 Discharge Date
-88 03 27 Enlistment Date

Continued on Next Page

Creditable Service, Continued

Example #1, Continued

What you will be doing is simple math - borrowing, subtracting or adding. Start the computation by subtracting the day's column.

```
     02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
```

We know that we cannot subtract 27 from 24. We need to borrow one month, which is equal to 30 days from the month's column, and add it to the 24 days to make 54.

Since we borrowed from the month column, we must change the 03 to a 02.

Next we need to work on the months column. Since we cannot subtract 03 from 02, we need to borrow from the year column. Borrow 12 months (01 year) and add it to the 02 months to make it 14 months.

```
     14
  87 02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
```

Because we borrow one year from the year column and converted it for use in the month's column, we must change the 88 to 87.

Continued on Next Page

Creditable Service, Continued

Example #1 Continued

We now have a workable problem. Subtract do the days, months, and years.

```
     14
  87 02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
  03 11 27
```

- Step 3 - So far our answer came out to be 03 years, 11 months and 27 days. **Now remember our rule, anytime you subtract two dates you must add 01 inclusive day.**

```
     14
  87 02 54
  88 03 24  Discharge Date
- 84 03 27  Enlistment Date
  03 11 27
+      01  Inclusive day
  03 11 28
```

For total creditable service our member has 03 years, 11 months, 28 days for pay purposes.

Continued on Next Page

Creditable Service, Continued

Example #2

This time we will do one where you have to change the ending date.

YN1 Smith who enlisted in the Coast Guard on 3 August 1984 and discharged on 31 July 1988.

- Step 1 - List the date of Release from the Coast Guard.

  88 07 31 Discharge Date (Ending Date)

- Step 2 - Minus the date entered the Coast Guard

  88 07 31 Discharge Date (Ending Date)
  - 84 08 03 Enlistment Date

Before we can do this problem we need to ask the following questions, based on our rules.

1. Is this computation for pay purposes? **Yes, Creditable Service is a pay computation.**

2. Is the ending date the last day of that month? **Yes, 31 July is the last day of July.**

3. Is ending date other than the 30th? **Yes, the 31st.**
   What does the rule tell you to do? It tells you to change 31st to 30th since **pay** is on a **30-day month basis.**

```
        30
  88 07 31  Discharge Date (Ending Date)
- 84 08 03  Enlistment Date
```

Continued on Next Page

Creditable Service, Continued

Example #2 Continued

Looking at the problem you can see that 07 cannot subtract 08. You have to borrow one year (12 months) and add it to the 07 to make 19. We now have a workable problem, subtract down the days, months, and years.

```
  87 19 30
  88 07 31  Discharge Date (Ending Date)
- 84 08 03  Enlistment Date

  03 11 27
```

- Step 3 - Since you subtracted two dates you have to add 01 day inclusive.

```
  87 19 30
  88 07 31  Discharge Date (Ending Date)
- 84 08 03  Enlistment Date

  03 11 27
+       01  Inclusive day

  03 11 28
```

Our member has a total creditable service of 03 years, 11 months, and 28 days for pay.

Remember

Never forget to ask yourself the four questions before changing a date.

- Is the date an ending date?
- Is the computation base on Pay (30-day month basis)?
- Is the ending date the last day of the month?
- Is the ending date other than the 30th?

Deductible Time

Introduction

You've read that deductible time is a period that does not count as creditable service. This is bad time -- time which needs making up. In this lesson will cover the rules for computing deductible time.

What time is deductible?

The following time is deductible and needs making up.

- Unauthorized Absence in excess of 24 hours
- Sickness due to own misconduct:

  Absence due to abuse of alcohol or drugs.

  Refusal to submit to medical treatment.

  Concealing disease or injury.
- Confinement:

  Civil Arrest

Confinement awaiting trial & disposition of courts-martial case
Confinement under sentence as a result of a courts-martial.

When doe deductible time start and finish?

First Day of Deductible Time

- Day of departure (time leave, liberty, or authorized travel time expires).
- Day of absence due to illness caused by own misconduct.
- Day taken into custody by civil authorities.
- Time liberty or leave expires, if absence due to own misconduct or custody by civil authorities occurs during authorized leave or liberty.

Last Day of Deductible Time

- Last full day of unauthorized absence (day **prior** to return to full duty status).
- **DO NOT** count the day of return as deductible time. **Day of return is a day of duty regardless of time of day.**

Continued on Next Page

Deductible Time, Continued

Procedures for Deductible time

There are different procedures for computing deductible time. The procedure used will be based on whether it is for Pay purposes or Expiration of Enlistment purposes.

(1) Is the period of absence over 24 hours?

If yes continue. If no STOP, the period of absences is not deductible

(2) Is the purpose of computation for Pay or Expiration of Enlistment?

The answer to this will determine which procedure table you will use. If the answer is both, be sure to work you pay and expiration of enlistment procedures separately.

(3) If the purpose is for expiration of enlistment, does unauthorized absence involve a single month or multiple months?

The answer to this will determine which expiration of enlistment procedure table you will use.

Procedure for Pay Purposes

Deductible Time for Pay Purposes

- Compute deductible time for pay purposes when the computation is for:

  Creditable Service

  Pay Base Date

  Active Duty Base Date

  Date of Rank

  Creditable Sea Duty

- Compute all months on a 30-day basis.

Comment

Only deduct actual paydays for deductible time for pay purposes. Since the 31st isn't a day of pay, don't count it as deductible day for pay purposes.

Continued on Next Page

Deductible Time, Continued

Procedure Table #2 Deductible time for Pay

Use the following steps in computing deductible time for Pay (30-day month basis computation).

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. If the ending date is the last day of the month and not the 30th, change it to the 30th.
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Remember

Procedure table #2 is used to compute deductible time for all 30 day based computations (creditable service, pay base date, active duty base date, date of rank and creditable sea duty).

Procedure for Expiration of Enlistment Purposes

Deductible Time for Expiration of Enlistment purposes.

- Compute on a **day for day basis**, as you would on a calendar.
- Deductible time is computed on **actual** full days of absence. Do not change the ending date.

Continued on Next Page

Deductible Time, Continued

Days in the month

It is very important for you to know how many days are in a given month. Listed below are the number of days in each month:

- Jan - 31 days
- Feb - 28 days (29 for leap years)
- Mar - 31 days
- Apr -30 days
- May - 31 days
- Jun - 30 days
- Jul - 31 days
- Aug - 31 days
- Sep 30 days
- Oct - 31 days
- Nov - 30 days
- Dec - 31 days

Procedure Table #3

Use the following steps in computing deductible time for **Expiration of Enlistment** when unauthorized absence happens within a **single month.**

Deductible Time for Expiration of Enlistment (Single Month)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. **(Never Change)**
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Continued on Next Page

Deductible Time, Continued

Procedure Table #4

Use the following steps in computing deductible time for expiration of enlistment when unauthorized absence involves multiple months.

Deductible Time for Expiration of Enlistment (Multiple Months)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the last day of the month in the month the member departed. (**Don't** change to the 30th) **Example** - if departure date is 20 March the last day of the month would be 31 March.
3	Subtract the Beginning Date from the last day of the month member departed. Example - 31 March minus 20 March is 11 days.
4	Add 1 day for inclusive dates. Example - 11 days plus 1 inclusive day is 12 days
5	Add remaining days of deductible time in the next month(s). (If any) Example - if member returned on 4 April the deductible days in April would be 3. 12 days from March plus 3 days from April equals 15 days total deductible time.

Comment

Procedure table #4 is used to compute unauthorized absence, which occurs in two different months for expiration of enlistment purposes. Step 5 (add remaining days of deductible time in the next month) will **not always** be used.

Example - Member departs on unauthorized absence on 14 October and returns 1 November.

The last day of deductible time is the day prior to returning to full duty status (in this case 31 October), there would be no deductible time in the next month (November) since the day of return (1 November) is a day of duty.

Continued on Next Page

Deductible Time, Continued

Example #1

Below are some examples of deductible time involving Pay & Expiration of Enlistment within the same month.

MK3 Michael declared on unauthorized absence (UA) 0730, 15 March 1987 and returned at 1900, 21 March 1987.

Remember the 3 questions you must ask before we can work the computation?

- Question 1 - Is the period of absence over 24 hours? **Yes**
- Question 2 - Is the Purpose of computation for pay or expiration of enlistment? **Both**
- Question 3 - If the purpose is for expiration of enlistment, does unauthorized absence involve a single or multiple months? **Single**

Since the answer to question #2 is both, that means you need to first use procedure table #2 (pay purposes). Look at the example below:

```
  87 03 20  Ending Date
- 87 03 15  Beginning Date
  00 00 05
+       01  Inclusive day
  00 00 06  Total deductible time for pay
```

Now let's do the expiration of enlistment computation. Since the answer to question #3 is single month use procedure table #3

Look at the example below:

```
  87 03 20  Ending Date
- 87 03 15  Beginning Date
  00 00 05
+       01  Inclusive day
  00 00 06  Total deductible time for expiration of enlistment
```

Comment

All **single** month computations will have the same answer, but different procedure tables are used to avoid confusion. Remember **procedure table #2 is used for all pay computations**, single and multiple month unauthorized absence periods. Always use the correct procedure table.

Continued on Next Page

Deductible Time, Continued

Example #2

The total deductible time for pay & expiration of enlistment won't always be the same. Always work your computations for pay first then for expiration of enlistment. Let's look at example of absence occurring over two months.

SN Ross went on UA at 0730, 15 March 1987 and returned 0730, 1 April 1987.

- Question 1 - Is the period of absence over 24 hours? **Yes**
- Question 2 - Is the purpose of computation for pay or expiration of enlistment? **Both**

Question 3 - If the purpose is for expiration of enlistment, does unauthorized absence involve a single month or multiple months? **Multiple**

Using procedure table #2 we will first work the problem out for **pay purposes**.

```
        30
  87 03 31  Ending Date
- 87 03 15  Beginning Date
  00 00 15
+       01  Inclusive Day
  00 00 16  Total deductible time for pay
```

Since the ending date was the last day of the month and other than the 30th, we had to change it to the 30th.

Continued on Next Page

Deductible Time, Continued

Example #2, Continued

Now let's work the problem out for expiration of enlistment purposes using procedure table #4.

```
  87 03 31  Last day of the month member departed
- 87 03 15  Beginning Date
  00 00 16
+       01  Inclusive Day
  00 00 17  Total deductible time for Expiration of Enlistment
```

Notice step #5 wasn't used for this problem. The last day of the month the member departed (31 March) is also the day prior to return from Unauthorized absence. The day of return (1 April) is a day of duty.

Continued on Next Page

Deductible Time, Continued

Example #3

Let's do another multiple month absence computation.

SN Johnson went UA at 1400, 29 July 1988 and returned 0830, 4 August 1988.

Let's do the computation for **pay** first. Remember to use the correct procedure table. Always use procedure table #2 for **all** pay computations regardless of number of months involved.

```
      07 33
   88 08 03 Ending Date
 - 88 07 29  Beginning Date
   00 00 04
 +       01  Inclusive Day
   00 00 05  Total deductible time for pay
```

Now let's do the computation for expiration of enlistment. Remember when doing a computation for expiration of enlistment involving 2 different months you must use procedure table #4.

```
   88 07 31  Last day of month of departure month
 - 88 07 29  Beginning Date
   00 00 02
 +       01  Inclusive Day
   00 00 03  Deductible time for July
 +       03  Deductible time for days in August (1 to 3 August inclusive)
   00 00 06  Total deductible time for Expiration of Enlistment
```

Notice step #5 was used for this problem. Since the day of return from unauthorized absence is 4 August, the last day of deductible time is 3 August, giving us 3 days deductible for the month of August.

Pay Base Date

Introduction

You've read that Pay Base Dates include both active and inactive service. A Pay Base Date is the actual or constructive date of original entry in the service, which is creditable for pay purposes. In this lesson you will learn how to compute or construct a pay base date.

Date Conversion Chart

When you final computation is not a real date, use the 30 Day Rule to convert to a true date (Except in some cases involving February). When computation ends in double zeros, use the Date Conversion chart provided below.

If your computation is:	Your date will be:
88 01 00	87 DEC 31
88 02 00	88 JAN 31
88 02 28	88 FEB 28
88 02 29	88 FEB 29
87 02 29	87 FEB 29*
88 02 30	88 MAR 01
88 02 31	88 MAR 01
88 03 00	88 MAR 01
88 04 00	88 MAR 31
88 05 00	88 APR 30
88 06 00	88 MAY 31
88 07 00	88 JUN 30
88 08 00	88 JUL 31
88 09 00	88 AUG 31
88 10 00	88 SEP 30
88 11 00	88 OCT 31
88 12 00	88 NOV 30
88 00 00	87 NOV 30
88 00 01	87 DEC 01

Comment

If a pay based date computation ends as 29 February, leave as 29 February regardless if the year is a leap year. The year 1988 in the chart above is hypothetical. You can use this chart in any year.

Continued on Next Page

Pay Base Date, Continued

Procedure Table #5 Pay Base Dates

Use the following steps in computing a pay base date:

Step	Procedure
1	List the date of current entry into the Coast Guard
2	Subtract Prior Military Service (active & inactive)
3	Add deductible time for pay (if any)
4	If the result is not a date, convert to a true date using the 30-Day Rule or Date Conversion Chart.

Example #1

MK3 Allen enlisted in the Coast Guard on 15 April 1988. He also has 04 Years 00 months and 00 days of Prior military service. No deductible time.

- Step 1 - List the date of current entry in the Coast Guard

  88 04 15

- Step 2 - Subtract prior military service.

```
   88 04 15  Enlistment Date
-  04 00 00  Prior military Service
   84 04 15
```

Comment

Notice in Step 2 we did not add 1 inclusive day, because 04 00 00 is not a true date, it's a period of time.

Continued on Next Page

Pay Base Date, Continued

Example #2

Let's try one with deductible time involved.

YN3 Herbert enlisted on 22 March 1986 and has 08 days deductible time (1 June 86 to 8 June 86 inclusive). No prior service.

- Step 1 - List the date of current entry in the Coast Guard

  86 03 22

- Step 2 - Subtract prior military service.

```
   86 03 22  Enlistment Date
-  00 00 00  Prior Military Service
   86 03 22
```

- Step 3 - Plus deductible time for pay.

```
   86 03 22  Enlistment Date
-  00 00 00  Prior Military Service
   86 03 22
+  00 00 08  Deductible time
   86 03 30  Convert to:  86 March 30 (pay base date)
```

Comment

Once you arrive at an actual date (one you know is on the calendar do not change it.

Active Duty Base Dates

Introduction

In your reading in Section B, you read that an Active Duty Base Date is the date on which seniority for retirement begins.

Only active time is used.

Procedure Table #6 Active Duty Base Dates

Compute Active Duty Base Date the same way as Pay Base Dates (except only active duty counts), as in computing months on a 30 days basis.

Use the following steps in computing an Active Duty Base Date:

Step	Procedure
1	List date member last entered on active duty.
2	Subtract the amount of previous active duty or active duty for training. **(Weekend drills for reserve do no count.)**
3	Add any deductible time for pay.
4	If the result is not a date, convert to a true date using the 30-Day Rule or Date Conversion Chart on page 19.

Continued on Next Page

Active Duty Base Dates, Continued

Example #1

SK3 Thomas enlisted in the Coast Guard on 19 August 1988. He has prior Active Service in the Marine Corps of 03 years 11 months and 26 days. Not deductible time.

- Step 1 - Determine the date member last entered Active Duty.

  88 08 19

- Step 2 - Subtract the amount of prior Active Duty.

```
   19
 87 07 49
 88 08 19  Enlistment Date
-  03 11 26  Prior Active Duty
 84 08 23
```

- Step 3 - Add any deductible time. **None**

- Step 4 - Convert results into a True Date. **84 August 23**

Comment

Notice an inclusive date was not added, due to 03 11 26 being a period of time and not a true date.

Continued on Next Page

Active Duty Base Dates, Continued

Example #2

Now let's try one using deductible time and prior active service.

ET2 Kerns enlisted in the Coast Guard on 24 August 1987 with 04 years 00 months and 00 days of prior active service. Since enlisting in the Coast Guard he has 8 days of deductible time.

- Step 1 - Date member last entered active duty

  87 08 24

- Step 2 - Subtract the amount of prior Active Duty.

```
  87 08 24  Enlistment Date
- 04 00 00  Prior Active Duty
  83 08 24
```

- Step 3 - Add any deductible time.

```
  87 08 24  Enlistment Date
- 04 00 00  Prior Active Duty
  83 08 24
+ 00 00 08  Deductible time
  83 08 32
```

- Step 4 - Convert to a True Date.

```
  83 08 32
-       30  days
  83 09 02
```

  83 September 02

Comment

Remember the 30-day rule, we have to subtract 30 days from 32 because 30 days is a month. Carry 30 days over to the month's column.

Date of Rank

Introduction

Date of Rank is the actual or constructive date of advancement. The date of rank is for advancement purposes within the present rating and is based on a 30-day month.

Date of Rank

Use the following steps in computing a new Date of Rank for members on active duty:

Step	Procedure
1	List the date of latest advancement or most current date of rank or list the date of latest enlistment.
2	The following rules apply: • Subtract periods of creditable Coast Guard (USCG) or Coast guard Reserve (USCGR) active duty. • Only time previously served in the present or higher pay grade in the USCG or USCGR, under continuous active service conditions within three months of separation is creditable. • Members with broken service (out of service over three months) will have their Date of Rank based on the effective date of their reenlistment. • When calculating prior active service, each month will be considered to have 30 days, unless the active duty was for a period of less than 30 consecutive days. • Members who return to active duty from the CNC program will receive full credit for any TIR formerly creditable prior to their separation under the CNC program. However, to be eligible to participate in SWE competition, they must serve half the minimum TIR required for advancement after returning to active duty.
3	Add deductible time for Pay.
4	If the result is not a true date, convert to a true date using the 30-Day Rule or Date Chart.

Date of Rank, Continued

Example #1 Initial Enlistment

Member enlisted in the USCG on 19 August 1996 as a SR. The member has no prior Coast Guard or Coast Guard reserve service.

- Step 1 - Member enlists in the USCG as E1.

  96 08 19

- Step 2 - Subtract prior USCG/USCGR active service

```
    96 08 19  Date member enlisted in USCG as E1
+   00 00 00  prior USCG/USCGR active service

    96 08 19

    96 08 19  New Date of Rank
```

Example #2 Entered USCG, RELAD, reenlisted USCG in same rate/grade

Member reenlisted in the USCG on 19 August 1996 as a BM3. The member had prior active USCG service from 2 July 1992 to 1 July 1996. During this service the member's pay grade history was as follows:

92 07 02 E1
92 09 10 E2
93 06 01 E3
94 07 01 E4 (BM3)

- Step 1 - Member enlists in the USCG as E4 (BM3)

  96 08 19

Continued on Next Page

Date of Rank, Continued

Example #2 Entered USCG, RELAD, reenlisted USCG in same rate/grade, continued

- Step 2 - Member's prior active service in pay grade E4 or above.

```
   96 07 01  Date of initial expiration of enlistment
-  94 07 01  Date member initially advanced to E4 (BM3)
   02 00 00
        +1
   02 00 01
```

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

```
   96 08 19  Date member enlisted in the USCG as E4 (BM3)
-  02 00 01  Prior USCG/USCGR active service in pay grade E4
             (BM3) or above

   94 08 18

   94 08 18  New Date of Rank
```

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade

Member reenlisted in the USCG on 19 August 1996 as a BM3. The member had prior active USCG service from 2 July 1992 to 1 July 1996. During this service the member's pay grade history was as follow:

92 07 02 E1
92 09 10 E2
93 06 01 E3
94 07 01 E4 (BM3)
96 01 01 E5 (BM2)

- Step 1 - Member enlists in the USCG as E4 (BM3)

96 08 19

Continued on Next Page

Date of Rank, Continued

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade, continued

- Step 2 - Member's prior active service in pay grade E4 or above.

```
    96 07 01  Date of initial expiration of enlistment
-   94 07 01  Date member initially advanced to E4 (BM3)
    02 00 00
          +1
    02 00 01
```

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

```
    96 08 19  Date member enlisted in the USCG as E4 (BM3)
-   02 00 01  Prior USCG/USCGR active service in pay grade E4 (BM3) or
              above

    94 08 18

    94 08 18  New Date of Rank
```

Example #4 Discharged from USCGR, entered USCG in same pay grade

Member was discharged from the USCGR on 27 January 1997 as an E3 and enlisted in the USCG on 28 January 1997 as an E3. The member had prior USCGR service from 6 June 1995 to 27 January 1997. Member has the following pay grade history in the USCGR.

95 06 06 E1
95 07 28 E2
96 11 16 E3

- Step 1 - Member enlists in the USCG as an E3.

97 01 28

Continued on Next Page

Date of Rank, Continued

Example #4 Discharged from USCGR and entered USCG in same pay grade, continued

- Step 2 - Subtract prior USCG/USCGR active service in pay grade E3 or above since 96 11 16 (date first made E3)

	97 01 28	Date member enlisted in the USCG as an E3
-	00 00 00	Prior USCG/USCGR active service in pay grade E3 or above since 96 11 16 (date first made E3). **Member was not on AD during this time frame.**
	97 01 28	
	97 01 28	New Date of Rank

Example #5 Discharged from USCGR and entered USCG in lower pay grade

Member enlisted in the USCG on 3 November 1996 as an SA. The member had prior USCGR service from 5 July 1995 to 2 November 1996 and was on active duty for the following periods:

95SEP07 - 95DEC23
96JUL29 - 96AUG11

Member has the following pay grade history in the USCGR:

95 06 05 E1
95 12 23 E2
96 07 01 E3

Step 1 - Member enlists in the USCG as an E2.

96 11 03

Step 2- Member's prior active service in pay grade E2 or above.
(1) 1 day of ADT on 95 12 23
(2) 14 days of ADT 96 07 29 through 96 08 11 (day for day, since less than 30 days active)

15 days total

Continued on Next Page

Date of Rank, Continued

Example #5 Discharged from USCGR and entered USCG in lower pay grade, continued

- Step 3- Subtract prior USCG/USCGR active service in pay grade E2 or above.

```
  96 11 03  Date member enlisted in the USCG as an E2
- 00 00 15  Prior USCG/USCGR active service in pay grade E2 or above
            (1) 1 day of ADT on 95 12 23
            (2) 14 days of ADT 96 07 29 through 96 08 11

             15 days total

  96 10 18

  96 10 18  New Date of Rank
```

Example #6 Member of USCG advanced, was reduced, discharged, reenlisted USCG (continuous service)

Member enlisted in the USCG on 3 January 1997 as a BM3. The member had prior USCG service from 14 November 1993 to 31 October 1996. Member's pay grade history was as follows:

93 11 14 E1
94 01 30 E2
94 03 01 E3
95 01 01 E4 (BM3)
95 02 01 E3
95 08 01 E4 (BM3)

- Step 1 - member enlists in the USCG as an E4 (BM3).

  97 01 03

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

```
  96 10 30  Date of initial expiration of enlistment (for computation purposes 30
            October 1996 will be used vice 31 October 1996)
- 95 08 01  Date member re-attained the rank of E4 (BM3)
  01 02 29
        +1
  01 02 30  therefore 01 03 00
```

Continued on Next Page

Date of Rank, Continued

Example #6 Member of USCG advanced, was reduced, discharged, reenlisted USCG (continuous service), continued

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 or above (during period 1 August 1995 to 31 October 1996).

```
    97 01 03  Date member enlisted in the USCG as E4 (BM3)
-   01 03 00  Prior USCG/USCGR active service in pay grade E4 (BM3) or
              above (during period 1 August 1995 to 31 October 1996)

    95 10 03

    95 10 03  New Date of Rank
```

Example #7 Member of USCG separated for CNC program, reenlisted in same pay grade

Member reenlisted in the USCG on 8 August 1996 as a YN3. The member had prior USCG service from 9 May 1988 to 3 July 1995.

Member has the following pay grade history in the USCG:

88 05 09 E1
88 07 15 E2
89 01 17 E3
91 06 01 E4 (RM3)
92 09 25 E4 (YN3)

- Step 1 - Member enlists in the USCG as an E4 (YN3).

96 08 08

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

```
  95 07 03  Date of initial expiration of enlistment
- 92 09 25  Date member re-attained the rank of E4 (YN3)
  02 09 08
        +1
  02 09 09
```

Continued on Next Page

Date of Rank, Continued

Example #7 Member of USCG separated for CNC program, reenlisted in same pay grade, continued

- Step3 - Subtract prior USCG/USCGR active service in pay grade E4 or above (same rating during period 25 September 1992 to 3 July 1995)

```
  96 08 08  Date member enlisted in the USCG as E4 (YN3)
- 02 09 09  Prior USCG/USCGR active service in pay grade E4 or
            above (same rating during period 25 September 1992 to
            3 July 1995)

  93 10 29

  93 10 29  New Date of Rank
```

Example #8 Member resumed enlisted status upon termination of appointment as a temporary officer

Member resumed enlisted status in the USCG on 1 June 1996 as a BM1.

Member has the following pay grade history in the USCG:

82 06 14 E1
82 08 20 E2
83 11 16 E3
84 06 09 E4 (BM3)
85 10 01 E5 (BM2)
92 07 01 E6 (BM1)
93 10 19 E6 (OCUI1)
94 03 04 O1E
95 09 04 O2E

- Step 1 - Member resumes enlisted status in the USCG as an E6 (BM1).

  96 06 01

- Step2 - Prior USCG/USCGR active service in pay grade E6 or above

```
  94 03 03  Date of initially appointed as temporary officer
- 92 07 01  Date of member's initial attainment of E6
  01 08 02
        +1
  01 08 03
```

Continued on Next Page

Date of Rank, Continued

Example #8 Member resumed enlisted status upon termination of appointment as a temporary officer, continued

- Step3 - Subtract prior USCG/USCGR active service in pay grade E6

96 06 01	Date member resumed enlisted status in the USCG as E6
- 01 08 03	Prior USCG/USCGR active service in pay grade E6 or above (during period 1 July 1992 to 3 March 1994)
94 09 28	
94 09 28	New Date of Rank

Expiration of Enlistment

Introduction

Expiration of enlistment computations are figured on a **day for day** basis. Only active military service is creditable. This section provides examples of how to compute expiration of enlistment given the term of enlistment, extensions, and any deductible time.

Procedure Table #8 Expiration of Enlistment

Use the following steps in computing Expiration of Enlistment.

Step	Procedure
1	Determine the date of entry into the Coast Guard.
2	Plus term of enlistment
3	Minus 01 day
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the day for day rule.

Note: Review the examples carefully on the following pages to compute an accurate EOE when Extensions and Re-extensions are involved.

Days in the month

When you need to convert to a true date it is very important for you to know how many days are in a given month. Listed below are the number of days in each month.

• Jan - 31 days	• Jul - 31 days
• Feb - 28 days (29 for leap years)	• Aug - 31 days
• Mar - 31 days	• Sep - 30 days
• Apr - 30 days	• Oct - 31 days
• May - 31 days	• Nov - 30 days
• Jun - 30 days	• Dec - 31 days

Continued on Next Page

Expiration of Enlistment, Continued

Example Deductible Time

YN2 Crane enlisted in the Coast Guard on 25 May 1984 for 04 years. He also has 17 days for deductible time for expiration of enlistment purposes.

- Step 1 - Determine date of entry into the Coast Guard.

84 05 25 Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

```
   84 05 25  Date of entry (Enlistment)
+  04 00 00  Term of Enlistment
   88 05 25
```

Step 3 - Minus 01 day

```
   88 05 25
-        01  Day
   88 05 24  Normal Expiration of Enlistment
```

- Step 4 - Plus deductible time for expiration of enlistment

```
   88 05 24
+        17  Days of deductible time
   88 05 41
```

- Step 5 - Convert to a true date using the day for day rule

```
   88 05 41        Subtract the number of days that belong to the
-        31        month in the month's column (in this case May).
   88 06 10        Add the remaining days to the next month(s).
   88 June 10   New Expiration of Enlistment
```

Note

Remember expiration of enlistment is done on a **day for day** basis. So when you need to round up the days to months to make a real date, subtract the number of days that belong to that particular month. For example: if your computation came out as 92 07 43 you would subtract 31 days from the days column (July has 31 days) and add the remainder to the next month. So 92 07 43 would convert to 92 08 12.

Continued on Next Page

Expiration of Enlistment, Continued

Extensions

When computing an expiration of enlistment based on an extension or reextension, always use the date the extension begins, add the period of the extension, and then subtract 1 day to arrive at the new expiration date.

- For extensions, the start date is the date following the normal date of expiration of enlistment.
- For reextensions, the start date is the date following the expiration of enlistment as previously extended.

Example Extensions

PS2 Caldwell enlisted in the Coast Guard Reserve on 29 February 1988 for 08 years. He extended on 29 February 1996 for 4 years.

- Step 1 - Determine date of entry into Coast Guard

  88 02 29

- Step 2 - Plus term of enlistment

```
    88 02 29  Date of entry (Enlistment)
+   08 00 00  Term of enlistment
    96 02 29
```

Step 3 - Minus 01 day

```
    96 02 29
-         01  Day
    96 02 28  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
    96 02 29      First extension start date (day after original or adjusted
+  04 00 00       expiration of enlistment) Plus term of extension.
    00 02 29
-         01      Minus 01 day
     00 02 28
    2000  FEB 28   New expiration of enlistment
```

Continued on Next Page

Expiration of Enlistment, Continued

Example Extension continued

HS2 Hernandez enlisted in the Coast Guard on 31 October 1989 for 04 years. She extended on 31 October 1993 for 2 Years, reextended on 31 October 1995 for 8 months, and is reextending on 1 July 1996 for 4 months.

- Step 1 - Determine date of entry into coast Guard.

```
  89 10 31  Date of entry (Enlistment)
```

- Step 2 - Plus term of enlistment.

```
  89 10 31  Date of entry (Enlistment)
+ 04 00 00  Term of enlistment
  93 10 31
```

- Step 3 - Minus 01 day

```
  93 10 31
-       01  Day
  93 10 30  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
                First extension start date (day after original or adjusted expiration
  93 10 31      of enlistment)
+ 02 00 00      Plus term of enlistment
  95 10 31
-       01      Minus 01 day
  95 10 30      New expiration  of enlistment
```

- Step 5 - Add term of first reextension and subtract 1 day.

```
  95 10 31      First reextension start date
+ 00 08 00      Plus term of reextension
  96 06 31
-       01      Minus 01 day
  96 06 30      New expiration of enlistment
```

- Step 6 - Add term of second reextension and subtract 1 day.

```
  96 07 01      First reextension start date
+ 00 04 00      Plus term of reextension
  96 11 01
-       01      Minus 01 day
  96 11 00      Convert to a real date
  96 10 31
  96 Oct 31     Final expiration of enlistment date
```

Continued on Next Page

Expiration of Enlistment, Continued

Example Extensions continued

MK2 Williamson enlisted in the Coast Guard on 29 March 1988 for 04 years. He extended on 29 March 1992 for 2 years and 2 months, reextended on 29 May 1994 for 09 months, and is reextending on 1 March 1995 for 2 months.

- Step 1 - Determine date of entry into Coast Guard

  88 03 29

- Step 2 - Plus term of enlistment

88 03 29	Date of entry (Enlistment)
+ 04 00 00	Term of enlistment
92 03 29	

- Step 3 - Minus 01 day

92 03 29	
- 01	Day
92 03 28	Normal expiration of enlistment

- Step 4 - Add term of first extension and subtract 1 day

92 03 29	First extension start date (day after original or adjusted expiration of enlistment)
+ 02 02 00	Plus term of extension
94 05 29	
- 01	Minus 01 day
94 05 28	

- Step 5 - Add term of first reextension and subtract 1 day

94 05 29	First reextension start date
+ 00 09 00	Plus term of reextension
94 14 29	
- 01	Minus 01 day
94 14 28	Convert to a true date to arrive at the new
95 02 28	Expiration of enlistment

- Step 6 - Add term of second reextension and subtract 1 day

95 03 01	First reextension start date
+ 00 02 00	Plus term of reextension
95 05 01	
- 01	Minus 01 day
95 05 00	Convert to a true date
95 04 30	
95 Apr 30	Final expiration of enlistment date

Creditable Sea Duty

Introduction

Computation of creditable sea duty is similar to computation of creditable service:

- Consider all months on a 30-day basis. The 31st day of the month does not count **unless** the member serves less than 30 consecutive days.
- Calculate deductible time on a 30-day basis same as deductible time for pay purposes.
- Count TAD on a day for day basis.

  Note: To compute TAD use procedure table #10 located in section E (quick reference tables).

- Creditable sea duty terminates on the 30th calendar day at 2400 after departure on TAD.
- Leave taken in conjunction with TAD is counted as creditable sea service provided the member was entitled to sea pay/time at the start date of the leave.

  Note: Members whose career sea pay stops during periods of TAD or while ashore at a mobile unit are not entitled to career sea pay for periods of leave taken <u>after</u> the career sea pay has stopped. In this case career sea pay will not restart until member reports back to a career sea pay eligible vessel.

- TAD to a qualifying sea pay vessel from a shore unit is creditable sea duty regardless of length of time aboard vessel.
- Time spent enroute from one vessel to another is not creditable.

Continued on Next Page

Creditable Sea Duty, Continued

Procedure Table #9 Creditable Sea Duty

Use the following steps to compute Creditable Sea Duty.

Step	Procedure
1	List the date that the member departed the vessel. This is the ending date. **If the ending date is the last day of the month and not the 30th, change it to the 30th.**
2	Minus the date the member reported to the vessel. This is the beginning date. **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Minus deductible time for pay purposes.
5	Minus any period of TAD after 30 **calendar** days.
6	Plus prior sea time.
7	Convert the results into full years, months and days.

Continued on Next Page

Creditable Sea Duty, Continued

Example #1

Member stationed on CGC STEADFAST from 15 March 1989 to 31 March 1990. Member had not deductible time. While on board member departed TAD to RESTRACEN Yorktown on 2 May 1989 and returned on 5 June 1989.

- Step 1 - List the date member departed the vessel.

  90 03 31 Ending Date

- Step 2 - Minus the date member reported to the vessel.

30	
90 03 31	Ending Date
89 03 15	Beginning Date
01 00 15	

- Step 3 - Plus 01 day for inclusive date.

90 03 30	Ending Date
89 03 15	Beginning Date
01 00 15	
+ 01	Inclusive Date
01 00 16	Creditable Sea Duty

- Step 4 - Minus deductible time. None in this example.

- Step 5 - Minus any period of TAD after 30 days.

89 05 31	Last day of month of departure
89 05 03	Day after departure
00 00 28	
+ 01	Inclusive Date
00 00 29	days TAD in MAY
00 00 04	days TAD in JUN
00 00 33	Total days TAD
- 30	Maximum allowed days TAD creditable for Sea duty
= 03	days lost for TAD
01 00 16	Creditable Sea Duty
- 00 00 03	Lost from TAD
01 00 13	Total Creditable Sea Duty

Continued on Next Page

Creditable Sea Duty, Continued

Example #1 continued

- Step 6 - Plus prior sea time: None, in this example.
- Step 7 - Convert to full years, months, and days

01 Year 00 Months 13 Days

Example #2

In this example we will compute a TAD period when leave is involved

While on board the CGC DALLAS member departed TAD to Support Center New York on 13 March 1990 and returned on 29 April 1990. Member used 5 days leave en route to TAD unit.

- Step 1 - List date following departure on TAD

  90 03 14 Day following date of departure

- Step 2 – Add the number of days Leave used en route to the TAD unit. The result will be the adjusted TAD start date.

```
  90 03 14  Date of departure
+ 00 00 05  Days of leave
  90 03 19
```

- Step 3 - Determine the last day of the month in the month member departed. (Beginning date month)

  90 03 31 Last day of month

- Step 4 - Subtract the beginning date from the last day of month

```
  90 03 31  Last day of month
- 90 03 19  Beginning Date
  00 00 12
```

- Step 5 - Plus 01 day for inclusive date

```
  00 00 12
+       01  Inclusive Date
  00 00 13  Days TAD in March
```

Continued on Next Page

Creditable Sea Duty, Continued

Example #2 continued

- Step 6 - Add remaining days of TAD in the next month(s) up through prior date of return from TAD.

13	Days TAD in March
+ 28	Days TAD in April
41	Total days TAD

- Step 7 - Subtract days leave used en route from TAD unit to permanent unit (if applicable)

  None in this example

- Step 8 - If total is 31 or more subtract any period of TAD over 30.

41	Total days TAD
- 30	Maximum allowed days TAD creditable for sea duty
11	Total days to deduct from sea duty.

Quick Reference Tables

Procedure Table #1

Creditable Service

Step	Procedure
1	List the date of release from the Coast Guard or other Service. (Ending Date) **If date of release is the last day of the month and other than the 30th change to the 30th.**
2	Minus the date entered the Coast Guard or other Service. (Beginning Date) **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Plus any prior military service. (if applicable)
5	Minus deductible time for Pay purposes.

Procedure Table #2

Use the following steps in computing deductible time for Pay (30-day month basis computation).

Deductible time for Pay

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. (Never Change)
2	Determine the date prior to returning to full duty status. This is the Ending Date. If the ending date is the last day of the month and not the 30th, change it to the 30th.
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Comment

Procedure table #2 is used to compute deductible time for all 30-day month based computations (creditable service, pay base date, active duty base date, date of rank and creditable sea duty).

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #3

Use the following steps in computing deductible time for Expiration of Enlistment when unauthorized absence happens within a single month.

Deductible time for Expiration of Enlistment (Single Month)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. **(Never Change)**
2	Determine the date prior to returning to full duty status. This is the Ending Date. **(Never change)**
3	Subtract the Beginning Date from the Ending Date.
4	Add 1 day for inclusive dates.

Procedure Table #4

Use the following steps in computing deductible time for Expiration of Enlistment when unauthorized absence happens within multiple months.

Deductible time for Expiration of Enlistment (Multiple Months)

Step	Procedure
1	Determine the date of departure. This is the Beginning Date. (Never Change)
2	Determine the last day of the month in the month the member departed. (**Don't** change to the 30th) **Example** - if departure date is 20 March the last day of the month would be 31 March.
3	Subtract the Beginning Date from the last day of the month member departed. **Example** - 31 March minus 20 March is 11 days.
4	Add 1 day for inclusive dates (omit if counting actual days on a calendar) Example - 11 days plus 1 inclusive day is 12 days
5	Add remaining days of deductible time in the next month(s). (If any) Example - if member returned on 4 April the deductible days in April would be 3. 12 days from March plus 3 days from April equals 15 days total deductible time.

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #5

Use the following steps in computing a pay base date.

Pay Base Date

Step	Procedure
1	List the date of current entry into the Coast Guard.
2	Subtract Prior Military Service (active & inactive)
3	Add deductible time for **pay** (if any)
4	If the result is not a date, convert to a true date using **the 30 Day Rule or Date Conversion Chart**

Procedure Table #6

Compute Active Duty Base Dates the same way as Pay Base Dates (except only active duty counts), as in computing months on a 30 day basis.

Active Duty Base Date

Step	Procedure
1	List date member last entered on active duty.
2	Subtract the amount of previous active duty or active duty for training. (Weekend drills for reserves do not count.)
3	Add deductible time for **pay** (if any)
4	If the result is not a date, convert to a true date using **the 30-Day Rule or Date Conversion Chart**

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #7

Use the following steps in computing a new Date of Rank:

Date of Rank

Step	Procedure
1	List the date of latest advancement or most current date of rank.
2	Add deductible time for **pay.**
3	If the result is not a true date, convert to a true date using the 30-Day Rule or Date Conversion Chart.

Procedure Table #8

Use the following steps in computing an Expiration of Enlistment:

Expiration of Enlistment

Step	Procedure
1	Determine the date of entry into the Coast Guard
2	Plus term of enlistment
3	**Minus 01 day**
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the **day for day** rule
6	Plus, if applicable, term of extension
7	**Minus 01 day**
8	If the result is not a true date, convert to true date using the **day for day** rule
	Repeat steps 4,5,6,7, and 8, computing any reextensions and/or periods of deductible time

Comment

Remember that deductible time for Expiration of Enlistment is on an actual calendar basis.

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #9

Use the following steps to compute creditable sea duty.

Creditable Sea Duty

Step	Procedure
1	List the date that the member departed the vessel. This is the ending date. (Remember if the ending date is the last day of the month and not the 30th, change it to the 30th.)
2	Minus the date the member reported to the vessel. This is the beginning date. **(Never Change)**
3	Plus one day (01) for inclusive date.
4	Minus deductible time for **pay** purposes.
5	Minus any period of TAD after 30 calendar days.
6	Plus prior sea time.
7	Convert the results into full years, months, and days.

Remember

Creditable sea duty is computed on a 30-day month just like creditable service.

Continued on Next Page

Quick Reference Tables, Continued

Procedure Table #10

Use the following steps in computing Temporary Additional Duty for use in computing creditable sea duty. TAD is computed on a **day for day** basis.

Temporary Additional Duty

Step	Procedure
1	List the date following departure on TAD. **Example** - if date of departure TAD is 20 July, the date following departure is 97 07 21.
2	Add the number of days Leave used en route to the TAD unit (if any). The result will be the adjusted TAD start date. **Example** - 97 07 21 (date following departure day) + 4 (days leave taken enroute) 97 07 25 (adjusted TAD start date)
3	Determine the last day of the month, which the member departed. Don't change to the 30th. **Example** - if TAD beginning date were 25 July the last day of the month would be 31 July. (31 days in July)
4	Subtract the TAD beginning date from the last day of the month member departed. **Example** - 97 07 31 (last day of month) - 97 07 25 (TAD start date) 6 (number of days TAD in July)
5	Add 1 day for inclusive date. **Example** - 31 July minus 25 July = 6 + 1 = 7 days TAD in July
6	Add remaining days of TAD in the next month(s) up through the day prior to the return date. Member returns from TAD 30 August. **Example** - Since day prior to return date is 29 August, add 29 days to the 7 days from July for a total of 36 days.
7	In this example the total is over 30 days therefore the members sea pay/time will stop at 2400 on 97 08 23 and be restarted at 0001 on 97 08 30. (6 days subtracted from members creditable sea service)

Comments

Members are entitled to creditable sea service for periods of leave in conjunction with TAD if the member is drawing career sea pay/time upon commencement of that particular leave. Sea pay/time stops at 2400, the 30th day of TAD. If the member takes leave after sea pay/time has been stopped, there will be no credible sea service for that leave period. Once sea pay/time has stopped it will only resume upon reporting back to the vessel.

Continued on Next Page

Creditable Sea Duty, Continued

Date Conversion Chart

When your final computation is not a real date, use the 30 Day Rule to convert to a true date (Except in some cases involving February). When a computation ends in double zeros, use the Date Conversion Chart.

If Your Computation is:	Your Date Will Be
96 01 00	95DEC31
960200	96JAN31
960228	96FEB28
950229	95FEB29*
960230	96MAR01
960231	96MAR01
960300	96MAR01
960400	96MAR31
960500	96APR30
960600	96MAY31
960700	96JUN30
960800	96JUL31
960900	96AUG31
961000	96SEP30
961100	96OCT31
961200	96NOV30
960000	95NOV30
960001	95DEC01

Comment

(*) If a pay base date computation ends as 29 February, leave as 29 February regardless if the year is a leap year. The year 1996 in the chart above is hypothetical. You can use this chart in any year.

Continued on Next Page

Quick Reference Tables, Continued

The following chart can be used to count actual days in each month.

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
1	1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5	5	5	5
6	6	6	6	6	6	6	6	6	6	6	6
7	7	7	7	7	7	7	7	7	7	7	7
8	8	8	8	8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12	12	12	12	12
13	13	13	13	13	13	13	13	13	13	13	13
14	14	14	14	14	14	14	14	14	14	14	14
15	15	15	15	15	15	15	15	15	15	15	15
16	16	16	16	16	16	16	16	16	16	16	16
17	17	17	17	17	17	17	17	17	17	17	17
18	18	18	18	18	18	18	18	18	18	18	18
19	19	19	19	19	19	19	19	19	19	19	19
20	20	20	20	20	20	20	20	20	20	20	20
21	21	21	21	21	21	21	21	21	21	21	21
22	22	22	22	22	22	22	22	22	22	22	22
23	23	23	23	23	23	23	23	23	23	23	23
24	24	24	24	24	24	24	24	24	24	24	24
25	25	25	25	25	25	25	25	25	25	25	25
26	26	26	26	26	26	26	26	26	26	26	26
27	27	27	27	27	27	27	27	27	27	27	27
28	28	28	28	28	28	28	28	28	28	28	28
29		29	29	29	29	29	29	29	29	29	29
30		30	30	30	30	30	30	30	30	30	30
31		31		31		31	31		31		31

NOTE: You need to add the 29th to February when a leap year occurs.

Overview

Introduction

The objective of this appendix is to establish requirements for reviewing leave and earnings statements and to assist in the verification process.

In this appendix

Description	See Page
You and Your LES	F-1
LES Review and Validation	F-10
Leave Errors on the LES	F-12
Explanation of Complex Areas on the LES	F-13

YOU AND YOUR LES

(Leave and Earnings Statement)

Introduction

The LES contains a monthly accounting of your leave and earnings. This information originates from paperwork submitted by your unit's yeoman at your unit's personnel reporting unit (SPO), and updates the pay and personnel computer system (PMIS/JUMPS). The following is an item-by-item explanation of the more common entitlements, allotments, deductions, etc., which may appear on your LES. If you do not receive a LES on or before the end of the month payday, or if there is an error on your LES, report it to your unit's administration/personnel office immediately. It is also a good idea to let your supervisor know when you have a pay or leave accounting problem.

REMEMBER, YOU ARE RESPONSIBLE FOR ADVISING APPROPRIATE OFFICIALS OF ANY SUSPECTED ERRORS ON YOUR LES. Interest will be assessed on debts to the Government other than routine adjustments unless paid within 30 days or waived by CO, PSC. Failure to report known overpayments could result in administrative and/or disciplinary action being initiated against you.

Block-by-Block Description

Here is a brief description of each block on the LES. Use a copy of one of your recent LESs as an example.

Block	Title	Description
1	PERIOD COVERED	Normally a period of one month.
2	SSN	Your social security number. **Make sure this is correct.**
3	PAY BASE DATE	This is your pay base date, which is your actual or constructive date (adjusted for non-continuous service) of original entry into service on active or inactive duty. This date is extremely important. It is used to determine longevity increases in basic pay.
4	AD BASE DATE	This is your active duty base date, which is your actual or constructive date (adjusted for non-continuous service) of entry onto active duty.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
5	EXP AD TERM DATE	This is your expected active duty termination date. For regular enlisted members, reserve members on active duty, and recalled retirees, this is the date you are expected to fulfill you active duty obligation. For regular officer and reserve officers on extended active duty, this is mandatory retirement date, or date of completion of contracted or obligated service. For reserve officers and enlisted members not on extended active duty, this is the date you were expected to be released from your last active duty period.
6	EXP LOSS DATE	For regular enlisted members, this will be the date you will have no further active duty or reserve military obligation. For regular officers and recalled retirees, this will be equal to block 5. For reserve enlisted members, this is your expiration of enlistment. For reserve officers, this should be your 30-year commissioned-service date.
7	MID-MO	The amount paid on mid-month payday for this period.
8	END-MO	The amount paid on end-month payday for this period.
9	ACCT NR	Your savings or checking account number at the financial institution where your net pay is being deposited.
10	ROUTE NR	Your financial institution's routing number for receiving direct deposit payments.
11	BAL BF	The number of leave days to your credit at the beginning of the PERIOD COVERED. The amount of leave days will be identical to the amount in block 15 of your last month's LES, unless leave days are lost on 1 October (due to excess of 60 days leave).
12	EARN	The amount of leave days you earned during the PERIOD COVERED (normally 2 ½ days per period).
13	USED	The number of leave days processed between last month's document processing cutoff date and this month's cutoff date. The actual days recorded are shown in the "Remarks" section.
14	SOLD-PD	The amount of leave sold during the PERIOD COVERED.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
15	BAL EOM	Your leave balance at the end of the PERIOD COVERED. This amount will be identical to block 11 on your next month's LES, unless leave days are lost on 1 October (due to excess of 60 days leave).
16	LOS PR FY	The amount of leave in excess of 60 days that was lost at the end of the prior fiscal year (1 October).
17	SOLDCTD	The total number of days sold during your military career (after 9 February 1976).
18	USCGR TRA/PAY CAT	A three-character code indicating the reserve member's classification, class and training/pay category.
19	NAME	**MAKE SURE THIS IS CORRECT.**
20	RANK/ RATE/ GRADE	Your pay grade (e.g., W-2, E-5, O-3, etc.) **MAKE SURE THIS IS CORRECT**.
21	COST CODE	This number identifies the unit to which the member is assigned and is used for accounting purposes. Normally only HQ units and district offices have cost codes that differ from unit OPFAC's.
	SPO	Identifies the SPO that maintains the member's records.
	UNIT OPFAC	Identifies the permanent unit to which the member is assigned.
22	MAILING ADDRESS	This is your mailing address. **MAKE SURE THIS IS CORRECT.** **NOTE: This is where your IRS Form W-2 will be sent.**
23	DATE/ AMOUNT	The date and estimated amount of your next month's mid-month payment based on PMIS documents processed to date.
24	DATE/ AMOUNT	The date and estimated amount of your next month's end-month payment based on PMIS documents processed to date.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
25	ENTITLE-MEMTS	Entitlements are amounts earned during the PERIOD COVERED. Some of the most common types of entitlements are: • BASIC PAY; Amount per LES period (usually 1 month) based on your grade and years of service. This income is taxable. • BAH WITH DEP; Basic Allowance for Housing, members with dependents: Paid to members who are on active duty for more than 139 days, and the dependents are not assigned/occupying Government-owned or Government-leased quarters. • BAH II WITH DEP; Basic Allowance for Housing Type II, member with dependents. This entitlement appears in two instances: (1) a member with dependents is on active duty for more than 139 days, and the dependents are assigned to Government-owned or Government-leased quarters (a deduction in the same amount will be shown in block 27, itemized as ADEQUATE QTRS); (2) a reservist, with dependents, is on active duty for less than 140 days. • BAH WITHOUT DEP; Basic Allowance for Housing, members without dependents: Paid to members without dependents when the member is not assigned/occupying Government-owned or Government-leased quarters. Also paid to members married to another service member when the member does not qualify for BAH WITH DEP. • BAH II WITHOUT DEP; Basic Allowance for Housing Type II, member without dependents. This entitlement appears in two instances: (1) a member without dependents is on active duty for more than 139 days and the member is assigned to Government-leased quarters (a deduction in the same amount will be shown in block 27, itemized as ADEQUATE QTRS); (2) a reservist without dependents is on active duty for less than 140 days. • BAH DIFF; Basic Allowance for Housing Difference. This entitlement is paid to members authorized a basic allowance for housing solely by reason the member's payment of child support. It is an amount equal to the difference between BAH II WITH DEP and BAH II WITHOUT DEP. • BAH PARTIAL; Basic Allowance for Housing, partial: Paid to members without dependents who are assigned to shipboard quarters or unit barracks. This allowance is not paid if assigned/occupying Government-leased quarters.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
25 (cont)	ENTITLE-MEMTS (con't)	• CLOTHING BMA and STD; Basic Maintenance Allowance and Standard Maintenance Allowance (Clothing Allowance): Paid only to enlisted members for the purchase/ maintenance of uniform items. • REG BAS and OFF BAS; Basic Allowance for Subsistence: Paid to members assigned to a unit without a Government dining facility. Officers always receive BAS since the Government does not provide meals to officers. • ENL BAS; Enlisted Basic Allowance for Subsistence: A type of BAS paid to enlisted members assigned to a duty station that has a government dining facility. If the member is required to eat meals at the dining facility, there will be a deduction shown in block 27, itemized as DISC MEAL RATE, which partially offsets the ENL BAS entitlement. • CAREER SEA PAY; Career Sea Pay: Paid to eligible members serving onboard a career sea pay eligible vessel. This income is taxable. • CAREER SEA PREM; Career Sea Pay Premium: An additional amount of sea pay paid each month beyond 36 consecutive months of sea duty. This income is taxable.
26	ALLOT-MENTS	Allotments are monthly deductions for direct payments to payees as requested by the member. Some of the most common types of allotments are: BOND - U. S. Savings Bonds CFC - Combined Federal Campaign CGA ASSOC - CG association dues CGMA - CG Mutual Assistance DEPENDENT - support to dependents INSURANCE - insurance premium LOAN - loan payment SAVINGS - savings NAVY M-AID - Navy Mutual Aid Insurance premium HOME MORT - home loan payment VEAP - enrolled in Veteran's Education Assistance Program **NOTE:** If you have enrolled in an educational program under the GI Bill of 1984 or Montgomery GI Bill, you will see "GI BILL" or "MGIB" in this block, even though they are not allotments. They actually reduce your entitlement to base pay and taxable income by the amount contributed during that year. Enrollment in the Reserve Montgomery GI Bill will not be displayed since there is no contribution by the member.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
27	DEDUC-TIONS	Deductions are administrative reductions from your gross pay in compliance with law and regulations. Some of the most common types of deductions are: * ADEQUATE QTRS; Adequate quarters. Members assigned to government family quarters (leased or owned), or single government leased quarters, will have BAH II WITH DEP shown in block 25, and an identical ADEQUATE QTRS amount in block 27. * FEDERAL TAX; Federal tax withholding. The amount withheld is based on your marital status and the number of exemptions shown in block 41, which you claimed when you filed your most recent IRS Form W4. * STATE TAX; State tax withholding. Not every state requires withholding. The amount withheld is based on your marital status and the number of exemptions (or dollar amount) in block 36, which you requested when you filed your applicable state form. * FICA TAX; Federal Insurance Contribution Act withholding, also known as Social Security tax. Only basic pay is subject to this deduction, at a rate determined annually by Congress. * SGLI; Servicemembers' Group Life Insurance. The monthly premium cost of your Government life insurance coverage if you have coverage for yourself only. * SGLI/FAMILY; Family Servicemembers' Group Life Insurance. The monthly premium for member and spouse government life insurance. * TSP-BASE-DEF; Amount contributed to TSP from Base Pay. * TSP-SPEC-DEF; Amount contributed to TSP from Special Pay. * TSP-INCENT-DEF; Amount contributed to TSP from Incentive Pay. * TSP-BONUS-DEF; Amount contributed to TSP from Bonus Pay. * DISC MEAL RATE; Discount Meal Rate. Meal charge for meals provided at a government dining facility. * OVERPAYMENT; The deductions block will also indicate amounts withheld for repayment of overpayments or debts to the Government. **NOTE:** The "Remarks" section at the bottom of the LES will explain the situation; the amount of the original debt, the amount collected this period and the balance due.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
28	AMOUNT BF	The amount brought forward (unpaid balance) from the previous month. It should be identical to the amount in block 33 of the previous month's LES.
29	ENTITLE-MENTS	The total sum of block 25 amounts.
30	ALLOT-MENTS	The total sum of block 26 amounts.
31	DEDUC-TIONS	The total sum of block 27 amounts.
32	NET EARNINGS	Block 28 plus block 29 minus blocks 30 and 31. This is your total take home pay for the PERIOD COVERED by the LES.
33	AMT TO BE CF	Any amount unpaid this period. This amount should be identical to the amount in block 28 on your next month's LES.
34	INCOME YTD	Total income subject to state tax withholding this calendar year including this period.
35	TAX W/H YTD	Total state income tax withheld this calendar year including this period.
36	EXEMPT	Your marital status and number of allowances claimed or the dollar amount of exemption claimed.
37	LEGAL RESIDENC E	The state you claim as your legal residence for state tax purposes.
38	TAX INC THIS PD	Income subject to federal income tax withholding for this period.
39	INCOME YTD	Total income subject to federal income tax withholding this calendar year including this period.
40	TAX W/H YTD	Total federal income tax withheld this calendar year including this period.
41	ALLOW-ANCES	Your marital status and number of allowances claimed for federal income tax withholding purposes.
42	ADD'L W/H	Additional federal tax withheld for PERIOD COVERED as requested on your most recently filed IRS Form W-4.

Continued on next page

YOU AND YOUR LES, Continued

Block-by-Block Description (continued)

Block	Title	Description
43	FICA WAGES	Wages subject to FICA (Social Security) tax withholding for this period.
44	FICA WAGES YTD	Total wages subject to FICA (Social Security) tax this calendar year including this period.
45	FICA TX YTD	Total FICA (Social Security) tax withheld this calendar year including this period.
	REMARKS	This section frequently contains items of importance as well as additional information about your leave and earnings. It may simply call your attention to one of the amounts shown on the LES or it may address other PMIS/JUMPS issues. In any case, the remarks are important, and if you don't understand them, or any other area of your LES, you should get an explanation as soon as possible from your unit's SPO or administrative officer, executive petty officer, or executive officer as appropriate. Don't forget to let your supervisor know as well.

Review and Validation

Purpose

The Review and Validation of the Leave and Earnings Statement is conducted as a cross check to determine if information submitted via the SPO is correct with respect to the related entries on the LES.

Monthly Validation

The SPO shall verify correct posting of documents input to PMIS/JUMPS by reviewing each member's monthly Leave and Earnings Statement (LES). The review shall consist of matching each document submitted (between the last end-month compute cycle cut-off and the current end-month compute cycle cutoff) with related Entitlement, Deduction, and remarks entries on the LES.

If	Then
All documents input during the month have correctly posted to the LES	The entry "Posting Verified Correct" shall be made on the LES and shall be initialed and dated.
One or more documents have not correctly posted to the LES	Conduct research to determine why: • See if document is on the current PMIS/JUMPS Feedback Report. • Research the Recents file and Segments. • Contact PSC (MAS) if these attempts fail. • Enter on the LES "Posting Verified Correct Except _____" with date and initials when cause has been determined. • Track un-posted documents on next month's LES.
A member's LES is missing	Take the following action: • Review the Reporting Endorsement on Orders to ensure that the OPFAC and Cost Center Code are correct for the member. • Contact member's prior unit if member is new, to see if it was forwarded there. • Send an E-mail request to PSC (MAS) for a replacement copy if it's not found.
An entire unit's LES's are not received	Contact PSC (MAS).

Continued on next page

Review and Validation, Continued

Audit of LES Upon Transfer

When a new member reports aboard, the SPO shall:

- Audit the member's first LES at the new duty station and input appropriate documents to stop/start necessary entitlements.
- The entry "Audit of LES Completed" shall be made on the LES with the entry dated and initialed.

Leave Errors on the LES

Purpose

This section denotes procedures if errors in a member's leave balance are discovered during a monthly LES review.

Requests for Audits

PSC (mas) will perform leave audits for discrepancies involving periods over three days. Requests should be researched by the SPO to ensure that the request involves a clear period of leave charged but not taken, or clear discontinuity in the balance shown on the LES.

PSC Action

PSC will take the following action upon receipt of inquiries from SPOs.

If	Then
Member's LES, leave segments (62 & 72), SOI segment (70), and current PMIS documents balance	No further action will be taken.
Member's LES, leave segments (62 & 70), SOI segment (70), and current PMIS documents do not balance	A leave audit will be performed consisting of documents processed during the current and prior fiscal year.

Explanation of Complex Areas on the LES

Purpose

The use of this section is to familiarize the user at a SPO with some of the trouble spots involved with an LES and show methods of resolution.

Computation of Rates of Pay in Items 25 and 27 of the LES

The LES reflects all pay and allowances credited to the member for the period covered by the LES. Rates of pay and allowances are provided in the Coast Guard Pay Manual, COMDTINST M7220.29 (series).

The following pay and allowances are based on a 30 day month:

- Basic Pay
- Officer Basic Allowance for Subsistence
- Basic Allowance for Housing
- Family Separation Housing
- Clothing Maintenance Allowance
- Personal Money Allowance
- Hardship Duty Pay-Location
- Career Sea Pay
- Career Sea Pay Premium
- Responsibility Pay
- Diving Pay
- Special Duty Assignment Pay
- Aviation Career Incentive Pay
- Flight Pay

The following rules apply to pay and allowances which are based on a 30 day month:

Item	Rule	Exception
1	No payment is made for the 31st day of the month	When members serve less than 30 days of active duty. Pay is computed on the actual number of days served (including the 31st day of the month).
2	When a member serves only a portion of a month, pay for that month will be computed at a daily rate of one-thirtieth of the monthly rate.	[redacted]
3	When service begins during a 31 day month and continues through the end of the month, pay will be credited through the 30th day	As provided in Item 1 listed above.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Rates of Pay in Items 25 and 27 of the LES, Continued

The LES reflects all pay and allowances credited to the member for the period covered by the LES. Rates of pay and allowances are provided in the Coast Guard Pay Manual, COMDTINST M7220.29 (series), continued:

Item	Rule	Exception
4	When service begins on the 31st day of the month, pay will not be credited for that day.	As provided in Item 1 listed above.
5	Pay is deducted when an enlisted member is on an unauthorized absence or other nonpay status. One thirtieth of one month's pay will be deducted for each day of absence in a nonpay status. No pay is lost for unauthorized absence on the 31st day of the month.	• When it is the first day of absence. • When the member was credited with pay for the 31st day as stated in Item 1.
6	Any member who enters active service during February and serves at least 30 consecutive days active duty, is entitled to 1 months pay, less the number of days expired before entry on active duty.	[redacted]

The following table illustrates how pay will be computed for members serving at least 30 consecutive days which begin or end in February:

Period Served in Feb		Number of Days Pay
1-28	(28-day month)	30
1-28	(29-day month)	28
1-29	(29-day month)	30
28th	(28-day month)	3
29th	(29-day month)	2
21-28	(28-day month)	10
21-29	(29-day month)	10

Continued on next page

Explanation of Complex Areas on the LES, Continued

Saved Leave Balance (SLB) Statement in Remarks Block

Members on Active Duty on 31 August 1976 will have a SLB statement in the remarks block of the LES.

Under 37 USC 501, Public Law 94-361, effective 1 September 1976 leave accrued and later sold would be paid based solely on a member's basic pay.

The following table gives related information as it occurs in date order.

Date	Saved Leave Balance Effect
31 August 1976	A member's accrued leave balance as of this date became the Saved Leave Balance (SLB) to which the "Saved Leave" provisions apply. • Saved Leave Balance cannot exceed 60 days. • Saved Leave Balance is subject to reduction when leave is taken or sold, and once reduced cannot be restored. • Saved Leave Balance can never be greater than a member's regular leave balance.
Prior to 1 September 1976	Leave accrued prior to this date could be sold based on Basic Pay, plus standard rates for housing and subsistence. Leave accrued on or after this date can be sold based solely on Basic Pay. SLB is "grandfathered", and can be sold based on the pre-1 September 1976 rules.
After 1 September 1976	Following each period of leave taken, or when leave is sold, SLB must be recalculated. To determine if there has been a change in SLB, the following steps must be taken: ▪ Determine the regular leave balance at the end of the month <u>prior</u> to the month in which leave was taken or sold. ▪ Add the number of days that were earned <u>through the day of return from leave/date leave sold.</u> ▪ Subtract the number of days leave taken sold. ▪ If the resulting leave balance is equal to or greater than SLB, SLB remains unchanged. If the resulting leave balance is less than SLB, then SLB is reduced to the newly calculated balance.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Special Accrual of Leave in Excess of 60 Days

(Items 11 and 16 of the LES)

Members assigned to certain types of duty may carry forward up to 90 days of accrued leave into a new fiscal year provided the duty meets the criteria set forth in Article 7-A-15 of the CG Personnel Manual, COMDTINST M1000.6 (series). All such leave in excess of 60 days must be used by the end of the third year following the fiscal year in which the authorizing duty occurred.

Unit commanding officers shall notify PSC (mas) at the end of each fiscal year of those members that they believe qualify for accumulation of leave in excess of 60 days. PSC (mas) will verify each member's entitlement, and make appropriate adjustments. These adjustments will not be made until after the **March** end-month compute cycle, and will be reflected on the **April** LES of qualifying members.

Any member identified by the unit commanding officer who does not qualify for leave carry over under the established criteria will be notified by PSC (mas) in writing (either letter, message, or email as appropriate).

Sold leave in Items 14 and 17 of the LES

Effects of sold leave are as follows:

- Item 14 will show leave sold this pay period.
- Item 17 will show the cumulative amount of leave sold during the member's career.
- The maximum amount of leave sold on or after 9 February 1976 is 60 days.
- SPOs must verify that leave sold is properly recorded in PMIS/JUMPS and reflected in Item 17 of the LES. If the SPO discovers an error in Item 17, they shall notify PSC-Customercare@uscg.mil.

Excess Leave (Items 11 and 12 of the LES)

Specific instructions on computation and checkage of excess leave are contained in Section 2-I, Coast Guard Pay Manual, COMDTINST M7220.29 (series). Items 11, 12 and the Remarks block will indicate when a member enters an excess leave status.

When excess leave situations occur and are not properly reflected on the LES, the SPO shall notify PSC-Customercare@uscg.mil or submit an online trouble ticket.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Reserve Leave

The PMIS/JUMPS system will accrue leave for reserve members while performing active duty with pay for 30 consecutive days or more until there has been a break in the continuous active duty period (e.g., performs a day of IDT, appropriate duty, active duty without pay, or no duty).

The following illustrates various types of Reserve Leave and its effect on the LES.

If	Then
Reserve members earn leave when performing active duty with pay for a period of 30 consecutive days or more	Their leave is accounted for in items 11 through 17 of the LES.
The member is entitled to lump sum leave upon break in continuous active duty with pay	The SPO shall submit Action Code R975. The system allows 30 days for the member's SPO to indicate leave sold on Action Code R 975 and will zero out the leave balance if a R 975 is not submitted. **Note:** If, at the end of an ADT period, the member continues on ADT with no break in active service (ie, "back-to-back" orders), leave may be carried forward or sold at the member's option. Should sale be elected, leave may be sold in half-day increments up to the member's leave balance at the time of entitlement.
Leave errors are detected on a reserve member's LES	Errors shall be handled the same way as for active duty members. Refer back to the section on leave errors in this chapter.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Leave Nonaccrual

(Items 11 and 12, and Remarks Block of the LES)

A member does not earn (accrue) leave under the following circumstances:

- Unauthorized absence (more than 24 hours).
- Custody by civil authorities.
- Sickness due to misconduct.
- Confinement adjudged by a court-martial.
- Excess leave.
- Leave without pay.
- Indefinite leave granted personnel awaiting appellate review of courts-martial.
- Active duty of less than 30 days.

General Leave Non-accrual Rules

The following are general rules for computing leave non-accrual:

- No more than 2.5 days leave accrual can be deducted for any full calendar month.

- For partial calendar months, the number of days of non-accrual may not exceed the number of days that could have been accrued during that period.

- The number of days of leave non-accrual will be computed on a day-for-day, month-for-month basis, including the 31st day of a 31-day month and counting February as 28 days (29 in a leap year). See examples on the following pages.

- Any group of consecutive leave days that occur in one month will be treated as a single period. Any groups of non-consecutive leave days that occur in one month will be considered separate periods when determining the amount of leave non-accrual (not to exceed 2.5 days per month). See examples on the following pages.

- Per the provisions of Chapter 7 of the CG Personnel Manual, COMDTINST M1000.6 (series), leave non-accrual is considered deductible time for which pay and allowances will be forfeited. PSC (mas) will take the necessary actions to debit a member's account for non-accrued time as soon as it is identified. Debits for leave non-accrual are to be made at the rates that were in effect during the last good leave period(s) in the member's record. Note: Leave non-accrual debits are always manually computed since the last good leave period(s) is(are) often "out of range" (ie, more than three months in the past).

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-accrual for Periods Within the Same Month

The following tables provide three scenarios involving leave non-accrual periods within a single month.

Scenario #1:

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89May01 - 89May02	2 Days	0.5 Day
89May04 - 89May10	7 Days	0.5 Day
89May12 - 89May24	13 Days	1.0 Day
Total	22 Days	2.0 Days

Note: Member could accrue only 1.0 day of leave from 5/1 through 5/10 and a total of 2.0 days up to 5/24.

Scenario #2:

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89May04 - 89May10	7 Days	1.0 Day
89May15 - 89May27	13 Days	1.5 Days
Total	20 Days	2.5 Days

Note: Member has lost all leave accrual as the periods of non-accrual covered periods that could have earned leave during the month.

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-accrual
For Periods Within the Same Month,(Continued)

Scenario #3:

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89May01 - 89May02	2 Days	0.5 Day
89May15 - 89May20	6 Days	0.5 Day
89May25 - 89May31	7 Days	1.0 Day
Total	15 Days	2.0 Days

Note: This is different from scenario 1 as the total days are less, but leave days non-accrued are the same based on the periods of leave covered.

Computation of Leave Non-accrual when Period Bridges Two Months

When the leave non-accrual period bridges two months, the leave forfeited for each month is calculated separately. Two scenarios are presented below.

Scenario #1: Member in non-accrual status 89Feb27 - 89Mar02

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Feb27 - 89Feb28	2 Days	0.5 Day
89Mar01 - 89Mar02	2 Days	0.5 Day
Total	4 Days	1.0 Day

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-accrual when Period Bridges Two Months (Continued):

Scenario #2: Member in non-accrual status 89Jul11 - 89Aug02

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Jul11 - 89Jul31	21 Days	2.0 Days
89Aug01 - 89Aug02	2.0 Days	0.5 Day
Total	23 Days	2.5 Days

Note: Deductible days are counted day-for-day based on the calendar month.

Computation of Leave Non-accrual When the Period Extends More Than Two Months

Two and one half days leave will be forfeited for each whole calendar month involved. Days in the beginning and ending months will be treated as a period bridging two months. The following three scenarios represent leave non-accrual for periods extending more than two months.

Scenario #1: Member in non-accrual status 89Feb26 - 89May02

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Feb26 - 89Feb28	3 Days	0.5 Day
89Mar01 - 89Mar31	31 Days	2.5 Days
89Apr01 - 89Apr30	30 Days	2.5 Days
89May01 - 89May02	2 Days	0.5 Days
Total	66 Days	6.0 Days

Continued on next page

Explanation of Complex Areas on the LES, Continued

Computation of Leave Non-Accrual When the Period Extends More Than Two Months, (Continued)

Scenario #2: Member in non-accrual status 89Jan18 - 89Mar31

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Jan18 - 89Jan31	14 Days	1.5 Days
89Feb01 - 89Feb28	28 Days	2.5 Days
89Mar01 - 89Mar31	31 Days	2.5 Days
Total	73 Days	6.5 Days

Scenario #3: Member in non-accrual status 89Jul27 - 89Sep13

Period Subject to Non-Accrual	No. of Days in Period	No. of Days Non-Accrual
89Jul27 - 89Jul31	5 Days	0.5 Day
89Aug01 - 89Aug31	31 Days	2.5 Days
89Sep01 -89Sep13	13 Days	1.5 Days
Total	49 Days	4.5 Days

Continued on next page

Explanation of Complex Areas on the LES, Continued

Effect of Leave Non-Accrual on Pay & Allowances

The following two scenarios illustrate the effect of leave non-accrual on pay and allowances.

Scenario #1

Leave Dates	No. of Days of Non-Accrual
97Feb15 – 97Feb19 (5 days annual leave)	None
97Jun20 (1 day excess leave)	0.5 non-accrued

Note: Since leave non-accrual is time for which pay and allowances are not due nor payable, PSC (mas) would in the above scenario debit one-half day of the pay and allowances to which the member was otherwise entitled on 97Feb19, the last good leave period in the member's record. PSC (mas) generates debits based on a report of leave non-accrual that is run with each end-month compute cycle. Members who have non-accrued time for any reason (excess leave, etc.) can expect to see their pay debited for the non-accrued period(s) in the month immediately following the month in which the non-accrued time posted to their LES.

Scenario #2

Leave Dates	No. of Days of Non-Accrual
97Mar31 – 97Apr01 (2 days annual leave)	None
97Apr05 (1 day excess leave)	0.5 non-accrued
97Apr12 – 97Apr18 (7 days excess leave)	1.0 non-accrued

Note: In this scenario PSC (mas) would debit one-half day of the pay and allowances to which the member was otherwise entitled on 97Apr01 for the non-accrual chargeable for the 1 day of excess leave on 97Apr05 and one-half day of the pay and allowances to which the member was otherwise entitled on both 97mar31 and 97Apr01 for the non-accrual chargeable for the 7 days of excess leave on 97Apr12-97Apr18. Note that the member would only be debited on 97Mar31 in this scenario for daily rate items such as Leave Rations as he/she had no entitlement to monthly rate items (Basic Pay, BAH, etc.) on that date.

Continued on next page

Explanation of Complex Areas on the LES, Continued

SLB Reduction Example

The following are examples of how Saved Leave Balance is reduced and the end result as posted on the LES.

On 31 August 1976, member's leave balance was 50 days. All 50 days became SLB. August 1976 end-month LES would show BALANCE EOM 50.0, SAV LV BAL 50.0

On 23 May 1977, the member returned from 20 days leave. At this time, the member had a 72 day leave balance prior to charging the 20 days leave. Subtracting the 20 days leave reduced the leave balance to 52 days. Since this 52 day leave balance exceeded the 50 day SLB balance, no SLB reduction resulted. May 1977 end-month LES would show BALANCE EOM 52.5, SAV LV BAL 50.0.

On 30 August 1977, the member returned from 13 days leave. Leave balance prior to charging leave was 60 days. Subtracting the 13 days leave taken reduced the leave balance to 47 days. Since this 47 day leave balance was less than the 50 day SLB balance, SLB was reduced from 50 to 47 days. August 1977 end-month LES would show BALANCE EOM 47.0, SAV LV BAL 47.0

On 5 October 1977, the member returned from 10 days leave. Subtracting this 10 days leave from a leave balance of 50.0 equals 40.0 October 1977 end-month LES would show BALANCE EOM 42.0, SAV LV BAL 40.0

On 11 January 1978, the member reenlisted and wanted to sell 10 days leave. The member should be advised that sale of 10 days leave would result in an SLB reduction. This is because on 11 January 1978, the member has a total leave balance of 48.0, composed of 40 days SLB and 8 days non-SLB. If the member does not want to reduce the SLB balance, he/she should sell no more than 8 days leave. Should the member at this point elect to sell 8 days non-SLB leave, his/her remaining lump sum leave entitlement will be: 52 days total leave, of witch 40 days are worth the higher SLB rate.

Subject	Page
A	
Abbreviations; Foreign Country	E-9-2
Abbreviations; Standard for Transfer of Personnel	Encl (2)
Abbreviations; State & U. S. Possessions	E-9-1
Absence, Unauthorized	10-B-5
Absentee; Reporting Return of	10-B-11
Accelerated Payment of SRB, Requesting	6-C-5
Accessions	3-A-1
Accounting Data for TDY	2-B-46
Active Duty Extensions of Reservists	3-C-7
Active Duty For Special Work (ADSW)	2-D-1
Active Duty for Training (ADT)	2-C-1
Advance of Federal Earned Income Credit (EIC)	8-B-2
Administrative Remarks	10-A-2 & Encl (6)
Administrative Review of the Enlisted Employee Review (EER) Worksheet	10-A-9
Advances; Pay, BAH, OHA, and Interim HA	6-B-5
Allotment Checklist	8-A-4
Allotments and Bonds	8-A-2
Amendments to TDY Orders	2-B-21
Annual Reserve Retirement Point Statement	6-D-14
Annual Reserve Screening Questionnaire	2-C-7
Annual Verification of BAH, Dependency, Beneficiaries, SGLI, and Emergency Data	5-C-2
Appellate Processing	10-B-4d
Armed Forces ID Cards	5-D-6
Assignment/Termination of Government Quarters	5-D-14
Automatic Stops of Pay & Allowances (due to PCS)	2-A-8
Aviation Career Incentive Pay (ACIP)	7-A-2
Awards; Reporting	10-A-3
B	
BAH/Dependency Data Form	5-B-4
Beneficiaries and Emergency Contracts, Designation of	5-A-2

Subject	Page
C	
Career Status Bonus (CSB)	7-D-2
Casualty Reporting	5-A-14 & E-7-1
Civil Arrest, Reporting	10-B-14
Collection of Other Debts	9-A-4
Collections, In-Service Debt	9-A-2
Combat-Related Injury Rehabilitation Pay	7-A-11
Combat SGLI Allowance	7-B-10
Commanding Officer Advancement Checklist	4-A-4
Commanding Officer Advancement Process	4-A-3
Common Access Card (CAC)	5-D-6
Company Commander Insignia	4-C-8
Computation of Service	Appendix (C)
Confinement Processing	10-B-4a
Contacting the Personnel Service Center	1-6
Continuance on Active Duty	3-C-1
Conviction, Reporting	10-B-14
Corrections/Changes of Name or SSN, DOB, or Minority Designator	5-D-17
Courts-Martial Checklists	10-B-3
D	
Death Gratuity	6-B-7
Decedent Affairs	5-A-1
Dependency Changes	5-B-2
Dependent Affairs	5-B-1
DEERS	5-B-16
Demobilization Checklist, Unit	11-49
Demobilization Process, The	11-47
Demobilization Procedures, SPO	11-51
Deserter, Reporting Return of	10-B-11
Desertion	10-B-8
Direct Deposit	6-A-2
Directives Referenced	1-16
Disability Processing	6-D-16
Discharge, Checklist for	3-B-22
Discounted Meal Rate (DMR)	7-B-2
Drill Orders	6-D-6

Subject	Page
E	
Educational Accomplishments	4-C-2
Employment Verification	5-D-12
Enlisted Advancements	4-A-1
Enlisted Employee Review (EER) Worksheet for Units Without Access To Direct Access	10-A-4
Enlisted to Cadet Status Processing	3-B-14
E-Resume	5-D-13
Extensions, Checklist for	3-C-3
Extensions, Voluntary	3-C-2
F	
Family Separation Allowance (FSA)	7-B-3
Family Subsistence Supplemental Allowance (FSSA)	7-B-8
Fax of PCS Advance Requests	2-A-12
Federal Income Tax Withholding	8-B-2
Federal or State Tax Adjustments, Requests for	8-B-15
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
Forms Referenced in this Manual	1-19
Funeral Duty Pay for Reservists	7-A-8
G	
Garnishment (Involuntary Allotment)	9-A-4
Government Quarters, Assignment/Termination of	5-D-14
H	
Headquarters Advancement Checklist	4-A-2
High Pressure Chamber Hazardous Duty Incentive Pay	7-A-5
Home Address Change	5-D-11
Hostile Fire Pay	7-A-6
I	
Identification Cards (Active Duty, Reserve, and Retired)	5-D-6
Identification Cards (Dependent)	5-B-8
IDT Certification	6-D-11

Subject **Page**

I (continued)

Immediate Enlistment in Coast Guard Reserve upon Discharge from the Regular Coast Guard	3-C-8
Immediate Enlistment of Reserve Members on Extended Active Duty In the Regular Coast Guard	3-C-9
Imminent Danger Pay	7-A-6
Inactive Duty Pay Prerequisites	6-D-2
Inactive Duty Pay Process	6-D-4
Indebtedness	9-A-2
Individual's Record of Small Arms Training	4-C-4
Involuntary Transfer or Recall of SELRES for Unsat Participation	2-E-12
IRS Tax Levy	9-A-4

J

Junior Enlisted Reserve Assignment (Other)	2-E-5
Junior Reserve Officer and Senior Reserve Enlisted Assignments	2-E-2

L

Leave and Earnings Statement (LES)	6-A-3, App F
Leave and Liberty Combined with TDY Travel	2-B-24
Leave Authorization	5-D-2
Leave Carried over in Excess of 60 Days	5-D-4
Lump Sum Payments for VEAP or MGIB-K Programs	4-C-5

M

Medical Readiness (Reserve Mobilization)	11-50
Message Order, Authenticated Original	2-B-34
Minority Designator, Corrections/Changes of	5-D-17
Mobile Unit Personnel, Payment of	6-C-2
Mobilization Checklist	1-23
Mobilization Orders	11-6
Mobilization Orders, Extension of	11-45
Mobilization Procedures, SPO	11-26
Mobilization Process	11-2
Monthly Verification Procedures (Reserve Mobilization)	11-44
Move-In Housing Allowance (MIHA)	7-B-7

Subject	Page
N	
Name Change	5-D-17
NATO Travel Order	2-A-10
Net Pay Advice Message	6-A-5
Non-Judicial Punishment (NJP) Checklist	10-B-2
Nonreceipt of an Allotment or Bond	8-A-5
Nonreceipt of Pay	6-B-3
Nonreceipt of W-2 Form	8-B-12
O	
Officer Uniform Allowance Claim Worksheet	7-B-9
Offline Payments template	6-B-5
Order (PCS Transfer Process)	2-A-2
Order (Reserve, ADT)	2-C-2
Order (TDY)	2-B-2
Other Entitlements When Mobilized	11-21
Overpayments	9-A-2
Overseas Housing Allowance (OHA)	7-B-7
Overseas Transfer, Checklist for	2-A-7
P	
Patrol Forces Southwest Asia (PATFOR SWA), PCS to	2-F-1
Passport, Issuance/Termination of	5-D-21
Pay (Mobile Unit)	6-C-2
Pay (Recruits)	6-C-4
Pay (Reserve)	6-D-1
Pay Entitlements Affected by TDY	2-B-26
Pay Entitlements When Mobilized	11-8
Payment of Inactive Duty Reservists	6-B-3
Payment Option Election (POE)	6-A-2
Permanent Change of Station (Departing), Checklist for	2-A-3
Permanent Change of Station (PCS)	2-A-1
Permanent Change of Station (SPO Reporting), Checklist for	2-A-6
Permanent Change of Station (Unit Reporting), Checklist for	2-A-5

Subject **Page**

P (continued)

Permissive Travel Authorization	5-D-16
Personal Clothing & Equipment Record	5-D-9
Personnel Data Extract (PDE)	5-C-9
Personnel Data Information File (PDIF)	5-C-8, E-5-1
Phone Calls, Rules for Claiming	2-B-44
Private Damages	9-A-4

R

Recalled Retired Members	3-A-5
Recalled RET-2 Members	3-A-5
Recall of Retirees	3-C-7
Reenlistments	3-C-2
Reenlistment, Checklist for	3-C-3
Reextensions, Voluntary	3-C-2
Reimbursement Methods for TDY	2-B-38
RELAD Assignments: E-2 – E-6	2-E-4
Release from Active Duty (RELAD), Checklist for	3-B-21
Remissions	9-B-2
Reporting Civil Arrest or Conviction	10-B-14
Reserve Family Member Identification Card	5-B-12
Reserve Junior Enlisted Assignments Waiting Lists	2-E-6
Reserve Retirement Separations	3-B-26
Reservists, Funeral Duty Pay for	7-A-8
Retention of Members in a Non-Pay Status or in Military Confinement	3-C-6
Retention of Members in a Pay Status (Other than Military Confinement)	3-C-5
Retired Members, Recall of	11-30
Retired Pay Projection Request	6-B-8
Retirement, Checklist for	3-B-23
Retirement Separations, Reserve	3-B-26
Return of Absentee or Deserter, Reporting	10-B-11

Subject	Page
S	
Savings Deposit Program	7-C-1
Security Clearances	5-C-10
Separations	3-B-1
Separation Travel Order	3-B-13
Servicemembers' Group Life Insurance (SGLI)	5-A-4
SGLI Family Member Coverage	5-A-11
Signature of Responsible Officer	1-6
Social Security Number Change	5-D-17
Special Payments	6-B-3
SPO Demobilization Procedures	11-51
SPO Mobilization Procedures	11-26
Standard Abbreviations for Transfer of Personnel	Encl (2)
Standard Separation Letters	Encl (4)
State Income Tax Withholding	8-B-3
State of Legal Residence	8-B-3
State Tax Listing	8-B-4
Statement of Creditable Service, Requesting	5-C-5
T	
Taxes (Federal)	8-B-2
Taxes (State)	8-B-3
Temporary Duty, Checklist for	2-B-35
Temporary Duty (TDY)	2-B-1
Temporary Duty Order, Preparation of	2-B-29
Temporary Duty Reimbursement Methods	2-B-37
Thrift Savings Plan (TSP)	8-C-2
Training and Educational Accomplishments	4-C-2
Transcript of Sea Service (TOSS)	5-C-11
Transfer from IRR/ISL/ASL to SELRES	2-E-8
Travel Claim	2-B-4
Travel Claims during Mobilization Status	11-33
Travel Claim, Manual Submission of	2-B-41
Travel Entitlements When Mobilized	11-17
Travel Preparation and Examination System (T-PAX)	2-B-5
Travel Orders, Blanket	2-B-22

Subject **Page**

T (continued)

Travel Orders, Group 2-B-23
Travel Orders Letter (Example) 2-B-32
TRICARE Benefits (Reserve Mobilization) 11-53
TRICARE Dental Program 5-B-6
Types of Mobilization 11-5

U

Unauthorized Absence 10-B-5
Uniform Allowance Claim (Officer) 7-B-9
Unit Demobilization Checklist 11-49
Unliquidated Travel Advances 9-A-4

V

Veterans Educational Assistance Program (VEAP) 4-C-5
Voluntary Transfer from SELRES to IRR/ISL/ASL 2-E-10

W

W-2 Form 8-B-12
Waiver of Pension/Disability Compensation or Retired Pay 6-D-12
Waivers of Claims for Erroneous Payments 9-B-3
Warrant Officer Appointments 4-B-1
Warrant Officer Appointments Checklist 4-B-3
Warrant Officer Appointments Process 4-B-2
Warrant Officer Appointments Process (Reserve) 4-B-4