U.S. Department of
Homeland Security

United States
Coast Guard

*P*ersonnel and *P*ay *P*rocedures *M*anual

"An indispensable resource for field unit personnel administrators"

PPCINST M1000.2B
October 2012

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

COMMANDING OFFICER
U. S. COAST GUARD
PAY & PERSONNEL CENTER

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PAY & PERSONNEL CENTER INSTRUCTION M1000.2B

Subj: PERSONNEL AND PAY PROCEDURES MANUAL (PPPM)

1. Purpose

This manual establishes personnel and pay administration procedures.

- It provides guidance to field units on how and when to report personnel actions to the Servicing Personnel Office (SPO) so personnel information is quickly and accurately entered into the personnel management system (Direct Access)/Joint Uniform Military Pay System (DA/JUMPS).
- It applies to all field units within the Coast Guard.

2. Action

All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, and chiefs of headquarters staff elements are requested to ensure compliance with this manual. Internet release is authorized.

3. Directives Affected

This manual supersedes PPCINST M1000.2A, Personnel and Pay Procedures Manual (PPPM), which is cancelled. It is a reissuance of the original PPPM, updated to reflect the change of name for Pay & Personnel Center. It includes the contents of the previous PPPM through change 13 and incorporates new information which was slated for addition to the PPPM in change 14.

4. Disclaimer

This guidance is not a substitute for applicable legal requirements, nor is it itself a rule. It is intended to provide operational guidance for Coast Guard personnel and is not intended to, nor does it impose legally-binding requirements on any party outside the Coast Guard.

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DISTRIBUTION - SDL No. 1xx (Note: This manual distributed electronically only.)

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*NON-STANDARD DISTRIBUTION:

5. Environmental Aspect and Impact Considerations

a. The development of this Instruction and the general policies contained within it have been thoroughly reviewed by the originating office in conjunction with the Office of Environmental Management, and are categorically excluded (CE) under current USCG CE # 33 from further environmental analysis, in accordance with Section 2.B.2. and Figure 2-1 of the National Environmental Policy Act Implementing Procedures and Policy for Considering Environmental Impacts, COMDTINST M16475.1 (series). Because this Instruction contains guidance on, and provisions for, compliance with applicable environmental mandates, Coast Guard categorical exclusion #33 is appropriate.

b. This directive will not have any of the following: significant cumulative impacts on the human environment; substantial controversy or substantial change to existing environmental conditions; or inconsistencies with any Federal, State, or local laws or administrative determinations relating to the environment. All future specific actions resulting from the general policies in this Instruction must be individually evaluated for compliance with the National Environmental Policy Act (NEPA), DHS and Coast Guard NEPA policy, and compliance with all other environmental mandates. Due to the administrative and procedural nature of this Instruction, and the environmental guidance provided within it for compliance with all applicable environmental laws prior to promulgating any directive, all applicable environmental considerations are addressed appropriately in this Instruction.

6. Procedures

No paper distribution will be made of this Manual. An electronic version will be located on the following Pay & Personnel Center web sites. Internet: http://www.uscg.mil./ppc/3pm.asp, and CGPortal: https://cgportal.uscg.mil/delivery/Satellite/PPC.

7. Summary of Changes

References to commands and Headquarters offices have been updated to reflect the current Coast Guard organizational structure. Changes to procedures in previously issued ALCOAST and ALSPO messages have been incorporated as well as legislatively mandated changes. References to elements of the legacy Personnel Manual have been updated to reflect newly promulgated Manuals. A side bar in the margin marks the significant changes.

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7. Summary of Changes (cont'd)

Significant changes include:

Chapter 1: Added "Adverse Administrative Remarks (CG-3307) Entries" to list of restrictions to "By direction authority". Removed language and exhibit pertaining to delegation of SPO data entry responsibilities to units.

Chapter 2-A: Added requirement to ensure member does not have any outstanding TPAX travel claim audits pending to the PCS Departing Checklist.

Chapter 2-B: Removed requirement to include SSN on checks (written by members) for repayment of travel debts. The requirement to include the TONO is sufficient identification of the payment. Removed requirement for excess baggage/airline baggage fees to be pre-authorized on the TDY travel order. Authorizing Officials may approve expenses for excess baggage/airline baggage fees without the authorization appearing on the order.

Chapter 2-F: Updated PATFORSWA mailing address for SPO PDRs.

Chapter 3-B: Incorporated policies and procedures for Survivor Benefit Plan (SBP) as promulgated in ALCOAST 022/08. Requests for reserve retirement or transfer to RET-2 status shall be forwarded, by the unit, directly to CGPSC (rpm-2) for approval. It is no longer necessary to route requests via the District.

Chapter 7-B: Added decision table for entitlement to FSA-T for Reserve Component members.

Chapter 8-A: Removed procedures for Bond allotments. Added "Treasury Direct" as an allotment type.

Chapter 8-B: Added Ohio and New Mexico as states that exempt active duty military pay from tax if member is not stationed in the state. Added Kentucky and Oklahoma as states that exempt all military earnings from state tax.

Chapter 11: Divided into two sections. Section 11-A provides procedures for mobilization under 10 U. S. C. and section 11-B provides procedures for mobilization under 14 U. S. C.

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7. Summary of Changes (cont'd)

Enclosure 4: Added information and section for Notarization for SBP election.

Enclosure 7: Removed SSN and replaced with Employee ID Number (EMPLID) for use on Personnel Casualty Report Message and notification letters.

Enclosure 11: Updated unit name and email address.

8. Forms and Reports

The forms referenced in this Manual are available in USCG Electronic Forms on the Standard Workstation or on the Internet: http://www.uscg.mil/forms/; CG Portal at https://cgportal.uscg.mil/delivery/Satellite/CG611/FORMSs; and Intranet at http://cgweb.comdt.uscg.mil/CGForms.

9. Comments and Recommendations

PPC 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 PPC (P&D) at PPC-PF-PD@uscg.mil.

/ /
S. L. LEBRUSKA

Record of Changes

Change Number	Dated	Date Entered	Signature of Person Entering Change

Note: Additional/Replacement copies of this manual instruction or changes may be obtained by downloading them from http://www.uscg.mil/ppc/3PM.asp

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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.

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1.1 Responsibilities

1.1.1 Reference

(a) United States Coast Guard Regulations 1992, COMDTINST M5000.3(series)
(b) Certifying and Disbursing Manual, COMDTINST M7210.1 (series)

1.1.2 Introduction

Direct Access (DA) and the Joint Uniform Military Pay System (JUMPS) exist as parts of the overall Coast Guard Personnel System. Six players (entities) within this system have a responsibility to ensure the system functions properly.

1.1.3 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	Members are responsible for the following: • Reporting changes in mailing address (including allotments.) phone numbers and e-mail addresses. • Understanding the LES and reporting any discrepancies via the chain-of-command. • Understanding the Retirement Point Statement and reporting any discrepancies via the chain-of-command (Reservists). • Reporting changes in family/dependent status. • Reporting occasions of moving into or out of government owned or leased quarters. • Reporting changes in allotments or direct deposit. • Advising CO/OIC of reenlistment/extension intentions. • Submitting E-Resume. • Providing any other personnel data and supporting documentation as requested. • Filing travel claims for self and dependents, if applicable, within three days of reporting to a new PDS or returning from TDY. • Maintaining a file of historical travel, personnel and pay transactions. Should a member challenge a travel, pay or personnel action, the member will be required to produce documentation necessary to substantiate the member's contention.

Continued on next page

1.1 Responsibilities, Continued

1.1.3 Entities (cont'd)

Unit CO	Unit commanding officers/officers in charge are responsible for the following personnel actions: • Completing Enlisted Employee Reviews and ensure they are completed no later than 30 days after the reporting period. • Preparing correspondence for the unit. • Authorizing and submit Leave Authorizations. • Endorsing E-Interviews. • Conducting pre-discharge interviews. • Granting interim security clearance, requesting final security clearance from Adjudication Facilities or granting/suspending access to classified information if required and for the conduct of briefings/debriefings. • Maintaining Unit Personnel Data Records (PDRs) as per PDR Manual (COMDTINST M1080 (series)). • Providing data and supporting documentation in support of personnel/pay actions for members. • Conducting annual reviews of BAH, Dependency and Emergency Data as prescribed by this Manual. • Ensuring compliance with the Coast Guard weight and body fat standards program. • Reviewing orders for attached personnel (Airport Terminal). • Maintain Security for Direct Access by keeping on file the original CG-7421B* and checking the Direct Access Department Role Query** on a quarterly basis to confirm access levels for unit personnel. • Reviewing and forwarding/releasing travel claims within 2 days of receipt from member. Units with insufficient administrative capability (See "non-administrative shore unit", in Section 7-1.1.c of reference (a)) should seek assistance from their Sector/Group Commander in completing these tasks. Per, section 3-1-7.b of reference (a), the Sector/Group commander is charged with providing "support" for functions performed by assigned subordinate units. *Form: http://www.uscg.mil/ppc/forms/ **Procedure: http://www.uscg.mil/ppc/ps/self_service/commands/user_role_query.htm

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1.1 Responsibilities, Continued

1.1.3 Entities (cont'd)

Servicing Personnel Office	Servicing Personnel Offices (SPOs) provide support to commanding officers/offices in charge by recording complex pay and personnel events in the DA/JUMPS system. Even though the SPO has responsibility for DA/JUMPS data entry, the unit commanding officer/officer in charge is not relieved of an authority or responsibility for personnel management functions. The event which results in the generation of DA/JUMPS transactions must still originate at the member's parent unit and must be accurately communicated to the SPO as prescribed in this manual. SPO staff members, who are authorized and designated Payment Approving Officials (PAOs) in accordance with section 1.6 of this manual, certify transactions for payment by the Authorized Certifying Officer (ACO) at PPC. SPOs are responsible for: • Maintaining SPO PDRs on all officers and enlisted members. • Providing expiration of enlistment/expiration of reserve orders information including those personnel needing physicals and pre-discharge interviews and the information necessary to conduct the initial interview. • Providing information feedback to the unit. • Investigating and resolve personnel and pay problems. • Ensuring that all DA/JUMPS transactions are supported by correctly executed (properly filled out and signed) documentation including source documents, forms, worksheets, and checklists. • Ensuring that required transactions are submitted within 2 working days of an event affecting a member's pay. • Ensuring that 99 percent or more of DA/JUMPS transactions successfully process on initial submission. • Taking corrective action on erroneous transactions within 1 update cycle after notification via the DA/JUMPS error feedback report.

Continued on next page

1.1 Responsibilities, Continued, Continued

1.1.3 Entities (cont'd)

Pay & Personnel Center (PPC) Topeka	• 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 CGPSC for official issuance. • Develop written procedures to support all areas of personnel and pay policy. • Process Travel Claims. • The ACO at PPC certifies transactions/vouchers prior to release of funds by the U. S. Treasury.
Coast Guard Personnel Service Center (CGPSC)	• 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.

1.2 Information Flow

1.2.1 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.

1. 2.2 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 supporting documentation and forms (listed 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 instructions on the form and reports the event to the SPO.
3	SPO	Reviews PDR; contacts unit for additional information, if needed, inputs appropriate data entries into DA , and provides required documents to the SPO PDR, including forms, and worksheets supporting those DA entries .
4	PPC	Processes the data for the event, updates personnel and pay entitlements, and provides feedback on the eLES.

Continued on next page

1.2 Information Flow, Continued

1.2.4 Supporting Documentation

Forms/worksheets, which are properly completed per section 1.7 of this manual, bearing the authorizing official's signature serve as sufficient supporting documentation for most DA/JUMPS transactions. Accession and dependency changes require additional legal documents such as:

- Birth certificate
- Marriage certificate
- Death certificate
- Final or interlocutory divorce decree

Legal documents submitted to the SPO for processing and inclusion in the SPO PDR shall be originals, notarized copies or certified to be true copies. The procedure for creating certified to be true copies is:

Step	Action
1	Member provides an original or notarized document bearing the seal of the issuing authority (e.g. county registrar, clerk of the court, etc.) or notary. Note: Documents notarized by commissioned officers of the armed forces of the United States are valid without a seal.
2	*Authorized USCG employee or service member* makes a photo static copy of the document. Handwrites or stamps "Certified to be a true copy" on each page of the photocopy. Prints his/her first name, middle initial, last name and rate/rank along with the date below *Certified to be a true copy*, leaving sufficient for their signature.
3	Signs, above their name, in blue ink.
4	Returns original to member.

Continued on next page

1.2 Information Flow, Continued

1.2.5 Electronically Imaged Documents and Digital Signatures

Documents which are electronically signed and transmitted in accordance with Commandant Instruction 5200.5, Electronic Signatures and Management of Electronically Signed Records, are presumed legally sufficient, valid, and enforceable. Electronically signed correspondence, worksheets and forms, with the exception of the Enlistment/Reenlistment Document Armed Forces of the United States, DD Form 4/1, the Agreement to Extend/Reextend Enlistment, CG-3301B and the Certificate of Release or Discharge from Active Duty, DD-214 and DD-215, are acceptable source documents for transactions described in this manual.

A SPO, at the supervisor's discretion, may accept other types of scanned, emailed, and faxed supporting documentation, in the interest of providing timely service, with the understanding that original, hard-copy documents or properly electronically signed documents are forthcoming. The SPO must track hard copy delivery ensuring that updates are received within seven working days for CONUS shore units, 15 working days for OUTCONUS shore units and 30 days for deployed units.

1.3 Contacting the Pay & Personnel Center (PPC)

1. 3. 1 Introduction

There are three methods to contact the Pay & Personnel Center in Topeka, KS.

1. 3. 2 Methods

These three methods, in order of preference, are the means for Coast Guard personnel to establish contact with PPC.

Method	Uses
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 PPC to track and correct recurring problems. http://www.uscg.mil/ppc/ccb/ or http://cgweb.uscg.mil/ccb/ (use this link if you have supporting documentation to attach).
E-Mail	Contact can be established using this email address: PPC-DG-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 weekdays 0700 to 1600 Central Time and on scheduled weekends. See "Weekend Staffing Schedule" in the "Important Notices" section of the PPC Customer Care webpage (http://www.uscg.mil/ppc/ccb/ or http://cgweb.usg.mil/ccb) for dates and hours. **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.**

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

1.4 Signature of Responsible Officer

1.4.1 Discussion

The requirements 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.**

1.4.2 Reference

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

1.4.3 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". These "by direction" authorizations must be documented, and maintained locally in an authorization file to support future audit inquiries. The authorizations are subject to the following restrictions.

- Only officers, the Master Chief Petty Officer of the Coast Guard (MCPO-CG), Commandant designated Command Master Chiefs, 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 Master Chiefs, 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-2000) or the Advances Worksheet (CG-2010) when the member is requesting Advance Pay & Allowances or Advance Pay with liquidation period in excess of 12 months.
- Only the CO may sign Adverse Administrative Remarks (CG-3307) entries. However, Per CG Regulations, (7-I-9.F), an officer, temporarily succeeding to command may sign as acting.

Continued on next page

1.4 Signature of Responsible Officer, Continued

1.4.4 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 PPC (MAS) as a Payment Approving Official (PAO)/SPO Supervisor-Auditor.

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

1.4.5 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 liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/Enlisted Employee Review) impacted by such action by an official in their chain with evaluation approving authority.

1.4.6 Designation Procedure for PAO

PAO designations and Direct Access Human Resource Site Supervisor (HRSUP) user role authorizations are processed together. See section 1.6, Procedures for Authorizing SPO Users (HRS & HRSUP), of this chapter for the PAO/HRSUP user role designation procedure.

**Form CG-7421B and all other PPC forms and worksheets are available at http://www.uscg.mil/ppc/forms/*

1.5 Procedures for Authorizing Direct Access Command Users

1.5.1 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.

1.5.2 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

1.5. Procedures for Authorizing Direct Access Command Users, Continued

1.5.3 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 PPC and/or COMDT (CG-10). There are alternative access roles available for personnel who do not need access to all of the Command User functions (see section 1.5.5).

1.5.4 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

1.5 Procedures for Authorizing Direct Access Command Users, Continued

1.5.5 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?* o If **yes**, the person should be authorized access in Direct Access. o 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 1-1. **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/CGPSC Staffs).

Continued on next page

1.5 Procedures for Authorizing Direct Access Command Users, Continued

1.5.6 Designation Procedure

To designate a Command User (or other role types), utilize CG-7421B (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 Division or Branch Chiefs at HQs/ DCMS/ CGPSC/ PPC/ FORCECOM/OPCOM (and their sub-units), Districts or Sectors may sign as authorizing officials. If the applicant is the CO/OIC, then they may sign their own application.
3. Fax the form to PPC's imaging system at: (785)-339-2297.
4. PPC (PS&R) 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-7421B until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

1.5.7 Terminating Privileges

Access terminates automatically upon transfer or separation. There is no need to notify PPC 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.

- If termination of access is desired prior to transfer/separation, notify PPC Customer Care (See Para 1.3.2). Include the user's employee ID number and the user access role(s) to be revoked.

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-7421B) for each person that will be authorized CG Field Admin access, to Direct Access applications, in order to provide personnel support for members assigned to the following units:

List Units

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

(b) **RESOURCES:** No additional YN resources will be provided to Name of Unit.

(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. Failure to establish internal controls may result in your access being terminated.

(d) **SUPPORT:** (SPO) will provide training, as requested, on data input requirements and software navigation.

(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-7421B forms (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 PPC (PS&R) with User Access Forms (fax to the number on the form)

Copy: COMDT (DCMS-81), YN Rating Force Manager

1.6 Procedures for Authorizing SPO Users (HRS & HRSUP)

1.6.1 Purpose

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

1.6.2 HRS Access Defined

HRS access permits a Direct Access user to create 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 or are administratively limited.

1.6.3 SPO Supervisors/ Payment Approving Officials – HRSUP Access Defined

HRS Supervisor (HRSUP) role users have the ability to release Direct Access transactions that require approval. HRSUP role users are also designated Payment Approving Officials (PAOs). See sections 1.4.4 and 1.4.5 of this chapter for PAO duties and responsibilities. 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.

The Commanding Officer of a unit with a SPO must nominate at least one person for designation by PPC (MAS) as a Payment Approving Official (PAO).

1.6.4 Prerequisites for HRSUP/PAO Designation

PAOs must be E-6 / GS-7 or above. E-5's may be recommended for designation only if extenuating circumstances create a situation where E-6's and above are not available for designation. Recommendations are from Commanding Officers of units with SPOs to the Pay and Personnel Center (Military Accounts Support Branch).

Continued on next page

1.6 Procedures for Authorizing SPO Users (HRS & HRSUP), Continued

1.6.4 Prerequisites for HRSUP/PAO Designation (cont'd)

Minimum requirements for designation include:

- being in proper billet for this authority,
- proper rank,
- having successfully completed the Internal Controls Over Financial Reporting (ICOFR) online training course (Course code 810047).
- having successfully completed the Payment Authorizing Official online training course (Course code 502360).

If an E-5 is being recommended for PAO, the CO must attach a letter to the CG-7421B that explains the authority that will be granted to the E-5.

If approved and after the member's information has been verified, PPC, will reply with a formal letter of designation to the member, via the chain of command. PPC (MAS) will forward a separate request to set the PAO's direct access level to CGHRSUP.

PAOs may not perform any of the duties of a PAO until the letter of designation is received from PPC.

1.6.5 Online Training Courses / Competency Code

The PAO and ICOFR online training courses can be accessed via the Coast Guard Portal (https://cgportal.uscg.mil/) or by accessing the Learning Management System (LMS) (https://elearning.uscg.mil/). Both courses are listed in the **Acquisitions** catalog.

Both courses must be completed/reviewed annually during the current fiscal year in order for PAO/HSRUP designations to remain in effect.

PAO and ICOFR course completions are not in the Training Management Tool (TMT). Users should print their LMS transcript, which can be accessed under the **My Account** link in the LMS, for proof of completion.

Upon successful completion of the PAO and ICOFR courses the **PAO** - Payment Approving Official competency code may be assigned.

Continued on next page

1.6 Procedures for Authorizing SPO Users (HRS & HRSUP), Continued

1.6.6 Terminating Privileges

PAO designations shall remain in effect through the current fiscal year, after which all PAOs must be re-designated requiring the prospective PAOs to repeat the online training courses, obtain CO's recommendation and submit a new CG-7421B and accompanying letters, if required.

Access terminates automatically upon transfer or separation. There is no need to notify PPC 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.

If a designated PAO is removed from his or her PAO position prior to the end of the fiscal year, the Commanding Officer shall notify PPC (MAS) by formal letter and must cite the reasons and effective dates.

CGHRSUP user roles for PAOs are automatically terminated each fiscal year unless the PAO completes annual required training and is re-designated in accordance with this chapter.

Continued on next page

1.6 Procedures for Authorizing SPO Users (HRS & HRSUP), Continued

1.6.7 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. A Yeoman, temporarily assigned to a SPO, may be granted access. SPO staff assignments/approval authorities must be documented, in a SPO Authorized Personnel Roster, showing the name, initials, signature, role, date arrived, and date departed from the SPO. This roster must be continually updated and a historical chronology maintained to substantiate the approval authorities executed by these members. See roster example below.

SPO Authorized Personnel Roster

SPO AUTHORIZED PERSONNEL ROSTER					
Name, last, first, MI	Initials	Signature	Role: Specify Data Entry(E), or Reviewer-Approver (RA)	Date arrived on duty at SPO	Date departed from SPO

1.7 Document Processing Standards

1.7.1 Introduction

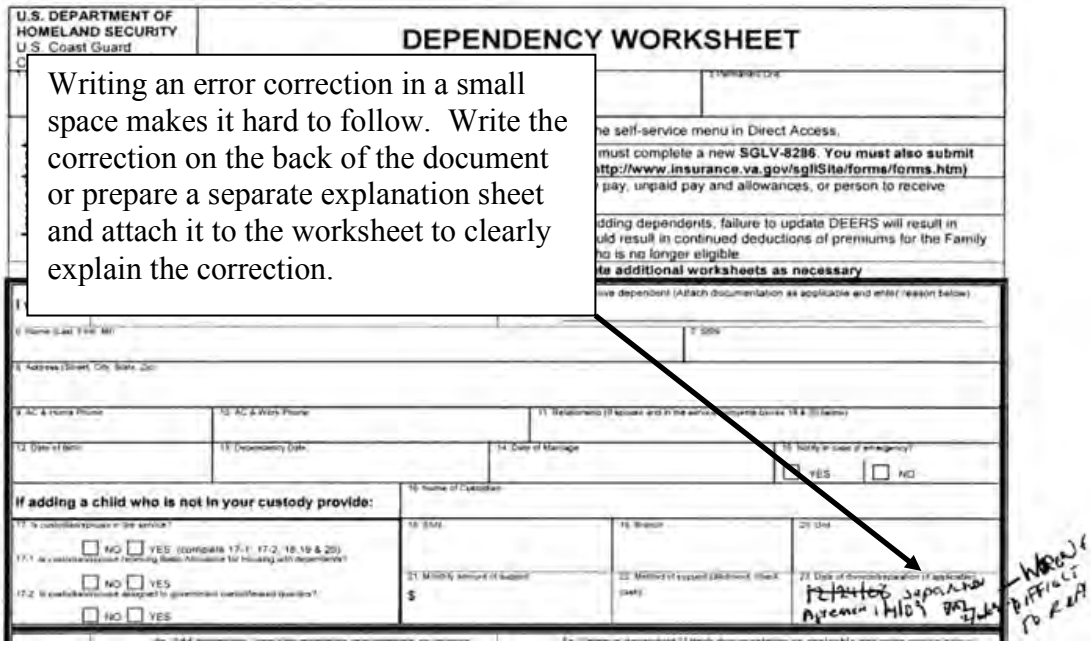
Much of the documentation in the SPO-PDR supports the validity of transactions within DA as such; it is critical that this documentation be accurate, authorized, and approved and appropriate for the transaction it supports. The examples presented in this section address the correct preparation of documents and show examples of correct and incorrect processing. Clear and correct processing can make the difference between full compliance with internal control for financial reporting standards; or the inability to prove the accuracy of DA transactions. Attention to detail is critical to ensure that the supporting documentation is a complete and accurate match to data contained within DA.

1.7.2 Error Corrections

(Figures 1 and 2)

Corrections to forms, worksheets and checklists should be legible to enable an outside reviewer to easily read and understand the change without prior knowledge or prompting. If space on the document does not permit for a legible, easily understood correction, either write it on the back of the document or attach a separate sheet. To clearly identify the correction, place a reference at the point of correction such as, "see back" or "see attached sheet," on the original document, and initial and date the correction.

Example of Improper Error Correction (Figure 1)

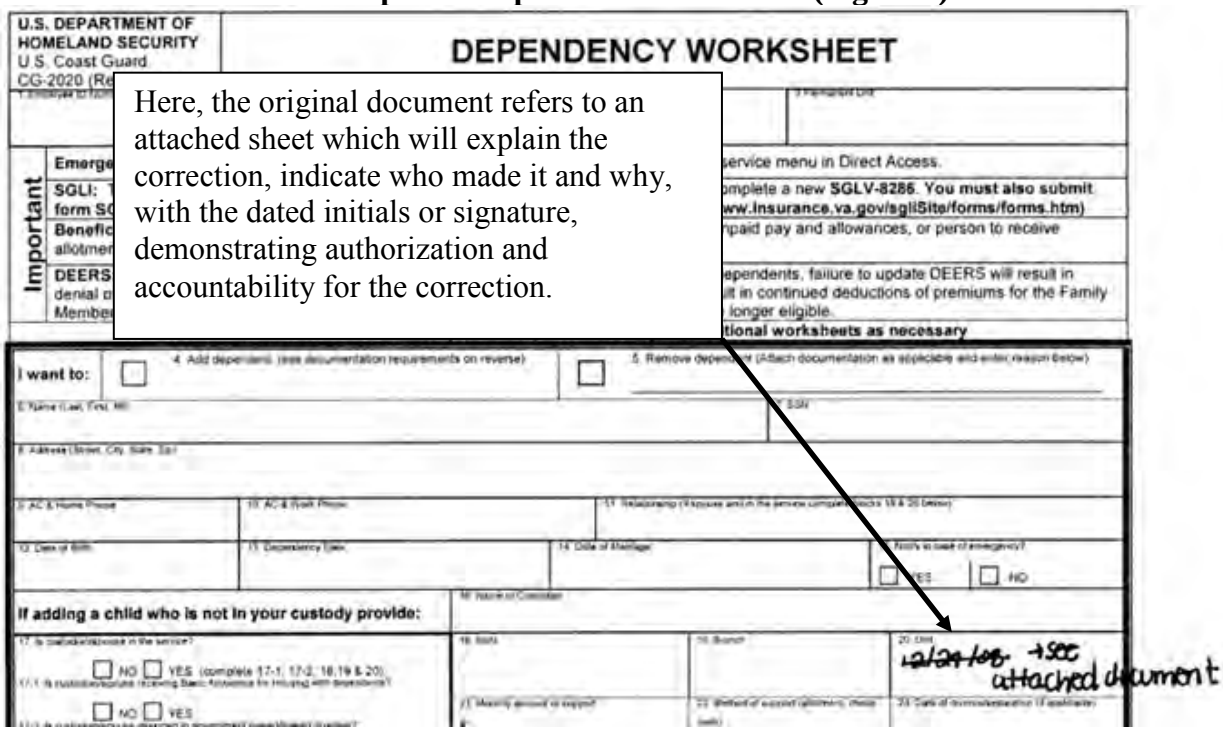


Continued on next page

1.7 Document Processing Standards, Continued

1.7.2 Error Corrections (cont'd)

Example of Proper Error Correction (Figure 2)



Here, the original document refers to an attached sheet which will explain the correction, indicate who made it and why, with the dated initials or signature, demonstrating authorization and accountability for the correction.

1.7.3 Proper Signatures and Dates

(Figures 3 and 4)

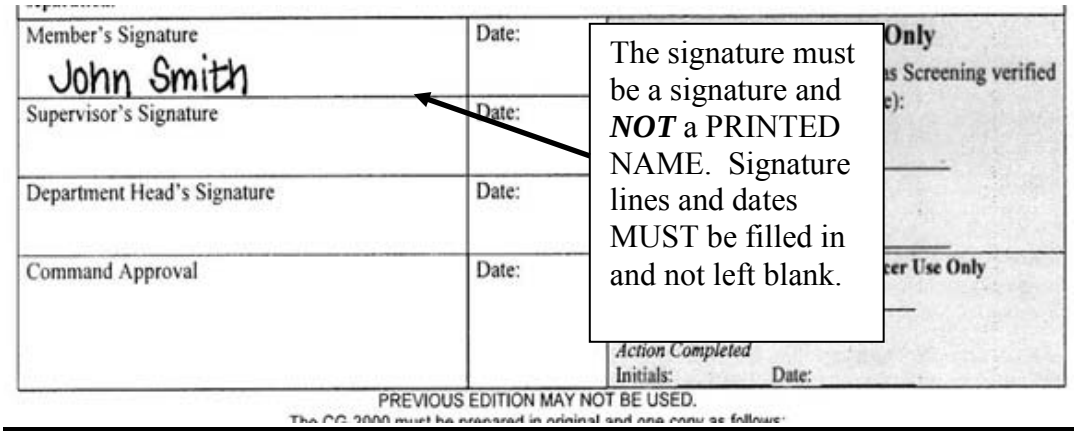
An unsigned form is not sufficient evidence of review or approval. A signature is defined as the signing of one's name (in cursive) in the appropriate block of a particular form. Simply printing the name of the reviewer or approving official is not acceptable. As a best practice, all SPO approval signatures should be listed on the SPO Authorized Personnel Roster shown in section 1.6.

Continued on next page

1.7 Document Processing Standards, Continued

1.7.3 Proper Signatures and Dates (cont'd)

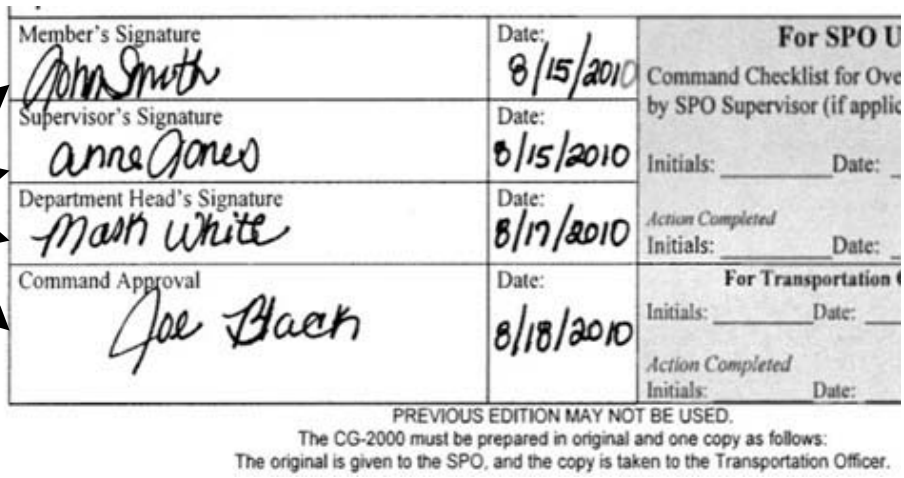
Example of Improper Signatures and Dates (Figure 3)



The signature must be a signature and ***NOT*** a PRINTED NAME. Signature lines and dates MUST be filled in and not left blank.

Example of Proper Signatures and Dates (Figure 4)

Here each line has been signed and dated, as required.



1.7.4 Completing Checklists

(Figures 5, 6 and 7)

All checklists must be filled out completely, with each line individually filled out. Each line represents an action for which a Yeoman is personally responsible and accountable, and must include both data entry and reviewer initials to demonstrate appropriate segregation of duties. If a particular checklist line does not apply, it should be marked "N/A" (not applicable) to demonstrate that it was not missed or ignored.

Continued on next page

1.7 Document Processing Standards, Continued

1.7.4 Completing Checklists (cont'd)

Initialing the first box and drawing a line through subsequent boxes ("sign and line") is not an acceptable approval practice and will fail tests performed by external auditors. Although this practice is used in other functions across USCG, it does not provide sufficient evidence of action, review and/or approval for audit since it does support that each step/action was actually approved. Only by initialing each line can an auditor gain assurance that the action the line item represents was actually taken, reviewed and/or approved.

Example of Improperly Completed Checklist (Figure 5)

RECRUIT PERSRU ACCESSION CHECKLIST

RESERVE RECRUIT

RECRUIT: Smith, John ANNEXES: _____

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

App. ID no: _____ EMPLID: _____

DEP Date: _____ Contract Term: _____

Rank/Rate: _____ Enlist Date: _____

Production Yeoman's Task	YN Initials
Applicant Data	JS
Identification Data	
Applicant Contract Data	JS
FWD to YN1 for Hire	JS
Enter Direct Deposit Info once EMPLID is established.	

Auditor's Task	YN1 Initials
Hire Applicant	MJ
Dependent Information	
IADT ORDERS (Long Term if RP, Short Term if RK)	MJ
R990	MJ
BAH	
COLA	MJ
MGIB BR START (USE CODE "AB")	

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

Accession Paperwork:

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

Blank lines indicate a check that needed to be performed but wasn't. This will not pass an external audit.

Continued on next page

1.7 Document Processing Standards, Continued

Example of Improperly Completed Checklist (Figure 6)

RECRUIT PERSRU ACCESSION CHECKLIST

ACTIVE DUTY RECRUIT

RECRUIT: Evans, Jacob ANNEXES: _____

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

App. ID no: _____ EMPLID: _____

DEP Date: _____ Contract Term: _____

Rank/Rate: _____ Enlist Date: _____

Production Yeoman's Task	YN Initials
Applicant Data	JE
Identification Data	
Applicant Contract Data	
FWD to YN1 for Hire	
Enter Direct Deposit Info once EMPLID is established.	

Auditor's Task	YN1 Initials
Hire Applicant	MJ
Dependent Information	
BAH	

Sign and line, a common practice, leaves it open to interpretation if the data entry person or reviewer actually performed all the tasks. indicated.

)ate is the date that the recruit actually came onto Active Duty, and will not be
rs the DEP.DEP dates are used in the Military Entry Date Block, and are used to
ted Military Obligation Date and the Expected Loss Date which is 8 years later
ay that an End of Enlistment is calculated.

Missing Accession Paperwork:

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

Continued on next page

1.7 Document Processing Standards, Continued

Example of Properly Completed Checklist (Figure 7)

RECRUIT PERSRU ACCESSION CHECKLIST

RESERVE RECRUIT

RECRUIT: Jones, Tim ANNEXES: _____

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

App. ID no: _____ EMPLID: _____

DEP Date: _____ Contract Term: _____

Rank/Rate: _____ Enlist Date: _____

Production Yeoman's Task	YN Initials
Applicant Data	TJ
Identification Data	TJ
Applicant Contract Data	TJ
FWD to YN1 for Hire	TJ
Enter Direct Deposit Info once EMPLID is established.	TJ

Auditor's Task	YN1 Initials
Hire Applicant	AL
Dependent Information	AL
IADT ORDERS (Long Term if RP, Short Term if RK)	AL
R990	AL
BAH	AL
COLA	AL
MGIB SR START (USE CODE "AB")	AL

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

Missing Accession Paperwork:

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

On this checklist each line is separately initialed. Also, it is clear that the data entry and review were done by different people, indicating a segregation of duties. This can be confirmed against the authorized data entry and reviewer roster illustrated in Section 1.6.7

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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	Vacant	
F	PCS to Patrol Forces Southwest Asia (PATFORSWA)	2-F-1

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Chapter Overview

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Section Overview

Introduction

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

In this section

Topic ID	Topic	See Page
2.A.1	The PCS Transfer Process	2-A-2
2.A.2	PCS/TEMDUINS Orders	2-A-3
2.A.3	PCS Departing Checklist	2-A-5
2.A.4	Overseas Transfer Checklist	2-A-9
2.A.5	Preparation of the PCS Transfer Order (CG-5131)	2-A-11
2.A.6	Automatic Stops of Pay and Allowances	2-A-19
2.A.7	How to Prepare NATO Supplemental Orders	2-A-21
2.A.8	PCS Advance Requests (Via Web-TPAX)	2-A-23
2.A.9	Submission (or preparation) of PCS Travel Claim (DD-1351/2)	2-A-24
2.A.10	Submission of Personally Procured Moves (PPM) Claims (AKA DITY Moves)	2-A-28
2.A.11	Reimbursement Vehicle Transportation (CONUS)	2-A-29
2.A.12	Temporary Lodging Allowance (TLA) claims	2-A-31
2.A.13	PCS Reporting Checklist	2-A-33
2.A.14	Amendments to Orders	2-A-35
2.A.15	Reimbursement for the Use of More than Two POCs	2-A-36

2.A.1 The PCS Transfer Process

2.A.1.1 Introduction

The transfer process depends on communication between many participants.

2.A.1.2 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	PSC	Issues transfer order in Direct Access (Airport Terminal).
3	SPO	Notifies unit when order is received. Notification includes any obligated service requirements. Members not serving on an indefinite enlistment contract must obligate service within 5 days of receipt of PCS orders.
4	Member/ Unit	Completes forms and worksheets for PCS departure, request for advance of travel funds, obligated service, BAH rate protection, passports, and ensures compliance with weight standards. Requests CAC-RAS access if member is departing to a non-CG unit (see https://cgportal2.uscg.mil/units/c4itsc/FSD/Shared%20Documents/EU-TT_Long-Term%20External%20Assignment.pdf)
5	Member/ Unit	If an Official Passport is required, follows instructions in chapter 9 of the Foreign Affairs Policy Manual, COMDTINST M5710.5 (series).
6	SPO	Approves and prints Direct Access orders.
7	PAO/ PPC (tvl)	If requested, will process travel advances **not more than 30 days prior to detachment**.
8	PSC (psd-fs)	If requested, will process member's BAH rate protection request
9	TO (TOPS site)	Counsels member and arranges shipment of HHG.
10	Unit	Endorses order upon departure. Ensures member submits a CGFIXIT request for transfer of CGSWSIII account (see https://cgportal2.uscg.mil/units/c4itsc/FSD/Shared%20Documents/EU-TT-Transfer_Checklist.pdf). Ensures member's, and dependents' ID cards are up-to-date.
11	SPO	Approves and transmits PCS Departing Transactions.
12	Member	Reports to new unit, prepares forms and worksheets for PCS reporting, travel claims(s), housing allowances, etc. • Completes PCS travel claim(s) and forwards to approving official (Note: Approving Officials must be designated. See section 2.A.9.4) **not later than 30 calendar days after arriving at the command**. • 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 TPAX. • Goes to https://dmt.uscg.mil/dmt and updates contact information.
13	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 PPC (tvl) **not later than two calendar days after receipt of claim(s) from the member or not later than 32 calendar days after member's arrival at unit, whichever is earlier**. • Forwards worksheets to SPO w/ copy of the endorsed order.
14	SPO	Completes PCS Reporting Transactions. Files supporting documentation in SPO-PDR and forwards copies to PSC (psd-mr) for inclusion in the EI-PDR.
15	PPC (tvl)	Processes travel claim(s).

2.A.2 PCS/TEMDUINS Orders

2.A.2.1 Introduction

This section provides an overview of entitlements and options for members ordered PCS/TEMDUINS.

2.A.2.2 Household Goods

Members ordered PCS/TEMDUINS to an "A" school for a period less than 20 weeks are authorized to store their Household Goods (HHG) at their current Permanent Duty Station (PDS) in non-temporary storage (NTS) pending identification of the new PDS whereupon shipment to the new PDS is authorized.

2.A.2.3 Shipment of POV

The following restrictions apply for members who are ordered PCS/TEMDUINS from OUTCONUS:

- Members may elect to leave their POV at the current PDS and execute a power of attorney allowing a responsible individual to act on their behalf once they are in receipt of orders to their new PDS.
- Members who elect to ship their POV while in receipt of TEMDUINS orders, will be liable for all excess costs incurred.
- Members must remit the entire cost of transportation if a PCS authorization is not issued later.
- The authorization is specific to the Vehicle Processing Center (VPC): the entitlement is limited to the VPC closest to the new PDS.
- Members electing to transport their POV ICW PCS/TEMDUINS to A-School for less than 20 weeks must be counseled IAW JFTR U5440-D.

2.A.2.4 Storage of POV

Long term storage of POVs is limited to those members in receipt of PCS orders to a country which excludes receipt of shipment.
Note: consult the processing VPC as to time limits applicable to pick-up

Continued on next page

2.A.2 PCS/TEMDUINS Orders, Continued

2.A.2.5 Travel/ Transportation of Dependents

The following restrictions apply to dependents of members in receipt of TEMDUINS orders:

- Dependents are authorized to remain in government housing pending eventual PCS assignment.
- Dependents are authorized to remain in the vicinity of the current PDS pending eventual PCS assignment.
- Dependent entitlement cannot exceed the entitlement from the previous PDS to the next PDS.
- Dependent travel and transportation allowances are not authorized when members are assigned to a school as a student if the course of instruction is less than 20 weeks (JFTR U5201B.1.b applies).
- Dependent travel and transportation allowances commence upon member's receipt of PCS orders to the new PDS.
- A member authorized a housing allowance based solely for the purpose of paying child support is not authorized PCS travel entitlements for that dependent child(ren).

2.A.2.6 If transporting POV ICW PCS/ TEMDUINS

The following statement is placed on orders by PSC-epm-2:

Members assigned to an OCONUS unit who receive PCS/TEMDUINS orders to A-School for less than 20 weeks may elect to transport their privately owned vehicle (POV) under provisions of JFTR, U5440-D. U5440-D states that POV transportation is permitted before PCS authorization/order is issued (i.e. prior to issuance of PCS orders from A-School) provided you agree by signing these orders that: You will remit the entire cost of transportation if a PCS authorization/order to authorize POV transportation is not issued later, or; and that you agree to pay any additional costs for POV transportation based upon the location of your new PDS. Should you elect to transport your POV, your authorization is from the POV port/Vehicle Processing Center (VPC) serving your OCONUS unit to the POV unloading port/VPC serving the PDS that will be identified at some time during your A-School assignment. If you receive orders back to your PDS or to another OCONUS PDS or to a PDS where transportation charges to the POV port/VPC exceeds transportation charges to the POV port/VPC where you shipped your POV ICW you're A-School assignment, you are financially liable for excess POV transportation charges.

Continued on next page

2.A.2 PCS/TEMDUINS Orders, Continued

2.A.2.7 BAH for members with dependents

See Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 3.G.5 (BAH-Assignment Situations, Members in transit) for guidance on the payment of BAH for members with dependents assigned PCS/TEMDUINS.

- The rules applicable to members en route PCS apply to members assigned TEMDUINS.
- These members will continue to receive BAH at the locality rate for their old PDS while TEMDUINS, unless the member had a previously approved BAH-rate protection request in place, in which case they would continue to receive BAH at the locality rate for their dependent's location/previous PDS.
- BAH is not payable while the member's dependents occupy government quarters at the old PDS.
- A BAH rate protection request must be submitted and approved by PSC (psd-fs), per Section 3-C (PAYMAN), in order for the SPO to effect BAH payment for any locality other than the member's old PDS or as provided or in a previously approved BAH rate protection request.

2.A.3 PCS Departing Checklist

2.A.3.1 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 section 2-A-4) for members transferring OUTCONUS.

2.A.3.2 References

(a) Military Assignments and Authorized Absences, COMDTINST M1000.8(series)
(b) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8(series)
(c) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2(series)
(d) Joint Federal Travel Regulations (JFTR), Vol I (Military)
(e) Coast Guard Pay Manual, COMDTINST M7220.29(series)
(f) Coast Guard Supplement to the Joint Federal Travel Regulations (CGS-JFTR), COMDTINST M4600.17(series)
(g) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and other Eligible Personnel, COMDTINST M5512.1(series)
(h) Coast Guard Personal Property Transportation Manual, COMDTINST M4050.6
(i) Foreign Affairs Policy Manual, COMDTINST M5710.5(series)
(j) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3(series)
(k) Government Travel Charge Card (GTCC) Program, Policies and Procedures, COMDTINST M4600.18(series)
(l) Personnel Security and Suitability Program, COMDTINST M5520.12(series)
(m) Military Personnel Data Records (PDR) System, COMDTINST M1080.10(series)
(n) Motor Vehicle and Recreational Off-Duty Safety Manual, COMDTINST M5100.5(series)
(o) Coast Guard Housing Manual, COMDTINST M11101.13(series)

2.A.3.3 Checklist

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

Step	Action	Reference	Date/Initials
1	Ensure member is eligible for transfer.	Ref (a) 1.B	
	Ensure member meets weight standards **within 30 days of PCS departure**.	Ref (b)	
	Ensure member meets obligated service requirements for transfer. Complete CG-2045, Career Intentions Worksheet and forward to SPO if member needs to extend enlistment. Members not serving on an indefinite enlistment contract must obligate service within 5 days of receipt of PCS orders.	Ref (a) 1.B.6	
	Counsel member on SRB entitlement if additional obligated service is required.	Ref (c) 1.B	
2	Complete member screening for assignment to semi-isolated units (if applicable) and administrative assignments.	Ref (a) 1.E	

Continued on next page

2.A.3 PCS Departing Checklist, Continued

2.A.3.3 Checklist **(continued)**

Step	Action	Reference	Date/Initials
3	Complete Coast Guard Sponsor Notification Form CG-6058**,** and send it to the member's destination.	Ref (a) 1.A.14	
4	Counsel member on PCS travel entitlements, and complete PCS Entitlements Worksheet (CG-2003). **Note**: AMHS Ferry tickets and other commercial carrier reservations shall be made through the Travel Management Office (TMC). Charges are made against the member's Individually Billed Account (IBA/GTCC). The Centrally Billed Account (CBA) shall be used and annotated on the orders "Authorized use of the CBA" when the PCS delay exceeds 15 days or when the member does not possess a IBA/GTCC. **Note**: A member authorized a housing allowance based solely for the purpose of paying child support is not authorized PCS travel entitlements for that dependent child(ren).	Ref (d), Chap 5 Ref (k), Chap 1 Gov't Travel Charge Card Web Page	
5	Verify member's entitlement to FSH and/or FSA-R and BAH allowances. • Complete Basic Allowance for Housing Rate Protection Worksheet (CG-2025A) if member is eligible for, and desires to apply for, BAH Rate Protection. Forward completed worksheet to Commander, PSC (PSD-FS) for approval.	Ref (e) 3.C	
6	Complete PCS Departing Worksheet (CG-2000), and, if applicable, a PCS/TEMDUINS to "A" school worksheet (CG-2001). Forward to SPO for data entry. If applicable, complete request to COMDT (CG-1222) for travel by more than 2 POC's IAW Sec. 2.A.16 of this manual.		
7	Submit a PPC Customer Care Ticket to revoke "All" TPAX permissions other than self service. (Unless the member is separating, then request TPAX account to be locked).		
8	Review Unit Audit Report (http://cgweb.PPC.uscg.mil/travel/audits/) or Individual Audit Report (https://www.fincen.uscg.mil/TVS_Aux2/) **If member has any outstanding Audit requests, gather audit information <u>before member departs</u> and mail to PPC (tvl).**	Sec. 2.B.17 of this manual	
9	Ensure Common Access card for member and ID cards for dependents are valid (Note: Ensure member knows his/her PIN number).	Ref (g)	
	Verify that member's dependents are enrolled in DEERS and instruct member on procedure for reporting change of address to DEERS.	Sec. 5.B.17 of this manual	
10	If PCS assignment is to a unit/position outside of the Coast Guard (e.g., Liaison Duty, Joint Duty, Advanced Education, MEPS) submit request for CAC-RAS (remote access to the CG network) See: https://cgportal2.uscg.mil/units/c4itsc/FSD/Shared%20Documents/EU-TT_Long-Term%20External%20Assignment.pdf		
11	Ensure member has an appointment scheduled with transportation office (TOPS site) to arrange shipment of HHG.	Ref (h)	

Continued on next page

2.A.3 PCS Departing Checklist, Continued

2.A.3.3 Checklist (continued)

Step	Action	Reference	Date/Initials
12	Ensure an Application for Assignment to Military Housing, Form CG-5267, is submitted to the housing office at the member's new duty station.	Ref (o) as amended by Flag Voice 384	
13	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 an official passport to enter or exit that country, (see electronic Foreign Service Guide) ensure member completes official passport application.	Ref (i) Procedures for obtaining official (no-fee) passports can be found on the CG-DCO-1 CGPortal Page Ref(i)	
14	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 official passport application is completed. (See step 10).		
15	SPO prepares orders and the Advance Signature Proxy submits PCS Advance in WEB TPAX for travel advances up to 80% of the PCS travel entitlements. Notes: The PCS advance shall not be submitted to PPC, except under extenuating circumstances, when it is greater than 30 days before the member detaches. Include a complete breakdown of all advances in the remarks block of the orders (Order notes in DA) see 2.A.8.3 for an example entry. Also, note in the remarks block of the orders if the member is married to another member.	Ref (d) 2300, Sec. 2-A-8 of this manual, Ref (f) Par. 5020	
	SPO AO reviews PCS Advance in WEB TPAX and may approve no more than 30 days before the member detaches except under extenuating circumstances. (Submit a Customer Care Ticket for PPC Travel to authorize payment prior to 30 days).		
16	Prepare PCS Departing Transactions (SPO). (Note: For PHS Officers assigned to the Coast Guard, notify PSC (OPM-2) when Officer departs, they are the SPO for PHS Officers).	Ref (j) Part IV	
17	Transfer Government Travel Charge Card account to the new coordinator.	Ref (k)	
18	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.	Ref (c) 5 Direct Access Guide, EER	
19	Ensure security debriefing is conducted.	Ref (l)	
20	Review PDR. Forward SPO PDR and Unit PDR to receiving SPO unless member is authorized to hand-carry IAW COMDTINST M1080.10(series).	Ref (m)	
21	Notify Health Record Custodian to forward Medical PDR.	Ref (m)	
22	Members who are traveling more than 400 miles in their private motor vehicle shall complete a TRiPS assessment and have their supervisor review and approve the assessment prior to detaching from their command. TRiPS can be accessed at Commandant (CG-1132) Motor Vehicle web page at: http://www.uscg.mil/hq/cg1/cg113/cg1132/motorvehiclesafety.asp	Ref (n) 1.F.4.f	
23	Ensure IT support staff (CG FIXIT) is notified of member's PCS so they can initiate an "Employee Transfer". 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. (see https://cgportal2.uscg.mil/units/c4itsc/FSD/Shared%20Documents/EU-TT-Transfer_Checklist.pdf)		

2.A.4 Overseas/OUTCONUS Transfer Checklist

2.A.4.1 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 (section 2-A-3).**

2.A.4.2 References

(a) Military Assignments and Authorized Absences, COMDTINST M1000.8
(b) Coast Guard Medical Manual, COMDTINST M6000.1(series)
(c) Foreign Affairs Policy Manual, COMDTINT M5710.5 (series)
(d) Coast Guard Housing Manual, COMDTINST M11101.13 (series)

Step	Action	Reference	Date/ Initials
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.	Ref (a) 1.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 1.H.1 and 1.H.2 "Overseas Screening for Active Duty Dependents", of Ref (a), and the list of screening questions sent by the overseas command to complete the interview.	Ref (a), Exhibit 1.H.1	
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.	Ref (a), Exhibit 1.H.1	
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.	Ref (a), 1.H.3 Ref (b)	

Continued on next page

2.A.4 Overseas/OUTCONUS Transfer Checklist, Continued

2.A.4.1 Checklist **(continued)**

Step	Action	Reference	Date/ Initials
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	Ref (a) 1.H.7	
6	If PDS is outside the U.S. or if travel requires crossing the U. S. border, ensure arrangements are made for MBR and dependents to apply for an official passport. (e.g. PDS is in Alaska and traveling via the Canada-U. S. border), (see electronic Foreign Service Guide).	Ref (c) Procedures for obtaining official (no-fee) passports can be found on the CG-DCO-1 CGPortal Page	
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.	Ref (a), 1.H	
8	Ensure an Application for Assignment to Military Housing, Form CG-5267, is submitted to the housing office at the member's new duty station.	Ref (d) as amended by ALCOAST 016/13	
9	Ensure entry approval has been granted prior to member receiving ORIGINAL orders or travel advances.	Ref (a), 1.H.4.a	

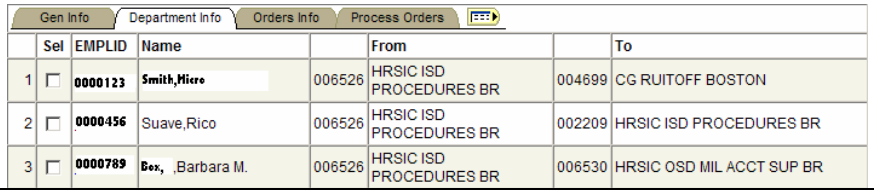
2.A.5 Preparation of the PCS Transfer Order (CG-5131)

2.A.5.1 Introduction

This section provides the procedure for a user at the Servicing Personnel Officer (SPO) to create the PCS Transfer Order

2.A.5.2 Procedure

Start PeopleSoft, sign-in and follow the steps below to complete the PCS Travel Orders:

Step	Action
1	Access the orders: • From your Direct Access Work list (if your supervisor routed them to you from the Airport Terminal). Or by selecting menu items in the following order: • Enterprise Menu > Administer Workforce > Track Global Assignments (GBL) > Use > PCS Orders , or • Enterprise Menu > Develop Workforce > Plan Careers > Inquire > Arrivals and Departures You can also access order from the Airport Terminal. The Airport Terminal menu path is - Self Service > Self Service for Commands > Use > Command Information Detailed instructions for the Airport Terminal can be obtained from the PPC website at: http://www.uscg.mil/ppc/ps/assignment_system/airport_terminal/airportterminal.htm
2	At the Departures listing screen. Click the **Process Orders** tab  Gen Info | Department Info | Orders Info | Process Orders Sel | EMPLID | Name | From | To 1 | 0000123 | Smith,Micro | 006526 | HRSIC ISD PROCEDURES BR | 004699 | CG RUITOFF BOSTON 2 | 0000456 | Suave,Rico | 006526 | HRSIC ISD PROCEDURES BR | 002209 | HRSIC ISD PROCEDURES BR 3 | 0000789 | Box, ,Barbara M. | 006526 | HRSIC ISD PROCEDURES BR | 006530 | HRSIC OSD MIL ACCT SUP BR

Continued on next page

2.A.5 Preparation of the PCS Transfer Order (CG-5131), Continued

2.A.5.2 **Procedure (continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click the Route/Work button of the Employee ID for the Orders you wish to complete.
Route/Work This button can also be used for Supervisors routing work to personnel within the SPO.</td></tr>
<tr><td>Notes</td><td>Status of Orders:
<table>
<tr><th>Status</th><th>Meaning</th></tr>
<tr><td>Apvd Mtual</td><td>An approved mutual exchange of station.</td></tr>
<tr><td>Apvd Std</td><td>An approved set of regular orders.</td></tr>
<tr><td>Apvd Unlat</td><td>An approved order for a unilateral.</td></tr>
<tr><td>Cancel</td><td>Canceled orders</td></tr>
<tr><td>Enroute</td><td>Enroute (based on estimated departure date)</td></tr>
<tr><td>Finished</td><td>The member has departed the old unit and has reported into the new unit (JUMPS 8C's have processed).</td></tr>
<tr><td>Proposed</td><td>Orders in a proposed status</td></tr>
<tr><td>Ready</td><td>Indicates the orders have been worked (member specific changes have been made to the orders) and the orders are now 'Ready' for the member to travel.
Note: Orders for extensions and fleet ups will not change to a ready status because travel entitlements are not applicable.</td></tr>
<tr><td>X Ord/TONO</td><td>Cancel the orders but keep the TONO active.</td></tr>
</table></td></tr>
<tr><td>4</td><td>If you began in the Airport Terminal, a new window will open. The path in the window is now the PCS Orders menu.</td></tr>
<tr><td>5</td><td>Click in the Authorizing Official (Name, Rate/Rank) field. Enter the Name and Rate/Rank of the Official signing the Orders:
Authorizing Official (Name, Rate/Rank):</td></tr>
</table>

Continued on next page

2.A.5 Preparation of the PCS Transfer Order (CG-5131), Continued

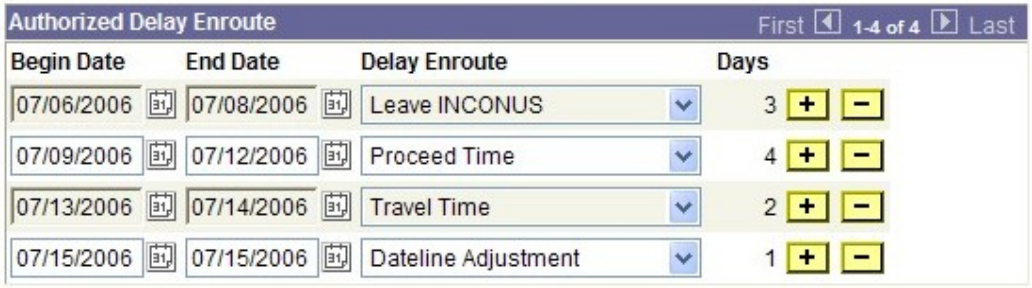
2.A.5.2 **Procedure (continued)**

Step	Action
6	Nature of Duty Section: For Assignment Officer issued orders this field will already be set. For a Nature of Duty listing, click on the drop down button. **Nature Duty** Duty Duty Further Assignment Home awaiting order status Inactive to Active Status Inpatient Instruction Inter Office Transfer Medical Leave TONOS Outpatient Medical Treatment Reserve PCS w/o Duty Separation
Note	Steps 7-9 must be completed for each type of delay, such as Authorized Travel Time, and Authorized Proceed Time. Add a Delay Period by clicking on the Add button.
7	Scroll down to the Authorized Delay Enroute Section. Click in the **Begin Date** field and enter a date in MMDDYYYY format. OR Click the **Choose a Date** to select a Begin Date. **This is the leave date the member is planning on departing his current unit, normally taken from the \members PCS Departing Worksheet. (The actual dates will be entered upon departing member and reporting member.)** To toggle through months and years click
8	Click in the **End Date** field and enter a date MMDDYYYY format, OR Click the **Choose a date** to select an End Date. Click the **Choose a date** button to select a Date.

Continued on next page

2.A.5 Preparation of the PCS Transfer Order (CG-5131), Continued

2.A.5.2 **Procedure (continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>Click the Delay Enroute dropdown button to view and select from the list. Select the type of delay authorized for the dates entered.
<table>
<tr><th>Delay</th><th>Use</th></tr>
<tr><td>Travel Time</td><td>If member is authorized travel time, enter the inclusive dates (in steps 7 and 8) for the number of days the member is authorized</td></tr>
<tr><td>Proceed Time</td><td>If member is authorized proceed time, enter the inclusive dates (in steps 7 and 8) for the number of days the member is authorized.</td></tr>
<tr><td>Leave INCONUS</td><td>If member is authorized leave INCONUS, enter the inclusive dates (in steps 7 and 8) for the number of days the member is authorized.</td></tr>
<tr><td>Leave OCONUS</td><td>If member is authorized leave OUTCONUS, enter the inclusive dates (in steps 7 and 8) for the number of days the member is authorized.</td></tr>
<tr><td>Compensatory Absence</td><td>If member is authorized compensatory absence, enter the inclusive dates (in steps 7 and 8) for the number of days the member is authorized.</td></tr>
<tr><td>Non-Chargeable Absence</td><td>If member is authorized non-chargeable absence, enter the inclusive dates (in steps 7 and 8) for the number of days the member is authorized.</td></tr>
<tr><td>Dateline Adjustment</td><td>If the member crossed the international dateline, enter the inclusive date (in steps 7 and 8), normally 1 day. For members traveling West to East use the same date as the reporting date. For members traveling East to West, use the date the member departed their PDS. The United States is in the West. If crossing was West to East, the total of all delay entries including DA should equal authorize delay total. If crossing was East to West, add all delay entries other than DA, then subtract 01. The balance must equal authorized delay total.</td></tr>
</table>
Example PCS Delay With Dateline Adjustment (West to East):

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

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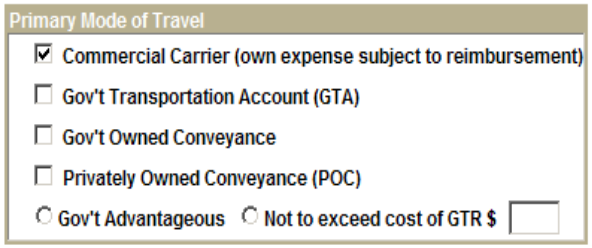
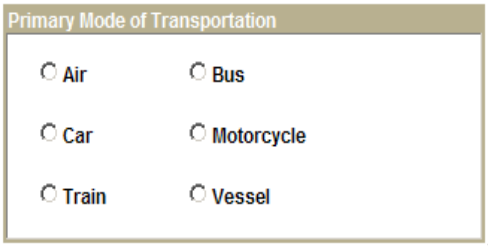
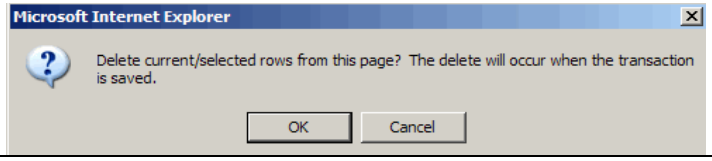
2.A.5 Preparation of the PCS Transfer Order (CG-5131), Continued

2.A.5.2 **Procedure (continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Scroll down to the Itinerary section and Click the Duty tab. Duty.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Nature of Duty</td><td>Make a selection from the dropdown menu.</td></tr>
<tr><td>Per Diem</td><td>This button is not Active (nothing happens when clicked) for PCS Orders. Enter Per Diem entitlement in Notes (remarks)</td></tr>
</table></td></tr>
<tr><td>11</td><td>Select primary mode(s) of travel. When an item(s) is selected, an item in Primary Mode of Transportation must also be selected.


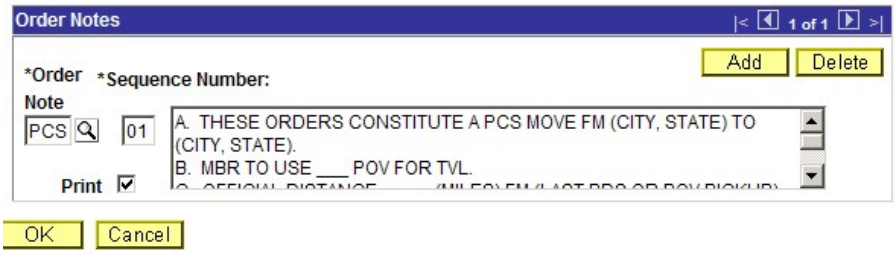


Commercial Carrier (own expense subject to reimbursement) is the default setting. Deselect if not the primary mode of travel</td></tr>
<tr><td></td><td>The sections titled Remain Over Night (RON) and Medical Travel apply to TAD travel authorizations.</td></tr>
<tr><td>12</td><td>If Other Authorized Expenses are authorized (normally this won't apply to PCS Orders), Select the Magnifying glass in the Search Dialog Box. Enter the Misc Expense code (if already known), or a description to lookup a specific authorization.
Click on the Lookup to view a listing of available Authorized Expenses.</td></tr>
<tr><td>13</td><td>To add additional authorized expenses, click on the Add button. To remove expenses click on the Delete button. When selecting the delete button, the following window will display, click OK.

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

Continued on next page

2.A.5 Preparation of the PCS Transfer Order (CG-5131), Continued

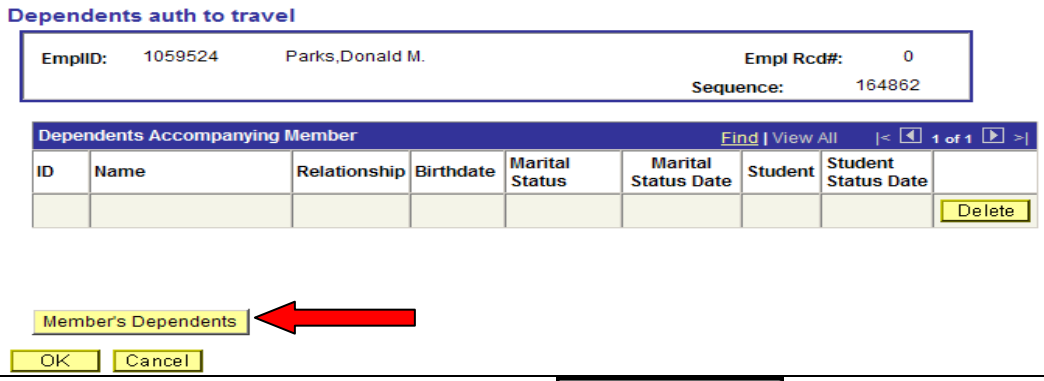
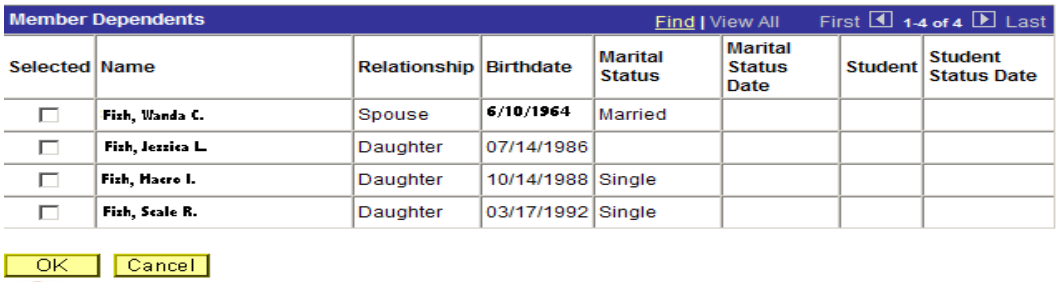
2.A.5.2 **Procedure (continued)**

Step	Action
14	Scroll to the bottom and click on the Orders Notes Button [Order Notes]
15	Select Magnifying glass to obtain Search Dialog Box. To obtain PCS Order notes, select Lookup or enter **PCS** in the Description box and select Lookup. Orders generated by CG PSC will have pre-filled notes. These notes should not be changed without CG PSC approval. To add additional notes click on the [Add] button and click on the OK button when complete. [OK]. Note: The order note "**PCS**" contains standard remarks, applicable to all PCS orders, which may be edited as necessary by the SPO.  **Reminder**: Standard Remarks/Orders Notes entered by the CG PSC (opm/epm) Assignment Officer shall not be modified or deleted by other users. Always add a new order note entry to add remarks to orders. **These notes should not be deleted or modified without CG PSC approval.** If advances are authorized, include a complete breakdown of the PCS travel entitlements: Example: DLA w/Dependents: $2000.00 @80% $1600.00 Mbr. MALT Plus: $ 200.00 @80% $ 160.00 Dept. MALT Plus: $ 100.00 @80% $ 80.00 Advance TLE: $ 500.00 @80% $ 400.00 Total: $2800.00 @80% $2240.00 **PCS TVL Advance Authorized at @80% $2240.00**
16	Scroll down to the bottom of the page and click the [Dependents Auth to Travel] button.

Continued on next page

2.A.5 Preparation of the PCS Transfer Order (CG-5131), Continued

2.A.5.2 **Procedure (continued)**

Step	Action
17	The field "Dependents Accompanying Member will appear blank. 
18	Click the **Member's Dependents** button. . Member's Dependents. You will see a listing of Dependents for the member.  Dependents must be already in direct access as dependents to appear on this screen. Dependents not appearing on this screen must first be added in Direct Access. BAH eligible dependents are defined in Chapter 3-D of the Coast Guard Pay Manual, COMDTINST M7220.29(series) A member authorized a housing allowance based solely for the purpose of paying child support is not authorized PCS travel entitlements for that dependent child(ren).
19	To Select members authorized to travel on the Travel Orders, click the **Selected** option. ☐. Once selected, a check mark will appear next to the Dependents Name. ☑ . Click the **Ok** button. OK

Continued on next page

2.A.5 Preparation of the PCS Transfer Order (CG-5131),
Continued

2.A.5.2 **Procedure (continued)**

Step	Action
20	The Dependent selected now appears on the **Dependents auth to travel** screen as below. Click the **Ok** button. OK. **Dependents auth to travel** EmplID: 1234567 FISH,MICRO D. Empl Rcd#: 0 Sequence: 164862 Dependents Accompanying Member Find | View All |< 1 of 1 >| ID: 01 Name: FISH, WANDA C. Relationship: SPOUSE Birthdate: 6/10/1964 Marital Status: MARRIED Marital Status Date: 9/10/1993 Student: Student Status Date: Delete Member's Dependents OK Cancel
21	Click the **Save** button. Save
22	Scroll down to and Click the **Route For Approval** button. Route For Approval.
23	Only a CGHRSUP (SPO Supervisor) can approve these orders. Enter the Employee ID of the Supervisor who will be approving these orders in the Route to field. Click Enter You can also click on the button to look up the Approvers Employee ID

2.A.6 Automatic Stops of Pay and Allowances

2.A.6.1 Introduction

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

2.A.6.2 References

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series)
Chapter 3, Allowances
Chapter 4, Special Pay
Chapter 5, Incentive Pay
(b) JFTR, para. U9100, Housing and Cost-of-Living Allowances

2A.6.3 Auto Stops on PCS

This table shows pay entitlements that automatically stop when a PCS transfer occurs. No pay transaction data entry (other than the PCS transaction) is required to stop these entitlements. However, data entry is required if the member's entitlement period ends prior to the day/date shown below.
Note: Automatic stops will not occur on interoffice transfers.

Entitlement Description	When the Entitlement Auto-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 PCS departure day.
Basic Allowance for Housing - Partial (BAH Partial)	On the day prior to PCS departure.
Enlisted Discount Meal Rate deduction	On the day prior to PCS departure.
Enlisted Basic Allowance for Subsistence (ENL BAS)	On the effective date of reporting PCS.
Career sea pay/time and premium	On the PCS departure day.
Combat SGLI Allowance	On the last day of the month of the effective date of PCS 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 PCS reporting.

Continued on next page

2.A.6 Automatic Stops of Pay and Allowances, Continued

2A.6.3 Auto Stops on PCS (continued)

Entitlement Description	When the Entitlement Auto-Stops
OUTCONUS-Cost of Living Allowance (OCOLA), with or without dependents and partial If dependents are delayed (see note below)	On the day prior to PCS departure. Date last dependents departs within 60 days.
Crew flight pay (enlisted only)	On the PCS departure day.
Diving Pay	On the PCS departure day.
Family Separation - Housing (FSH)	On the day prior to 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 PCS departure day.
Hostile Fire, Imminent Danger Pay	On the last day of the month of the effective date of PCS departure.
Noncrew flight pay	On the PCS departure day.
Overseas Housing Allowance (OHA), with and without dependents If dependents are delayed (see note below)	On the day prior to PCS departure. Date last dependent departs (Delay not to exceed 60 days).
Responsibility Pay	On the day prior to departure.
Diving Duty Pay	On PCS departure day.
Special Duty Assignment Pay (SDAP)	On the day prior to PCS departure.
Flight Deck Hazardous Duty Incentive Pay	On the day prior to PCS departure.
Foreign Language Proficiency Pay	On the day prior to PCS departure.
Hazardous Duty Incentive Pay for Visit, Board, Search & Seizure	On the day prior to PCS 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)

Note: Member must obtain authorization to continue OHA/OCOLA from COMDT (CG-1222) prior to PCS departure. CG-1222 will forward approved requests for continuation of OHA/COLA to PPC (mas) for payment.)

2.A.7 How to Prepare NATO Supplemental Orders

2.A.7.1 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. The NATO Travel Order Statement may be placed on the back of the PCS or TDY order or as a separate sheet to accompany the TDY/PCS order.

2.A.7.2 References

(a) Military Assignments and Authorized Absences, COMDTINST M1000.8 (series), 1-A-17

2.A.7.3 Format for order

The below table describes how to complete a NATO order.

Step	Action
1	Top of letterhead/page type: Grading of Form: NATO UNCLASSIFIED
2	Include in the heading: country of origin, employee ID and the date the order is 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

2.A.7 How to Prepare NATO Supplemental Orders, Continued

2.A.7.4 Recommended format

Here is a recommended format for NATO travel orders. Another example is available online at https://secureapp2.hqda.pentagon.mil/passportmatters/Visas/VisaER/NATO_order.htm.

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: Employee ID Number
Pays de provenance: 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

2.A.8 PCS Advance Request (Via Web-TPAX)

2.A.8.1 Introduction

This section provides the procedure for a user at the Servicing Personnel Office (SPO) to submit requests for travel advances via TPAX.

2.A.8.2 Getting access to the ASP function

Advance Signature Proxy (ASP) – This function is for SPOs. This permission/designation is granted after the completion of a new form CG-7421A (http://www.uscg.mil/ppc/forms/). Complete the form, have it signed by the SPO supervisor and fax it to the number on the form. You will be contacted, via e-mail, after your account has been modified to allow access to the ASP function.

2.A.8.3 Procedure

Refer to the Advance Signature Proxy tutorial in the Web-TPAX Online Help at http://www.uscg.mil/ppc/travel/WebTpaxASPtutorial.pdf for data entry procedure.

Note: A completed original PCS Travel order signed by the Approving Official must be scanned and uploaded to Web-TPAX to request a PCS travel advance. Before you begin the advance request ensure the PCS travel advances are correctly listed on the order. The PCS order must show what is being requested and at the 80% amount as shown in the example below:

```
MEMBER PER DIEM              _______ @ 80% __________
MEMBER MALT                  _______ @ 80% __________
DEPENDENT(S) PER DIEM        _______ @ 80% __________
DEPENDENT(S) MALT            _______ @ 80% __________
DLA                          _______ @ 80% __________
TLE                          _______ @ 80% __________
TOTAL                        _______ @ 80% __________

       PCS TRAVEL ADVANCE AUTHORIZED FOR $ ___________
```

Do not submit the PCS advance to PPC when it is greater than 35 days before the member detaches. The additional five days accounts for processing time and making payment to the member. Per the Coast Guard Supplement to the Joint Federal Travel Regulations (CGS-JFTR), COMDTINST M4600.17(series), paragraph 5020, payment of advances must not be made more than 30 days before the member detaches, except under extenuating circumstances. If you need to submit a PCS advance to PPC greater than 35 days due to extenuating circumstances, the SPO Approving Official may submit a PPC Customer Care Ticket with details.

2.A.9 Submission of PCS Travel Claim (DD-1351/2)

2.A.9.1
Introduction

This section provides the procedure for the traveler to properly complete the PCS Travel Claim

2.A.9.2
Procedure

Follow these steps to complete the PCS Travel Voucher (DD-1351/2)

Block	Action
1	**Payment.** Place an X in the block that applies to member. Note: Coast Guard members, choose EFT.
2	**Name**. Type last, first and middle initial
3	**Grade**. Type rank/rate or grade (CDR, ENS, YNC,E6,GS-12,etc)
4	**SSN**. Type Social Security Number or EMPLID
5	**Type of Payment**. Place an X in boxes that apply to member. If the member is authorized DLA and received it in an advance, the traveler must check DLA. Note: If dependent travel is involved and Dislocation Lodging Allowance (DLA) is claimed, all applicable boxes must be completed. Each applicable block must be checked to process the claim.
6	**Address.** These blocks are mandatory for claiming DLA, single or married. Enter the member's current physical residential address. If the member has not secured a permanent residence in the vicinity of the new PDS, the duty address may be used. Note in block 29 if member is establishing a residence in the vicinity of the PDS and if dependents accompanied the member to the new PDS. a. Number and Street: house or apartment number and street name b. City: spell out name of city or municipality c. State: 2-digit state code (MA, KS, NH, etc.) d. Zip code: 5 or 9 digit zip code e. e. E-Mail Address. If not in the global e-mail address system, enter a personal e-mail address that is checked often.
7	**Daytime Telephone Number and Area Code**
8	**Travel Order/Authorization Number** (TONO) – found on PCS orders (will begin with a 12)
9	**Previous Government Travel Payments/Advances** (EFT or Debit not GTCC)
10	**For D.O. Use Only**. Note: the member should enter nothing here: this section is reserved for Disbursing Offices only
11	**Organization and Station**. Note: this is the command to which the member is currently attached (new PDS).

Continued on next page

2.A.9 Submission of PCS Travel Claim (DD-1351/2), Continued

2.A.9.2 **(continued)**

Block	Action
12	**Dependents**. Type an (x) in **Accompanied** if dependents traveled to the member's new duty station or in **Unaccompanied** if dependents chose not to relocate. a. Name – last, first, middle initial b. Relationship (son, daughter, husband, mother, father, etc.) c. Date of Birth (DOB) or Date of Marriage. Date of Marriage applies to spouse, DOB applies to children. Note: if member is single, N/A may be entered
13	**Dependents Address on Receipt of Orders**. Enter the complete dependents address (es) while attached to last command or duty station.
14	**Have household goods been shipped?** Check applicable block. Note: If the answer is no, enter explanation in remarks (block 29)
15	**Itinerary**. a. Date. Indicate current year (month/day will be listed below) b. Place. Enter City/State and zip code from which member departed and to which member reported c. Means/Modes of Travel. See 2-digit codes on reverse d. Reason for stop. See 2-digit codes on reverse (pg2 of 1351-2) e. Lodging Cost. Not applicable for PCS travel (pg2 of 1351-2) f. Privately Owned Conveyance (POC) miles. Indicate total mileage. Note: Member need only list arrival site (new duty station). It is not necessary to list each stop and departure.
16	**POC Travel**. Member must indicate whether an owner/operator or a passenger if private auto is listed in the itinerary.
17	**Duration of Travel**. Type (x) in appropriate block. Typically, More Than 24 hours will be checked.
18	**Reimbursable Expenses**. Enter Temporary Lodging Expense (TLE), tolls, etc. here.
19	**Government Deductible Meals**. Not applicable to PCS travel.

Continued on next page

2.A.9 Submission of PCS Travel Claim (DD-1351/2), Continued

2.A.9.2 **(continued)**

Block	Action
20	a. **Claimant signature** – original hand written signature in blue ink of the traveler b. **Date** – date member signs the claim c. **Reviewer's printed name** d. **Reviewer signature** e. **Telephone number** (where the Reviewer may be contacted) f. **Date** – date reviewer signed claim
21	a. **Approving Official's (AO) Printed Name**. Note: Approving Officials must be designated. See section 2.A.9.4 b. **Approving Official's Original Hand Written Signature in blue ink**, (the travel claim 1351-2 cannot be a copy or certified to be a true copy, must be an original) c. **Approving Official's EMPLID** for verification d. **Telephone number** (where AO may be contacted) e. **Date claim approved** Note: On final PCS the following statement may be entered block 21a or block 21b – Final PCS, AO not available
22	**Accounting Classification**. N/A
23	**Collection Data**. N/A
24	**Computed By**. N/A
25	**Audited By**. N/A
26	**Travel Order/Authorization Posted By**. N/A
27	**Received**. N/A
28	**Amount Paid**. N/A
DD 1351-2C	The following instructions are for the Continuation Sheet. List page number in upper right portion of form (Page 2 of 2, etc.)
4	**Name**. Last, First, Middle initial
15	**Itinerary**. See block 15 above
3	**For D.O Use Only**. N/A
18	**Reimbursable Expenses**. See block 18 above
19	**Government/Deductible Meals**. N/A
29	**Remarks**. Member may enter all required/pertinent remarks here. Claiming TLE (M&IE only) while staying with family/friends within the local area of the PDS, provide their name, residential address, dates, and contact number.

Continued on next page

2.A.9 Submission of PCS Travel Claim (DD-1351/2), Continued

2.A.9.3
Submission Guidelines

Submit (via US Mail) the completed Original DD Form 1351/2 (and 1351/2C if necessary), along with the original orders and all original receipts to the following address:

Commanding Officer (TVL-PCS)
Coast Guard Pay & Personnel Center
444 SE Quincy Street
Topeka, KS 66683

Note: Keep a completed copy of your travel voucher, original orders (these may be certified as a true copy if lost) and receipts. Members are reminded that they must keep these copies for six years and three months.

2.A.9.4 Approving Official Designation

All travel claim authorizing officials (AO) must have the TPAX/WINIATS USER ACCESS AUTHORIZATION AND APPROVING OFFICIAL (AO) DESIGNATION FORM CG-7421A (Revised 03/13 or later) filed with PPC Travel Branch regardless of the type of claim (TPAX or manual) being approved or claims will not be processed and will be returned for valid AO signature.

- Each form submitted supersedes the previous form on file.
- Forms must be physically signed. Electronic/digital signatures are not acceptable.
- Block 13 CMD Designation Signature must be a supervisor in the user's supervisory chain of command or permissions will not be granted.
- Submit the form via Fax to PPC (TVL). The Fax number is on the form.
- All permissions above self service will be terminated after one year from the date of the command signature, upon PCS (including fleet ups and re-tours), upon separation from service, upon change of status from active to reserve component or when deemed necessary by the competent authority.
- TPAX/WINIATS termination should be part of the unit checkout process.

2.A.10 Submission of Personally Procured Moves (PPM) Claims (AKA DITY Moves)

2.A.10.1 Introduction

This section will guide you towards properly submitting your claim for Personally Procured Moves (PPM).

2.A.10.2 Procedure

Complete a DD 1351/2 (Travel Voucher) from departure to arrival.
Note: This is a separate claim specific to your transportation of household goods. For instructions and guidance on submitting a claim for personally procured transportation of household goods, refer to CG FINCEN website.
For questions concerning the particulars of this claim, contact CG FINCEN Customer Service Team at (757) 523-6940 or (800) 564-5504.

2.A.10.3 Submission Guidelines

Send PPM/DITY claim(s) to the following address:

Commanding Officer
U.S. Coast Guard Finance Center
1430A Kristina Way
Chesapeake, VA 23326

2. A.11 Reimbursement of Vehicle Transportation within CONUS

2.A.11.1 Introduction

This section will guide you through the process of receiving reimbursement for the shipment of your Privately Owned Vehicle (POV) should you avail yourself of the opportunity to personally procure transportation (JFTR, par. U5417).

2.A.11.2 Procedure

Keep in mind the following procedural items when applying for reimbursement:

- Member must receive approval for shipment prior to detachment from the old Permanent Duty Station (PDS)
- Requests to ship a vehicle will be made on the PCS Departing/Separation Worksheet (CG-2000)
- The Servicing Personnel Office (SPO) must determine eligibility, do the computations and counsel the member concerning entitlement and reimbursement limitations.
- PCS orders must be annotated to authorize transportation to include the maximum reimbursement computation.
- Reimbursement is limited to the transportation of one (1) authorized POV
- This is a member-with-dependents entitlement
- Member and/or eligible dependent(s) must possess more than one POV to be relocated to the new PDS
- Member and dependents must travel at one time in one POV
- Transportation costs should not exceed the remainder of the MALT-Plus for driving two POVs to the new PDS
- Member is financially responsible for all excess costs/additional expenses associated with POV transportation
- Commercial travel at Government expense is not authorized for the member or any dependent if reimbursement for vehicle transportation within CONUS is authorized.

Continued on next page

2. A.11 Reimbursement of Vehicle Transportation within CONUS, Continued

2.A.11.3
Submission Requirements

To properly facilitate the processing of your claim, submit the following documents:

- Travel Voucher (DD-1351/2) for commercial vehicle shipment
- Receipt for commercial vehicle shipment
- Copy of signed PCS travel orders **annotated with the vehicle shipment authorization to include the maximum reimbursement computation.**
- Copy of the vehicle registration

2.A.11.4
Reminder

- Ensure member's name and EMPLID are on all documents
- Retain a copy of all documents/receipts

2.A.11.4
Where to Submit?

Mail all documents to:

Commanding Officer
U.S. Coast Guard Finance Center (opb-1a)
1430A Kristina Way
Chesapeake, VA 23326

2. A.12 Temporary Lodging Allowance (TLA) claims

2.A.12.1 Introduction

This section will provide guidance for submitting Temporary Lodging Allowance (TLA) claims. TLA is an allowance intended to partially reimburse a member and/or dependents for expenses incurred while occupying temporary lodging outside the continental United States.

2.A.12.2 References

(a) Joint Federal Travel Regulations (JFTR), Chapter 9, Temporary Lodging Allowance
http://www.defensetravel.dod.mil/site/travelreg.cfm
(b) U. S. Coast Guard Finance Center SOP
http://www.fincen.uscg.mil/sop.htm

2.A.12.3 Procedure

TLA claims are completed by the OCONUS unit: Follow submission guidelines listed in reference (b).

2.A.12.4 Web-based Application

Units processing TLA claims may now utilize a web-based application on the **Coast Guard Finance Center (FINCEN) Intranet**. The following restrictions apply:

- Prior to acquiring access, a signed request assigning the Payment Authorizing Official (PAO) must be submitted by the Unit Commander.
- PAOs must be E6 and above or GS7 and above.
- Request (via signed memo) must be routed through Commandant (CG-1222) who will forward the request to the FINCEN (OPA-MT).
- FINCEN Comptroller will issue the authorization.
- The PAO will not need a password.
- There must be (at a minimum) one PAO/DEO from a qualifying unit

Continued on next page

2. A.12 Temporary Lodging Allowance (TLA) claims, Continued

2.A.12.5 DEO specific information

- The PAO will assign the Data Entry Operator (DEO) for the respective unit
- DEO passwords will be assigned by FINCEN

2.A.12.6 Submission Guidelines for Fax/Email

Fax or email to FINCEN for processing to:

- Fax: (757) 523-6734
- Email: FIN-DG-TAC@uscg.mil

2.A.13 PCS Reporting Checklist

2.A.13.1 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.

2.A.13.2 References

(a) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(b) Coast Guard Pay Manual, COMDTINST M7220.29(series)
(c) Personnel Security and Suitability Program, COMDTINST M5520.12(series)
(d) Government Travel Charge Card (GTCC) Program, COMDTINST 4600.14(series)
(e) Direct Access (DA) Online Help http://www.uscg.mil/ppc/ps/index.htm
(f) Military Personnel Data Records (PDR) System, COMDTINST M1080.10(series)

2.A.13.3 Reporting checklist

Action upon member reporting.

Step	Action	Reference	Date/ Initials
1	Endorse orders (Note: For PHS Officers, notify CG PSC (OPM-2) when Officer reports, they are the SPO for PHS Officers).	Ref (a), 2.A.2	
	Verify member's entitlement to FSH and/or FSA-R, and BAH allowances.	Ref (b), 3.H	
3	Complete PCS Reporting and BAH/Housing Worksheets and forward to SPO with copy of endorsed order.	CG-2005 CG-2025	
4	Update address in DEERS.	Ref (a), 5.B.17	
5	Ensure member has a valid ID card.	Ref (a), 5.D.6	
6	Update emergency contacts, e-mail, mailing address, and allotment addresses in Direct Access.	Ref (a), 5.D.11	
7	If member is unable to complete address changes in Direct Access, ensure member completes CG-2040, Allotment Worksheet.	CG-2040	
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.	Ref (a), 8.B.3	

Continued on next page

2.A.13 PCS Reporting Checklist, Continued

2.A.13.3 Reporting checklist **(continued)**

Step	Action	Reference	Date/ Initials
9	Ensure member completes travel claim for self and dependents, if applicable. **Claim(s) must be completed and forwarded to unit Authorizing Official not later than 30 calendar days after arriving at the command**.	Ref (a), 2.B.4	
10	Ensure the Authorizing Official signs the travel claim in blue ink, block 21a, **not later than two calendar days after receipt of claim(s) from the member or not later than 32 calendar days after member's arrival at unit, whichever is earlier**.	Ref (a), 2.B.4	
11	Ensure the original travel claim and original order are forwarded to PPC (tvl) for processing (Note: If member received advance for dependent travel, do not submit travel claim until dependent(s) complete relocation. Submitting the claim without dependent travel information will result in collection of the dependent portion of the advance travel and per diem. **If more than 30 calendar days have elapsed since the member's arrival and all PCS travel is not completed, contact PPC Customer Care for guidance.**)	Ref (a), 2.B.4	
12	Conduct security briefing.	Ref (c)	
13	If applicable, ensure Government Travel Charge Card account was transferred from old PDS.	Ref (d)	
14	For Reservists, check and update member's Training/Pay code in DA	Ref (e)	
15	Update Family Member/Beneficiary/SGLI/FSGLI Information in Direct Access.	Ref (a), 5-A-2	
16	Renew "other than self service" permissions in DA and TPAX if required.		
17	Update information in DA and TPAX profiles as required.		
18	Review PDR and file supporting documentation.	Ref (f)	

2.A.14 Amendments to Orders

Reference

Please see section 2.B.12 of this chapter for guidance on amendments to orders.

2.A.15 Reimbursement for the Use of More than Two POCs

2.A.15.1 Introduction

This section lists the conditions for which payment of Monetary Allowance in Lieu of Transportation (MALT) for PCS travel by more than two privately owned conveyances (POCs) may be requested in accordance with JFTR, Par. U5150-B.

2.A.15.2 Conditions

One or more of the following conditions must be met before **requesting** authorization for PCS travel by more than two POCs.

A. More than eight family members travel together by POC, including the member.
B. Because of age or physical condition, a dependent needs special accommodations in one vehicle and the second and third vehicles are required for other family members.
C. A member must report to a new duty station in advance of travel by dependents who delay travel for acceptable reasons (school term completion, property sale, settlement of personal business, HHG transportation, non-availability of adequate housing at the new PDS) and five or more dependents travel by POC later.
D. Five or more dependents travel unaccompanied by POC between authorized points other than those for the member's travel (e.g., travel to a designated place or to the new PDS when member has TDY en route).
E. Five or more dependents travel unaccompanied by the member to the new duty station in advance of the member's reporting for acceptable reasons (to enroll children in local school). or
F. Special circumstances such as travel via ALCAN Highway where extra spare tires, parts, and tools are to be carried.

2.A.15.3 Travel by More Than 2 POCs Authorization Request Procedure

The command from which the member is departing from shall submit requests for approval of PCS travel by more than two POCs to Commandant (CG-1222) well in advance of the member's (or dependent's) planned departure date. Requests shall be submitted by memo (Fax to (202) 475-592), record message traffic, or email to compensation@comdt.uscg.mil. Additional contact information is available at www.uscg.mil/hq/cg1/cg122/contact.asp.

Section Overview

Introduction

This section prescribes processes necessary to the effective execution of Temporary Duty (TDY) travel.

In this section

Topic ID	Topic	See Page
2.B.1	The Temporary Duty (TDY) Order	2-B-2
2.B.2	The Travel Claim Process and Responsibilities	2-B-4
2.B.3	Travel Preparation and Examination System (TPAX) Process	2-B-5
2.B.4	The TPAX Traveler Role	2-B-11
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2.B.8	Pay & Personnel Center (PPC) TPAX Responsibilities	2-B-16
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2.B.1 The Temporary Duty (TDY) Order

2.B.1.1 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.

2.B.1.2 For the Traveler

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

2.B.1.3 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, complete, and follows applicable regulations/Agency Policy.

2.B.1.4 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 Officers, etc.).
- Accounting information to enable correct funds accounting.

Continued on next page

2.B.1 The Temporary Duty (TDY) Order, Continued

2.B.1.5 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 are authorized and/or directed?
- **WHAT** type of messing is authorized and/or directed?
- **IS** the traveler a government travel charge card holder?
- **WHAT** is the 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.)?

2.B.1.6 While You Are Traveling

Obtain receipts for **ALL** expenses while you are traveling. Although itemized 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.

2.B.2 The Travel Claim Process and Responsibilities

2.B.2.1 Introduction

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

2.B.2.2 Integrated Automated Travel System

The Coast Guard uses a system called Travel Preparation and Examination (TPAX)/Integrated Automated Travel System (WINIATS) for the liquidation of travel claims which facilitates processing and liquidation in just a few days.

2.B.2.3 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.	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	Travel Approving Official (AO)	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 PPC. • Provides EMPLID.
3	PPC (tvl) Examiner	Within 4 days after receipt, depending on workload. (e.g., For periods of heavy travel it may take longer.)	Reviews travel voucher and enters 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 via USPS
4	PPC (tvl) Audit	Within 4 days after receipt, depending on workload. (e.g., For periods of heavy travel it may take longer.)	Reviews travel voucher and enters into WINIATS. **If travel voucher is** — **Then** Correct and complete — Forward reviewed claim and voucher summary to PAO. (Go to Step 5) Incorrect or incomplete — Auditor returns to Examiner.
5	PPC (tvl) PAO for disbursement	Claim is received from examiner	Certifies travel voucher for payment and returns to examiner for filing and mailing. **Note**: A traveler, whose total entitlement is less than an applicable government travel advance, will be sent a system generated email to go to WEB-TPAX to print a TVS and debt letter..
6	Coast Guard Finance Center	Upon receipt from PPC (tvl)	**If payment is** — **Then** EFT — Payment will be transferred to the traveler's account within 10 days. Check (EFT preferred) (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 (ARSC, Baltimore, etc.) MUST contact their respective industrial site to ascertain if payment has been made.

2.B.3 Travel Preparation and Examination System (WEB-TPAX) Process

2.B.3.1 Introduction

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

2.B.3.2 Benefits

Utilizing stored data from the TPAX Travel Order to complete the TPAX 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 all claims on-site by accessing the TPAX main menu.
- A single system creates and produces ALL travel documents necessary to execute government travel.
- Eliminating manual processes decreases reimbursement cycle time.

2.B.3.3 Description

Travel Preparation and Examination System (TPAX) is a software application designed to run on Coast Guard Network thru the Standard Workstation or a VPN connection. TPAX provides an electronic link between the traveler, the Authorizing Official and the Integrated Automated Travel System (WINIATS). WINIATS is the software application used by PPC (tvl) to compute claim/voucher entitlements and transmit the information to FINCEN for payment.

2.B.3.4 Purpose

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

2.B.3.5 Uses

TPAX is used to create Temporary Duty (TDY) Travel Orders, Request for TDY or PCS Travel Advances and/or Requests for TDY Settlement (it is not used for PCS authorizations or claims at this time).

2.B.3 Travel Preparation and Examination System (WEB-TPAX) Process, Continued

2.B.3.6 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 Advance 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 TPAX for accuracy and completeness. • If in error, return to Traveler w/remarks to correct. • If accurate and complete, release in TPAX, as approved, to PPC. Ensures funds are obligated prior to approval.
3	PPC (tvl)	Daily.	• Conduct import routine to download TPAX batch to WINIATS for computation and release to FINCEN.

Continued on next page

2.B.3 Travel Preparation and Examination System (WEB-TPAX) Process, Continued

2.B.2.3 Process **(continued)**

Stage	Who	When	What Happens	
3	PPC (tvl)	Daily.		
		In WINIATS:	**If travel voucher is:**	**Then:**
			Complete and accurate	Release claims to Audit
			Incorrect or incomplete	• Have claim corrected prior to release. • Return claim for subsequent submission by traveler if unable to correct.
4	PPC (tvl) Audit	Daily		
			If travel voucher is:	**Then:**
			Complete and accurate	Release claims to FINCEN for payment.
			Incorrect or incomplete	• Have claim corrected prior to release. • Return claim to Examiner
5	PPC (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 PPC (tvl). • If overpayment due to system error or due to traveler and/or AO oversight, PPC (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 system generated email to go to WEB-TPAX to print a TVS and debt letter.	
6	Member	If audited (post payment)	Mails ***copies*** of original orders, claim, and receipts within 10 days of notification. *See page 2-B-17 for audit procedures and mailing address.*	

Continued on next page

2.B.3 Travel Preparation and Examination System (WEB-TPAX) Process, Continued

2.B.3.7 Critical Elements

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

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

Obligating Travel Funds. TPAX *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 TPAX Approving Officials. The TPAX AO cannot approve a TPAX transaction without first having a valid TONO and "Line of Accounting String". Develop internal procedures that streamline and coordinate this activity at your unit.

Record-keeping. Per Information and Life Cycle Management Manual, COMDTINST M5212.12 (series), General Records Schedule 9, the unit controlling the authorization of travel must maintain copies of records relating to reimbursing individuals, such as travel orders, per diem vouchers, and all supporting documents relating to official travel. These official travel records shall be maintained for a period of six years.

Per National Archives and Records Administration (NARA), General Records Schedule 6, item 1a, the traveler is required to maintain complete and accurate records of all travel claims for 6 years and 3 months.

Airline or Hotel Reservations. It is mandatory policy that all travelers use the designated Travel Management Center for all official transportation requirements. Failure to do so may result in transportation reimbursement being denied or limited to the City Pair contract rate.

Hotel Reservations: When making lodging reservations, travelers shall use the Travel Management Center or reserve a room directly with the hotel/chain (including the hotel's online website). Third party lodging reimbursement is authorized for hotel lodging obtained through an online booking agent only when the traveler can provide a documented itemized receipt for room costs from the hotel or online booking agent showing the following charges: Daily hotel room costs; Daily hotel taxes; and Daily miscellaneous fees, if applicable.

Rental Car/GARS:

Continued on next page

2.B.3 Travel Preparation and Examination System (WEB-TPAX) Process, Continued

2.B.3.7 Critical Elements (continued)

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 nine characters long and must be alphanumeric (no special characters, such as @!?). TPAX passwords are case sensitive. The traveler is required to change their password and confirmation codes every 90 days. WEB-TPAX is Common Access Card (CAC) enabled allowing travelers to auto login once their CAC card is linked to their Logon ID. This eliminates the need for logon passwords although secondary passwords will remain for orders/claim document approval. Share ID or PIN is a violation of current regulations and could result in TPAX accounts being locked to prevent use.

2.B.3.8 User Categories

There are eight categories of TPAX users, each with a different role and responsibility. These TPAX user categories are:

1. Traveler	5. Approving Official
2. Proxy	6. Unit Travel Command Rep
3. Signature Proxy	7. CS1 and CS2
4. Advance Signature Proxy	8. TPAX Admin

2.B.3.9 User Categories/ Privileges

TPAX allows users more than one access capacity, if authorized. All TPAX user's 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 **View** menu item and change their view to access the additional privileges. After completing actions as a Proxy or AO, the user must select the **View: Traveler** option to complete the TPAX logout process or to work on or view their own requests and settlements.

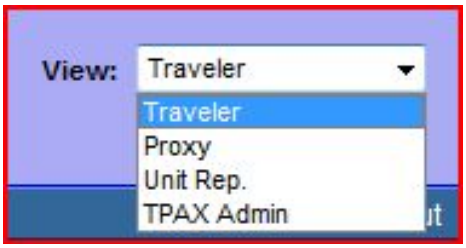

Figure 1: TPAX **Log in as** menu.

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2.B.3 Travel Preparation and Examination System (WEB-TPAX) Process, Continued

2.B.3.9 User Categories/Privileges
(Cont'd)

USER CATEGORY	TPAX 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.
FULL 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.
ADVANCE SIGNATURE PROXY	See Section 2.A.8 of this manual.		
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 TPAX work flowing. ONLY PPC Travel can turn on and off AO privileges
UNIT COMMAND REP	Unit Rep	Review traveler history and profile. Change email and password for travelers.	Complete CG-7421A and fax to PPC.
CS1 and CS2	Customer Care	CS1: Review traveler history and profile. Change email and password for travelers. CS2: Review traveler history and profile.	PPC only. Field Unit upon approval by PPC (tvl)
TPAX ADMIN	TPAX System Admin	Consolidation of all privileges to assist in the completion and correction of claims.	PPC only.

2.B.4 The TPAX Traveler Role

2.B.4.1 Introduction

The basic user access level in TPAX is called "TRAVELER".

2.B.4.2 Authorized TPAX Travelers

Any Coast Guard active duty, reserve, and civilian employees having access to CGSWSIII or VPN can use TPAX as a "TRAVELER". Passwords must be carefully guarded and not shared. Individuals w/o uscg.mil or dhs.gov email addresses, without access to the CG Network must submit manual claims until TPAX is made available on the internet.

2.B.4.3 Non-TPAX 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 PPC for processing (see page 2-B-48 for address specifications). These travelers must consult the unit controlling the authorization of travel for guidance, assistance and review of the travel voucher.

Non-TPAX Travelers are:

- Anyone who does NOT have access to CGSWSIII
- Other service members or civilians traveling on behalf of the USCG that do not have uscg.mil or dhs.gov email addresses
- Dependents
- Non-appropriated fund activity employees
- Members who separate or retire from the service (who depart their unit)
- Coast Guard Auxiliarists that do not have uscg.mil or dhs.gov email addresses

2.B.4.4 Traveler Database

PPC (tvl) downloads, maintains and updates the customer database once every two weeks, following the JUMPS payroll update cycles. This updates unit OPFACs and addresses, member names and ranks. Members must keep other profile information (e.g. home address, phone numbers, e-mail address, default AO, etc.) up to date.

2.B.4.5 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 TPAX, contact PPC Customer Care for assistance:

Phone: 1-866-772-8724 or 1-785-339-2200.
Online Trouble Ticket – http://www.uscg.mil/ppc/ccb/

2.B.5 The TPAX Proxy Role

2.B.5.1 Definition

A Proxy is a person designated to create (but not sign for or deliver) travel documents (travel orders and claims) for another individual.

2.B.5.2 Who Can Be a Proxy

Any traveler can act as a Proxy for another member of the same unit.

2.B.5.3 Limits

Travel documents prepared by a Proxy can only be forwarded to the traveler. Corrections are sent to the Traveler not Proxy. A Proxy cannot serve as both Proxy and AO.

2.B.6 The TPAX Full Signature Proxy Role

2.B.6.1 Definition

A Full Signature Proxy is a person designated by a traveler to create, sign for, and forward travel documents.

2.B.6.2 Who Can Be a Full Signature Proxy

Any person can be designated a Full Signature Proxy by a traveler.

2.B.6.3 Designation Procedure

The traveler designates the Full Signature Proxy in their personal profile. Corrections are returned to the FSP. The member is held accountable for the actions of the FSP and the member's travel documents.

Note: A member cannot serve as both the Full Signature Proxy and Approving Official.

2.B.7 The Approving Official (AO) Role

2.B.7.1 Introduction

The Approving Official (AO) authorizes travel, approves expenses and forwards e-claims to PPC. Each unit must designate AO's to approve their TPAX transactions **and manual travel claims**. PPC (tvl) controls the maintenance of AO privileges in TPAX for all units. **Remember: AO's are required to physically possess the original order and all required receipts for the advance or settlement request prior to electronic approval of claims. Once approved, all documentation shall be returned to the traveler and informed to maintain for six years and three months.**

2.B.7.2 Who Can Be an AO

Any E-5, GS-7, or WS-8 and above, operating in the capacity of supervisor or manager who possesses an understanding of Government travel regulations and DHS/CG travel policy can be designated as an AO.

2.B.7.3 AO Duties

AO's must:

- Confirm in an 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 original order and all required receipts for the advance or settlement request prior to electronic approval in TPAX. Once approved, all documentation shall be returned to the traveler and informed to maintain for six years and three months.**
- Assist Travelers with submission of post payment audit requests.
- Check unit web reports for members within the command being selected for audit, if member has transferred, forward copy of audit info to new unit when applicable.

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2.B.7 The Approving Official (AO) Role, Continued

2.B.7.3 AO Duties (Con'td)

Note: The unit controlling the authorization of travel must maintain copies of records relating to reimbursing individuals, such as travel orders, per diem vouchers, and all supporting documents relating to official travel. These official travel records shall be maintained for a period of six years and three months.

The **Approving Official Checklist and Travel AO Course** is available to assist AO's in completing their duties. The Approving Official Checklist is available from PPC's web site at
http://www.uscg.mil/ppc/travel/aochecklist.pdf /
http://www.uscg.mil/ppc/travel/aocert/1-Overview/index.htm

2.B.7.4 Designation

TPAX profiles must be set up with complete and accurate general information prior to faxing a request for TPAX AO designation. TPAX AO designation requests without a member's basic profile will not be updated in TPAX by PPC.

2.B.7.5 Procedure

To designate a AO, complete TPAX Approving Official (AO) Designation form, CG-7421A (http://www.uscg.mil/ppc/forms/).

1. Complete the blocks 1-7 of the form at the unit level, signatures required in blocks 13-14. Block 13 must be in the member's supervisory chain of command.
2. Fax the form to PPC Travel at (785) 339-2296.
3. Within 3 business days of receipt, PPC Travel will enable AO privileges in TPAX.

The unit shall retain the original CG-7421A until the member/employee departs the unit (transfer, discharge, etc.), or the TPAX AO designation is otherwise terminated (AO designations expire every twelve months) 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.
Note: Each form supersedes the previous so all forms should be inclusive of permissions.

2.B.7.6 Terminating Privileges

To terminate TPAX AO designation and privileges a supervisor within the command submits a PPC customer service ticket.

2.B.8 Pay & Personnel Center (PPC) TPAX Responsibilities

2.B.8.1 Introduction

As the Process Owner of TPAX, PPC (tvl) conducts system management, maintenance, and development.

2.B.8.2 Support Services

This list identifies TPAX support services provided by PPC (tvl).

Service	Description
Technical Support	Assistance troubleshooting TPAX software errors, providing feedback to the field, and reporting corrections and enhancements to programmers.
Maintenance	Download/update TPAX database(s) of AO's, user profiles, CG standard accounting lines, city per diem rates, and Reimbursable Agreement Numbers (RAN).
Travel Entitlement Computation	Process TPAX 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/ppc/tvl.asp.

2.B.9 CG Finance Center (FINCEN) TPAX Responsibilities

2.B.9.1 Introduction

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

2.B.9.2 Support Services

This list identifies TPAX 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 Websites	To electronically view payment status of claims go to the Finance Center's Intranet/CGWEB site at:: http://cgweb.fincen.uscg.mil/travel.htm And select from the available list of web applications: o Travel Claim History o Travel Claim/Voucher Status (last 90 days) o TPAX Audit Status Inquiry

2.B.10 TPAX Records Maintenance

2.B.10.1 Traveler

It is the traveler's responsibility to manage records for all travel transactions related to TPAX. 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.

2.B.10.2 Travel Document Verification

Prior to approving transactions for claim settlement in TPAX, the AO must have all supporting documentation, including printed original signed authorization, claim and receipts, and verify the data entered in TPAX is accurate. Without the original travel authorization/order, amendments, receipts, and advance requests, the AO *should not* approve the transaction for payment. Once approved, all documentation shall be returned to the traveler and informed to maintain for six years and three months.

The unit controlling the authorization of travel must maintain copies of records relating to reimbursing individuals, such as travel orders, per diem vouchers, and all supporting documents relating to official travel. These official travel records shall be maintained for a period of six years.

2.B.10.3 Records Retention

The traveler 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. When the traveler files an electronic claim (1351-2) in Web-TPAX, block 20.a and block 21.a are where the traveler's and AO's printed name and electronic signatures appear, it's not necessary to re-sign these claims in ink. Manual claims must be signed in blue ink.
- Receipts as required by current regulation (JFTR). A receipt must show what and when specific services were rendered or articles purchased, and the unit price. See JFTR, U2710. 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 2.B.21.2 for guidance on the documentation necessary in the event a required receipt is lost or missing.

2.B.11 TPAX Audits (Reviews)

2.B.11.1 Auditing

Due to requirements of the JFTR (U1039), ALL travel claims submitted via TPAX are subject to the audit review process to ensure funds accountability, unit controls, and process integrity.

PPC (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.*

2.B.11.2 Audit 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 and FPD). Orders generated out of TPAX do not require a hand written signature.
- Copy of all signed amendments.
- Copy of travel claim (DD-1351-2 electronically signed).
- Copy of itemized receipt(s) for all hotel/motel lodging reflecting all occupants and single daily lodging rates (Express Check-out receipts are not acceptable).
- Itemized receipts for lodging must include the single room rate (monthly amount on leases) applicable daily taxes, dates of lodging, name of establishment/landlord/leasing office, full address and contact information (phone number).
- All other itemized receipts must include total amount, name of establishment, full address and contact information (phone number).
- Rental car receipts not indicating the amount paid (showing amount due) must have the accompanying credit card statement showing the amount billed to the traveler. The itemized rental car receipt must be included along with the credit card statement. Other transactions, card number and account number may be darkened if desired by the traveler.
- Copy of signed Long-Term or month to month lease agreement(s)
- Copy of signed monthly rental receipt (proof of payment includes but is not limited to copy of money order or front & back of cancelled check)
- Copy of airfare itinerary(s) (must reflect cost of airfare) and excess baggage receipts.
- Copy of commercial transportation receipts (This includes air, rail, bus, ferry, and rental car receipts; estimated receipts are not acceptable).
- Copy of receipts **for all reimbursable expenses** of $75 or more.
- Copy of GTR worksheet if the cost of a GTR was authorized in lieu of common carrier travel.

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

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2.B.11 TPAX Audits (Reviews), Continued

2.B.11.3 Responsibilities

This table describes the responsibilities associated with TPAX travel claim audits.

Who	Responsibility
PPC (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 TPAX 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. • 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 then a recoupment notice is sent via email to the traveler. If a requested audit is not received within three months after the initial audit request or within ten days of final notice following an audit suspension or kickback notice, the traveler will be placed in an overpayment status and collection action will be taken. All of these e-mail notifications are sent using the travelers TPAX email address. **It is imperative that members ensure their e-mail address in TPAX are current (uscg.mil or dhs.gov).** • 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 PPC. • Initiate and mail Pending Audit Reports to units providing notification of audit requests. • Notify travelers of incomplete audit packages and request corrective actions (kickback).

Continued on next page

2.B.11 TPAX Audits (Reviews), Continued

2.B.11.3 Responsibilities **(continued)**

Who	Responsibility
Traveler	• Mail travel claims package for TPAX audits to: COMMANDING OFFICER (TVL- TPAX AUDITS) U. S. COAST GUARD PAY & PERSONNEL CENTER PO BOX 3551 TOPEKA, KS 66601-3551 • For travel claim packages being sent via FEDEX or other express service, mail to the following address as these companies do NOT deliver to a PO Box: COMMANDING OFFICER (TVL- TPAX AUDITS) U. S. COAST GUARD PAY & PERSONNEL CENTER 444 SE QUINCY STREET TOPEKA, KS 66683-3591 Note (Multiple Audits): If the traveler is audited on multiple claims, a complete individual audit package is required for each claim requested for audit. Multiple audit packages may be sent in the same envelope to PPC (TVLTPAX AUDITS). However, each claim package must be separated by placing each audit in their own individual package that distinguishes them apart from each other. Incomplete/improperly prepared packages will be returned to the member to be separated into the individual audit packages. Additionally, Please send only copies of the required documents. • 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 TPAX AO immediately of any known discrepancies or changes to audited original travel claims.

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2.B.11 TPAX Audits (Reviews), Continued

2.B.11.3 Responsibilities (cont'd)

Who	Responsibility
Traveler (continued from previous page)	• Travelers can request a suspension of an audit due to operational commitments. Requests need to be submitted to PPC Customer Care. Requests must include the claim number and the estimated ending date of suspension. Submit requests via the PPC web site: http://www.uscg.mil/ppc/ccb/. • 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 PPC (tvl). Please make your check or money order payable to "U.S. Coast Guard", and write your TONO on your payment. Include a copy of your official notice of travel overpayment letter and send your payment to: USCG ART/OTHERS PO BOX 530249 ATLANTA, GA 30353-0249 For Express Mail: BANK OF AMERICA LOCKBOX NO. 530249 1075 LOOP ROAD ATLANTA, GA 30337-6002 ACCOUNT NUMBER: 6731 • If an audit results in an overpayment, travelers are not authorized to submit subsequent claims in TPAX to cancel the debt. If a supplemental travel claim is necessary to offset the debt the supplemental claim package must be mailed to PPC (TVL-TPAX Audits). • If further documentation is needed to reconcile a debt created in the audit process, travelers/AOs may submit a "HOT AUDIT" package including the full original submitted audit package plus the additional documentation. Hot audits may be faxed with the statement "HOT AUDIT" on the cover sheet to 785 339 3777. • Take corrective action on returned claims and resubmit for audit within 10 days. • Remember: Maintain original orders, amendments, travel claim, and receipts for a period of 6 years and 3 months.

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2.B.11 TPAX Audits (Reviews), Continued

2.B.11.4 Audit Request Information Packages

Monthly, all units will receive a TPAX 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 PPC 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 "TPAX 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 TPAX claim submission accuracy.

2.B.11.5 Audit Status Reports

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

The most recent audit request reports can be accessed the first week of each month via the PPC intranet (CGWEB) page at http://cgweb.ppc.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 https://www.fincen.uscg.mil/TVS_Aux2/ (Internet) or http://cgweb.FINCEN.uscg.mil/tvs_aux2/ (Intrantet/CGWEB). This shows the following information on a requested audit: claim number, TONO, travel dates, dates of requests, date received at PPC, date suspended, suspension end date, date cancelled, date returned to the traveler for further documentation, and date when the audit was completed.

2.B.12 Amendments to Orders

2.B.12.1 Amendment to Orders

Orders can be amended after-the-fact to document verbal authority given during the TDY and PCS 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 the Orders. The amendment should identify:

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

Amendments are done on memo, letterhead, e-mail, or handwritten note and attached to the original TDY order. Amendments require the AO's name and EMPLID printed/typed with their original handwritten signature in blue ink.

2.B.12.2 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.

2.B.12.3 Amendments Cannot Be Used to Deny an Entitlement

Under NO CIRCUMSTANCES can an 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.

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2.B.12 Amendments to Orders, Continued

2.B.12.4 Amendments to Training Quota Management Center Orders

Orders issued by the Training Quota Management Center (TQC) may be amended by the unit AO to reflect alternate means of travel to and from TDY location. Cost of alternate travel cannot exceed the constructed cost of the GTR. Unit AOs may also authorize and amend orders to cover remain overnights (RON). Unit authorization of RON is limited to delay in travel due to weather, missed connections due to late arrival of a flight, and to accommodate travel IAW JFTR U3006. RONs are not authorized for personal convenience. IAW JFTR U3015-C and APP G, the AO may authorize/approved excess accompanied baggage.

Rental vehicles and change in course dates must be approved by TQC. To request an amendment, contact the POC for the related course at http://www.uscg.mil/hq/tqc/TQC_phone_list.asp. If approved, TQC will reply with an e-mail amendment that must be printed/signed by the unit AO and placed with the original orders.

2.B.13 Blanket Travel Orders

2.B.13.1 Definition

A Blanket Travel Order is a TDY Order issued to a traveler who regularly and frequently makes trips away from the PDS within specific geographical limits for a specific time period within a fiscal year in performance of regularly assigned duties.

2.B.13.2 Reference

(a) Joint Federal Travel Regulations (JFTR), U2225.

2.B.13.3 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.
- The reason(s) making the blanket/repeat TDY order necessary.
- Excess accompanied baggage authorization, if necessary; and
- Other conditions, limitations, and instructions appropriate such as the use of GOV'T QTRS/dinning facility/mess is required if available to the member.

For geographic area(s) the Blanket Travel Orders must list the following:

- Unlimited Open. Allows the traveler to travel anywhere on official business without further authorization for a specified period of time within a fiscal year.

- Limited Open. Allows the traveler to travel on official business without further authorization under certain specific conditions, i.e., travel to specific geographic area(s) for a specific purpose(s), subject to trip cost ceilings, or for specific periods of time within a fiscal year.

- Repeat. Allows the traveler to travel on official business without further authorization to a specific destination for a specified period of time within a fiscal year.

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2.B.13 Blanket Travel Orders, Continued

2.B.13.3 Requirements **(Cont'd)**

The following types of travel must be authorized on a trip-by-trip basis;

- Other than economy/coach-class transportation;
- Conference travel;
- Foreign travel;
- Travel funded from a non-federal source
- Training-related travel; and,

Travel by volunteers and invitational travel.

Note: Generic actual expenses allowance is not authorized on blanket orders. If necessary, an amendment to the order must be completed.

2.B.13.4 Monthly Order

The period covered by a Blanket Travel Order that is one month in duration.

2.B.13.5 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.

2.B.13.6 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.

2.B.14 Group Travel Orders

2.B.14.1 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. No cost travel does not require submission of travel claims.

2.B.14.2 Reference

(a) Joint Federal Travel Regulations (JFTR), U4102-O and U2015
(b) Military Assignments and Authorized Absences, COMDTINST M1000.8(series), 1.G.12.b(Exhibit 1.G.1).

2.B.14.3 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 a Claim for Reimbursement for Expenditures on Official Business, form SF-1164 to orders.

2.B.14.4 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.

2.B.14.5 Preparing the Attachment

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

- rate/rank/grade
- name
- employee ID number
- 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”.

2.B.15 Leave and Liberty Combined With TDY Travel

2.B.15.1 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/LIB time.

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

2.B.15.2 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.

2.B.15.3 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."

2.B.15.4 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

2.B.15 Leave and Liberty Combined with TDY Travel, Continued

2.B.15.5 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."

2.B.16 Pay Entitlements Affected by TDY

2.B.16.1 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.

2.B.16.2 Reference

(a) Coast Guard Pay Manual (PAYMAN), COMDTINST M7220.29(series)

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

2.B.16.3 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, Note: When a member receives travel allowances for residing in commercial quarters and subsistence they are not performing “sea duty” and are not eligible for sea pay/time. To be eligible for sea pay/time the member must be berthed and subsisted aboard a vessel while TDY.	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.
to a unit with a government dining facility,	is entitled to 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.

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12)

2.B.17.1 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, a typewriter or by using TPAX.

2.B.17.2 Procedure

Here are specific directions to complete the CG-4251.

Block	Entry
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. Emplid	Enter the employee (7 digit) identification number
3. Grade/Rank	The traveler's rate/rank and pay grade Example 1: MK2/E5 Example 2: CDR/O5
4. Current Duty Station	The traveler's command (and staff symbol) if any. Example 1: SECTOR SAN DIEGO Example 2: COMDT (CG-1222)
5. Work Phone Number	The traveler's duty phone number, including area code, and extension. Example: 785- 357-3691 (X35)

DEPARTMENT OF HOMELAND SECURITY
U.S. Coast Guard
MILITARY/CIVILIAN TEMPORARY DUTY (TDY) TRAVEL ORDER

1. Name of Traveler *(Last Name, First Name, MI)*	2. Employee ID	3. Grade/Rank	4. Current Duty Station	5. Work Phone Number
Guardian, John B.	1234567	BM1/E6	CG SEC SAN DIEGO	619-55-1212

Exhibit 2.B.17.1: CG-4251, blocks 1-5.

6. Depart Date	The date that the traveler is to depart the PDS and begin TDY travel, in the following format: MM/DD/YYYY Example: 04/15/2012 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.
7. Expected Date of Return to PDS	The date the traveler is expected to return to the PDS (in MM/DD/YYYY format). ♦ This is the last day for which travel allowances can be paid. ♦ If the member is taking leave or liberty and returning later enter the "constructive" date that the member would have returned to PDS on time had there been no leave or liberty authorized.
8. Estimated Days	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.

Continued on next page

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12), Continued

2.B.17.2 Procedure **(continued)**

Block	Entry
9. Order Issuing Authority	This is the command that issued the orders.
10. Authorized days of leave	The number of days leave authorized (if any), from date and to date. The leave must also be authorized via Absence Request/eLeave .

6. Departure Date *(MM/DD/YYYY)*	7. Expected Date of Return to PDS *(MM/DD/YYYY)*	8. Estimated Days	9. Order Issuing Authority	10. Authorized 01 days of Leave
08/09/2011	08/14/2011	05	FORCECOM (FC-1)	Dates of LV: 08/15/2011 to 08/15/2011

Exhibit 2.B.17.2: CG-4251, blocks 6-10.

11. Blanket Orders	For a Blanket Travel Order mark the appropriate checkbox and enter the beginning and ending dates for the period the order covers (use the MM/DD/YYYY) format. Example: FROM 10/01/2011 to 10/31/2011

11. **BLANKET ORDERS** *(Doc type 13 TONO)* ☐ Unlimited Open ☐ Limited Open ☑ Repeat Travel
Period of travel from 07/01/2011 to 09/30/2011 *(See Block 13A for Geographical location)*

Exhibit 2.B.17.3: CG-4251, block 11.

12. Medical Travel	Check appropriate box as applies for medical travel. Otherwise, leave blank. See JFTR U7250 and U7550 for more information.

12. **FOR MEDICAL TRAVEL**: ☐ Inpatient ☐ Outpatient ☐ Attendant ☐ Escort

Exhibit 2.B.17.4: CG-4251, block 12.

13A Report to	The unit and geographic location(s) including county if in CONUS Example: C2CEN Portsmouth (Independent City) VA Sonoma County, CA Miami (Dade County) FL If member is traveling to more than one TDY Unit, enter the units in the order they are to be visited.
13B Purpose of TDY	Description of TDY reason (from drop down) Example. 1. Site visit 2. Training 3. Conference
13C Dates of TDY	List the beginning and end dates of each TDY period, using MM/DD format.

13A. **REPORT TO:** UNIT/CITY/COUNTY/ STATE/ZIP-CODE/COUNTRY	B. Purpose of TDY (Conference: must have an approved conference attendance worksheet.)	C. Dates of TDY *(mm/dd-mm/dd)*
STA Monterey CA	Site Visit	08/14 - 08/14
STA San Francisco CA	Site Visit	08/15 - 08/15
Various locations with the 11th CD Dist	Training	07/01 - 09/30

Exhibit 2.B.17.5: CG-4251, blocks 13a – 13c (non-blanket and blanket travel orders)

Continued on next page

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12), Continued

2.B.17.2 Procedure **(continued)**

Block	Entry
14. Remain Over Night (RON)	Leave blank, unless authorized to remain overnight to await transportation (if authorized, enter the number of nights and locality).
14. Remain Over Night (RON) awaiting transportation may be authorized for 01 night(s) at (locality) Seattle, WA *Exhibit 2.B.17.6: CG-4251, block 13.*	

15. Per Diem	1. Enter the maximum per diem rate for lodging and meals & incidental expenses (M&IE) in the spaces provided. Rates can be obtained from http://www.defensetravel.dod.mil/site/perdiemCalc.cfm
	2. QUARTERS: Type of quarters directed at TDY location.
	• **Government/Government Contracted** (when MBR is directed to a military installation or if the lodging is already paid for by the government, for lodging. If member pays for lodging fees at TDY, reimbursement is authorized.)
	• **Commercial Lodging** (There are NO Gov't quarters available; MBR authorized reimbursement up to lodging rate for TDY area. MBR utilizes local hotel.)
	*****NOTE:** Per JFTR U1045, for CG Personnel only: Govt Qtrs are available only if use is directed in the order.*
	3. **MESSING**: Type of Messing directed at TDY location (Select only one):
	• Government Rate (*Military Only)*. Civilians members are never directed to eat at Government Installation, Civilians are authorized either Commercial or Reduced (no lower than the incidental rate and no higher than maximum M&IE. Reduced rate must be ordered and accepted prior to TDY commencing.
	  • Messing directed for all three meals: Example, "A" school or OCS, member only authorized the incidental rate for periods of TDY (indicate cost or no cost)
	  • Proportional Per Diem: MBR is authorized the Proportional per diem rate for TDY area. All three meals are NOT available to the MBR.
	  • Reduced Per Diem Rate: MBR authorized reduced per diem rate for TDY area. Authorization for reduced Per Diem comes from COMDT (CG-1222) memo 4650 of _____.
	• Commercial Rate (Full locality Per Diem Rate)
	4. Actual Expenses Authorized: Check Exemption box if member is authorized Actual Expense for Lodging. (See JFTR U4200 and FTR , par 301-11.300). Enter the percentage per day, allowance and period.
	
	***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 U4165 for an explanation of deductible meals)*

Continued on next page

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12), Continued

2.B.17.2 Procedure **(continued)**

Block	Entry
15. Per Diem (cont'd)	15. PER DIEM Military: JFTR, par. U4100/Civilian: FTR, par. 301-11 Max Locality Per Diem Rate: Lodging $ 96.00 M&IE $ 33.00 *(Lodging Receipts required for reimbursement)* QUARTERS ☐ GOV'T/GOV'T CONTRACTED ☐ No Cost ☐ Cost ☑ COMMERCIAL Lodging *(Gov't Quarters NOT Available)* MESSING ☐ GOV'T Rate ☐ MESS for ALL three meals ☐ No Cost ☐ Cost ☐ Proportional Meal Rate ☐ Reduced/No M&IE of $ _____ (For Military: IAW COMDT (CG-1222) memo 4650 of _____) ☐ COMMERCIAL RATE *(Full Locality Per Diem)* EXEMPTION ☐ Actual Expenses Authorized (JFTR, par. U4200 & FTR, par. 301-11.300) _____ % per day allowed at _____ for period _____ *Exhibit 2.B.17.7: CG-4251, block 15.*

Continued on next page

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12), Continued

2.B.17.2 Procedure **(continued)**

Block	Entry

16. Mode of Travel	Select the mode of transportation directed to and from the TDY locality. One or more of modes listed may apply. Remember: It is mandatory to arrange official travel through the Travel Management Center (TMC) or a Commercial Travel Office (CTO) per JFTR U2400.
	
	• **Commercial Carrier**: (Government Travel Charge Card: Individually Billed Account)
	• **Gov't Procured Transportation Ticket:** (Centrally Billed Account) MBR's Ticket was paid for under the MBR's TONO and reimbursement is not authorized.
	• **Gov't Owned Conveyance:** MBR is authorized to travel by Government conveyance. Pick one of the following: Auto, Vessel, and Plane. NO REIMBURSEMENT.
	• **Privately Owned Conveyance:** MBR is authorized to travel by own conveyance. Pick one of the following: Car, Airplane or Motorcycle. Subject to reimbursement.
	  • **POC is more advantageous to the Gov't**: MBR is reimbursed full mileage and tolls for traveling with POC.
	  POC is authorized not to exceed the cost of a GTR. MBR subject to reimbursement not to exceed the cost of a GTR. Specify the amount of government procured transportation (GTR) cost.
	
	16. MODE OF *TRAVEL (Mode of travel to TDY site and Return) (It is mandatory to arrange Official Travel through the TMC/CTO).*
	☐ Commercial Carrier *(GTCC IBA Use)*
	☐ GOV'T Procured Transportation Ticket *(GTCC CBA Use)*
	☐ GOV'T Owned Conveyance ☐ Auto ☐ Vessel ☐ Plane
	☐ Privately Owned Conveyance (POC): ☐ Car ☐ Airplane ☐ Motorcycle
	☐ POC is more advantageous to the Gov't
	☐ POC is authorized not to exceed the cost of a GTR $
	Exhibit 2.B.17.8: CG-4251, block 16.

17. Travel at TDY Site	Select the mode of transportation around the TDY locality. 17. TRAVEL AT TDY SITE ☐ Rental Car *(compact)* ☐ Upgrade Authorized-size _____: *(TMC/CTO use is mandatory)* ☐ Local travel: taxi/bus/metro/other public conveyance *(Max 15% Tip)* *Exhibit 2.B.17.9: CG-4251, block 17*

Continued on next page

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12), Continued

2.B.17.2 Procedure **(continued)**

Block	Entry
18. Authorized Reimbursable Expenses	Travel Expense reimbursable items that require pre-authorization on the travel order are: (1) Registration (or Seminar) Fee. (2) Baggage Fees (3) Communication Services (official use). (4) Phone Calls (official use). Not to exceed amount must be entered. (5) Computer Connections (Official use) 18. AUTHORIZED REIMBURSABLE EXPENSES ☐ Registration Fees *(if meals are included in the cost-report in Block 19, DD-1351-2)* ☐ Baggage Fees ☐ Communication Services *(Official Use)* ☐ Phone Calls *(Official Use)* NTE $ _____ daily ☐ Computer Connections *(Official Use)* *Exhibit 2.B.17.10: CG-4251, block 18*
19. Remarks	Enter in any authorizations or variations not listed in a previous blocks. Also see enclosure (3) of this manual for examples. Continue on plain bond paper, identified with the travel order number and member's employee ID number, if additional space is necessary.
20. Travel Advance Authorization	Enter the amount of authorized Travel Advance and check the appropriate GOV'T Travel Card Holder box. 20. TRAVEL ADVANCE AUTHORIZATION: ☐ GTCC holder Travel advance is authorized in the amount of $ _____ ☐ Not a GTCC holder/Charged to TONO *(Attach SF-1038)* ☐ Not a GTCC holder/Charged to Debit Card *(Attach SF-1038)* *Exhibit 2.B.17.11: CG-4251, block 20* Note: Do not list the cost of Government procured transportation (GTA/GTR) as an advance.
21. TONO and Accounting String	Enter in the 16 digit Travel Order Number and Accounting String. ♦ Note: If travel spans FY's provide TONO and Accounting String for both FY's. ♦ See section 2-B-23 (beginning on page 55 of this chapter) for additional information. ♦ ALC does not use the 16 digit TONO, they use a 6-8 digit TONO.
22. Funds approving official's Signature (Optional Unit Use)	Official approving the funding signs and dates with original hand written signature in blue ink. *This signature, if for local unit accounting, is not required to be completed when orders are funded from non-unit accounts.* ***This signature certifies that funds have been obligated***
23. Other Gov't agency funds (Optional Unit Use)	Utilize this block for funds controlled by another government agency. Contact FINCEN (OGQ) and enter a Reimbursable Agreement Number (RAN).

Continued on next page

2. B.17 Preparation of TDY Order (CG-4251 Rev. 5/12), Continued

2.B.17.2 Procedure **(continued)**

Block	Entry
24. Authorizing Official's Signature, Name, Rank & Title	Authorizing Official original hand written signature in blue ink with rank, title and work phone number.
25. Traveler's Signature	Traveler signs and dates orders upon receipt.
26. Amendment Block	Use this block to amend travel orders to authorize changes after travel has been completed. See section 2.B.12 on page 2-B-22, Amendments to TDY Orders, for more information.

2.B.18 Other Forms of Written Orders

2.B.18.1 Introduction

This section describes forms of written orders.

2.B.18.2 Discussion

There are four 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.

1. Letter/Memo Travel Order

- A standard CG Memo that includes all the information necessary (see exhibit 2.B.18.1 on the next page for an example).

2. Authenticated Message Order

- 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 with original hand written signature in blue ink, and mark as “Original”

3. E-Mail Order

- Like message traffic, electronic mail (e-mail) can also be used as a travel order.

4. Direct Access/CG-5131

- TDY training orders issued by Training Quota Management Center (TQC) via the Direct-Access Airport Terminal are on form CG-5131.
  Simple – Add mode of travel, per diem information, remarks (“order notes” in DA), print it, endorse it, sign it with original hand written signature in blue ink, and mark as “Original”.

Continued on next page

2.B.18 Other Forms of Written Orders, Continued

Exhibit 2.B.18.1 - Letter Travel Order

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

COMMANDING OFFICER
USCG PAY & PERSONNEL 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 XXXXXXX, 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.

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Continued on next page

2.B.18 Other Forms of Written Orders, Continued

2.B.18.3 Message / E-Mail 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 (similar to form CG-4251):

A. Travel order number (TONO) and accounting line data;
B. Traveler name, EMPLID, 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, or Actual expense allowance in the amount of ($) for (Locality name)(TDY period), etc.

Continued on next page

2.B.18 Other Forms of Written Orders, Continued

2.B.18.4 Message / E-Mail 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, EMPLID
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 ($000.00) 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 hand written signature, in blue ink, not stamped) (AUTHENTICATION) HAVE MSG STAMPED: <u>ORIGINAL</u>.

2.B.19 Temporary Duty (TDY) Checklists

2.B.19.1 Introduction

These checklists have been provided to assist the unit/and to some extent, the 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.

2.B.19.2 References

(a) Joint Federal Travel Regulations (JFTR), Vol I (Military)
(b) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(c) Military Assignments and Authorized Absences, COMDTINST M1000.8(series)
(d) Personnel Security and Suitability Program, COMDTINST M5520.12(series)
(e) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8(series)
(f) Coast Guard Servicing Personnel Officer (SPO) Manual, PPCINST M5231.3(series)

2.B.19.3 TDY Departing checklist

Use this checklist when a member requires a TDY order.

Step	Action	Reference	Date
1	Member submits TDY Travel Request Worksheet, CG-2070 to unit admin via supervisor, funds approving official (required when unit funds are used. If funded by another source include a copy of the authorization; message, memo, e-mail, etc.) and approving official.	Ref (b) 2.B.19	
2	Counsel member on travel and pay entitlements	Ref (a) Chap. 4 Ref (b) 2.B.16	
3	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. The Travel Management Office must be used to arrange official travel.	Local policy	
4	Get Commandant (CG-12) approval if TDY will be over 180 days or for other than Coach class tickets.	Ref (a) 2415	
5	Complete travel order	Ref (b), 2.B.17	
6	Ensure member has sufficient funds; arrange for advances if needed	Ref (a) 2300	
7	Ensure member has sufficient obligated service	Ref (c) 1.B.6	
8	Ensure member has proper security clearance	Ref (d)	
9	Ensure member meets weight standards (if applicable) 15 to 30 days prior to class convening.	Ref (e), 2.A.4	

Continued on next page

2.B.19 Temporary Duty (TDY) Checklists, Continued

2.B.19.3 TDY Departing checklist **(continued)**

Step	Action			Reference	Date
10	Complete PCS/TEMDUINS to "A" School worksheet (CG-2001) if member is going TDY to "A" School.			Ref (b), 2.A.2	
11	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.			Ref (b), 2.B.16 Ref (f) Part II, Chap 12	
12	**If**	**And**	**Then**	Ref (b) 7.B.3	
	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				

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

2.B.19.4 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.	Ref (b) 10.B.5	

2.B.19.5 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	Ref (a) 4400	
2	Ensure member submits travel claim to supervisor within 3 working days of return	Ref (b), 2.B.2.3	
3	Ensure supervisor reviews the travel claim and signs and dates block 16 within 2 working days	Ref (b), 2.B.2.3	
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).	Ref (b), 2.B.16 Ref (f) Part II, Chap 12	
5	Ensure the travel claim is prepared and submitted through TPAX with documentation retained by the member for a period of 6 years & 3 mos, or travel claim, original orders, and receipts are forwarded to PPC (tvl) if TPAX is not used	Ref (b), 2.B.2.3	
6	Forward Career Development Worksheet (CG-2030) to SPO to report school completion or addition of enlisted competency codes.		
7	Review and complete PCS/TEMDUINS to “A” School (CG-2001) if member is returning from TDY to “A” School.		

2.B.20 Reimbursement Methods

2.B.20.1 Introduction

This section covers various reimbursement methods used during TDY.

2.B.20.2 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*
http://www.defensetravel.dod.mil/site/perdiemCalc.cfm

2.B.20.3 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.

Notes: (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 next to the lodging amount in the itinerary. OUTCONUS lodging taxes are included in the daily lodging amount.

Continued on next page

2.B.20 Reimbursement Methods, Continued

2.B.20.3 Per Diem Types, continued

Actual Expense Allowance (AEA) :

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% . 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 $5.00 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

2.B.20 Reimbursement Methods, Continued

2.B.20.3 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 (CG-1222) 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.

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2.B.20 Reimbursement Methods, Continued

2.B.20.4 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.).

2.B.21 Manual Submission of Travel Claims

2.B.21.1 Introduction

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

2.B.21.2 Authorizing Official Designation

All travel claim authorizing officials (AO) must have the TPAX/WINIATS USER ACCESS AUTHORIZATION AND APPROVING OFFICIAL (AO) DESIGNATION FORM CG-7421A (Revised 03/13 or later) filed with PPC Travel Branch regardless of the type of claim (TPAX or manual) being approved or claims will not be processed and will be returned for valid AO signature.

- Each form submitted supersedes the previous form on file.
- Forms must be physically signed. Electronic/digital signatures are not acceptable.
- Block 13 CMD Designation Signature must be a supervisor in the user's supervisory chain of command or permissions will not be granted.
- Submit the form via Fax to PPC (TVL). The Fax number is on the form.
- All permissions above self service will be terminated after one year from the date of the command signature, upon PCS (including fleet ups and re-tours), upon separation from service, upon change of status from active to reserve component or when deemed necessary by the competent authority.
- TPAX/WINIATS termination should be part of the unit checkout process

Continued on next page

2.B.21 Manual Submission of Travel Claims, Continued

2.B.21.3 The Travel Claim Package

The following items are required for each travel claim:

- Original Travel Voucher
- Original travel orders or statement for lost/missing original (see below) 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).

ORIGINAL OR CERTIFIED COPY OF TRAVEL 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.

EMPLOYEE NAME: _____ DATE: _____(current date)

Travel Order Number: _____

Accounting Data: _____

Dates of Order: _____ to _____

Place Ordered From and To: _____

TDY Per Diem (check one): Messing: □ Commercial □ Government □ Proportional □ Deductible □ Reduced $_____per day □ Actual Expense (for meals, itemized receipts are required)

Quarters: □ Commercial □ Government

Mode of Travel authorized:_____

Reimbursable Expenses Authorized: _____

_____

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: _____ Signature: _____

Printed Full Name, Signature & EMPLID Employee/Traveler

Printed Full Name, Signature & EMPLID Authorized Certifying Official

The statements must be completed by the traveler and signed IN BLUE INK by both the traveler and the Authorizing Official (AO).

Continued on next page

2.B.21 Manual Submission of Travel Claims, Continued

2.B.21.3 The Travel Claim Package (cont'd)

- A copy of the itemized receipt for lodging expenses no matter the amount. For lost lodging receipts, a statement signed by the traveler and AO with original hand written signatures in blue ink can be accepted. Statements are located on the PPC Travel website, http://www.uscg.mil/ppc/travel/LostLodgingReceipt.pdf .

STATEMENT OF LOST LODGING RECEIPT

IAW JFTR U2500.B.3 & U4125.A… An Itemized receipt must be provided. When an Itemized receipt is lost, destroyed, or impractical to obtain, you must provide a statement explaining the circumstances why the Itemized receipt was not enclosed. Included in this statement provide the name and address of the lodging facility, the dates the lodging was obtained, whether others shared the room, the daily lodging rate, the daily taxes incurred, contact information & all other expenses (if any) that were included.

I, _____certify that I paid $_____ per night for Lodging, and $_____ for lodging taxes between the dates of _____ and _____. I am not claiming any special fees such as pets, movies, room service, bar, laundry or sundry charges.

I stayed at: _____ (Hotel / Motel)

Contact Information (phone # w/area code)_____

Address: _____

In city of: _____ State of: _____

Zip code: _____

Travel was Under TONO number _____

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)

An Itemized receipt was either lost or impractical to obtain therefore it could not be submitted for reimbursement. If a copy of this receipt is found, I will not make another claim against this TONO#.

_____ _____
Traveler's Signature w/EMPLID (Date)

Approved By:_____ _____
Approving Official's Signature w/EMPLID (Date)

The statements must be completed by the traveler and signed in BLUE INK by both the traveler and the Authorizing Official (AO).

Continued on next page

2.B.21 Manual Submission of Travel Claims, Continued

2.B.21.3 The Travel Claim Package (cont'd)

- Original Airfare, or primary commercial transportation, receipt.
- Original receipts for reimbursable expenses of $75 or over. For lost lost or missing receipts, a statement signed by the traveler and AO with original hand written signatures in blue ink can be accepted. Statements are located on the PPC Travel website, http://www.uscg.mil/ppc/travel/receipts.pdf .

LOST OR MISSING RECEIPT FOR REIMBURSABLE EXPENSE OF $75 OR MORE
(each lost/missing receipt must have its own individual signed statement)

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

Total Amount:_____

Name of Establishment:_____

Full Address:_____

Contact Information (phone #):_____

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)

Traveler Signature w/EMPLID:_____Date: _____

Printed Full Name:_____

Approving Official Signature w/EMPLID:_____Date:_____

Printed Full Name: _____

The statement must be completed by the traveler and signed in BLUE INK by both the traveler and the Authorizing Official (AO).

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

2.B.21.4 Actual Travel Performed

Travelers shall indicate in block 15 of the DD-1351-2 all legs involved showing actual travel performed for TDY. Include modes of travel to transportation terminals and all TDY sites.

Continued on next page

2.B.21 Manual Submission of Travel Claims, Continued

2.B.21.5 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 approving official 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. PPC (tvl) will not return the original travel claim package.

- Prior to mailing, securely staple the entire travel claim package to prevent separation in transit (refrain from using paper clips). Small receipts should be taped down to a blank sheet of paper or full readable photocopies of receipts should be provided (refrain from stapling individual receipts).
- Remember that you must submit your travel voucher to your supervisor within three days of completion of travel.
- All permanent change of station travel claims should be filed within 30 days of completion of travel.
- It is up to your AO to complete the administrative review to validate that funds are available and obligated and forward the entire package to PPC (tvl) for processing.

Note: Travel claims for separation or retirement must be filed after the effective date of orders (This is usually the separation/retirement date minus any authorized travel days plus one day). On separation/retirement claims, the AO signature is not required. In order for the claim to be processed without the AO's signature, the following statement must be entered in block 21a or block 21b of the DD-1351-2– "*Final PCS, AO not available*".

2.B.21.6 Payment

If all documentation is correct, PPC (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-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.

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2.B.21 Manual Submission of Travel Claims, Continued

2.B.21.7 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 PPC'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 PPC Customer Care by submitting an online Trouble Ticket at:

http://www.uscg.mil/ppc/ccb/
or call: (785) 339-2200 or 1-888-772-8724

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

2.B.21.8 Mailing Procedures

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

Address
COMMANDING OFFICER (TVL) U. S. COAST GUARD PAY & PERSONNEL CENTER 444 SE QUINCY ST TOPEKA KS 66683-3591

Note: Mail (unfolded) in a large envelope with all documents and receipts stapled together as one package. Receipts should be taped to and 8 ½ X 11 sheet of paper. This will help to reduce the risk of lost documents. DO NOT fold travel claim documents. Remember to keep a complete copy of your submitted package.

2.B.22 Rules for Claiming Official Phone Calls

2.B.22.1 Introduction

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

2.B.22.3 Rules Concerning Official Calls

Military personnel shall follow these regulations when claiming reimbursement for telephone calls or other communication charges incurred during the course of official business, JFTR App. G.

Government owned/leased services should be used for official communications, but when government services are not available commercial communications services may be used.

- Prepaid communication service (i.e., prepaid phone cards, cell phones) or in-flight communications services are not reimbursable unless the AO can determine they were used for official business.

The Approving Official (AO) may determine certain communications to a traveler's home/family are official (i.e., to advise of the traveler's safe arrival, inform/inquire about medical conditions, and advise regarding changes in itinerary).

- The AO should limit communications to a dollar amount in advance of the TDY, and may approve charges after the TDY completion, when appropriate.

- When a cell phone is used for official communication, each call must be documented showing the additional cost incurred outside of the normal usage covered in the cell phone contract.

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2.B.22 Rules for Claiming Official Phone Calls, Continued

2.B.22.3 Rules Concerning Personal Calls (cont'd)

Computer connections (e.g., internet) used for computers to perform official government business is reimbursable when authorized/approved by the AO.

- In-flight computer connections are not reimbursable unless the AO can determine they were used for official business, authorization must be stated on the orders or within an amendment.

2.B.23 Accounting Data

2.B.23.1 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.

2.B.23.2 Reference

(a) FINCEN Standard Operating Procedures (SOP)
http://www.fincen.uscg.mil/sop.htm
Chap 4, Accounting Line Data
Chap 5, Document Numbering

2.B.23.3 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	11(FY)234PBZA73000
PCS, Retirement, Discharge	12(FY)234P23704000
Blanket or Repeat	13(FY)234ZM1233000

Note: Industrial site TONOs differ from this restriction.

2.B.23.4 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

Note: Travelers should only input two lines of accounting when processing a TDY claim when a FY crossover has occurred. Having multiple lines of accounting other than the FY crossover will cause the claim to be removed from the system and the traveler resubmitting the claim in TPAX.

Mismatched fund types with LOAs will suspend and cannot be corrected. The TONO and all associated documents (claims/orders/advances) must be removed from the system and reentered correctly with the appropriate fund type.

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2.B.23 Accounting Data, Continued

2.B.23.5 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: 11(YR)238HWA026000

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.

2.B.23.6 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. PPC (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.

2.B.24 Evacuation Orders to a Safe Haven

2.B.24.1 Introduction

This section provides basic guidance for preparing claims for dependent evacuation orders.

2.B.24.2 Officials authorized to order evacuations

Information for evacuations within CONUS is released by the responsible official designated by paragraph U6051-B, JFTR. The message announcing the evacuation will designate the safe haven location, PPC shall be copied on all safe haven location message traffic. The evacuation applies to dependents residing in the vicinity of the member's PDS or at an authorized designated location. It also applies to dependents en route to establish a residence with the member and to dependents residing in the vicinity of the member's old or new PDS.

PPC Travel will accept an official Coast Guard message or memo signed by the District Commander to process the evacuation claims. The decision of the local civil official to evacuate an area is not sufficient. The appropriate military official must authorize/order an evacuation as local evacuation allowances can only be paid as of the date of the evacuation is ordered/authorized. Per JFTR U6052-D, the message or memo shall specify the evacuation termination process.

Information on evacuations from overseas areas for a Service member's dependents is released by message from the Under Secretary of Defense, for Coast Guard members the responsible official designated by paragraph U6003-A, JFTR. The message announcing the evacuation outlines the safe haven locations. The JFTR evacuation applies to both command and non-command-sponsored dependents for members stationed overseas. It further applies to command sponsored dependents that are en route to establish a residence with the member, and to student dependents that are authorized to travel to the member's PDS. (NOTE: Entitlement to evacuation allowances is based on command sponsorship of the dependents. Command sponsorship is a personnel decision and should be reflected in the evacuation order.)

Continued on next page

2.B.24 Evacuation Orders to a Safe Haven, Continued

2.B.24.3 Evacuation orders are only issued for dependents

The Joint Federal Travel Regulations, Volume 1, Chapter 6 is the regulatory guidance for military family evacuations. Uniformed members are not evacuated; they may be issued orders for temporary duty (TDY) or permanent change of station (PCS) as required. Reserve component members who are not on active duty are not authorized evacuation TDY orders.

The TONO for evacuations can be an 11 or 13 document type. Blanket orders are not authorized. When the evacuation is expected to exceed 21 days and incremental claims will be submitted, issue a doc-type 13.

Questions and answers for civilian employees affected by emergency situations may review the following guide at http://www.uscg.mil/ppc/travel/civilianevac.pdf .

2.B.24.4 Requirements for Evacuation Orders

The processing of evacuees requires patience, tact, and expeditious service. Authorized dependents will be issued a separate tono/order with authorized dependent minors listed in the remarks block of the non-military spouse evacuation order. A CG-4251 or a memo travel order shall be used. The order shall contain the dependency dates; date of marriage, date of birth, and reflect the evacuation/safe haven location, as appropriate. The sponsor's name/EMPLID shall be listed in the remarks section of the dependent evacuation order.

2.B.24.5 Utilize Centrally Billed Account (CBA) for purchase of transportation

Dependent transportation tickets may be charged to the centrally billed account using the travel order when travel is arranged through the Travel Management Center (TMC) contractor, SATO. Use of the uniformed member's travel charge card is not authorized and would constitute misuse. The toll free SATO Service Center phone numbers are; Hawaii, Guam, Singapore, and Japan - 1-877-666-1304, all others - 1-800-753-7286.

2.B.24.6 Escort when dependent(s) not able travel alone

In the case of uniform members who are single parents or member to members with minor children, the Approving Official may determine if the member should accompany dependents as escorts. A person may travel under an official travel authorization/order as an escort for a dependent evacuated under

Continued on next page

2.B.24 Evacuation Orders to a Safe Haven, Continued

2.B.24.6 Escort when dependent(s) not able travel alone (Cont'd)

Chapter 6, Part A of the JFTR who is incapable of traveling alone (IAW JFTR, Par. U6004-H) between the member's PDS and safe haven or designated place. The minor dependents shall be listed on the escorts or member's orders with all pertinent information. Married members who are both assigned in an area that is being evacuated shall be given their own set of TDY or PCS orders.

2.B.24.7 Advances

Advances for evacuees will be paid to the dependents the orders are issued to. To request advances use the SF-1038 form (under their SSN) with a signed copy of the orders, fax to the Pay and Personnel Center at (785) 339-3775. To expedite the payment process for advances, the payment of claims and reduce the issue of paper checks, it is highly recommend that the dependent that is issued an evacuation order complete the Finance Center online Electronic Funds Transfer/Member Payment Enrollment Form at (https://www.fincen.uscg.mil/secure/enrollment_form.htm). Once completed all travel payments will be electronically transferred into their banking institution of choice (EFT). It is recommended to request advances no more than 80% of the travel entitlements; this will help in reducing potential overpayments.

2.B.24.8 Submitting evacuation claims

All dependent evacuation claims shall be submitted on DD Form 1351-2 using their SSN, clearly annotated as a dependent evacuation claim, and submitted by mail to the Pay and Personnel Center. Claims should be submitted every thirty days; dependents (non access to the CG network) cannot submit claims via TPAX. Units shall assist evacuees with claim preparation. Each evacuee shall be asked about advances or previous payments received. All advances or previous payments associated with an evacuation claim must be disclosed upon submission of any evacuation claim in order to avoid duplicate payments in accordance with the JFTR, Chapter 1, Part A, para U1000.D. To verify travel advance payments visit the Coast Guard Finance Center Travel Payment Application at (https://www.fincen.uscg.mil/secure/TP_menu.htm or http://cgweb.fincen.uscg.mil/travelPmt). Each claim submitted must have an original hand written signature in blue ink by the traveler and Approving Official. The order must be an original with the Approving Official's hand written signature in blue ink or a copy of the approved order certified as a true copy.

Continued on next page

2.B.24 Evacuation Orders to a Safe Haven, Continued

2.B.24.8 Submitting evacuation claims (cont'd)

Mail Claims to:
Commanding Officer (Travel)
Evacuation Travel Claims (TST)
Coast Guard Pay & Personnel Center
444 S.E. Quincy Street
Topeka KS 66683

If the traveler is overpaid, PPC will mail a debt letter to the address provided on the Travel Voucher DD-1351-2. The traveler has 30 days from the date of the letter to make payment in full, or the indebtedness will be referred to the U.S Treasury for collection.

2.B.24.9 Termination of entitlements

When a member returns from a safe haven location with one or more dependents, all evacuation allowances cease for the entire family regardless of the location of other dependents. COMDT (CG-1222) may direct the early return of dependents, and termination of evacuation allowances, in certain areas before the evacuation period termination date. When requested through the member's chain of command, COMDT (CG-1222) may authorize one or more of the dependents to remain at the evacuation safe haven location with appropriate allowances.

2.B.25 Invitation Travel Orders (ITOs) Guide

2.B.25.1 Introduction

Invitation Travel Orders (ITOs) are complex and follow very specific rules. This guide should answer many of your questions.

2.B.25.2 Purpose of ITOs

There are occasions when the Coast Guard will authorize the reimbursement of travel expenses to a non-governmental individual. ITOs may only be issued to individuals who are not employed by Government or are employed intermittently in Government as consultants or experts (under 5 U.S.C. 5703) (NOTE: This does not include a contractors' employee traveling in the performance of the contract, individuals who serve without pay or are paid $1 per year when acting in a capacity that is directly related to, or in connection with official government activities; or volunteers who are covered by 10 U.S.C. 1588.) .

2.B.25.3 Travel Allowances for ITOs

Travel allowances authorized for these individuals are usually the same as those for employees traveling on temporary duty (TDY) authorizations. This guide addresses how to prepare the traveler for making their transportation arrangements, receive advances, and file a travel claim. It is not comprehensive in content. The full regulations governing ITOs and entitlements are covered in the Joint Federal Travel Regulations, Federal Travel Regulations, COMDTINST 12570.3E and Travel for Official Government Business, DHS Management Directive 1510.1. Evacuation orders are not ITOs.

2.B.25.4 ITO Instruction

Guidelines on the preparation of invitational travel orders are listed in COMDINST 12570.3E, enclosure (1). Only certain officials are authorized to sign ITOs. The instruction is very specific and must be followed; see enclosure (3) of the instruction. Claims submitted without the proper official's original signature signed in blue ink on the orders will not be processed and returned to the Approving Official (AO). Per COMDTINST 1750.4(series), Ombudsman Program, an ITO for an ombudsman requires authorization for the director included with the order.

Continued on next page

2.B.25 Invitation Travel Orders (ITOs) Guide, Continued

2.B.25.5 Member and Dependent Traveling Together

When an active duty uniform member is traveling under official TDY orders with a command sponsored dependent that could have been issued an ITO for medical purposes either as the patient or an escort, the dependent may be placed on the active duty uniform member's travel orders with all pertinent information. This can be done for medical ITOs only, all other ITO circumstances the dependents must be issued their own ITO. Minors traveling with a guardian or escort may be listed on the guardian or escorts ITO. When the active duty uniform member is traveling with a command sponsored dependent with orders, the member may use their GTCC for their travel expenses only, not the dependents. A member who has their dependents listed on their orders for medical shall complete the travel claim and submit it by mail to PPC due to the complexity of the claim and entitlements.

2.B.25.6 ITOs for Dependent Children

Travelers over the age of 21 should be issued their own ITO. Minors/ incapacitated travelers who are authorized to travel under an ITO shall be listed under the legal guardian, escort, or attendant's ITO.

2.B.25.7 SSN/ITIN Required

A traveler must have a Social Security Number (SSN) or, in the case of foreign nationals, an Individual Taxpayer Identification Number (ITIN). To apply for an ITIN, use the latest revision of IRS Form W-7 (http://www.irs.gov/pub/irs-pdf/fw7.pdf) (Note: See this page for the procedure for obtaining an ITIN from abroad: http://www.irs.gov/businesses/small/international/article/0,,id=96690,00.html). If a foreign national or any other traveler does not hold a US bank account, a paper check in US dollars will be sent to the mailing address provided on the Travel Voucher, DD-1351-2.

2.B.25.8 ITO TONOs

The TONO for ITOs can be an 11 or 13 document type. Blanket orders are not authorized.

Continued on next page

2.B.25 Invitation Travel Orders (ITOs) Guide, Continued

2.B.25.9 Travel Arrangements for ITO travelers

The unit AO shall assist the traveler in making their transportation reservations. They must be arranged using the Commercial Travel Office (CTO) contractor, SATO. Travelers on ITOs will use the Centrally-Billed Account (CBA) for transportation expenses since the Invitational Traveler does not possess a GTCC. The order must specify that the CBA is authorized. Reimbursement for reservations made outside the contracted CTO is limited to the City-pair YCA contracted fares plus CTO transaction fee. The toll free SATO Service Center phone numbers are; Hawaii, Guam, Singapore, and Japan - 1-877-666-1304, all others - 1-800-753-7286. Travelers will have to arrange their own lodging and rental car, if authorized, unless the unit has contracted out the lodging. When a rental vehicle is authorized on the ITO, Invitational Travelers are listed as authorized users under the U.S. Government Rental Car Agreement Number 4. The Invitational Traveler should verify that the Government Administrative Rate Supplement (GARS) is stated within rental vehicle contract at $5.00 per day. Global Positioning Systems are not authorized for Invitational Travelers.

2.B.25.10 Advances for ITOs

Travelers should be notified of the TDY location per diem rates which define their maximum reimbursements. An advance for invitational travelers will be paid to the traveler to whom the ITO is issued. To request advances, use the SF-1038 form (under their SSN) with a signed copy of the authorization. Fax the SF-1038 to the Pay and Personnel Center at (785)339-3775. The advance should be requested prior to travel, but may be issued during travel with authorization from PPC Travel Branch Chief. To expedite the payment process for advances, the payment of claims and reduce the issue of paper checks, it is highly recommend that the traveler who is issued the ITO complete the Coast Guard Finance Center online Electronic Funds Transfer/Member Payment Enrollment Form at: https://www.fincen.uscg.mil/secure/enrollment_form.htm. Once completed all travel payments will be electronically transferred into their banking institution of choice (EFT). It is recommended that travel advance requests not exceed 80% of the estimated travel entitlements. This will help reduce overpayments and collection action.

Continued on next page

2.B.25 Invitation Travel Orders (ITOs) Guide, Continued

2.B.25.11 Travel Claims for ITOs

The invitational traveler with assistance from the AO will have to complete and provide an original Travel Voucher DD-1351-2 signed in blue ink by the traveler and AO, original order signed in blue ink by the ITO Authorizing Official, and provide all necessary receipts (lodging, airfare, rental vehicle, other receipts in the amount of $75 or greater). The entire claim should be mailed to the address below. If the traveler was authorized Actual Expense for meals/transportation (AE), they must save all receipts (gas, meals, etc). The claims shall be submitted to the AO within five business days after travel has been completed. All contact information on the travel voucher must be provided, i.e., address, phone number, and e-mail. The invitational traveler shall be reminded to maintain their travel documentation for six years, three months.

Commanding Officer (TST)
Invitational Travel Claims
Coast Guard Pay & Personnel Center
444 S.E. Quincy Street
Topeka KS 66683

If the traveler is overpaid, PPC will mail a debt letter to the address provided on the Travel Voucher DD-1351-2. The traveler has 30 days from the date of the letter to make payment in full, or the indebtedness will be referred to the U.S Treasury for collection.

2.B.26 Premium Class Travel Request

2.B.26.1 Introduction

This section discusses the eligibility criteria for premium-class travel and the standard procedures for requesting such common carrier accommodations.

2.B.26.2 References

(a) Federal Travel Regulation (FTR) (civilian employees)
(b) Joint Federal Travel Regulations (JFTR) (military personnel)
- Par. U3125-b (for commercial air) and
- Par. U3135 (for train)

2.B.26.3 Discussion

Premium-class travel includes first-class accommodations, business-class accommodations, and extra-fare train service (e.g. Amtrak Acela and Metroliner). The authority to approve premium-class travel is held at the Commandant/Vice Commandant level with no further re-delegation authorized.

The use of premium-class travel can be authorized prior to travel or approved after the fact. However, by regulation, authorization/approval for the use of premium-class travel is strictly limited to travel that meets specific eligibility criteria as indicated in reference (a) and reference (b). For commercial air the length of flight in and of itself is not sufficient justification to authorize premium-class travel.

2.B.26.4 Submission of Premium-Class Travel Request Form (CG-4600)

Commands shall ensure members and employees are eligible to use premium-class travel prior to submitting the Premium-Class Travel Request Form (CG-4600) via COMDT (CG-1222) for military or COMDT (CG-1215) for civilians.

The CG-4600 is available at http://www.uscg.mil/forms/cg/CG_4600.pdf.

In order to allow time for processing and routing, CG-4600 should be submitted immediately when the need for premium-class travel is known. Normal processing time is 21 calendar days.

Continued on next page

2.B.26 Premium Class Travel Request, Continued

2.B.26.5 Supporting Documentation

The following shall be included with the CG-4600: a copy of the travel orders, itinerary, and any supporting documentation/justification. For medical travel, a statement is required from a competent medical authority of the need for a patient to travel by premium-class and the need for an attendant, if applicable. A separate CG-4600 must be submitted for an attendant.

2.B.26.6 Submit Approved Requests with Travel Claims

A copy of the approved CG-4600 is required to support the claim for reimbursement of premium-class travel and must be referenced in TPAX (comment block) when filing an electronic voucher.

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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 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. Chapter 3-A of the Reserve Policy Manual, COMDTINST M1001.2 (series), defines these duty types in detail. This section will focus on the procedures and processes governing ADT.

In this section

Topic ID	Topic	See Page
2.C.1	The ADT Process	2-C-2
2.C.2	The ADT-OTD Process	2-C-5
2.C.3	Amendments to ADT Orders	2-C-9
2.C.4	Wavier of Annual Training Requirement	2-C-10
2.C.5	Preparation of Annual Screening Questionnaire	2-C-11

2.C.1 The ADT Process

2.C.1.1 ADT order processing

This table describes the stages of ADT order processing. The following entities own the ADT process: Member; Supervisor; Reserve Force Readiness System (RFRS); Servicing Personnel Office (SPO); District (dxr); Permanent Unit.

2.C.1.2 Reference

The following web pages and directives provide additional procedural and regulatory information on the ADT process.

(a) Direct Access Online Guide (http://www.uscg.mil/ppc/ps)
   1. Request for Reserve Orders (Self- Service)
   2. Request for Reserve Orders Supervisor Approval Process

(b) Reserve Policy Manual, COMDTINST M1001.28 (series), Chap. 3

(c) Coast Guard, Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chap. 4, Reserve Active Duty Orders

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

2.C.1.3 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 (DA), Reserve Orders module per reference (a.1)
2	Supervisor	Within 5 days of receipt of request	• Complete the Request for ADT Orders through DA if member does not have computer accessibility per reference (a.2) • Verifies all readiness requirements (ASQ, medical, dental, security, current enlistment/contract, weight standards, etc.) per reference (b). • Verifies Personal Information is current. • Verifies no other duty/drills are scheduled in DA during timeframe desired. • Forwards to SPO for orders completion.

Continued on next page

2.C.1 The ADT Process, Continued

2.C.1.3 Process **(continued)**

Stage	Who Does It	When	What Happens

3	SPO	Within 2 Days of receipt of request	• Completes the Reserve Orders Manager portion of the Request for ADT in DA per reference (c).
			  • Completes Per Diem Entitlements (if applicable).
			  • Completes Other Authorized Expenses (if applicable).
			  • Completes Partial Entitlements Tab.
			  • Completes Order Notes tab.
			• 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-2001).
			• Forwards to District (dxr).

4	Servicing (dxr)	Within 2 days of receipt of request	• Verifies ADT order request for accuracy. • Approves the request for ADT orders in Direct Access per reference (c)
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	• Prints the orders. • Signs the orders. • Mails the orders to the member 30 days prior to effective date of orders. • Send email confirmation to member stating date orders were mailed. Members shall not report for any type of duty without being in receipt of signed original orders. 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. Forward Medical PDR IAW reference (d). 3. Set up tracking of completion date of IADT period. **Note**: The Servicing (dxr) must be notified immediately of any cancellation or changes to reserve orders.

Continued on next page

2.C.1 The ADT Process, Continued

2.C.1.3 Process **(continued)**

Stage	Who Does It	When	What Happens
6	Member	As directed by orders	Reports to ADT site.
7	ADT site	Member reports	ADT site reports actual reporting date to the SPO via email, or fax.
8	SPO	Immediately	Upon arrival notification from ADT site: • Completes actual report date in Direct Access. • Completes the Travel Report Dates Section. • Validates partial entitlements and starts appropriate pay and allowances.

9	ADT site	Member completes ADT	• Endorse Travel Orders to show:
			  • Date and time member reported and departed
			  • Availability of government quarters/mess.
			• Fax copy of endorsed Travel Orders to member's home SPO on the same day.
			• If ADT was 60 days or more, return SPO/Medical PDR to member's home unit.

10	SPO	Upon departure notification	**(Less than 140 days)** • Enters actual depart date. • If ADT was over 29 days, submit Direct Access transaction (Process Lump Sum Leave) per reference (c). • In IADT cases, verify that the reservist's school completion and advancements/designator assignment have been recorded in Direct Access.
11	Member	Within 3 days following completion of travel	• Complete settlement request in Web T-PAX. • Forward to unit Approving Official with original receipts as required by Chapter 2.B of this manual for verification and approval. **Note**: Refer to Chapter 2.B of this manual for guidance submitting a paper travel voucher if unable to access Web T-PAX.
12	Unit AO	Within 2 days of settlement request	• Complete administrative review of settlement request in Web T-PAX and process as appropriate. • Ensure follow-up with member if request is incomplete.
13	PPC (TVL)	Upon receipt of voucher	• Process settlement request for payment of travel entitlements.

2.C.2 The ADT-OTD Process

2.C.2.1 ADT-OTD order processing

This table describes the stages of ADT-OTD order processing. The following entities own the process: Member; Supervisor; Reserve Force Readiness System (RFRS); Servicing Personnel Office (SPO); District (dxr); Permanent Unit; ADT-OTD site; Training Officer.

2.C.2.2 Reference

The following web pages and directives provide additional procedural and regulatory information on the ADT-OTD process.

(a) Direct Access Online Guide (http://www.uscg.mil/ppc/ps)
   1. Request for Reserve Orders (Self- Service)
   2. Request for Reserve Orders Supervisor Approval Process

(b) Reserve Policy Manual, COMDTINST M1001.28 (series), Chap. 3

(c) Coast Guard, Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chap. 4, Reserve Active Duty Orders

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

2.C.2.3 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-OTD	• Negotiates duty dates with unit. • Complete the Request for ADT-OTD Orders through Direct Access per reference (a.1).
2	Supervisor	Within 5 days of receipt of request	• Complete the Request for ADT-OTD Orders through Direct Access if member is unavailable per reference (a.1). • Verifies all readiness requirements (ASQ, weight, medical, dental, security, time in service, current enlistment/contract, weight standards, etc.) per reference (b). • Verifies Personal Information is current. • Verifies no other duty/drills are scheduled in DA during timeframe desired.

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2.C.2 The ADT-OTD Process, Continued

2.C.2.3 Process **(continued)**

Stage	Who Does It	When	What Happens
2 Continued	Supervisor	Within 5 days of receipt of request	• Verifies ADT-OTD request is to achieve certification, re-certification, qualification, completion of performance qualifications, graduation from a formal course of instruction, specialized training, or for a specific qualification. • Forwards to SPO for orders completion per reference (c). **Note**: Use of ADT-OTD for general unit augmentation without any clear training benefit is not authorized.

3	SPO	Within 2 days of receipt of request	• Completes the Reserve Orders Manager portion of the Request for ADT-OTD in DA per reference (c).
			  • Completes Per Diem Entitlements (if applicable).
			  • Completes Other Authorized Expenses (if applicable).
			  • Completes Partial Entitlements Tab.
			  • Completes Order Notes tab.
			  • Forwards to District (dxr).

4	District (dxr)	Within 2 days of receipt of request	• Verifies ADT-OTD order request for accuracy. • Approve the Request for ADT-OTD Orders in Direct Access per reference (c). **Note**: Late notifications of quotas will be approved on a case by case basis.

Continued on next page

2.C.2 The ADT-OTD Process, Continued

2.C.2.3 Process **(continued)**

Stage	Who Does It	When	What Happens
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	• Prints the Orders. • Signs the Orders. • Mails the orders to the member once complete. • Sends email confirmation to member stating date orders were mailed; attach copy of orders. Members shall not report for any type of duty without being in receipt of signed original orders. In cases where the ADT-OTD is for 60 or more days: 1. Review and mail the SPO PDR to the SPO servicing the ADT site. 2. Forward Medical/Unit PDR per reference (d). 3. Set up tracking of completion date of ADT-OTD period. **Note**: SPO must immediately notify District (dxr) for any cancellation or changes to ADT orders. Under no circumstances will the member's unit cancel or alter any existing approved reserve orders. All change requests must be forwarded to the District (dxr).
6	Member	As directed by orders	• Reports to ADT-OTD site.
7	ADT-OTD site	Member reports for ADT-OTD	• Reports actual reporting date to the SPO via email or, fax.
8	SPO	Immediately	Upon arrival notification from ADT-OTD site: • Completes actual report date in Direct Access. • Completes the Travel Report Dates Section. • Validates partial entitlements. • Starts appropriate pay and allowances.
9	ADT-OTD site	Member completes ADT-OTD	• Endorse Travel Orders to show: (1) Date and time member reported and departed, and; (2) Availability of government quarters/mess. • Fax copy of endorsed Travel Orders to member's home SPO on the same day.

Continued on next page

2.C.2 The ADT-OTD Process, Continued

2.C.2.3 Process **(continued)**

Stage	Who Does It	When	What Happens
10	SPO	Upon departure notification	• Enters actual depart date. • If ADT-OTD was over 29 days submit Direct Access transaction (Process Lump Sum Leave). • Verifies training completion.
11	Training Officer	Upon completion of training	• Ensure competency codes and/or training certificates have been recorded in Direct Access and/or TMT.
12	Member	Within 3 days following completion of travel	• Complete settlement request in Web T-PAX. • Forwards to unit Approving Official with original receipts as required by Chapter 2.B.2 of this manual for verification and approval. **Note**: In cases where the member does not have access to Web T-PAX, refer to Chapter 2.B.2.3 of this manual for procedure to submit paper travel voucher.
13	Unit	Within 2 days of receipt from member	• Complete administrative review of settlement request in Web T-PAX and process as appropriate. • Ensure follow-up with member if request is incomplete.
14	PPC (TVL)	Upon receipt of voucher	• Process Settlement Request for payment of travel entitlements.

2.C.3 Amendments to ADT Orders

2.C.3.1 When orders can be amended

Orders can be amended after the fact to document verbal authority given during the ADT/ADT-OTD 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.

2.C.3.2 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.

2.C.3.3 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 that was originally authorized by the Order Issuer to deny payment to the traveler.

Continued on next page

2.C.4 Waiver of Annual Training Requirement

2.C.4.1 Discussion

Per section 4.A.2 of reference (a), the ADT requirement may be waived for individual reservists on a case-by-case basis. CO/OICs may waive one year of the ADT requirement for sufficient cause to include:

- SELRES who have requested and are within one year of retirement
- SELRES experiencing temporary physical disability of less than four months that is documented by a Medical Officer (i.e., Uniformed Services Physician, Physician Assistant, Nurse Practitioner)
- A temporary family or personal hardship

Civilian employment conflict is not considered sufficient cause for waiver of the AT requirement.

Personnel who require AT waiver consideration for two consecutive years must gain approval from the Servicing (dxr).

2.C.4.2 Reference

(a) Reserve Policy Manual, COMDTINST M1001.28 (series)

2.C.4.3 Process

Process table.

Stage	Who Does It	What Happens
1	Member	• Submits AT waiver request memorandum to supervisor with supporting documentation.
2	Supervisor	• Forwards waiver request to CO/OIC.
3	CO/OIC	• Approves or denies request. • Forwards endorsed waiver request to Servicing (dxr) staff.
4	Servicing (dxr)	• Retains request in unit files.

2.C.5 Preparation of Annual Screening Questionnaire

2.C.5.1 Introduction

Federal law requires 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 completed as often as the information or recall availability changes, anytime of the year.

2.C.5.2 Reference

The following web pages and directives provide additional procedural and regulatory information on the Reserve Annual Screening process.

(a) Reserve Policy Manual, COMDTINST M1001.28 (series), Chap. 4.B
(b) Direct Access Online Guide (http://www.uscg.mil/ppc/ps)
    1. How to Complete the ASQ (Self- Service)
    2. Reserve ASQ, Supervisor Notification
(c) Coast Guard, Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chap. 2, Annual Screening Questionnaire

2.C.5.3 Process Overview

Per reference (a), members of the Ready Reserve must complete the Annual Screening Questionnaire (ASQ). Members will use Direct Access (DA) self service to complete the ASQ per reference (b.1). SPOs will enter questionnaires on behalf of those members without access to the system per reference (c).

Reservists who cannot access Direct Access may use CG form 3799R to provide screening information to the servicing SPO.

Continued on next page

2.C.5 Preparation of Annual Screening Questionnaire, Continued

2.C.5.4 Supervisor Notification

When members indicate on the ASQ they are not available for recall or do not understand their mobilization requirement, Direct Access prompts them (or the SPO, 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 ASQ is added to the supervisor's worklist.

2.C.5.5 Supervisor Action

Supervisors must contact and counsel those members who indicate they are not available for recall, or who do not understand their mobilization requirement. If the counseling results in the member modifying his or her availability for mobilization, a new ASQ must be submitted. Members who are not available for mobilization should be processed for transfer or separation as appropriate, i.e., Active Standby List (ASL), or Inactive Standby List (ISL). Consult the references cited at the beginning of this section for additional guidance.

2.C.5.6 Procedures

- See reference (b) for procedures to complete the Direct Access Annual Screening questionnaire.
- CG Form 3799R 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 Other Support (ADOS)

This section will focus on the procedures and processes governing ADOS-AC, (formerly ADSW). Members 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) Reserve Policy Manual, COMDTINST M1001.28 (series)
(b) Military Personnel Data Records (PDR) System, COMDTINST M1080.10 (series)
(c) Coast Guard, Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chap. 4, Reserve Active Duty Orders

In this section

Topic ID	Topic	See Page
2.D.1	Projecting Costs of ADOS-AC Orders	2-D-2
2.D.2	Document ID's (TONO) for ADOS-AC Orders	2-D-3
2.D.3	Accounting Line Data for ADOS-AC Orders	2-D-4
2.D.4	How to Process an ADOS-AC Order	2-D-6

2.D.1 Projecting Cost of ADOS-AC Orders

2.D.1.1 Introduction

All ADOS-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 ADOS-AC. Commands using long-term ADOS-AC should keep in mind those personnel ordered to active duty for 181 or more days are entitled to PCS entitlements.

2.D.1.2 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 ADOS-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 ADOS-AC
- CONUS COLA or OUTCONUS 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 ADOS-AC site
- Per diem for travel days

Note: Travel Entitlements are not payable if ADOS-AC site is within the geographical limits of the members' home.

2.D.2 Document ID's (TONO) for ADOS-AC Orders

2.D.2.1 Introduction

Direct Access does not automatically generate Document IDs short-term (180 days, or less) ADOS-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.

2.D.2.2 Document Number Examples

- 11/11/29/1/8/16/001/000 (for TVL)
- 72/11/29/1/8/16/001/000 (for P&A)
- 72/11/29/1/8/16/001/001 (for FICA)

Note: Refer to the FINCEN SOP, FINCENSTFINST M7000.1, Chapter 5, for more information on document IDs.

2.D.2.3. DOC ID TABLE

This table gives guidance on each part of the document number.

Field	Function
11 - Document Type	Use DOC type 11 for ADOS Travel Orders with a duration under 181 days where only a single travel claim will be submitted. Use DOC type 13 for ADOS 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.
11 - 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.
1 - 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 ADOS-AC Orders, use 000 for Travel and Pay & Allowances, and 001 for FICA Entries.

2.D.3 Accounting Line Data for ADOS-AC Orders

2.D.3.1 Introduction

Direct Access does not automatically generate Accounting Lines for short term (180 days, or less) ADOS-AC orders.

2.D.3.2 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)

2.D.3.3 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 ADOS-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

2.D.3 Accounting Line Data for ADOS-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.

2.D.4 How to Process an ADOS-AC Order

2.D.4.1 Introduction

The below stages shall be followed in the ADOS-AC Order Process

2.D.4.2 ADOS-AC Order Processing

This table describes the stages of the ADOS-AC order process.

Stage	Who Does It	When	What Happens
1	Member & Supervisor	At least 45 working days prior to the date of ADOS-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 ADOS-AC Orders through Direct Access (Reserve Orders module) • Route to the Unit Reserve Orders Manager.

Continued on next page

2.D.4 How to Process an ADOS-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 (if short-term).
			  • 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 District for final approval Or • Disapprove request and forward back to member/unit.
5	District	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 ADOS site	If ADOS-AC is over 60 days, forward Medical/Unit PDR to ADOS-AC site.

Continued on next page

2.D.4 How to Process an ADOS-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 ADOS-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 ADOS-AC). • Maintain approved request and copy of orders in SPO files and PDR for 1 year. In cases where the ADOS-AC is for 60 or more days: 1. Review and mail the SPO PDR to the SPO servicing the ADOS-AC site. 2. Set up tracking of completion date of ADOS-AC period.
8	Member	As directed by orders	• Obtain new I.D. card at nearest issuing unit if ADOS-AC is over 30 days. • Report to ADOS-AC site.
9	ADOS-AC site	Member reports for ADOS-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

2.D.4 How to Process an ADOS-AC Order, Continued

Stage	Who Does It	When	What Happens
11	ADOS-AC site	Member completes ADOS-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 PPC (tvl) for processing.

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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 (PATFORSWA), Bahrain or a cutter deployed (for a year or more) in support of Operation Iraqi Freedom.

In this section

Topic ID	Topic	See Page
2.F.1	Mobile Unit Designation	2-F-2
2.F.2	PCS Travel	2-F-3
2.F.3	PCS Orders Remarks	2-F-4
2.F.4	HHG/Unaccompanied Baggage	2-F-5
2.F.5	POV Transportation/Storage	2-F-7
2.F.6	Station Allowances (OHA and COLA)	2-F-8
2.F.7	Allowances for Members With Dependents (FSA, DLA, BAH, OHA and COLA)	2-F-9
2.F.8	Basic Allowance for Subsistence	2-F-11
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2.F.10	PDR Handling	2-F-13
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2.F.1 Mobile Unit Designation

2.F.1.1 Mobile Unit Designation for PATFORSWA Cutters

Per Coast Guard Pay Manual, COMDTINST M7220.29 (series), 4.b.5.e, members ordered to serve on PATFORSWA cutters 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 PATFORSWA. 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.

2.F.2 PCS Travel

2.F.2.1 Introduction

This section provides information on PCS travel entitlements for members ordered to PATFORSWA.

2.F.2.2 PCS Travel

Members will receive PCS Orders from their current duty station to PATFORSWA. They also receive TAD Orders to SMTC-DTD located in Portsmouth, VA for the duration of Pre-Deployment training.

Note: Due to the complexity associated with payment of TDY/PCS travel entitlement throughout a member's preparation for deployment to PATFORSWA, request for PCS/TEMDU orders will normally not be granted. All PCS/TEMDU requests must be approved in advance and directed for consideration to PATFORSWA.

Following Pre-Deployment training, members either go on leave or return to their current Duty Station. When they depart their PDS they are authorized an overnight delay en route prior to departing CONUS. Members are entitled to 2 additional travel days for the flight OCONUS to Manama, Bahrain.

Members without dependents are authorized:

- PCS travel entitlements from their old PDS via airport used for OCONUS flight for transportation to Manama, Bahrain. Members are not allowed round-trip travel between a TDY station and designated place.
- Members are directed to travel via commercial air form their PDS utilizing the GTCC Centrally Billed Account.

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

2.F.2 PCS Travel, Continued

2.F.2.2 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 CG PSC (PSD-FS) Use form CG-2025A, Housing Allowance Protection Worksheet (http://www.uscg.mil/ppc/forms/) for requesting BAH or OHA at a designated place of dependents, or if eligible, the previous duty station (BAH location only).

2.5.3 PCS Orders Remarks

2.F.3.1 Introduction

Include these standard remarks on all PCS orders for members assigned to PATFORSWA:

2.F.3.2 PCS Orders Remarks

Include these remarks in the PCS order notes:

```
A.  THESE ORDERS CONSTITUTE A PCS MOVE FM ____________________   FOR FURTHER
ASSIGNMENT TO BAHRAIN VIA AUTH DELAY IN STERLING, VA.
B.  DEPN INFO:  WILL BE TRAVELING OOA____________TO DESIGNATED LOCATION OF
_______________.    OR   DEPENDENTS NOT RELOCATING AT THIS TIME.
C.  IAW JFTR U5012:  ENTITLEMENTS DEPEND ON THE MBR & DEPN INDIVIDUAL TRAVEL
CIRCUMSTANCES. TRAVEL SETTLEMENTS WILL BE DETERMINED BY PPC(TVL) BASED ON TYPE
OF ORDERS/TRAVEL VOUCHER AND ACTUAL TRAVEL PERFORMED.
D.  MBR NOT AUTH POV SHIPMENT TO BAHRAIN- COMMAND RESTRICTED, IAW JFTR U5410-
B.
E.  MBR AUTH POV STORAGE IN LIEU OF SHIPMENT AT GOVT EXPENSE IAW JFTR U5466.

STORAGE OF A POV NOT AUTH IF A POV IS SHIPPED TO DESIGNATED PLACE FOR DEPN
USE.
POV SHIPMENT TO DESIGNATED PLACE IS IAW U5410-B.
F.  AUTH GTR TRANSPORTATION FROM ___________________ TO BAHRAIN VIA STERLING,
VA, MOST COST ADVANTAGEOUS TO THE COAST GUARD.
G.  OFFICIAL DISTANCE (MILEAGE)__________ FM  __________TO
H.  DLA NOT AUTHORIZED FOR SINGLE MEMBERS.  MANDATORY GOV'T QUARTERS. OR AUTH
ADVANCE DLA WITH DEPENDENTS FOR PAYGRADE ___ IN THE AMOUNT OF $__________
(80% MAX) 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:  $116.00 X (TVL DAYS) = _____________
      DEPN: $87.00 X
      DEPN: $58.00 X
      MALT:
(# OF TRAVELERS):    (MILEAGE) X       (CENTS) = _____x 80% =____
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-C2.
M.  IAW JFTR APPENDIX G, REIMBURSEMENT FOR PASSPORT FEES, VISA, AND LEGAL
SERVICES ARE AUTHORIZED FOR A MEMBER ASSIGNED TO A FOREIGN OCONUS AREA.
N.  IAW JFTR APPENDIX G-1, REIMBURSEMENT IS AUTHORIZED FOR NECESSARY TRAVEL
AND TRANSPORTATION-RELATED MISCELLANEOUS EXPENSES INCURRED ON OFFICIAL
BUSINESS.  THESE EXPENSES INCLUDE: EXCESS BAGGAGE, BAGGAGE TRANSFER, BAGGAGE
STORAGE (WITH EXPLANATION), BAGGAGE CHECKING, CURBSIDE BAGGAGE CHECK-IN FEE
(REIMBURSEMENT OF A FEE CHARGED FOR THE USE OF OPTIONAL CURBSIDE BAGGAGE
CHECK-IN IS NOT AUTHORIZED).  A TIP, SEPARATE FROM THE FEE ITSELF, IS
REIMBURSABLE.
O.  MBRS LEAVE ADDRESS:
P.  SPO ADDRESS:
COMMANDER (SPO)
COAST GUARD PATROL FORCES SOUTHWEST ASIA NSA GSK, BANZ WAREHOUSE BAY 6
1 JUFFAIR AVENUE
MANAMA, KINGDOM OF BAHRAIN 09501
```

A template for these standard remarks is available in Direct-Access. The “Orders Note” code is “P4S”.

2.F.4 Household Goods/Unaccompanied Baggage

2.F.4.1 HHG/ Unaccompanied baggage

Bahrain is designated an administrative weight restricted area for Coast Guard personnel assigned to PATFORSWA. All members should be aware they will be required to reside in fully furnished government quarters equipped with communal TV and stereos.

- Storage space is limited, so members should only ship those personal effects that can be accommodated in their assigned quarters.

- Members are encouraged to bring their own personal laptop computers. While communal computers are provided in the flats, they are sometimes antiquated in nature and do not provide system function you may be accustomed to.

- Partial HHG /Unaccompanied baggage shipments to and from Bahrain are limited to 500 pounds. This 500 pound shipmate must be determined PRIOR to any HHG's being placed in government or personal storage as there are no provisions to allow withdraw as a later time.

- 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.

2.F.5 POV Transportation/Storage

2.F.5.1 POV Transportation/ storage

Transportation:

- Coast Guard personnel assigned to PATFORSWA 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.

- For those single members who ELECT to leave their POV at a location NOT in Government control (i.e. government funded/approved storage), there is no entitlement to return to that location to pick up your vehicle.

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 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.

2.F.6 Station Allowances

2.F.6.1 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 OCONUS COLA at the full without dependents rate. In accordance with U8008, Joint Federal Travel Regulations, COMDT (CG-1222) may authorize members with dependents concurrent payment of 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 Chapter 9 of the Joint Federal Travel Regulations, Volume 1. Requests for station allowances must be submitted before the dependents relocation.

2.F.6.2 Entitlements Summary

Exhibit 2.F.1 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

2.F.7 Allowances for Members With Dependents

2.F.7.1 Introduction

This section provides information on allowances and entitlements for members with dependents assigned to PATFORSWA.

2.F.7.2 Dislocation Allowance (DLA)

Only members with dependents that relocate dependents to a designated place are authorized DLA.

2.F.7.3 BAH, OHA and COLA for Members With Dependents

To request BAH for either the previous duty station location, if eligible, or a designated place of dependents, or OHA for a designated place of dependents, members with dependents will submit a CG-2025A, Housing Allowance Protection Worksheet (http://www.uscg.mil/ppc/forms/) to Commander, PSC (PSD-FS) 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.

The payment of BAH based on a previous duty station may be authorized if the member permanently resided with their dependents while serving at the previous duty station, and the member has no intention of relocating their dependent from their residence . If the distance between the previous duty station and the dependents location caused the member to establish a separate private residence from their dependents, the member is considered as not residing with their dependents and BAH will be based on the dependents location.

Note: Members who receive BAH or OHA with dependents **based on the payment of child support** are not eligible to submit a CG-2025A. **Effective upon their PCS reporting date, these members are entitled to receive BAH-DIFF ONLY**, if otherwise so entitled per Section 3-B-6 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-2025A to request BAH or OHA for the designated place of their dependent(s).

Continued on next page

2.F.7 Allowances for Members With Dependents, Continued

2.F.7.3 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 CG-2025A, 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. COMDT (CG-1222) scans the memo and e-mails it to the PATFOR SWA (SPO) and CG (PPC) (MAS) and (FAR).

2.F.7.4 FSA

Members with dependents, including member-married-to-member (see Coast Guard Pay Manual, COMDTINST M7220.29(series), Section 3-H-12), are entitled to FSA. The current rate for FSA is $250 per month.

2.F.7.5 Entitlements Summary

Exhibit 2.F.1 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

2.5.8 Basic Allowance for Subsistence

2.F.8.1 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.

2.F.8.2 Entitlements Summary

Exhibit 2.F.1 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

2.5.9 Hardship Duty Pay, Imminent Danger Pay and Combat Allowances

2.F.9.1 Hardship Duty Pay, Imminent Danger Pay and Combat Allowances

Some members assigned to PATFORSWA 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	Sec 7.B PPPM (PPCINST M10002.)
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 (PPCINST M10002.) *Note: Ensure members desiring to make cash deposits are counseled to send checks to the USCG PPC, not DoD-DFAS.

See the Special and Incentive Pays chapter in the DA Online Manual for SPO procedures: http://www.uscg.mil/ppc/spoman

2.F.9.2 Entitlements Summary

Exhibit 2.F.1 (page 2-F-15) lists the pay entitlements, described in this section, in a quick reference, tabular format.

2.F.10 PDR Handling

2.F.10.1 PDR Handling

Note: Check the online version of this section at http://www.uscg.mil/ppc/pppm/chap02.pdf for updates to this page.

Ship SPO PDR's via rapid and accountable means. Below are different addresses to be used based on the means you are sending the PDR. Ensure you read the below in full before deciding on the mailing address to use.

If mailing via FEDEX mail to:	If mailing via any other accountable means (USPS, DHL etc...) mail to the address in TOPTS/JUMPS:
COMMANDING OFFICER (SPO) COAST GUARD PATROL FORCES SOUTHWEST ASIA NSA GSK, BANZ WAREHOUSE, BAY 6 1 JUFFAIR AVENUE MANAMA, KINGDOM OF BAHRAIN 09501-3950	COMMANDING OFFICER (SPO) COAST GUARD PATROL FORCES SOUTHWEST ASIA UNIT 3950 FPO AE 09501-3950

2.F.11 Points of Contact

2.F.11.1 Points of Contact

Note: Check the online version of this section at http://www.uscg.mil/ppc/pppm/chap02.pdf for updates to this page.

CG PATFORSWA SPO:

- YNC at 011-973-3930-1088
- AO DSN 318-439-3134
- Email: D05-DG-PATFOR-YN-SPO@uscg.mil

HHGs/POV Storage/Relocation of Dependents (OCONUS):

- Commandant (CG-1222) at (202) 267-1646

Operations/Mission issues: BAHRAIN:
COMMANDER
USCG PATFORSWA
UNIT 3950
FPO AE 09501-3950
Tel: 011-973-3966-0389
Fax: 011-973-1785-4718 or DSN: 318-439-4718

If unable to contact please contact:

SMTC-DTD:
PATFORSWA Stateside Admin Support
Tel: (757) 295-2234
Cell: (757) 285-3799
Fax: (757) 295-2217
D05-DG-PDTADMIN@uscg.mil

US CENTCOM
Exhibit 2.F.1 US CENTCOM
CUTTER AND SHORE-BASED PERSONNEL PAY ENTITLEMENTS

PAY AND ENTITLEMENTS BASED ON DEPENDENCY STATUS

Member Status	(BAH)	CONUS Cost of Living Allowance (COLA)	OCONUS COLA w/ out dpn (FULL)	Family Separation Allowance ($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)	NO	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	NO	NO	YES	NO	YES

Benefit Gaps Matrix

1. Shipment of Household Goods (500 lbs of unaccompnied bagage)
a. Prior to 04 April 2006, personnel assigned to CENTCOM Cutters were not authorized to ship 500 lbs of unaccompanied baggage (IAW JFTR), a benefit enjoyed by CENTCOM shore-side personnel. As of 04 Apr 2006 Cutter crews have been assigned to a mobile unit and have taken advantage of this entitlement.

2. OCONUS COLA for CENTCOM Cutter Personnel:
a. Prior to 04 April 2006 personnel assigned to CENTCOM Cutters received per diem ($86.00) for days inport, not to exceed 5 days a month. CENTCOM shoreside personnel receive OCONUS COLA w/o. Cutter personnel who reported prior to 04 Apr 2006 still receive per diem up to 5 days a month, while Cutter personnel assigned after 04 Apr receive OCONUS COLA w/o

3. BAH w/Dependents for CENTCOM Cutter personnel.
a. Prior to 04 Apr 2006 Cutter personnel received BAH/w based on the homeport of cutter, regardless of the actual location of dependents. This resulted in pay inequities between the Cutters. After 04 Apr, Cutter personnel received BAH/w based on actual location of dependents.

4. Non-Chargeable Rest and Recuperation (NCR&R).
a. Personnel assigned to CENTCOM AOR who maintain 270 days "boots on the ground" in Irag or Afghanistan are entitled to 15 days of NCR&R.

Notes:
[1] BAH and COLA is based on dependents location unless otherwise designated by Commander, PSC (PSD-FS). Housing Allowance Protection Worksheet (CG-PSC-2025A) must be submitted to PSC for determination and approval. All OCONUS M-2-M w/minors should claim minors to be entitled to BAH-W.
[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 reimbursment. Member will be reimbursed up to government cost.

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]	Hardship Duty Pay for Location (HDP-L)
Cutter Mobile Unit Crew, Bahrain	YES	YES	NO	NO	YES	YES	YES	YES	YES	YES	YES	NO
Cutter Mobile Unit CO, Bahrain	YES	YES	NO	YES [14]	YES	YES	YES	YES	YES	YES	YES	NO
Shore-Based members, Bahrain	NO[15]	YES	NO	NO	NO	YES	YES	YES	YES	YES	YES	NO
RAID @ Army Base in Kuwait	YES[14]	YES	NO	NO	YES	YES	YES	YES	YES	YES	YES	YES[16]

Notes:
[5] CSEAPAY - Member receives continuous career 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 section 4-E of USCG Pay Manual are met.
[8] IDP – Areas defined by SECDEF.
[9] CZTR areas designated by the President or Congress. Applies to all taxable income (up to highest enlisted pay grade (MCPO-CG) 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 pays for $400K 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.
[15] Member receives sea pay for each day TDY to a CSP-eligible vessel, IAW Section 4-B of USCG Pay Manual. So-called 7th cutter crew is now a mobile unit & receives CSEAPAY same as regular crew members.
[16] Capped at $100/month due to IDP eligibility

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Chapter Overview

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
D	SELRES Separations	3-D-1

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Section Overview

Introduction

This section will guide you through the process of accessing a member onto active duty.

In this section

Topic ID	Topic	See Page
3.A.1	Process for Accessions	3-A-2
3.A.2	Types of Accessions	3-A-4
3.A.3	Recalled Retired Members	3-A-5

3.A.1 Process for Accessions

3.A.1.1 Introduction

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.

3.A.1.2 Reference

(a) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3, Part VIII, Accessions

3.A.1.3 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-2020D (Designation of Beneficiaries) • CG-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

3.A.1 Process for Accessions, Continued

3.A.1.3 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-5100 (Officer Uniform Allowance Claim Worksheet) *for eligible officers*	
2	Unit	Assist member in completing PCS Reporting Worksheet (CG-2005) forward 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.	

3.A.2 Types of Accessions

3.A.2.1 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.

3.A.2.2 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, current active duty reserve component member, 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

3.A.3 Recalled Retired Members

3.A.3.1 Introduction

The Commandant may direct that a retired member be recalled to active duty. These members may be paid by PPC (ras) or by PPC (mas) through JUMPS depending on the duration of the recall.

3.A.3.2 Payment Method

Use this table to determine if the member will be paid by PPC (mas) or by PPC (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 active duty service of more than 24 hours	For any period	• JUMPS. • CGPSC (OPM/EPM) creates orders. • SPO creates contract data and PCS endorsements to rehire the member.
Recalled from RET-2 status	For any period	• The CGPSC (OPM/EPM) Assignment Officer issues orders to the member (copy to PPC (ras). • PPC (ras) changes member's 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.
Recalled from RET-1 status	For any period	• Contact PPC Customer Care for guidance.

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Section Overview

Introduction

This section prescribes procedures for separating members on active duty. This includes Reservists on long-term active duty orders for 140 days (ADT)/181 days (ADOT) or more or serving on an involuntary recall to active duty under 10 U.S.C. 12302 or 12304.

In this section

Topic ID	Topic	See Page
3.B.1	The Separation Process	3-B-2
3.B.2	Immediate Separation Processing	3-B-5
3.B.3	Priority Separation Processing	3-B-7
Exhibit 3.B.1	E-mail Format For Immediate and Priority Separations (Exhibit 3.B.1)	3-B-9
3.B.4	Routine Separation Processing	3-B-10
Exhibit 3.B.2	Cancellation of Document Numbers and Accounting Data (Exhibit 3.B.2)	3-B-12
3.B.5	Preparation of Separation Orders	3-B-13
3.B.6	Enlisted to Cadet Status Processing	3-B-14
3.B.7	Regular Retirement Separations	3-B-15
3.B.8	Disability Retirement Separations	3-B-16
3.B.9	Checklist for Separations	3-B-18
3.B.10	Checklist for RELAD	3-B-22
3.B.11	Checklist for Discharge	3-B-23
3.B.12	Checklist for Retirement	3-B-24
3.B.13	Reserve Retirement Separations	3-B-27

3.B.1 The Separation Process

3.B.1.1 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 PPC (ses), by e-mail to PPC-PF-SES@uscg.mil or by completing Customer Care trouble-ticket online at http://www.uscg.mil/ppc/ccb. If the date needs to be changed to a later date, the request must be made to CGPSC (EPM-1, for enlistd personnel or OPM-1, for officers).

3.B.1.2 References

(a) Certificate of Release or Discharge from Acitve Duty, DD-214, COMDTINST M1900.4 (series)
(b) SPD Handbook (Distributed by COMDT (CG-1221) to Servicing Personnel Offices)
(c) Military Separations, COMDTINST M1000.4
(d) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series) (Part V, Separations)
(e) Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1(series)
(f) Military Personnel Security Program, COMDTINT M5520.12(Series)
(g) Coast Guard Pay Manual, COMDTINST M7220.29 (Series)

3.B.1.3 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
CGPSC (OPM)	extend an officer's date of separation
Member's SPO	submit a Retained Beyond Normal Expiration of Enlistment (P176) transaction in DA. (Reference (d), page VI-46)
PPC	reopen the member's pay account and reprocess the separation

Continued on next page

3.B.1 The Separation Process, Continued

3.B.1.4 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 PPC. This 4-day clock begins once: • The SPO notifies PPC of the authorization to separate the member. This may require coordination between the unit, SPO, and PPC (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 PPC (ses) at (785) 339-3551.
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-2045) to the SPO not later than 60 days prior to the separation date or departure on terminal leave.

Continued on next page

3.B.1 The Separation Process, Continued

3.B.1.5 Type of separation 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 PPC (ses) at(785) 339-3551).	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 CGPSC (epm-1) for urgent reasons	Priority
under normal circumstances	Routine

3.B.2 Immediate Separation Processing

3.B.2.1 Introduction

Immediate separations require 4 working days for processing after CGPSC (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 PPC (ses) at (785) 339-3551.

3.B.2.2 References

See 3.B.1.2.

3.B.2.3 Procedure

Procedure required for an Immediate separation.

Day	Who Does It	What Happens
1	CGPSC (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 CGPSC. **Note:** For immediate separations requiring less than normal processing time, a signed CG-3307 (SEP-01 Agree to withholding of final pay on sep date) by the member (see Enclosure 6 of this manual, CG-3307's for Separation (SEP-1)) shall be faxed to (785-339-3784) PPC (ses).
T H R U 3	SPO	• Sends Urgent E-mail to PPC-PF-SES@uscg.mil on Day One with pertinent information using the format provided in Exhibit 3.B.1. • SPOs must contact PPC (ses) to request approval of immediate separations • SPOs must contact PPC (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

3.B.2 Immediate Separation Processing, Continued

3.B.2.3 Procedure, **continued**

Day	Who Does It	What Happens
1	PPC (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 PPC (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: https://www.dmdc.osd.mil/rsl .
	SPO	NLT the effective date of separation, transmits the separation transaction. Discharges can be approved 14 days before the effective date. RELADs and Retirements can be approved 14 days before the date to depart on terminal leave or the effective date if no leave is taken.

3.B.3 Priority Separation Processing

3.B.3.1 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.

3.B.3.2 References

See 3.B.1.2

3.B.3.3 Procedure

Procedure required for a Priority separation.

Day	Who Does It	What Happens
1 THRU 9	CGPSC (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 Enclosure (6) of this manual) must be faxed (785-339-3784) to PPC (ses).
	SPO	Sends Urgent E-mail to PPC-PF-SES@uscg.mil on Day One with pertinent information using the format provided in Exhibit 3.B.1. • SPOs must contact PPC (ses) to request approval of priority separations • SPOs must contact PPC (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

3.B.3 Priority Separation Processing, Continued

3.B.3.3 Procedure **(continued)**

Day	Who Does It	What Happens
1 T H R U 9 (Cont.)	PPC (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	NLT the effective date of separation or departure on terminal leave, delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PPC (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: https://www.dmdc.osd.mil/rsl.
	SPO	NLT the effective date of separation, or date of departure on terminal leave, transmits the separation transaction. Discharges can be approved 14 days before the effective date. RELADs and Retirements can be approved 14 days before the date to depart on terminal leave or the effective date if no leave is taken.

Exhibit 3.B.1, E-mail Format for Immediate and Priority Separations

From: SPO Supervisor
To: PPC-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: 2010JAN01" vice "2010JAN01"). However, you do not need to include notes.

EXHIBIT 3.B.1

3.B.4 Routine Separation Processing

3.B.4.1 Introduction

Routine separations occur with sufficient lead-time to allow routine processing.

3.B.4.2 References

See 3.B.1.2

3.B.4.3 Procedure

Procedure 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 ***approves*** a Statement of Intent transaction in DA (See reference (d) for the procedure). 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 PPC (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

3.B.4 Routine Separation Processing, Continued

3.B.4.3 Procedure **(continued)**

When	Who does it	What happens
At least 10 days prior to separation	PPC (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 PPC (ses).
Prior to separation	PPC (ses)	Schedules a special payment through Treasury to ensure member receives final separation pay.
Day of departure from unit for travel or leave in connection with separation	UNIT	Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PPC (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: https://www.dmdc.osd.mil/rsl.
	SPO	SPO approves separation transaction in Direct Access: Discharges can be approved 14 days before the effective date. RELADs and Retirements can be approved 14 days before the date to depart on terminal leave or the effective date if no leave is taken
Following separation	PSC	Evidence of case review for separations (see Separation Documents Checklist, Enclosure (3) to PDR Manual, COMDTINST M1080.10(series) where Commander (PSC-EPM, OPM, RPM) is the discharge authority shall be retained locally at PSC for a minimum of three years.

Exhibit 3.B.2, 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 PPC (ses), the order issuing authority (CGPSC epm/opm), 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

3.B.5 Preparation of Separation Orders

3.B.5.1 Introduction

After the Document Number and Accounting Data are in the Direct Access Airport Terminal for CGPSC approved separations, the responsible SPO shall issue Separation Orders on a Standard Travel Order for Military Personnel (CG-5131).

3.B.5.2 Special Instructions

Separation Orders shall include the following remark:

"You are directed to submit a Travel Claim to PPC (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."

3.B.5.3 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

3.B.6 Enlisted to Cadet Status Processing

3.B.6.1 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.

3.B.6.2 Procedure

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).

3.B.7 Regular Retirement Separations

3.B.7.1 Introduction

Retirements are normally processed as routine separations

3.B.7.2 Reference

See 3.B.1.2

3.B.7.3 Procedure

Procedure 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-4700) to PPC (ras) **Note: <u>AUTOMATIC FULL COVERAGE</u> in the Survivor Benefit Plan (SBP) is elected in the absence of a properly completed CG-4700.** **The SPO and/or unit will assist in counseling the member and completing the CG-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 PPC (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 and the standard separation letter (from enclosure (4) of this manual).
	Member	Visits 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: https://www.dmdc.osd.mil/rsl.
	SPO	NLT the effective date of terminal leave or date of retirement, if no leave is authorized, transmits the retirement transaction.

3.B.8 Disability Retirement Separations

3.B.8.1 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 CGPSC's action. Active duty allotments will be paid by JUMPS for the last month of active duty.

3.B.8.2 Reference

See 3.B.1.2

3.B.8.3 Procedure

Procedure required for Temporary and Permanent Disability Retirements.

Day	Who Does It	What Happens
0	CGPSC (opm/epm)	Issues message directing temporary or permanent disability retirement.
1	SPO	• Sends urgent E-mail message to PPC (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. **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 Separation transaction in Direct Access
2	PPC (ses)	Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of 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

3.B.8 Disability Retirement Separations, Continued

3.B.8.3 Procedure, **(continued)**

Day	Who Does It	What Happens
13	SPO	If the PPC (ses) separation notification is not received at least 7 days prior to the date of separation, contacts PPC (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: https://www.dmdc.osd.mil/rsl.
	SPO	NLT the effective date of terminal leave or the date of retirement, if no leave is authorized, approves the retirement separation transaction in Direct Access. Retirements can be approved 14 days before the date to depart on terminal leave or the effective date if no leave is taken.

3.B.9 Checklist for Separations

3.B.9.1 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.

3.B.9.2 References

(a) Military Separations, COMDTINST M1000.4
(b) Transition Assistance Program, COMDTINST 1900.2(series)
(c) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(d) Certificate of Release or Discharge from Active Duty, DD Form 214, COMDTINST M1900.4(series)
(e) Coast Guard Personal Property Transportation Manual, COMDTINST M4050.6
(f) Military Personnel Security Program, COMDTINST M5520.12(series)
(g) Government Travel Charge Card (GTCC) Policies and Procedures, COMDTINST M4600.18(series)
(h) Coast Guard Servicing Personnel Officer (SPO) Manual, PPCINST M5231.3
(i) Joint Federal Travel Regulations (JFTR), Vol I (Military)
(j) Military Personnel Data Records (PDR) System, COMDTINST M1080.10(series)
(k) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and other Eligible Personnel, COMDTINST M5512.1(Series)
(l) Continued Health Care Benefit Program, COMDTINST 1760.7(series)
(m) Coast Guard Pay Manual, COMDTINST M7220.29 (series)

Continued on next page

3.B.9 Checklist for Separations, Continued

3.B.9.3 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	Ref (a)	
	• Transition Assistance Program counseling	Ref (b)	
	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 PPC's web site http://www.uscg.mil/ppc/forms)	
	• CG-3307 with SEP-4 entry completed.	Ref (c), Encl. (6)	
2	Ensure member is physically qualified for separation.	Ref (a)	
3	Notify the CGPSC (epm/opm) assignment officer at least six months prior to date of separation indicating member's intention to separate. For all members eligible/recommended for reenlistment: • Notify the CGRC IN SERVICE TRANSFER TEAM (ISTT) (email: CGR-DG-CGRC-ISTT@uscg.mil. Phone: (703) 235-1731) of 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.		

Continued on next page

3.B.9.3 Separation checklist **(continued)**

Step	Action	Reference	Date
3 C O N T I N U E D	Upon receipt of the notification, a CGRC ISTT 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, CGRC ISTT will provide the member's servicing SPO with the information needed to effect the assignment.		
4	Complete follow-up interview at 3 months prior to separation date.	Ref (a)	
5	• Complete Career Intentions Worksheet, CG-2045, PCS Departing/Separation Worksheet, CG-2000, and PCS Entitlements Worksheet, CG-2003. • forward worksheets to SPO at least 60 days prior to the separation date.	(Forms available from PPC's web site http://www.uscg.mil/ppc/forms)	
6	SPO forward DD-214 WS (worksheet) to the member, via the unit, for review and approval	Ref (d)	
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 (provided the is member is eligible for reenlistment).		
8	Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods.	Ref (e) 1.H.1	
9	Conduct Final Termination Briefing	Ref (f)	

Continued on next page

3.B.9 Checklist for Separations, Continued

3.B.9.3 Separation checklist **(continued)**

Step	Action	Reference	Date
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 (https://www.tsp.gov/PDF/formspubs/tspbk02.pdf) if they have a TSP account.	Ref (a)	
11	Ensure Government Travel Charge Card is turned into coordinator for cancellation.	Ref (g)	
12	Complete CG-3307-SEP-21 (Acknowledgement of Separation Pay & Recoupment from Retired Pay) entry for any member receiving Separation Pay and send a copy to PPC (ses) via email to" PPC-PF-SES" (in the global address book) or via fax to 785-339-3784.	Ref (m), Sec. 10-H and Ref (c), Encl (6)	
13	SPO completes Direct Access transactions (Statement of Intent, DD-214 and Discharge or Retirement or RELAD)	Ref (h)	
14	Complete appropriate separation letter(s) from enclosure (4) to this manual.	Ref (c), 3-B-5, 7	
15	Counsel member on separation travel. Provide member with travel claim form(s) and instructions for completion. Instruct the member on the procedure to reenroll in direct deposit after the effective date of separation by completing the Online Electronic Funds Transfer Application at https://www.fincen.uscg.mil/secure/enrollment_form.htm. This is essential and necessary even if the member's banking information doesn't change following separation because the travel payment system is purged of the member's current EFT information upon separation.	Ref (i)	
16	Provide member with pre-addressed envelope to mail travel claims and original separation travel order to PPC (tvl).	Ref (c), 2-B	
17	Review SPO/MED PDR's.	Ref (a)	
18	Distribute PDR's and notify Health Record Custodian (by completing enclosures (3) and (4) to the PDRMAN) to forward MED PDR as appropriate.	Ref (j)	
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.	Ref (k)	

3.B.10 Checklist for RELAD

3.B.10.1 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.

3.B.10.2 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.	Ref (l)	
2	Complete ID Card(s).	Ref (k)	
3	Counsel member on: • Assignment to Selected Reserve (Note: Premiums for SGLI/FSGLI coverage will continue to be deducted for members who affiliate with the SELRES. This can result in a significant debt if the member does not intend to perform regular monthly drills following RELAD. Members who desire to terminate/reduce coverage will be required to meet the "proof of good health" requirement if they desire to reinstate/increase coverage at a later date. See section 5-A of this manual for more information). • 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 (SEP-01 Agree to withholding of final pay on sep date) if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PPC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	Ref (c), 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.	Ref (c), 9-A-5	
6	Deliver separation paperwork to member.	Ref (j)	

3.B.11 Checklist for Discharge

3.B.11.1 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.

3.B.11.2 Checklist for discharge

Additional items when discharging a member.

Step	Action	Reference	Date
1	Notify PPC (ses) (for Immediate or Priority discharges)	Ref (c), 3-B	
2	Complete a CG-3307 (SEP-01 Agree to withholding of final pay on sep date) if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PPC of Date of Service (Separation Date) and that member signed CG-3307 for waiver.	Ref (c), 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.	Ref (c), 9-A-5	
4	Complete Continued Health Care Coverage Benefit Program application.		
5	Complete appropriate Discharge Certificate.	Ref (a)	
6	Issue Honorable Discharge Button (if applicable).	Ref (a)	
7	If member will be enlisting in the Coast Guard Reserve immediately following discharge, complete an enlistment contract and return to servicing SPO		
8	Deliver separation paperwork to member.		

3.B.12 Checklist for Retirement

3.B.12.1 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.

3.B.12.2 Checklist for retirement

Additional items when retiring a member.

Step	Action	Date
1	Endorse retirement order • Forward one copy to the SPO.	
2	Provide the member with PPC's "Retirement Package", which is available from the PPC (RAS) web page at: http://www.uscg.mil/ppc/RAS/. The Retirement Package contains forms and worksheets, which are necessary for establishing the member's retired pay account. The forms must be completed by the member and mailed directly to PPC (RAS).	
3	Ensure the member completes and returns the following forms: CG-4700, (Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election) and if starting new allotments, CG-7221, (Retired Allotment Authorization Form) The member must include a copy of their latest eLES if they are continuing any allotments or direct deposit to same account. • Administratively review the worksheets, ensuring they are completed in accordance with instructions. Instructions and worksheets are in the "Retirement Package" on PPC's web site at: http://www.uscg.mil/ppc/RAS/RetPack.pdf	

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3.B.12 Checklist for Retirement, Continued

3.B.12.2 Checklist for retirement **(Continued)**

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. ***Note** Whenever a member elects less than the maximum SBP or RC-SBP, the spousal consent signature must be notarized.	

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 notary public will complete and sign part VII of the CG-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)".

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3.B.12 Checklist for Retirement Continued

3.B.12.2 Checklist for retirement **(Continued)**

Step	Action	Date
5	Forward the following to PPC (ras) at least 30 days prior to retirement or start of terminal leave	
	• CG -4700 (four pages) and supporting documents (e.g. Physician's statement for an incapacitated child over age 21)	
	• Copy of latest eLES, if member is continuing any allotments or direct deposit to same account (if changing accounts, new routing transit number and account number must be provided on CG-4700)	
	• CG-7221 if member is starting any new allotments	
	• SBP Spousal notification/concurrence letter, endorsed by spouse and notarized, 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-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 PPC (ras) at least 15 days prior to member's retirement or departure on terminal leave. You may order Retirement Certificates at http://www.uscg.mil/ppc/ras/retirementprocessing.asp	
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." See: http://www.uscg.mil/ppc/forms/tspsepform.pdf	
9	Complete retired and dependent ID cards.	

3.B.13 Reserve Retirement Separations

3.B.13.1 Introduction

Reserve retirements are processed by PPC (ras). The two retirement categories are:

- Retirement with Pay (RET-1) for reservists who complete 20 years of satisfactory service and have reached retirement age.
- Retirement Awaiting Pay (RET-2) for reservists who have satisfied all requirements for RET-1, except reaching retirement age.

3.B.13.2 Procedure

Procedure for Retirement With Pay (RET-1)

When	Who does it	What happens
Six months prior to reaching retirement age, usually age 60, if member has 20 years of satisfactory service	PPC (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-2055A (Reserve Retirement Transfer Request) and CG-4700 (Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election from http://www.uscg.mil/ppc/forms/. 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 CGPSC (rpm).		
1 month prior to retirement	PPC (ras)	Forward to member: • Retirement Letter • Final Point Statement • Retirement Certificates (if applicable)
Retirement day	PPC (ras)	Transmit Endorsement on Orders transaction

Continued on next page

3.B.13 Reserve Retirement Separations, Continued

3.B.13.2 Procedure **(continued)**

When	Who does it	What happens
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 Military Separations, COMDTINST M1000.4. In such cases, the reservist's SPO shall notify the CGPSC (rpm-2) that the reservist has failed to reenlist. CGPSC (rpm-2) shall in turn notify PPC (ras). PPC (ras) shall transmit Endorsement on Orders transactions to transfer the reservist to RET-2 status.		

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3.B.13 Reserve Retirement Separations, Continued

3.B.13.D Procedure For RET-2 Status

Procedures for Retirement Awaiting Pay at retirement age (RET-2) followed by Retirement With Pay (RET-1) upon reaching retirement age.

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	PPC (ras)	Sends "20 Year Letter" notifying member of eligibility for RET-2 Retirement. Include Reserve Component Survivor Benefit Plan election forms.
After receipt of "20 year letter".	Member	May request transfer to RET-2 status by completing form CG-2055A from http://www.uscg.mil/ppc/forms/. Written requests are submitted to CGPSC (rpm-2) via the unit commanding officer. 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	CGPSC (rpm-2)	Forwards to PPC (ras).
Upon receipt of request for RET-2 Retirement	PPC (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	PPC (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: https://www.dmdc.osd.mil/rsl.

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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 ID	Topic	See Page
3.C.1	Reenlistment and Voluntary Extensions/Reextensions	3-C-2
3.C.2	Checklist for Reenlistment or Extension	3-C-3
3.C.3	Retention of Members in a Pay Status Other than Military Confinement	3-C-5
3.C.4	Retention of Members in a Non-Pay Status or in Military Confinement	3-C-6
3.C.5	Active Duty Extensions of Reservists and Recall of Retirees	3-C-7
3.C.6	Immediate Enlistment in Coast Guard Reserve Upon Discharge from the Regular Coast Guard	3-C-8
3.C.7	Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard	3-C-9

3.C.1 Reenlistments and Voluntary Extensions/Reextensions

3.C.1.1 Introduction

This section will guide you through the process of continuing a member on active duty.

3.C.1.2 Reference

(a) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part V, Reenlistments and Extensions
(c) Military Bonus Programs, COMDTINST M7220.2 (series)
(d) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(e) Discipline and Conduct, COMDTINST M1600.2 (series)
(f) Military Separations, COMDTINST M1000.4 (series)
(g) Coast Guard Pay Manual, COMDTINST M7220.29 (series)

3.C.1.3 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	PPC (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	PPC (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	PPC (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 PPC (mas) for credit of the SRB will not process in JUMPS until the reenlistment/ extension/reextension document input by the SPO successfully processes. Payment of any leave being sold will be included in the first regular end-month payment following successful processing of the reenlistment/extension transaction.		

3.C.2 Checklist for Reenlistment or Extension

3.C.2.1 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.	Ref (a) 1.A.5/1.A.7	
2	Advise member: The saved leave balance and regular leave balance on the effective date of separation. The number of days of leave previously sold during career.	Ref (g), 10-A	
3	Counsel member on SRB program. Early reenlistment can effect SRB.	Ref (c)	
4	Ensure CG-3307 (SEP-06 Counseled regarding the loss of entitlement to file for U.S citizenship) entry is completed for citizens of the Republic of the Philippines. This policy does not apply to members who are citizens of the Republic of the Philippines who enlisted on or after 18 September 2008.	Ref (f), 1.B.30.b Ref (d), Encl (6)	
5	Ensure member completes a CG-2045 Career Intentions Worksheet and forwards to SPO.		
6	SPO forwards appropriate documentation to unit for member's signature.		
7	Unit returns signed documentation to SPO for input into Direct Access.		
8	If member intended to discharge and decides to reenlist/extend, ensure member submits new CG-2040 (Allotment Worksheet) (if allotments stop).		
9	Explain Article 137, UCMJ and code of Conduct and types of discharge certificates. Complete Page 7 (CG-3307) entries (PD-08 UCMJ Code of Conduct Acknowledgement and SEP-03 Types of discharge certificates).	Ref (e) Ref (f)	
10	Verify U.S. citizenship.	Ref (a)	

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3.C.2 Checklist for Reenlistment or Extension, Continued

3.C.2.2 SRB processing

Process table for Selective Reenlistment Bonuses.

WHEN	THEN
retention documents submitted by the SPO have successfully processed in JUMPS,	lump sum SRB payments will be processed by PPC within 30 days after receipt and included in the member's first regular payment following successful processing of the reenlistment/extension transaction.

3.C.2.3 Rules for payment of lump sum leave upon reenlistment or first extension of enlistment

See Article 2.A.20, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series) for rules when selling leave upon reenlistment or entering the first extension of 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.

3.C.2.4 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.

3.C.3 Retention of Members in a Pay Status Other than Military Confinement

3.C.3.1 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.

3.C.3.2 Reference

(a) Military Separations, COMDTINST M1000.4
(b) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap 2-L
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part V, Reenlistments and Extensions

3.C.3.3 Procedures

Procedures required by the SPO for retention of members in a pay status other than Military confinement.

When	Action
Prior to retention	Review Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 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 PPC (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.

3.C.4 Retention of Members in a Non-Pay Status or in Military Confinement

3.C.4.1 Introduction

This includes member involuntarily retained because of military confinement, appellate leave, or any other non-pay status.

3.C.4.2 Reference

(a) Military Separations, COMDTINST M1000.4
(b) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap 2-J
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part V, Reenlistments and Extensions

3.C.4.3 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.

3.C.5 Active Duty Extensions of Reservists and Recall of Retirees

3.C.5.1 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.

3.C.5.2 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 PPC (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.		

3.C.6 Immediate Enlistment in Coast Guard Reserve upon Discharge from the Regular Coast Guard

3.C.6.1 Introduction

Members in the regular Coast Guard being discharged may immediately enlist in the Coast Guard Reserve if they meet eligibility requirements.

3.C.6.2 Reference

(a) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2
(b) Military Bonus Programs, COMDTINST M7220.2
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series):
Part VI, Separations, Chapter 2, Statement of Intent
Part VIII, Accessions, Chapter 8, Component Changes

3.C.6.3 Definition

The term “Immediate Enlistment” means within 24 hours following separation from the regular Coast Guard.

3.C.6.4 Procedures

CG PSC (RPM) must approve the member’s reserve assignment before the member may enlist in the Coast Guard Reserve.

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.

3.C.6.5 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.

3.C.7 Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard

3.C.7.1 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.

3.C.7.2 Reference

(a) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2
(b) Military Bonus Programs, COMDTINST M7220.2
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series):
Part VI, Separations, Chapter 2, Statement of Intent
Part VIII, Accessions, Chapter 8, Component Changes

3.C.7.3 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 (CGPSC-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 separation or departure on terminal leave	Unit	Delivers DD form 214 to member.
Up to 14 days prior to date of separation	SPO	Approves Transmits a Discharge Separation transaction.
Day following discharge If applicable	SPO PPC (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

3.C.7 Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard, Continued

3.C.7.4 Reservist not 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.

Section Overview

Introduction

This section prescribes procedures for separating/discharging Selected Reserve (SELRES). This includes regular Reserve separations, discharges, placement into the Individual Ready Reserve (IRR), Active Status List (ASL), Inactive Status List (ISL), Reservists on long-term active duty orders for 140 days (ADT)/181 days (ADOS) or more or serving on an involuntary recall to active duty under 10 U.S.C. 12302 or 12304.

This section *supplements* the procedures in Section 3-B (Separations) and Chapter 11 (Reserve Mobilization) for SELRES members being discharged from long-term active duty. Ensure the applicable procedures in Section 3-B and Chapter 11 are also followed when discharging a member from active duty.

In this section

Topic ID	Topic	See Page
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3.D.2	SELRES Separations	3-D-3
3.D.3	Procedure for Transfer into IRR, ASL, ISL	3-D-7
3.D.4	Discharge of SELRES for Non-participation	3-D-9
Exhibit 3.D.1	Memorandum 1, Failure to Participate	3-D-13
Exhibit 3.D.2	Attachment for Memorandum 1, Failure to Participate	3-D-14
Exhibit 3.D.3	Memorandum 2, Notice of Intent to Recommend Discharge	3-D-15
Exhibit 3.D.4	Attachment for Memorandum 2, Notice of Intent to Recommend Discharge	3-D-16
Exhibit 3.D.5	Memorandum 3, Recommendation for Discharge – Letter to SELRES	3-D-17
Exhibit 3.D.6	Memorandum 4, Recommendation for Discharge – Letter to PSC-rpm	3-D-18

3.D.1 SELRES Separation Process

3.D.1.1 Introduction

The proper execution of the separation process requires clear communication between all participants. Timely processing of all paperwork and Direct Access data entries are essential to provide the SELRES with a smooth transition and ensure consistency with applicable directives.

3.D.1.2 Owner of Process

The following entities are responsible for the SELRES Separation and Discharge process: Member; Supervisor; Reserve Force Readiness System (RFRS), or Full Time Support staff (FTS); Servicing Personnel Office (SPO); Unit Admin; Pay and Personnel Center (PPC); and Personnel Service Center-Reserve Personnel Management (PSC-rpm).

3.D.1.3 References

(a) Certificate of Release or Discharge from Acitve Duty, DD-214, COMDTINST M1900.4 (series)
(b) Military Personnel Data Records (PDR) System, COMDTINST M1080.10I (series)
(c) Military Separations, COMDTINST M1000.4 (series)
(d) Reserve Policy Manual, COMDTINST M1001.28 (series), Chap 4.B, and 8.B
(e) Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series) (Vol VI, Separations)
(f) Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1(series)
(g) Transition Assistance Program, COMDTINST 1900.2(series)
(h) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(i) Personnel Security and Suitability Program, COMDTINST M5520.12(series)
(j) Government Travel Charge Card (GTCC) Program, Policies and Procedures, COMDTINST M4600.18(series)

Continued on next page

3.D.2 SELRES Separations

3.D.2.1 Introduction

Routine SELRES separations/discharges shall occur with sufficient lead-time to allow for proper document processing. SELRES who have remaining Military Service Obligation (MSO) will be placed into the Individual Ready Reserve (IRR) until all contractual service requirements have been met. SELRES who have fulfilled their MSO and have not incurred additional time for benefits such as tuition assistance, Montgomery GI Bill Selected Reserve, bonuses, or mutual assistance can be discharged.

3.D.2.2 Procedure

Procedure required for Routine separation from SELRES.

When	Who does it	What happens
Monthly	SPO	• Generates Separation Report from Direct Access Unit Roster. • Contacts SELRES for statement to determine separation date. • Notifies RFRS staff or Full Time Support staff of SELRES intentions. • Provides Career Intentions Worksheet (CG-2045) to SELRES ****Note: Once Letter of Resignation for Officers has been approved, complete procedure and checklist as indicated.**
180 days prior to separation	SELRES	• Submits Career Intentions Worksheet (CG-2045) to supervisor, Branch Chief, and Commanding Officer/ Officer in Charge for approval.
Upon receipt of request	Commanding Officer/ Officer in Charge	• Approves request, forwards CG-2045 to the SPO for processing.

Continued on next page

3.D.2 SELRES Separations, continued

3.D.2.2 Procedure, continued

When	Who does it	What happens
Day of separation	SPO	• 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: https://www.dmdc.osd.mil/rsl ****Note: If SELRES have remaining MSO, verify with ID Card Manual, reference (g) for proper issuance.**
Following separation	PSC	Evidence of case review for separations (see Separation Documents Checklist, Enclosure (3) to PDR Manual), where PSC-rpm is the discharge authority, shall be retained locally at PSC for a minimum of three years.

Continued on next page

3.D.2 SELRES Separations, continued

3.D.2.3 Introduction

This checklist is a job aid to use congruently by the supervisor, unit admin, and SPO to separate or discharge SELRES. It is designed to be reproduced locally.

3.D.2.4 Checklist for SELRES Separation

Additional items when releasing SELRES.

Step	Action	Reference	Date
1	• Complete predischarge interview six months prior to separation date.	Ref (c)	
	• Transition Assistance Program counseling (TAPS).	Ref (g)	
	• Completes Preseparation Counseling Checklist for **Reserve** Component Service Members Released From Active Duty (DD-2648-1). ****Note**: Upon receipt of the DD-2648-1, the SPO shall record training using school code 500650.	(Forms available from PPC's web site http://www.uscg.mil/ppc/forms)	
	• Complete Career Intentions Worksheet, CG-2045 at least 180 days prior to separation date. • If member is on long-term active duty -- Submit Statement of Intent in DA.	Ref (e) VI-2-1	
2	Notify the PSC-rpm-1 assignment officer immediately of SELRES anticipated date of separation.		
3	Completes follow-up interview 3 months prior to separation date if SELRES indicates discharge.	Ref (c)	
4	Conducts Final Security Termination Briefing 30 days prior to separation.	Ref (i)	

Continued on next page

3.D.2 SELRES Separations, continued

3.D.2.4 Checklist, (continued)

Step	Action	Reference	Date
5	**SPO** • Counsels member on separation. • Provides SELRES copy of Thrift Savings Plan (TSP) Withdrawal Package (https://www.tsp.gov/PDF/formspubs/tspbk02.pdf) if they have a TSP account. SELRES must also complete a TSP Separation Notification, (http://www.uscg.mil/ppc/forms/tspsepform.pdf) and forward to PPC (MAS-TSP) before they will be able to withdrawal funds from the account.	Ref (c)	
6	Ensures Government Travel Charge Card is turned in to coordinator for cancellation.	Ref (j)	
7	Verifies SELRES does not have service obligation remaining for Tuition Assistance (PPC (MAS-DC)).		
8	Completes appropriate Discharge Certificate and issue appropriate Administrative Remarks CG-3307 (SEP-16 Discharge from USCGR inactive duty without immediate reenlistment).	Ref (c)	
9	Issues Honorable Discharge Button (if applicable).	Ref (c)	
10	Completes appropriate separation letter(s) from enclosure (4) of this manual.	Ref (h) 3-B-5, 7	
11	SPO to review and distribute SPO PDR per PDR Manual. SPO notifies Health Record Custodian to forward MED PDR as appropriate./MED PDRs.	Ref (b)	
12	Collects member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. ****Note: If SELRES have remaining MSO, verify with ID Card Manual, reference (g) for proper issuance.**	Ref (f)	
13	Collects all government property issued to SELRES including any building keys, gear, portable computer, Remote Access Service (RAS), CAC access. Update safe combinations.		

3.D.3 Procedure to Request Transfer to the IRR, ASL, ISL

3.D.3.1 Introduction

SELRES who have completed their initial enlistment contract and who desire transfer to the IRR must follow the process identified below. SELRES may request transfer to the Active Status List (ASL) during their enlistment. Likewise, Commanding Officers may use this guidance to place SELRES on the ISL. See Reference (d) for further guidance regarding the ASL and ISL.

This procedure is provided to assist supervisors, unit yeoman, commanding officers, and RFRS staff in following the process.

3.D.3.3 Procedure

Procedure required for requests to change reserve components.

When	Who does it	What Happens
Impending temporary hardship,	SELRES	Complete CG Form 1001, Change in Reserve Component Category (RCC) and submit via chain of command. The request form is available at http://www.uscg.mil/forms/cg/cg_1001.pdf.
Within 3 days	Supervisor	Reviews CG-1001, and forwards to Commanding Officer.
Within 5 days	Unit CO	Forwards request to servicing District (dxr).
Upon receipt of approved request	District (dxr)	Endorses and forwards request to PSC-rpm-1 (via email to ARL-PF-CGPSCR-RPM-Query@uscg.mil)
Upon receipt of approved request	PSC-rpm-1	Places member into new catagory per request in DA.
Weekly	RFRS	Verifies and reports to supervisor and unit CO action is completed in DA.

Continued on next page

3.D.3 Procedure to Request Transfer to the ASL, continued

3.D.3.1 Introduction

This checklist is provided to assist the Unit/SPO yeoman and supervisors in completing all tasks required for transferring SELRES to the IRR and ASL. This job aid is designed to be reproduced locally.

Step	Action	Reference	Date
1	Verify completion of Change in Reserve Component Category (RCC) form.		
2	Checks SELRES status in DA.	Ref (e)	
3	Suspends or Terminates clearance with Security Manager with form CG 5588.	Ref (i)	
4	Verifies SELRES does not have service obligation remaining for Tuition Assistance.	PPC (MAS-DC)	
5	Ensures Government Travel Charge Card is turned in to coordinator for cancellation.	Ref (j)	
6	Verifies type of ID card SELRES is entitled to maintain.	Ref (f)	
7	Collects all government property issued to SELRES, including any building keys, gear, portable computer, Remote Access Service (RAS), CAC access. Update safe combinations.		

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3.D.4 Discharge of SELRES for Non-participation

3.D.4.1 Discharge Processing

This process requires documentation by the unit to begin discharge proceedings for SELRES in a non-participation status.

3.D.4.2. Owner of Process

Non-participation requires the unit to take an active role by working and communicating with the immediate supervisor and SPO. The following entities are responsible for this process: Member; Supervisor; Reserve Force Readiness System (RFRS), Full Time Support staff; Servicing Personnel Office (SPO); Permanent Unit; Pay and Personnel Center (PPC); and CG PSC-rpm.

3.D.4.3 Procedure

Procedure required for reserve component transfers.

When	Who does it	What happens
Unexcused absence (s) (first offense)	Supervisor	• Contact SELRES to discuss reason for missing drill(s). • Review Direct Access for drilling status and evaluations to prevent continued non-performance. • If SELRES unavailable, send correspondence to last current address with prepared Administrative Remarks Form (CG-3307, with entry RPM-01 Counseled for failure to report for scheduled IDT) for SELRES to sign acknowledgment of missed drill(s). • Send the Administrative Remarks Form (CG 3307) by certified mail with return receipt and self-addressed stamped envelope. IAW reference (e), excused drills include: • Illness or injury of the reservist • Serious or unusual hardship due to unforeseen emergency • Accident or illness of a family member requiring presence or other action by the reservist • Death or imminent death of a member of the immediate family.

Continued on next page

3.D.4 Discharge of SELRES for Non-participation, Continued

3.D.4.3 Procedure, (continued)

When	Who does it	What happens
Immediately	SELRES	• Contact supervisor or unit Senior Enlisted Reserve Advisor (SERA) or the Command Chief to resolve non-participation issue and/or discuss options to change reserve component. • Supervisor will counsel SELRES and proceed with discharge, or transfer to IRR as appropriate.
More than three (3) unexcused absences	Supervisor/ SERA	• Send Non-participation Memo (Exhibit 1) to current home address via certified mail with return receipt and self-addressed stamped envelope. • Unit/SPO to document procedure on form CG-3307 for record purposes. • Notate on disclosure log in PDR.
More than five (5) unexcused absences	Supervisor / SERA	• Contact SELRES to correct absenteeism; review Direct Access for drilling status and evaluations to identify methods to prevent continued non-performance. • If SELRES is unavailable, send Non-participation Memo (Exhibit 2, and attachment, Exhibit 3) to current home address via certified mail with return receipt and self-addressed stamped envelope. • Unit/SPO to document procedure on form CG-3307 for record purposes. Notate on disclosure log in PDR. • IAW ref (c), the Commanding Officer is authorized to recommend discharge at any time during probationary period if member is not making an effort to overcome the deficiency.
More than nine (9) unexcused absences	Commanding Officer	• Send Discharge Memorandum (Exhibit 3) by certified mail to member with stamped, self-addressed envelope and return receipt. • Unit/SPO document procedure with Admin Remarks Form CG-3307 (Enclosure 6) for record purposes, and complete disclosure log in PDR. • If member fails to respond, document and file in PDR; continue process for discharge.

Continued on next page

3.D.4 Discharge of SELRES for Non-participation, Continued

3.D.4.3 Procedure, (continued)

When	Who does it	What happens
Within 30 days of second notification	Unit/ Commanding Officer	Prepare Discharge Memorandum (Exhibit 4) request for Honorable/Dishonorable Discharge to CG PSC-rpm. Discharge package will include the following documentation: • Notice of Intent to Recommend Discharge. • Member Acknowledgement of Command Intent to Recommend Discharge. • Copies of Return Receipt Request. • Direct Access screen print indicating address and phone number of record. • Non-Participation Notice mailed to member (with failed delivery notation from USPS). • Statement of (Rate/Grade Name of member who attempted to contact) SELRES with details related to failed response. • Direct Access screen print indicating (XX) IDT drills and (XX) ADT days completed.

Continued on next page

3.D.4 Discharge of SELRES for Non-participation, Continued

3.D.4.4 Non-Participation Checklist for Discharge

This checklist is provided to assist the Unit/SPO complete all tasks required to discharge SELRES. This job aid is designed to be reproduced locally.

Step	Action	Reference	Date
1	Counsel member after one unexcused IDT drill weekend period. Prepare Administrative Remarks (CG-3307 with RPM-01 Counseled for failure to report for scheduled IDT entry) documenting counseling session.	Ref (c)	
2	After three unexcused IDT drill weekends, prepare Administrative Remarks (CG-3307 with RPM-01 Counseled for failure to report for scheduled IDT entry) documenting the number of missed drills and counseling session.	Ref (c)	
3	After five unexcused IDT drill weekends, prepare Memorandum indicating member **will** be processed for discharge. Send Memorandum certified with return receipt.		
4	After the ninth unexcused IDT drill weekend, prepare Memorandum indicating member **is being** processed for discharge. Send Memorandum certified with return receipt.		
5	Within 30 days of second notification, prepare discharge recommendation Memorandum to PSC-rpm-1.		
6	Terminate Clearance with Security Manager.	Ref (i)	
7	Verify with unit ESO member does not have remaining service obligation for Tuition Assistance.	PPC (MAS-DC)	
8	SPO to verify with PPC of possible bonus recoupment.	PPC (MAS-DC)	
9	Ensure Government Travel Charge Card account is terminated by unit GTCC coordinator. (Charge Card Instruction)	Ref (j)	
10	SPO completes Direct Access transactions (DD-214, Discharge or Retirement).	Ref (e)	
11	Review SPO/MED PDRs. (Ref (c))		
12	SPO to review and distribute SPO PDR per PDR Manual. SPO notifies Health Record Custodian to forward MED PDR as appropriate.	Ref (b)	
13	Collect member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal (ID CARD Manual).	Ref (f)	
14	Collect all government property issued to SELRES, including any building keys, gear, and miscellaneous items.		

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Exhibit 1, Memorandum 1, Failure to Participate

MEMORANDUM

From: <Initials & Surname of CO>
Commanding Officer

Reply to Attn of: Rate/Grade Name of POC
POC Phone number

To: <Rate/Grade MemberName>

Subj: NOTICE OF FAILURE TO PARTICIPATE

Ref: (a) Military Separations, COMDTINST M1000.4 (series)
(b) Reserve Policy Manual, COMDTINST M1001.28 (series)

1. You are hereby notified that you have failed to meet the minimum participation standards as outlined in Chapter 4-A of reference (b). Your deficient participation includes, but is not limited to failure to:

Edit this list as needed.

- perform more than <enter 43 (54 for deployable units)> IDT drills per year.
- perform 12 or more days of ADT drills per year.
- respond to Annual Screening Questionnaires between AUG and NOV at a minimum.

2. Records indicate you **have** completed your Military Service Obligation. Not participating while in a SELRES status is not an option. You should begin drilling or take action to be removed from the SELRES status, or your participation deficiency could result in corrective measures, which could include:

- An Honorable, General, or Bad Conduct Discharge.
- Arrest by civil authorities for failure to respond to orders, DD 553 Wanted by Armed Forces.
- Recoupment of any bonus funds you may have received.

3. Our goal is to provide opportunities to correct these deficiencies. Assistance includes providing other participation opportunities to assist you in meeting SELRES participation standards.

4. **Please contact <rate/grade/name of command POC at POC phone number> to discuss this matter**. In addition to calling, you *must* return the enclosed form stating your particpation intentions. Please return the attached form no later than <date>. Failure to respond to this order will result in a participation failure and may be construed as your acknowledgement to be subject to disciplinary action.

#

Encl: (1) Member Acknowledgement of Failure to Participate Notice

Exhibit 2, Attachment for Memorandum 1, Failure to Participate

MEMORANDUM

From: <Rate name of member with unsat participation> Reply to Attn of:

To: Commanding Officer, <Your unit name>

Subj: MEMBER ACKNOWLEDGEMENT OF FAILURE TO PARTICIPATE NOTICE

Ref: (a) <Your unit name> memo 1001 dtd date command signed failure to participate memo

1. **Acknowledgement:** *(initial each)*:

_____ *(initials)* I understand that I have failed to meet the required minimum participation standards as outlined in the Reserve Policy Manual, COMDTINST M1001.28, chap 4.A.

_____ *(initials)* I understand that various disciplinary actions may be pursued and the possible implications of such actions.

2. **Member career desires:** *(initial **only one**)*:

_____ *(initials)* I would like to continue in a SELRES status. I agree to meet the minimum participation standards as outlined in the Reserve Policy Manual, COMDTINST M1001.28, chap 4.A. situation.

Or

_____ *(initials)* I do not wish to participate. Please contact me to discuss my options. *(Provide address and phone numbers below)*

3. **Member signature:** *(provide home address and phone number)*:

_____ _____
(Signature of member) *(Date)*

_____
(Street)

_____
(City, State, Zip Code)

_____
(Area code and Phone Number)

Exhibit 3 Memorandum 2, Notice of Intent to Recommend Discharge

MEMORANDUM

From: <Initials & Surname of CO>
Commanding Officer

Reply to Attn of: <Rate/Grade Name of POC POC Phone number>

To: <Rate/Grade Member Name>

Subj: NOTICE OF INTENT TO RECOMMEND DISCHARGE

Ref: (a) Reserve Policy Manual, COMDTINST M1001.28 (series)
(b) Military Separations, COMDTINST M1000.4 (series)

1. You are being notified that to discharge you from the U.S. Coast Guard Reserve has been initiated pursuant to the provisions of references (a) and (b). In your response to our efforts to correct your participation deficiencies, you made it clear that you had no intention of participation in the Coast Guard Reserve. Enclosure (1) is your statement to this effect.

2. Since you have fulfilled your service obligations, I will recommend to Coast Guard Personnel Service Center (PSC) that your discharge be characterized as Honorable as defined by reference (b), reason: Convenience of the Government in accordance with reference (b).

3. However, due to your failure to participate as required while in an Active Status, I will recommend an RE-3 re-enlistment code as describe by reference (b). An RE-3 re-enlistment code will hinder re-entry to the Coast Guard or any other military service.

4. It is within your rights to rebut this decision, by submitting a statement on your behalf to be included with my recommendation.

5. You have the right to present your case and appear in person before an administrative discharge board, if you so desire. Please contact <Your Command POC & phone number> if you wish to explore this option.

6. You must complete enclosure (2) to communicate your desire to PSC. Return the completed and signed memo to <Your Command POC> no later than <date>. If you do not return the memo by <date>, the discharge recommendation will proceed without your input. Failure to return the memo in a timely manner might also be construed as your consent to discharge.

#

Encl: (1) Rate/Grade MemberName Memo dtd date (Acknowledgement of Failure to Participate)
(2) Acknowledgement of Command recommendation to Discharge

Exhibit 4, Attachment for Memorandum 2, Notice of Intent to Recommend Discharge

MEMORANDUM

From: Rate name of member to be discharged

Reply to
Attn of:

To: Commanding Officer, Your unit name

Subj: MEMBER ACKNOWLEDGEMENT OF COMMAND INTENT TO RECOMMEND DISCHARGE

Ref: (a) Your unit name memo 1001 dtd date command signed notification memo

1. **Acknowledgement of counseling** *(initial each)*:

_____ I understand why my command is recommending discharge as detailed in reference (a).
(initials)

2. **Member statement:** *(initial **only one**)*:

_____ I waive my right to make a statement on my behalf.
(initials)

Or

_____ I have attached a statement on my behalf.
(initials)

3. **Member desire:** *(initial **only one**)*:

_____ I do **not** object to being discharged from the United States Coast Guard Reserve.
(initials)

Or

_____ I object to being discharged from the United States Coast Guard Reserve
(initials)

_____ _____
(signature of member) *(date)*

Exhibit 5, Memorandum 3, Recommendation for Discharge – No MSO Remaining

MEMORANDUM

From: <Initials & Surname of CO>
Commanding Officer

Reply to Attn of: <Rate/Grade Name of POC POC Phone number>

To: CG PSC-rpm

Subj: RECOMMENDATION FOR DISCHARGE FOR <Rate/Grade Member Name> USCGR, <EMPLID>

Ref: (a) Reserve Policy Manual, COMDTINST M1001.28 (series)
(b) Military Separations, COMDTINST M1000.4 (series)

1. I recommend <Rate/Grade Member Name> be discharged from the United States Coast Guard Reserve for failure to meet the minimum participation standards as outlined in Chapter 4-A of reference (a). <Rate/Grade Member Name> has overtly stated <he or she> has no intent to participate in Reserve activities. After corresponding with the member, it was determined that interventions would not return the member to a satisfactory participation status.

2. Given the member has completed <his or her> military service obligation and overall service is satisfactory, an Honorable discharge is recommended as defined by reference (b), reason for Convenience of the Government defined by reference (b). An RE-3 re-enlistment code is recommended given the member's stated ambivalence toward meeting the terms of their current enlistment contract.

3. I recommend *against* forgiving any Coast Guard debts the member may have.

4. Enclosure (2) is my memo informing the member of my intent to recommend this discharge. Enclosure (3) is the member's acknowledgement of my intent. The member <is (or is not)> opposed to this action, and the member <chose (did not choose)>to make a statement on <his or her> behalf. <Enclosure (4) is the member's statement.>

#

Encl: (1) Member Acknowledgement of Failure to Participate
(2) Command Notice of Intent to Recommend Discharge
(3) Member Acknowledgement of Command Intent to Recommend Discharge
(4) Statement of Rate/Grade MemberName dtd date of statement

Exhibit 6, Memorandum 4, Recommendation for Discharge – MSO Not Completed

MEMORANDUM

From: <Initials & Surname of CO>
Commanding Officer

Reply to Attn of: <Rate/Grade Name of POC POC Phone number>

To: CG PSC-rpm

Subj: RECOMMENDATION FOR DISCHARGE FOR <Rate/Grade Member Name> USCGR, <EMPLID>

Ref: (a) Reserve Policy Manual, COMDTINST M1001.28 (series)
(b) Military Separations, COMDTINST M1000.4 (series)

1. I recommend <Rate/Grade Member Name> be discharged from the United States Coast Guard Reserve for failure to meet the minimum participation standards as outlined in Chapter 4-A of reference (a). <Rate/Grade Member Name> has overtly stated <he/she> has no intent to participate in Reserve activities. After corresponding with the member, it was determined <he/she> would not return to a satisfactory participation status.

2. <Rate/Grade MemberName> demonstrated a repeated pattern of failure to meet participation requirements. These failures occurred despite assistance and counseling provided to help the member overcome deficiencies. The administrative remarks in Enclosure (1) detail the member's non-participation. A summary follows:

a. Failure to notify the Coast Guard of changes in address and phone number
b. Failure to perform IDT and ADT drills. Enclosures (1) through (4) document this unsatisfactory participation.

3. Attempts to contact the member to correct these deficiencies have been unsuccessful, as a result, this discharge package is submitted without member involvement.

4. In this case the member has *not* completed <his or her> military service obligation. An Honorable discharge is not warranted, and I recommend a General Discharge under Honorable Conditions as defined by reference (b). An RE-4 re-enlistment code is recommended to prevent re-entry into military service.

5. I also recommend *against* forgiving any Coast Guard debts the member may have.

#

Encl: (1) Administrative Remarks (CG-3307)
(2) Notice of Intent to Recommend Discharge
(3) Member Acknowledgement of Command Intent to Recommend Discharge
(4) Direct Access screen print indicating address and phone number of record
(5) Non-Participation Notice mailed to member (with failed delivery notation from USPS)
(6) Statement of Rate/Grade Name of your crew who tried to call Detailing Failed Phone Contact
(7) Direct Access screen print indicating <XX> IDT drills and <XX> ADT drills

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 competency 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

Section Overview

Introduction

This section will guide you through the procedures for advancing a member.

In this section

Topic ID	Topic	See Page
4.A.1	Headquarters Advancement Checklist	4-A-2
4.A.2	Commanding Officer Advancement Process	4-A-4
4.A.3	Commanding Officer Advancement Checklist	4-A-5

4.A.1 Headquarters Advancement Checklist

4.A.1.1 Introduction

Following each Servicewide exam PPC (ADV) and PSC (epm) will publish eligibility lists and a series of Enlisted Personnel Advancement Announcements (EPAA), for active duty personnel, or Enlisted Reserve Advancement Announcements (ERAA) for reservists. An EPAA or ERAA is notification of who will be advanced and on what date the advancement will be effective.

4.A.1.2 Reference

(a) Enlisted A ccessions, E valuations,, a nd A dvancements, C OMDTINST M1000.2 (series)
(b) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(c) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8(series)
(d) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part III, General Transactions, Chapter 2, Advancements, Change in Rating, Reduction, Add/Remove Designator

4.A.1.3 Checklist

Use the following checklist when a member is authorized by an EPAA or ERAA to be advanced.

Step	Action	Reference	Date
1	Ensure member has continued to remain eligible for advancement, meets weight standards ,and for advancement to E-7 and above, meets obligated service requirements Complete CG-3307 (AR-02 Obligated Service for Advancement to E-7, E-8, or E-9) entry if one was not completed when the member's name appeared above the cutoff on the Advancement Eligibility List. Advise PPC (adv) and PSC (epm) to withhold advancement if member is not eligible for advancement.	Ref (a), 3.A.19.c & Ref (c)	
2	Complete Unscheduled Enlisted Employee Review on the day before advancement or change in rating to pay grade E-7 or above. (Not required for advancement to pay grade E-6 and below).	Ref (a) 5.e.2.a. & 5.E.1.b.(4)(g)	

Continued on next page

4.A.1 Headquarters Advancement Checklist, Continued

4.A.1.3 Checklist **(continued)**

Step	Action	Reference	Date
3	Complete Petty Officer Advancement Certificate (CG-216) for advancement to E-4 through E-6. • Certificate for E-7 through E-9 will be completed by PPC (ADV)	Ref (a) 3.A.29.c.	
4	Issue new ID card	Ref (b), 5.D.4	
5	Remove member from "A" school list (members in pay grade E-3 only)	Ref (a) 3.A.20.c(1)	

4.A.2 Commanding Officer Advancement Process

4.A.2.1 Introduction

The advancement process is broken down into stages by what needs to be completed and who is responsible.

4.A.1.2 Reference

(a) Enlisted Accessions, Evaluations,, and A dvancements, C OMDTINST M1000.2 (series)
(b) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(c) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8(series)
(d) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part III, General Transactions, Chapter 2, Advancements, Change in Rating, Reduction, Add/Remove Designator

4.A.2.3 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-2030).
2	CO of Unit	Ensures member is eligible in accordance with reference (a), approves request and forwards Career Development Worksheet to the SPO.
3	SPO	Completes advancement transaction in Direct Access per reference (d)

4.A.3 Commanding Officer Advancement Checklist

4.A.3.1 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.

4.A.3.2 Reference

(a) Enlisted Accessions, Evaluations,, and Advancements, COMDTINST M1000.2 (series)
(b) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(c) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8(series)
(d) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part III, General Transactions, Chapter 2, Advancements, Change in Rating, Reduction, Add/Remove Designator

4.A.3.3 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 (Note to SPO: 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 EPAA or ERAA (See Sec. 4.A.1).

Continued on next page

4.A.3 Commanding Officer Advancement Checklist, Continued

4.A.3.4 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	Ref (a) 3.A.4, 3.A.20.a, 3.A.20.b, 3.A.22.c, and Ref (c)	
2	Complete Career Development Worksheet, CG-2030	Ref (b)	
3	SPO completes Direct Access transaction Develop Workforce > Career Management > Use > Adv/Promote One Member	Ref (d)	
4	Unit complete CG-5530 (Certificate for Advancement to Seaman/Fireman) or CG-216 (Petty Officer Appointment Certificate)	Ref (a) 3.A	
5	Issue ID card (if applicable)	Ref (b), 5.D.4	

Section Overview

Introduction

This section will guide you through the warrant officer appointment process

In this section

Topic ID	Topic	See Page
4.B.1	Warrant Officer Appointment Process	4-B-2
4.B.2	Warrant Officer Appointment Checklist	4-B-3

4.B.1 Warrant Officer Appointment Process

4.B.1.1 Introduction

The Coast Guard Personnel Service Center manages the CWO Appointment Board Process. PSC will release an ALCGPSC (active duty) or ALCGRSV (reserve) message annually announcing the timeline for the next CWO Appointment Board. This message will establish responsibilities and deadline dates.

4.B.1.2 Reference

(a) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3, (Series)

4.B.1.3 Process

Here is the warrant officer appointment process.

Stage	Who Does It	What Happens
1	Member	Meets all eligibility requirements by deadline.
2	Member	Prior to published deadline 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	PPC (ADV)	Produces PDE for member's validation. Note: The reserve component does not utilize a pre-scoring system for candidates. Personnel Data Extracts (PDE) and a pre-board eligibility list will not be available.
5	PPC (ADV)	Produces Profile Letter
6	PSC	Publishes pre-board eligibility list via ALCGPSC/ALCGRSV
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 deadline date.
9	PSC	Convenes selection board Publishes selection list

4.B.2 Warrant Officer Appointment Checklist

4.B.2.1 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 is to designed to be reproduced locally.

4.B.2.2 Reference

(a) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series), 1-D.
(b) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8(series)
(c) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2(series)
(d) Military Bonus Program, COMDTINST M7220.2 (series)

4.B.2.3 Procedures

Procedures required upon selection to warrant officer

Step	Action	Reference	Date
1	Ensure physically qualified for appointment (within 12 months of appointment).	Ref (a)	
2	Review SRB entitlement	Ref (d)	
3	Endorse Appoint letter		
4	Ensure weight requirements are met	Ref (b)	
5	Execute Oath of Office, CG-9556	Ref (a)	
6	Complete ID card(s)	Ref (c)	
7	Appointee mails copy of Oath of Office and Physical to PSC	Ref (a)	

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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 ID	Topic	See Page
4.C.1	Training and Educational Accomplishments	4-C-2
4.C.2	Individual's Record of Small Arms Training	4-C-5
4.C.3	Lump Sum Payments to VEAP or MGIB-K Programs	4-C-6
4.C.4	Managing Competencies	4-C-8
4.C.5	Insignia	4-C-10

4.C.1 Training and Educational Accomplishments

4.C.1.1 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 Mandatory Use of the Training Management Tool, COMDTINST 5270.2.

4.C.1.2 References

(a) Performance, Training and Education Manual, COMDTINST M1500.10(series), Chap 4
(b) Reserve Policy Manual, COMDTINST M1001.28(series), 8.C.9
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part III, General Transactions, Chapter 1, Manage Competencies

4.C.1.3 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-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 to unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information.
3	SPO/Unit DA Field Admin user	Completes appropriate Direct Access transaction in accordance with reference (c). If data entry is completed by unit, forwards copy of worksheet or other source document marked "data entry complete by (name/signature) on (date of data entry)" to SPO for inclusion in SPO PDR.

Continued on next page

4.C.1 Training and Educational Accomplishments, Continued

4.C.1.4 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 to unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information.
2	SPO/Unit DA Field Admin user	Completes appropriate Direct Access transaction in accordance with reference (c). If data entry is completed by unit, forwards copy of worksheet or other source document marked "data entry complete by (name/signature) on (date of data entry)" to SPO for inclusion in SPO PDR.

Continued on next page

4.C.1 Training and Educational Accomplishments, Continued

4.C.1.5 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**

4.C.1.6 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 to unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information.
3	SPO/Unit	Records accomplishment in Direct-Access. Develop Workforce > Manage Competencies (GBL) > Use > Education If data entry is completed by unit, forwards copy of worksheet or other source document marked "data entry complete by (name/signature) on (date of data entry)" to SPO for inclusion in SPO PDR.

4.C.1.7 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 may be used to report accomplishments. This form offers active duty, and reserve personnel the opportunity to record their professional development accomplishment to PSC-psd-mr where it will become a part of their official record. The procedure is voluntary and does not affect Direct-Access entry.

4.C.2 Individual's Record of Small Arms Training

4.C.2.1 Introduction

The Small Arms Record Firing Report (CG-3029) provides a summary of individual's small arm qualifications. Upon receipt of CG-3029, enter the appropriate award and competency in Direct Access.

4.C.2.2 Reference

(a) Ordnance Manual, COMDTINST M8000.2(series)

4.C.2.3 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. Only one award shall be entered regardless of the number of times qualified (example: Expert rifle shall only be entered in Direct Access upon initial qualification, subsequent qualifications will not be entered.).

4.C.2.4 Award breakdown

See enclosure (7) of reference (a) for the qualification and breakdown of scores when entering in Direct Access.

4.C.2.5 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

4.C.3 Lump Sum Payments for Veterans Education Assistance Program (VEAP) or Montgomery GI Bill (MGIB) Additional Contributions and Request for VEAP Refunds

4.C.3.1 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.

4.C.3.2 Reference

(a) Performance, Training and Education Manual, COMDTINST M1500.10(series)
(b) Coast Guard Pay Manual, COMDTINST M7220.29(series),
(c) GI Bill Website - http://www.gibill.va.gov/
(d) Montgomery G.I. Bill (MGIB) – Active Duty Education Assistance Program, COMDTINST 1760.9(series)
(e) The Veterans Benefits And Health Care Improvement Act of 2000 (Public Law 106-419)

4.C.3.3 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.

4.C.3.4 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-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

4.C.3 Lump Sum Payments for Veterans Education Assistance Program (VEAP) or Montgomery GI Bill (MGIB) Additional Contributions and Request for VEAP Refunds, Continued

4.C.3.5 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 PAY & PERSONNEL CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591

4.C.3.6 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 PAY & PERSONNEL CENTER 444 SE QUINCY STREET TOPEKA, KS 66683-3591
3	Member should receive refund within 90 days.

4.C.4 Managing Competencies

4.C.4.1 Introduction

Competencies 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.

4.C.4.2 Reference

(a) U.S. Coast Guard Competency Management System Manual, COMDTINST M5300.2
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part III, General Transactions, Chapter 1, Manage Competencies

4.C.4.3 Adding a competency

Add a competency for a member.

WHEN	THEN
A member completes school and receives a competency	Forward Career Development Worksheet (CG-2030) to the SPO. SPO or unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information, will complete Direct Access competencies transaction.
A member is assigned a competency by the unit CO	The CO will forward a letter or a worksheet to the SPO or unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information. The SPO/Field Admin will complete Direct Access competencies transaction.
A member completes small arms training and receives a competency	Forward Career Development Worksheet (CG-2030) to the to the SPO or unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information. The SPO/Field Admin will complete Direct Access competencies transaction.

Continued on next page

4.C.4 Managing Competencies, Continued

PDR documents	If data entry is completed by unit (Field Admin user), the unit forwards copy of worksheet or other source document marked “data entry complete by (name/signature) on (date of data entry)” to SPO for inclusion in SPO PDR.

4.C.5 Insignia

4.C.5.1 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.

4.C.5.2 Reference

(a) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part III, General Transactions, Chapter 1, Manage Competencies

4.C.5.3 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 to the SPO or unit member with the Direct Access "Field Admin" (See section 1.5.5 of this manual) user role who, under an agreement with the SPO, is authorized to update unit competency and training information.
2	UNIT/SPO	Will record this honor or award in Direct Access using appropriate honor or award code. If data entry is completed by unit, forwards copy of worksheet or other source document marked "data entry complete by (name/signature) on (date of data entry)" to SPO for inclusion in SPO PDR.

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

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Section Overview

Introduction

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

In this section

Topic ID	Topic	See Page
5.A.1	Designation of Beneficiaries and Record of Emergency Data	5-A-2
Exhibit 5.A.1.1	Death Gratuity Designation Spousal Notification Letter	5-A-9
5.A.2	Servicemembers' Group Life Insurance (SGLI)	5-A-6
Exhibit 5.A.2.1	Notice to Spouse , SGLI Coverage Reduction or Beneficiary Change	5-A-12
5.A.3	SGLI Family Coverage	5-A-13
Exhibit 5.A.3.1	Notice to Spouse – Termination of Coverage	5-A-15
5.A.4	Quality Review of Beneficiary Designations and SGLI Elections	5-A-16
5.A.5	Casualty Reporting	5-A-17

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

5.A.1.1 Introduction

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

5.A.1.2 Reference

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

5.A.1.3 Purpose

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

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

5.A.1.4 Annual Verification

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

Continued on next page

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

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

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

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

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

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

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

5.A.1.7 Death Gratuity

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

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

Continued on next page

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

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

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

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

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

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

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

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

Continued on next page

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

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

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

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

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

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

1772
Date

NOTIFICATION OF BENEFICIARY DESIGNATION:

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

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

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

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

Note: Undesignated portions will be paid by law:

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

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

Sincerely,

Name
Rank, USCG/USCGR
Title

Copy: SPO

Exhibit 5.A.1.1

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

5.A.2.1 Introduction

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

5.A.2.2 Reference

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

5.A.2.3 Automatic coverage

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

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

5.A.2.4 Traumatic Injury Protection (TSGLI)

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

5.A.2.5 Combat SGLI Allowance

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

Continued on next page

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

5.A.2.6 Payment of SGLI Premium

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

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

For payment by credit card (Visa or Master Card) or call PPC (mas/dc) at (785) 339-**3615**.

Check or money order payments should:

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

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

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

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

Continued on next page

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

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

5.A.2.8 Procedures for reducing or declining coverage

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

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

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

Continued on next page

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

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

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

5.A.2.11 Spousal Notification

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

5.A.2.12 Designations of beneficiaries who are minors

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

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

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

Continued on next page

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

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

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

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

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

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

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

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

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

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

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

Continued on next page

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

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

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

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

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

Stage	Who Does It	What Happens
1	Member	Completes Form SGLV-8286 per instructions on the form
2	Unit	Unit representative completes the "For Branch of Service Use Only" section of the form upon receipt from member (whether in person, by mail or electronically). Photocopies are made of the original form and distributed as follows: Original - SPO Photocopy 1 - CGPSC (PSC-MR) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR **Note:** The distribution printed on the SGLV-8286 itself should be disregarded.
3	SPO	Enters SGLI information in Direct-Access Direct Access path: 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 section 5.A.2.7 of this section.

Continued on next page

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

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

Commanding Officer
U. S. Coast Guard
Any Unit

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

1741
DD Month Year

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

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

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

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

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

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

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

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

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

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

Sincerely,

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

Copy: Member

Exhibit 5.A.2.1

5.A.3 SGLI Family Member Coverage

5.A.3.1 Introduction

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

5.A.3.2 Reference:

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

5.A.3.3 Eligibility

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

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

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

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

Continued on next page

5.A.3 SGLI Family Member Coverage, Continued

5.A.3.4 Coverage Amounts

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

5.A.3.5 Cost of Coverage

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

5.A.3.6 Deduction of Premiums

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

5.A.3.7 Form for Reducing or Declining Coverage

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

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

5.A.3.8 Reinstating/ Increasing Family Coverage

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

5.A.3.9 Spousal Notification

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

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

Continued on next page

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

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

Commanding Officer
U. S. Coast Guard
Any Unit

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

1741
DD Month Year

First Name Last Name
Street Address
City, ST Zip

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

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

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

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

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

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

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

___ Cancel his/her SGLI Family (spouse) Coverage

Sincerely,

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

Exhibit 5.A.3.1

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

5.A.4.1 Introduction

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

5.A.4.2 Discussion

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

5.A.4.3 Reviewer responsibilities

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

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

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

5.A.5 Casualty Reporting

5.A.5.1 Introduction

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

5.A.5.2 Reference

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

5.A.5.3 Reporting procedures

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

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

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

5.A.5.4 Inventory and Disposition of Personal Effects

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

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

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

Continued on next page

5.A.5 Casualty Reporting, Continued

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

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

- Declaring member a deserter
- Member's death

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

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

Section Overview

Introduction

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

In this section

Topic ID	Topic	See Page
5.B.1	Dependency Information	5-B-2
5.B.2	BAH/Dependency Data Form & Designation of Beneficiaries and Record of Emergency Data (Form CG-2020D)	5-B-4
5.B.3	TRICARE Dental Plan	5-B-7
5.B.4	Applying for a Uniformed Service Identification and Privilege Card (DD Form 1173)	5-B-9
5.B.5	Verification of Eligibility for the DD Form 1173	5-B-11
5.B.6	Reserve Family Member Identification Card (DD Form 1173-1)	5-B-13
5.B.7	Information concerning the Application For Uniformed Services Identification Card-DEERS Enrollment (DD Form 1172)	5-B-15
5.B.8	Defense Enrollment Eligibility Reporting System (DEERS)	5-B-17

5.B.1 Dependency Information

5.B.1.1 Introduction

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

5.B.1.2 References

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

5.B.1.3 Responsibility

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

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

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

5.B.1.4 Final divorce decree not available

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

Continued on next page

5.B.1 Dependency Information, Continued

5.B.1.5 Systems that need to be updated

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

5.B.1.6 Forms

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

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

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

5.B.2.1 Introduction

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

5.B.2.2 References

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

5.B.2.3 Purpose

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

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

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

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

Continued on next page

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

5.B.2.4 Annual Verification

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

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

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

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

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

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

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

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

Continued on next page

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

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

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

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

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

5.B.3 Tricare Dental Plan

5.B.3.1 Introduction

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

5.B.3.2 Reference

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

5.B.3.3 Discussion

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

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

5.B.3.4 Eligibility / Enrollment requirements

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

5.B.3.5 TDP premiums and changes

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

Continued on next page

5.B.3 Tricare Dental Plan, Continued

5.B.3.6 Enrollment options

Individual and family enrollment options are available. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for more information.

5.B.3.7 Enrollment period

The minimum enrollment period is 12 months. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for exceptions.

5.B.3.8 Disenrollment procedure

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

5.B.3.9 Automatic disenrollment

Separation, retirement or a family member's loss of eligibility (e. g. dependent child reaches age 21) will result in automatic disenrollment. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for more information.

5.B.3.10 Effective date of coverage / Evidence of coverage

Enrollment will be confirmed with the issuance of dental identification cards. Please do not seek dental treatment without confirmation of enrollment. If a member has received their identification card and are seeking care, contact United Concordia's Enrollment and Billing Member Services Department at 1-888-622-2256. See reference (b) (http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp) or reference (c), chapter 2 for more information.

5.B.3.11 New enrollment in the TDP

United Concordia handles the enrollment process. Enrollment must be initiated by the sponsor and is accomplished by completing a TDP Enrollment Form. Forms are available by calling United Concordia at 1-888-622-2256 to request a form, by accessing the United Concordia website at http://www.tricaredentalprogram.com/tdptws/enrollees/enrollment/enrollment.jsp, or from your Health Benefits Advisor. With the initial enrollment application, all new enrollees must submit a payment equal to the member's portion of one month's premium.

5.B.4 Applying for a DD Form 1173

5.B.4.1 Introduction

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

5.B.4.2 References

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

5.B.4.3 How to apply

This is the process for applying for a DD Form 1173

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

Continued on next page

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

5.B.4.3 How to apply (continued)

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

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

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

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

5.B.5.1 Introduction

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

5.B.5.2 Reference

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

5.B.5.3 Verification of eligibility

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

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

5.B.5.4 If eligibility cannot be established

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

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

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

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

5.B.5.5 Entitlements on the DD Form 1173

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

5.B.6 Reserve Family Member Identification Card

5.B.6.1 Introduction

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

5.B.6.2 Reference

(a) Procedures for manually issued (non-RAPIDS) ID cards, DODINST 1000.13.

(b) Identification cards for members of the uniformed services, their eligible family members, and other personnel, COMDTINST M5512.1(series), Chap. 16.

5.B.6.3 How to apply

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

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

5.B.6.4 Dependent eligibility

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

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

Continued on next page

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

5.B.6.5 Preparation

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

5.B.6.6 Application over 90 days old

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

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

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

5.B.6.8 Corrections

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

5.B.6.9 Instructions

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

5.B.6.10 DEERS enrollment

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

5.B.7 Information Concerning the DD Form 1172

5.B.7.1 Introduction

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

5.B.7.2 Reference

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

5.B.7.3 Preparation of DD Form 1172

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

5.B.7.4 Section I, sponsor information

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

5.B.7.5 Section II, dependent information

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

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

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

Continued on next page

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

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

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

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

5.B.7.9 Questionable cases

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

5.B.7.10 Privileges authorized

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

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

5.B.8.1 Introduction

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

5.B.8.2 Data on sponsors

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

5.B.8.3 Procedures for transmitting data to DEERS

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

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

5.B.8.4 When to update DEERS

DEERS must be updated when:

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

Continued on next page

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

5.B.8.5 Updating residential address

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

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

5.B.8.6 DEERS inquiries

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

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

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

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

5.B.8.9 Reports from the DEERS database

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

5.B.8.10 Obtaining DEERS database reports

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

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

Section Overview

Introduction

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

In this section

The following topics are covered in this section.

Topic ID	Topic	See Page
5.C.1	Annual Verification of BAH, Dependency, Beneficiaries, SGLI, and Emergency Data	5-C-2
5.C.2	Requesting Statements of Creditable Service	5-C-5
5.C.3	Personnel Data Information File (PDIF)	5-C-9
5.C.4	Personnel Data Extract (PDE)	5-C-8
5.C.5	Security Clearances	5-C-10
5.C.6	Transcript of Sea Service (TOSS)	5-C-11

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

5.C.1.1. Introduction

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

5.C.1.2. Reference

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

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

5.C.1.3. Annual verification process

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

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

Continued on next page

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

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

Stage	Who Does It/ When	What Happens
(Continued from previous page)		**Note:** If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms and Designation of Beneficiaries & Record of Emergency Data forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from Direct Access using Command Self-Service access.
2	Unit/ Upon Receipt	Forwards all forms and Emergency Contact Reports to members for verification. Also provides blank (or instructions for completing) DD Form 2760, Qualification to Possess Firearms or Ammunition. Per reference (b), DD Form 2760 must be completed annually.
3	Member NLT 30 Nov	1. Reviews Designation of Beneficiaries & Record of Emergency Data Form (CG-2020D) for accuracy. Makes the following entry in Item 15 (remarks) if there are no changes: _____: reviewed, no changes. _____ (date) (member's signature) Or, completes a new form CG-2020D (http://www.uscg.mil/ppc/forms/) if there are any changes. 2. Reviews BAH/Dependency Data for accuracy: • Annotates any necessary changes or corrections. • Signs and dates in the "Members Certification" area. • Returns forms to SPO, includes Dependency Worksheet (CG-2020), and supporting documentation (e.g. Child's Birth Certificate, Member's Marriage Certificate or Divorce Decree) if adding/removing BAH eligible dependents (See COMDTINST M5512.1A (*Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel*), Attachment 5 (Basic Documentation Requirements), Note 7 for acceptable "temporary" documentation when awaiting receipt of certified documents from the records custodian/issuing authority.). 3. Reviews Emergency Contact Report for Accuracy: • Enters any changes or corrections to Emergency Contact info in Direct Access using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO for data entry. 4. Reviews SGLI (SGLV-8286) and Family SGLI (SGLV-8286A) elections. Completes new form(s) (http://www.insurance.va.gov/sgliSite/forms/forms.htm) if there are changes to the beneficiary designation(s) or the member desires to change coverage elections. It is not necessary to re-complete the SGLV-8286/8286A if the current editions of the forms are used and only the "Rank, title or grade" field or the "Current Duty Location" field has changed (e.g. A new form isn't needed upon advancement, promotion, PCS or unit name change.). The Health-Related questions in Part 4 of the SGLV-8286 and in Part III of the SGLV-8286A are only required to be completed when the member is adding coverage or increasing coverage (after previously electing no or reduced coverage).

Continued on next page

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

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

Stage	Who Does It/ When	What Happens
Continued from previous page		5. Provides missing supporting documentation requested by the SPO (See COMDTINST M5512.1A (*Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel*), Attachment 5 (Basic Documentation Requirements), Note 7 for acceptable "temporary" documentation when awaiting receipt of certified documents from the records custodian/issuing authority.) 6. Completes DD Form 2760.
4	SPO	Conducts a Quality Review of all elections and beneficiary designations (See Sec. 5.A.4 of this manual) and enters, into Direct Access, any changes or corrections the member noted using the appropriate process per reference (c): • **Dependent/Beneficiary** to add or change information about dependents (Note: Appropriate Direct Access entries must be completed if dependency change impacts entitlements). Generates a new BAH/Dependency form and forwards to member for signature. • **Emergency Contact** to add or change emergency contact information. • **Life and AD/D Benefits** to make SGLI election changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI election, i.e. increasing, decreasing or declining coverage. **No data entry is required if the member is only updating beneficiary designation.**) • Per reference (a), files SGLI forms, BAH/Dependency forms, supporting documentation, and CG-2020D forms in the SPO PDR and forwards copies of any newly completed forms and supporting documentation to CG PSC for the IE PDR.
5	SPO	Follow up with unit on the status of any member who fails to complete annual validation.

5.C.2. Requesting Statements of Creditable Service

5.C.2.1 Introduction

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

5.C.2.2. Purpose

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

5.C.2.3. When to Request

Request a SOCS/SOCSS when:

1. The member's service dates (ie Active Duty Base Date, Pay Base Date) or the member's sea time is incorrect.
2. The member is enlisting (or assessed as officers) and has prior service in another branch of service.
3. The member is enlisting (or assessed as officers) and has prior Coast Guard or Coast Guard Reserve service with a break in service.
4. The member is a Coast Guard reservist who is entering extended active service greater than 139 days.

5.C.2.4. Documentation Needed

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

For personnel with other than Coast Guard or Coast Guard Reserve prior service include:

- All contracts.
- All Discharge Documents including DD-214's and NGB 22 and 23's for National Guard members. (NGB Documents are the National Guard's version of the DD-214 and enlistment contracts).
- All Oath of Office (Officers)

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

Continued on next page

Requesting Statements of Creditable Service Continued

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

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

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

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

5.C.2.5. Documents Containing Errors

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

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

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

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

- Member's Employee ID and full name
- Whether or not member has any prior service - all documents will need to be scanned and attached (Note: Use the web-form at http://cgweb.ppc.uscg.mil/ccb to attach documents to trouble-tickets)

Continued on next page

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

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

- A very descriptive narrative as to the problem as well as the reason for the SOCS/SOCSS
- SOCS date, if member has already had a SOCS completed but for some reason it is thought to be incorrect.

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

5.C.2.7. Interim Service

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

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

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

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

The purpose of the Interim Adjustment is to help the member get his pay corrected in a timely manner. PPC (SES/S4) will only use blocks 12A and 12B of the DD Form 214 for pay base date purposes and will not count any active or inactive time. If the person is coming from the reserves will only use the point statement from the other Armed Service. A SOCS will still be completed once all of the information from the National Personnel Records Center and the member's prior service has been received from the SPO/member. An interim adjustment in no way speeds up the casework process. An Interim Adjustment will be completed as soon as it has been received by PPC (SES) and has been approved for an adjustment.

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

5.C.3.1. Introduction

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

5.C.3.2. Reference

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

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

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

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

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

5.C.3.4. SPO to Unit Transmission

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

5.C.3.4. Direct Access Path

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

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

5.C.4.1. Introduction

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

5.C.4.2. Reference

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

5.C.4.3. The PDE

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

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

5.C.4.4. Direct Access Path

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

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

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

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

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

5.C.5. Security Clearances

5.C.5.1. Introduction

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

5.C.5.2. Reference

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

5.C.5.3. Personnel Security Record

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

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

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

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

5.C.6.1. Introduction

A Transcript of Sea Service (TOSS (CG PPC-1075)) documents service aboard Coast Guard vessels to obtain a merchant marine license. TOSS is only for Coast Guard members and former Coast Guard members who want to receive their Mariners License. The TOSS chronicles the vessels that a Coast Guard member served aboard during their career. This Sea Duty may have been on either a Sea Pay or Non-Sea Pay eligible vessels but must have been documented. 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: TOSS does not serve to verify creditable sea service for pay purposes; refer to part 5-C-4 of this section. TOSS does not document small vessel sea service; refer to 5.C.6.4 later in this section.

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

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

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

Continued on next page

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

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

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

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

5.C.6.4 Small Vessel Sea Service

PPC (ses) does not provide small vessel sea service documentation.

Complete CG Form 719S, Small Vessel Sea Service, to document small vessel sea service. Mail the completed form directly to a local Regional Exam Center.

Direct questions to the Merchant Maritime Center (NMC) (http://www.uscg.mil/nmc/default.asp).

- NMC Customer Service Center: **1-888-IASKNMC** (1-888-427-5662).
- Email: IASKNMC@uscg.mil.

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 ID	Topic	See Page
5.D.1	Leave Authorization (CG-2519) (Legacy Information) Leave requests and authorizations are now processed via Direct Access (DA) Self Service. See Absence Request Overview in the DA Online Help (http://www.uscg.mil/ppc/ps/) for procedures.	5-D-2
5.D.2	Leave Carried over in Excess of 60/75 Days/ Special Leave Accrual (SLA)	5-D-4
5.D.3	Sale of Special Leave Accrual	5-D-8
5.D.4	Issuance of the Common Access Card (CAC)	5-D-10
5.D.5	Manual Preparation of the DD Form 2 CG (active ID card)	5-D-13
5.D.6	Reporting Change in Mailing Address	5-D-15
5.D.7	Employment Verification	5-D-16
5.D.8	E-Resume	5-D-17
5.D.9	Assignment/Termination of Government Quarters	5-D-18
5.D.10	Permissive Travel Authorization	5-D-20
5.D.11	Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator	5-D-21
5.D.12	TRICARE Selected Reserve Dental Program	5-D-23
5.D.13	Issuance/Termination of Official Passport	5-D-25

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

Legacy Information

Leave requests and authorizations are now processed via Direct Access (DA) Self Service. See Absence Request Overview in the DA Online Help (http://www.uscg.mil/ppc/ps/) for procedures. This section provides procedures for the legacy CG-2519 form to be used in the event the member or command does not have access to DA or the system is not available.

5.D.1.1 Reference

(a) Military Assignments and Authorized Absences, COMDTINT M1000.8 (series)
(b) Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap 3.A.5.g., BAS Policy

5.D.1.2 CG-2519 usage

Use the Leave Authorization (CG-2519) to authorize:

- Regular, sick or emergency leave.
- A member to attend to associated family needs following the birth or adoption of a child (Adoption Leave, Maternity Leave or Paternity Leave).

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

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

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

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

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

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

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

Continued on next page

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

5.D.1.5 Preparation of the CG-2519

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

Items 1-7 are completed prior to departing.

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

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

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

5.D.1.6 Disposition

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

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

5.D.2.1 Introduction

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

5.D.2.2 Reference

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

5.D.2.3 Leave accrual policy

The National Defense Authorization Act (NDAA) for Fiscal Year 2013, Section 521 authorized all Coast Guard members to accrue up to 75 days of leave until the end of Fiscal Year 2014. Leave balances for active duty personnel must be at 60 days or less by 30 September 2015 to avoid loss.

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

Unless the criteria of Article 2.a.15.b. of reference (a) are met, the following are the maximum leave balance carryover totals for both active duty and reservists for FY10-FY13:

End of FY	Carryover Limit	Reference
30SEP13	75 Days	NDAA for Fiscal Year 2013, Sec 521
30SEP14	75 Days	National Defense Authorization Act for Fiscal Year 2013, Section 521
30SEP15	60 Days	U.S. Code, Title 10, Section 701

See section 5.D.2.6 when a member meets the criteria of Article 2.a.15.b. of reference (a) and is authorized to carryover more than 60/75 days leave.

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

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

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

For example:

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

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

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

5.D.2.6 Procedures

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

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

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

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

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

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

Continued on next page

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

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

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

5.D.3 Sale of Special Leave Accrual

5.D.3.1 Introduction

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

5.D.3.2 Discussion

Per Military Assignments and Authorized Absences, COMDTINST M1000.8(series), paragraph 2.A.15.c.(5), enlisted members, who have more than 120 days leave at the end of the fiscal year may make a one time election to be compensated for any leave in excess of 120, up to 30 days, at the end of that fiscal year. An enlisted member may only exercise this option once. Any days compensated under this section will be deducted from the 60-day career limit of payable accrued leave days. This provision is intended for members assigned to mobile or deployable units or entitled to hostile fire or imminent danger pay. Officers are not eligible for this entitlement

5.D.3.3 Special Leave Accrual Payment Process

This is the Special Leave Accrual Payment process.

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

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

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

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

5.D.3.4 Form CG-2046

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

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

5.D.4.1 Introduction

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

5.D.4.2 Reference

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

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

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

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

5.D.4.4 Availability of RAPIDS Facilities

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

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

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

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

Continued on next page

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

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

The following categories of personnel are authorized a CAC:

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

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

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

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

Continued on next page

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

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

The following categories of personnel cannot be cross-serviced:

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

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

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

5.D.5.1 Introduction

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

5.D.5.2 Preparation

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

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

Continued on next page

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

5.D.5.2 Preparation (cont'd)

Block	Description
Social Security No.	Enter 9 digit SSN in format 000000000.
Blood Type	Enter the member's blood type (e.g., B-, O+).
Geneva Convention	Refer to the table below or see COMDTINST M5512.1(series), Attachment 13, and enter I, II, etc. as appropriate.
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.

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

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

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

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

5.D.5.4 Lamination

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

5.D.6 Reporting Change in Mailing Address

5.D.6.1 Introduction

A member's mailing address is shown on their LES. This address should be the member's home address and not the unit address. The member's mailing address is used for several purposes, including mailing IRS Form W-2 annually for all personnel.

5.D.6.2 Reference

(a) Direct Access Guide, Changing Mailing Address (Self Service for Members)

5.D.6.3 Members without access to Direct Access

If you do not have access to Direct Access, contact your servicing SPO for instructions.

5.D.6.4 Members with access to Direct Access

Follow the instructions in Reference (a).
http://www.uscg.mil/ppc/ps/self_service/members/change_home_or_mailing_address.htm

5.D.7 Employment Verification

5.D.7.1 Introduction

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

5.D.7.2 Reference

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

5.D.7.3 Procedure

All requests for employment verification will be completed as follows:

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

5.D.8 E-Resume

5.D.8.1 Introduction

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

5.D.8.2 References

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

5.D.8.3 Submission of the E-Resume

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

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

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

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

5.D.9 Assignment/Termination of Government Quarters

5.D.9.1 Introduction

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

5.D.9.2 References

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

5.D.9.3 The need for prompt SPO notification

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

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

5.D.9.4 Advance notification will avoid incorrect payments

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

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

5.D.9.5 Notifying the SPO

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

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

Continued on next page

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

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

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

BAH Verification Report

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

5.D.10 Permissive Travel Authorization

5.D.10.1 Introduction

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

5.D.10.2 Reference

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

5.D.10.3 Preparing a Permissive Travel Authorization

A Permissive travel authorization must contain the following:

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

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

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

5.D.10.4 Distribution

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

5.D.10.5 Carry LES Copies for House Hunting

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

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

5.D.11.1 Introduction

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

5.D.11.2 Reference

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

5.D.11.3 Policy

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

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

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

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

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

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

Continued on next page

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

5.D.11.5 Effective date of name change

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

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

5.D.11.6 Change of SSN

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

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

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

5.D.11.7 Change to Minority Designator

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

5.D.12 TRICARE Selected Reserve Dental Program

5.D.12.1 Introduction

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

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

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

5.D.12.2 TSRDP Premiums

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

5.D.12.3 Enrollment Requirements

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

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

5.D.12.4 Disenrollment requirement

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

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

Continued on next page

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

5.D.12.5 Collection of premiums

The following rules apply:

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

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

5.D.12.6 Termination of TSRDP

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

5.D.12.7 Effective date of coverage

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

5.D.13 Issuance of Official Passport and Visas

5.D.13.1 Introduction

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

5.D.13.2 Reference

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

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

5.D.13.3 Policy

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

5.D.13.4 Passport / Visa issuance procedure

See reference (a), paragraph 7, and the applicable checklist (No-Fee Official Passport Application Checklist, reference (a), enclosure (1) or Official Visa Application Checklist, reference (a), enclosure (2)) for passport and visa application procedures. Updated information, forms, detailed instructions, and illustrative examples are maintained in the *Foreign Travel Community* on the *CGPortal*: https://cgportal2.uscg.mil/communities/foreign-travel/SitePages/Home.aspx.

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

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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

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 ID	Topic	See Page
6.A.1	Pay Delivery Method	6-A-2
6.A.2	Electronic Leave and Earnings Statement (eLES)	6-A-4
6.A.3	Pay Notification for Member assigned to Deployed Cutters or Overseas/Isolated Units	6-A-6

6.A.1 Pay Delivery Method

6.A.1.1 Introduction

This section describes pay delivery options for Coast Guard military personnel.

6.A.1.2. Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 9.A.4.a
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 2, Payment Option Election

6.A.1.3 Direct Deposit

Per reference (a), Coast Guard pay payees (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, PPC can normally correct the problem and make payment within 48 hours.

6.A.1.4 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 PPC	A member may have their pay held at PPC during PCS or extended leave/TDY periods.	Submit a new election to resume regular pay delivery.

6.A.1.5 How to select a pay delivery method or change direct deposit account information

Members should use Direct Access Self Service to change existing Direct Deposit account information. Alternatively, the member may change the pay delivery method by completing a new CG-2015, Pay Delivery Worksheet, and forwarding the completed form to the SPO. The SPO will follow the procedure in reference (b) to update the member's pay delivery information.

Continued on next page

6.A.1 Pay Delivery Method, Continued

6.A.1.6 Account for travel claim payments

Members may elect to use an account, different from their payroll direct deposit account, for travel claim payments. Members may visit the Coast Guard Finance Center's web site at https://www.fincen.uscg.mil/secure/enrollment_form.htm if they want to change the account used for direct deposit of travel claim payments.

6.A.2 Electronic Leave and Earnings Statement (eLES)

6.A.2.1 Introduction

This section provides an overview for accessing the Electronic Leave and Earnings Statement (eLES).

6.A.2.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 1.B.4.d
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 15, SPO Access to "View Members Paycheck" (eLES)

6.A.2.3 Discussion

Per reference (a), at the end of the month, each member is furnished an eLES detailing the monthly activity and status of their pay and leave account. The paper Leave and Earnings Statement (LES) was discontinued in January 2010. All personnel have 24/7 access to LES information in Direct Access via the *MyPortalDirect* "View My Paycheck" page. SPOs can access the eLES by following the procedure in reference (b).

6.A.2.4 eLES description

The Direct Access View Paycheck Quick Reference, appendix (f) of this manual, provides descriptions of the eLES data fields.

Continued on Next Page

6.A.2 Electronic Leave and Earnings Statement (eLES), Continued

6.A.2.5 Non-Computes

Occasionally, a member's file may not meet the conditions necessary to compute pay. When this occurs, the member will receive an eLES for projected pay for the month(s) the member is in a non-compute status. The projected eLES will only reflect allotment deductions. When the file is corrected, the member will receive a corrected eLES for each month the file was in a non-compute status.

6.A.3 Pay Notification for Members Assigned to Deployed Cutters or Overseas/Isolated Units

6.A.3.1 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).

6.A.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 1.B.4.d

6.A.3.2 Requesting NPAMs

Per reference (a), eligible units must submit a one-time request to receive NPAMS.

- Requests for NPAMs may be submitted by message to PPC (MAS), or E-mail to PPC-DG-Customercare@uscg.mil, or by submitting an online trouble ticket at http://www.uscg.mil/pp/ccb/.

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.

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

Section	Topic	See Page
6.B.1	Regular Payments	6-B-2
6.B.2	Special Payments	6-B-3
Exhibit 6.B.2.1	Exhibit 6.B.2.1: Offline Payment Template	6-B-6
6.B.3	Advance Payments	6-B-7
6.B.4	Death Gratuity Payments	6-B-9

6.B.1 Regular Payments

6.B.1.1 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.

6.B.1.2 Pay periods

Each month is divided into two pay periods (mid-month and end-month). Approximately 10 days before the end of each pay period, PPC computes the payroll based on Direct Access transactions that are submitted prior to the cutoff for the pay date and process successfully through JUMPS. Cutoff dates are published annually via E-Mail ALSPO message.

6.B.1.3 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.

6.B.2 Special Payments

6.B.2.1 Background

In addition to making regular semimonthly payments, PPC 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.

6.B.2.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Section 9-C

6.B.2.3 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 exhibit 6.B.2.1 on page 6-B-6) and sent via email to PPC-DG-Customercare@uscg.mil (Be sure to put member's Name, Emplid, and Special Payment Request in subject line.) or submit an online trouble ticket at http://cgweb.ppc.uscg.mil/ccb/. Complete the Problem/Issue section of the online trouble ticket as shown below:

Problem/Issue Information	
User Role for this issue:	I am a Command, SPO or ADMIN support user
Category:	PAY ACTION
Type:	PAYMENTS
Reason:	SPECIAL OFFLINE PAYMENT

Include the information from the Offline Payment template (See exhibit 6.B.2.1 on page 6-B-6) in the *Description of the Problem* section of the online trouble ticket web form.

Continued on next page

6.B.2 Special Payments, Continued

6.B.2.4 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.

6.B.2.5 How special payments are liquidated & posted on the eLES

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 2010 will be deducted from the member's 15 June 2010 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.

Continued on next page

6.B.2 Special Payments, Continued

6.B.2.6 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 PPC-DG-Customercare@uscg.mil or via online trouble ticket using the Offline Payment template (See exhibit 6.B.2.1 on page 6-B-6).
	PPC (mas)	Makes special payment via EFT if needed within 3 working days.

6.B.2.7 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 PPC-DG-Customercare@uscg.mil or via online trouble ticket using the Offline Payment template (See exhibit 6.B.2.1 on page 6-B-6).
	PPC (mas)	Makes or authorizes special payment if needed within 3 working days.

Continued on next page

6.B.2 Special Payments, Continued

Exhibit 6.B.2.1 – Offline Payment Template

Introduction Include the following information in requests for special payments:

To: PPC-DG-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 2010 to 30 June 2010, due to non-receipt of pay for 01 July 2010. An e-mail statement of intent was submitted on 08 June 2010, reflecting member's intentions to extend current contract but was not submitted in time to make the 15 June 2010 pay cut.

Computation of payment are as follows:

CREDIT	PERIOD	MONTHLY/DAILY AMOUNT
BASIC PAY	2010JUN16 - 2010JUN30	$60.91 X 15 DAYS = $913.64
SDAP STRIKE TM	2010JUN16 - 2010JUN30	$4.67 X 15 DAYS = $70.05
ENL BAS	2010JUN16 - 2010JUN30	$8.31 X 15 DAYS = $124.68
BAH WITH DEP	2010JUN16 - 2010JUN30	$37.74 X 15 DAYS = $566.06

DEBIT	PERIOD	MONTHLY/DAILY AMOUNT
TAXES	2010JUN15 - 2010JUN30	$9.13 X 15 DAYS = $137.02

TOTAL PAYMENT **$1,526.79**

3. Request meets the criteria of chapter 6-B of PPCINST 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)

6.B.3 Advance Payments

6.B.3.1 Introduction

This information is provided to aid in determining the type of advances allowed, when they may be utilized, and how they will be liquidated.

6.B.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec. 9-D, Advance Payments.
(b) Servicing Personnel Office (SPO) Direct Access (DA) Manual, Part II – Pay Entitlements, Chapter 4 – Advances

6.B.3.3 Rules

See reference (a) for types of advance payments and conditions for payment.

Note: Effective 01 October 2012, COMDTNOTE 7220/ALCOAST 422/12 amended the policy in reference (a) for the payment of advance pay. Any request for two or three months advance pay requires approval by the member's commanding officer. COMDTNOTE 7220/ALCOAST 422/12 provides guidelines for Commanding Officers to consider.

Payment of advances must be made through Direct Access/JUMPS unless a bona fide emergency exists. Advance Pay may not be paid in cash.

6.B.3.4 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.

6.B.3.5 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-2010), or • Submits PCS Departing Worksheet (CG-2000), if applicable.
2	Unit	Authorizes advance and forwards to SPO.
3	SPO	Completes Advance transactions in Direct Access per reference (b)

Continued on next page

6.B.3 Advance Payments, Continued

6.B.3.6 Liquidation

Refer to reference. (a), Paragraph 9-D-5 for specific liquidation schedules. The Advances Worksheet (CG-2010) provides a general description of the liquidation process.

6.B.3.7 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).

6.B.4 Death Gratuity Payments

6.B.4.1 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.

6.B.4.2 References

(a) Military Civil and Dependent Affairs, COMDTINST M1700.1
(b) Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec.10-I, Death Gratuity

6.B.4.3 Discussion

PPC (ses) normally pays the Death Gratuity via an EFT, but the beneficiary may request payment by check. PPC (ses) records the Death Gratuity payment in JUMPS.

6.B.4.4 Procedure

This is the procedure for payment of the Death Gratuity:

Step	Who Does It	Action Taken
1	Base 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 PPC (ses) at (785) 339-3784 for payment.
2	PPC (ses)	Issues payment.

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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 ID	Topic	See Page
6.C.1	Payment of Mobile Unit Personnel	6-C-2
6.C.2	Payment of Recruits	6-C-4
6.C.3	Requesting an Accelerated SRB Payment	6-C-5

6.C.1 Payment of Mobile Unit Personnel

6.C.1.1 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.

6.C.1.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 3-A, BAS and 4-B, Career Sea Pay.
(b) JFTR, Para U4105-B2 and U4125.

6.C.1.3 What is a Mobile Unit?

See reference (a) section 4.B.4 for the definition of a Mobile Unit.

6.C.1.4 Types of Mobile Units

See reference (a) section 4.B.5, Authorized Mobile Units for a listing of units.

6.C.1.5 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).

6.C.1.6 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 <u>not</u> have a Discount Meal Rate deduction from his/her pay. The member must either:
    1. Pay cash for meals; or
    2. The ship will submit a Pay Adjustment Authorization (DD Form 139) to PPC (MAS) for recoupment of meal charges.

6.C.1.7 Per Diem while underway

Members issued TDY orders to a Government vessel are NOT entitled to per diem.

Continued on next page

Payment of Mobile Unit Personnel, Continued

6.C.1.8 Certifying entitlement

To accomplish payment of continuous CSEAPAY, each member's eligibility must be certified monthly by the appropriate personnel:

- District (ole) staffs.
- Sector/Group Commanders.
- CO of the PACAREA TACLET.
- Regional TACLET Commanders.
- Senior CG liaison officer attached to Navy mobile units.

6.C.1.9 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.

6.C.1.10 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.

6.C.1.11 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.

6.C.2 Payment of Recruits

6.C.2.1 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).

6.C.2.2 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 PPC-DG- Customercare@uscg.mil or by sending an online trouble ticket at http://www.uscg.mil/ppc/ccb/.
At separation	Discharged recruits will have their first direct deposit payment made by PPC 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 PPC (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.

6.C.3 Requesting an Accelerated SRB Payment

6.C.3.1 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.

6.C.3.2 Reference

(a) Military Bonus Programs, COMDTINST M7220.2, Art. 1.B.8

6.C.3.3 Process

This is the process for accelerated SRB payments:

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 PPC (MAS) if approved.
3	PPC	Processes payment within 30 days of receipt. Payment will be in the first regular payday after documents process.

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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 ID	Topic	See Page
6.D.1	IDT Prerequisites	6-D-2
6.D.2	The IDT Process	6-D-5
6.D.3	Drill Orders	6-D-7
6.D.4	Waiver of Pension/Disability Compensation or Retired Pay	6-D-13
6.D.5	Annual Reserve Retirement Point Statement	6-D-15
6.D.6	Disability Processing	6-D-17

6.D.1 IDT Prerequisites

6.D.1.1 Introduction

Before crediting a reservist with pay and/or points for IDT drills certain conditions must be met.

6.D.1.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap. 12
(b) Reserve Policy Manual, COMDTINST M1001.28 (series)
(c) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

6.D.1.3 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.).

6.D.1.4 Pay Status For IDT

Only reservists in a training/pay category (e.g. “A, B, C and D”) are authorized payment for IDT drills.

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6.D.1 IDT Prerequisites, Continued

6.D.1.5 Readiness Management Peirod (RMP)

Readiness Management Periods are additional inactive duty periods that may be authorized in excess of scheduled IDT drills. As an alternative to using an IDT drill, they may be used to support the following functions which include:

- Individual Periodic Health Assessment (PHA)
- Enlisted Reserve Servicewide Exam
- Dental Readiness Examinations
- Training Preparation or Unit Administration and Maintenance functions such as annual validation, weigh-ins and hurricane preparedness
- General Mandated Training
- Medical treatment (Member issued Notice of Eligibity)
- Mandatory nutritionist visits related to weight program

Units COs may approve RMPs for PHAs and Dental Readiness Examinations. Districts (dxr) must authorize all other RMPs with pay.
Only reservists in training/pay categories A, B, C, D, E, H, J, and P may be authorized RMP with pay.

RMP Requirements:

- No reservist may exceed a combination of 30 paid and non-paid RMPs in one fiscal year.
- Only one RMP may be performed in a calendar day.
- The maximum duration is 24 hours.
- Each period must be at least three hours duration.

6.D.1.6 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

6.D.1 IDT Prerequisites, Continued

6.D.1.7 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 other types of compensation while performing IDT:

(a) Enlisted reservists assigned to certain High Priority Units (PSU or MSRON) receive additional special IDT bonus of $30 per drill.
(b) Enlisted reservists are entitled to Reserve Clothing Maintenance Allowance for each IDT drill performed.
(c) An enlisted reservist serving on IDT is entitled SDAP, on a pro-rated basis, if the reservist meets the qualifications prescribed in the instruction for Special Duty Assignment Pay (SDAP), COMDTINST 1430.1 (series).
(d) An enlisted reservist serving on IDT is entitled to FLPP, on a pro-rated basis if the reservist meets the qualifications prescribed by Commandant (CG-132).
(e) 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.

6.D.2 The IDT Process

6.D.2.1 Introduction

Inactive duty reservists are paid by the JUMPS system. This section was developed to help guide the field in the IDT processes.

6.D.2.2 Reference

(a) Reserve Policy Manual, COMDTINT M1001.28 (series), Chap. 2
(b) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chapter, 3, Inactive Duty Training
(c) Direct Access Online Help (http://www.uscg.mil/ppc/ps/), Reserve IDT Drills Topics:
    1. IDT Overview
       http://www.uscg.mil/ppc/ps/idt/reserve_idt_drills.htm
    2. Scheduling IDT Drills (Self Service)
       http://www.uscg.mil/ppc/ps/idt/scheduling_idt_drills.htm
    3. Schedule/Approve Drills (command)
       http://www.uscg.mil/ppc/ps/idt/schedule_drills_commands.htm
    4. Schedule/Approve Multiple Drills (Commands and SPOs)
       http://www.uscg.mil/ppc/ps/idt/schedule_multiple_drills_.htm

(d) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3
(e) Information and Life Cycle Management Manual, COMDTINST M5212.12

6.D.2.3 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

6.D.2 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	PPC	• Process payments

6.D.3 Drill Orders

6.D.3.1 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.

6.D.3.2 Reference

(a) Reserve Policy Manual, COMDTINT M1001.28 (series), Chap. 2
(b) Measuring the Contribution of Reserve Duty, COMDTINST 5310.3

6.D.3.3 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.

6.D.3.4 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 _____."

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6.D.3 Drill Orders, Continued

6.D.3.5 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

6.D.3.6 IDT Drill Orders

See reference. (a), Article 2.B.1.a for required information that must be included in all drill orders.

Continued on next page

6.D.3 Drill Orders, Continued

Exhibit 6.D.3.1 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
ME3 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.

#

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6.D.3 Drill Orders, Continued

Exhibit 6.D.3.2 Supervisor Endorsement on IDT Orders

RESERVIST NAME _____ RANK _____ SSN _____

Note: 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.

Continued on next page

6.D.3 Drill Orders, Continued

Exhibit 6.D.3.3 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

Continued on next page

6.D.3 Drill Orders, Continued

Exhibit 6.D.3.4 IDT Certification Sheet This sheet may be used to report drill completions

IDT CERTIFICATION SHEET

Name *(last, first, MI)*:	Employee ID	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/FLPP 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 1

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:

6.D.4 Waiver of Pension/Disability Compensation or Retired Pay

6.D.4.1 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.

6.D.4.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 12.B.4

6.D.4.3 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.

6.D.4.4. 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

6.D.4 Waiver of Pension/Disability Compensation or Retired Pay, Continued

6.D.4.5 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	PPC	Verifies the number of drills and active duty periods the member performed Provides totals to VA
4	VA	Adjusts member's VA compensation

6.D.5 Annual Reserve Retirement Point Statement

6.D.5.1 Discussion

Annually, each member of the SELRES is issued an Annual Reserve Retirement Point Statement (CG-4175A). These statements are produced and distributed by PPC (mas) monthly. The monthly run produces a CG-4175A for selected reservists whose anniversary month is three months past. For example, in February 2012, PPC (mas) issues CG-4175As to all selected reservists whose anniversary month is in November 2011.

6.D.5.2 Reference

(a) Reserve Policy Manual, COMDTINST M1001.28 (series), Section 8.C.10
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chap. 9, View Reserve Points.

Note: PPC (mas) no longer provides copies of CG-4175A forms to SPOs. The data (used to produce the form) is available in JUMPS and DA and can be accessed by the SPO following the procedures in reference (b). SPOs are no longer required to maintain a copy of the CG-4175A in the member's SPO-PDR.

6.D.5.3 Discrepancies on the CG-4175A

Instructions are on the CG-4175A. Per reference (a), reservists must 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

6.D.5.4 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, 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 or via Direct Access (see below).

6.D.5.5 Reserve Retirement Points Data in Direct Access

Reserve retirement point data is also available in Direct Access for self service, command and SPO users. The DA pages do not replace the Annual Reserve Retirement Points Statement. However, they are an excellent way of keeping track of accounts, allowing you to spot, and report, problems before the annual paper statements are issued. Here are the navigation and reference guides for the View Retirement Points pages:

- Self-Service - View My Reserve Points
  http://www.uscg.mil/ppc/ps/self_service/members/view_my_reserve_points.htm
- Command Users and SPOs - View Reserve Points
  http://www.uscg.mil/ppc/ps/self_service/commands/view_reserve_points.htm

Access procedures for Command users and SPOs are also available in reference (b).

6.D.6 Disability Processing

6.D.6.1 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).

6.D.6.2 Reference

(a) Reserve Policy Manual, COMDTINST M1001.28 (series)
(b) Administrative Investigations Manual, COMDTINST M5830.1 (series)
(c) Physical Disability Evaluation Manual, COMDTINST M1850.2 (series)

6.D.6.3 Background

A reservist who incurs a line of duty injury or illness and is not on, or does not remain on, active duty is entitled to medical care for that injury/illness. As described in chapter 6.b of reference (a), a Notice of Eligibility (NOE) documents a members illness or injury, authorizes medical treatment at a specified treatment facility for a specific time period, and provides reimbursement for travel and transportation connected with the medical treatment. Eligibility for medical care authorized via a NOE is not reflected in DEERS and therefore requires close coordination with military medical support office (MMSO) to ensure proper and timely validation of a member's eligibility, access to medical treatment and timely payment of claims.

6.D.6.4 Issuing authority/ appeals

PSC-RPM is the sole issuing authority for all NOEs and NOE extensions. District (dxr)/dg-1 staffs are no longer authorized to issue NOEs for any duration.

Commandant (CG-131) retains appeal authority for NOEs and NOE extensions. NOE appeals shall be submitted to CG-131 through member's chain of command and PSC-RPM.

Continued on next page

6.D.6 Disability Processing, Continued

6.D.6.5 Initial NOE request

All requests for a NOE shall be submitted to PSC-RPM via CGMS using the message template provided on the PSC-RPM-3 web page at: www.uscg.mil/psc/rpm/rpm3/medical/NOE.asp.

NOE requestor shall provide the following supporting documentation:

A signed CG-3822 (Injury Report) or CG-4614 (Report of Illness of Reservist) documenting the line of duty (LOD) injury or illness. A formal LOD investigation as outlined in reference (b) is required only when the command has reason to believe that the injury/illness was not incurred in the line of duty or occurred as a result of misconduct.

All relevant medical documentation related to NOE injury/illness (includes cg clinic, civilian healthcare provider or non-Coast Guard military treatment facility provider). Documentation shall be scanned and emailed to POCs PSC-RPM.

A completed Physician's Report form, which is available on the PSC-RPM-3 web page at: www.uscg.mil/psc/rpm/rpm3/medical/NOE.asp.

6.D.6.6 NOE approval

PSC-RPM will provide the NOE authorization memo, including a TONO and accounting data, to the member through the requesting command.

- Commands shall provide PSC-RPM with a copy of the NOE endorsement signed by the member.
- Commands shall continue to provide status updates to PSC-RPM-3 via submission of an updated Physician's Report form every thirty days or in advance of requesting a NOE extension.

Continued on next page

6.D.6 Disability Processing, Continued

6.D.6.7 NOE extensions

All requests for a NOE extension shall be submitted to Psc-Rpm via Cgms using the template provided on the Psc-Rpm-3 web page at: www.uscg.mil/psc/rpm/rpm3/medical/NOE.asp.

A current Physician's Report form and medical documentation shall be provided via separate correspondence concurrent with the extension request.

Unless a reservist has been approved for Temporary Limited Duty (TLD) status as defined in chapter 2.C of reference (c), PSC-RPM typically will not authorize a NOE to exceed a total period of six months. Commands shall initiate a Medical Evaluation Board (MEB) in accordance with reference (c) for any reservist expected to remain incapacitated (i.e., not available for full duty) for more than six months unless the reservist has been approved for TLD status.

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 ID	Topic	See Page
7.A.1	Aviation Career Incentive Pay (ACIP)	7-A-2
7.A.2	Hazardous Duty Incentive Pay (HDIP)	7-A-3
7.A.3	Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	7-A-4
7.A.4	High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)	7-A-5
7.A.5	Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)	7-A-6
7.A.6	Funeral Honors Duty Allowance for Reservists	7-A-8
7.A.7	Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams	7-A-9
7.A.8	Combat-Related Injury Rehabilitation Pay	7-A-11
7.A.9	Foreign Language Proficiency Pay	7-A-13

7.A.1 Aviation Career Incentive Pay (ACIP)

7.A.1.1 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 Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 5-A

7.A.1.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 5-A, Aviation Career Incentive Pay (ACIP) for Rated/Designated Officers
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 11-A.

7.A.1.3 Procedures

Follow these procedures to start, stop, suspend, and reinstate ACIP. Data entry/SPO procedures can be found in reference (b).

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 PPC (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).

7.A.2 Hazardous Duty Incentive Pay (HDIP)

7.A.2.1 Introduction

Members issued flight orders in accordance with Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series) or Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), and meeting all requirements of the Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 5-B are entitled to Hazardous Duty Incentive Pay (HDIP).

7.A.2.2 Reference

(a) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series), Article 4.A.4, Technical Observers
(b) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), Article 4.A.6, Flight Orders for Enlisted Personnel
(c) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 5-B, Hazardous Duty Incentive Pay for Enlisted Members and nonrated or nondesignated Officers
(d) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 11-B.

7.A.2.3 How to start HDIP

To start HDIP for members qualified in accordance with reference (a) (officers) or (b) (enlisted personnel) and meeting all the requirements of reference (c), forward copies of flight orders to the SPO.

The SPO will complete data entry in accordance with reference (d).

7.A.2.4 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.

7.A.3 Flight Deck Hazardous Duty Incentive Pay (FDHDIP)

7.A.3.1 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.

7.A.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 5-C, Flight Deck Hazardous Duty Incentive Pay (FDHDIP)
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 11-G

7.A.3.3 Procedures to start FDHDIP

Use these procedures to start FDHDIP when a member becomes entitled in accordance with reference (a):

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. The SPO will complete the data entry in accordance with reference (b).	

7.A.4 High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)

7.A.4.1 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.

7.A.4.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 5-D, High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap 11-J

7.A.4.3 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.

7.A.4.4 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.

7.A.4.5 Amount of HDIP

See reference (a) for current rates.

7.A.4.6 SPO Data entry procedures

See reference (b) for Direct Access data entry procedures.

7.A.5 Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)

7.A.5.1 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.

7.A.5.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 4-H, Special Pay - Duty Subject to Hostile Fire or Imminent Danger
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 11-L

7.A.5.3 Qualified Areas for HF/ID Pay

Areas designated as qualifying for HF/ID pay are listed in the DoD Financial Management Regulation, Volume 7a: Military Pay Policy and Procedures - Active Duty And Reserve Pay, Chap 10, Figure 10-1 Designated Hostile Fire or Imminent Danger Pay Areas. The listing of qualified areas may be modified, from time to time, via ALCOAST messages.

7.A.5.4 Rules for HF/ID Pay

The following rules apply when determining entitlement to HF/ID Pay:

- On 1 January 2012 HF/ID Pay changed from a monthly entitlement to a prorated day-for-day entitlement. Members who performed qualifying service in designated areas prior to this change were entitled to the full monthly amount, $225, for service during any part of a month (i.e. 1 day in a designated area = $225). Members who perform qualifying service for less than a full month, on after 1 January 2012, will receive a daily prorated amount (i.e. 1 day in a designated area = $7.50).
- 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 reference (a), Section 8-G to verify income tax exclusion locations.
- HF/ID pay for Cuba is limited to service members performing duties **within** the Joint Task Force Guantanamo Bay Detention Facilities.

Continued on next page

Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID) Continued

7.A.5.5 Amount of HF/ID Pay

See reference (a), Section 4-H-2 for current rates.

7.A.5.6 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 section 8-B of this manual for the procedures for reporting entitlement to combat tax exclusion and, if applicable Combat Servicemembers' Group Life Insurance (SGLI) Allowance. See section 7-B 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, employee ID number 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: • Dates the event occurred (e.g., date member entered a designated HF/ID area and the date the member departed a designated HF/ID area) • Statement indicating the member is entitled on a one-time basis. • For Cuba, include copies of logs showing dates member was actually on duty within the detention facility.
2	The SPO Submits a Direct Access Start Pay transaction, following the procedures in reference (b).	

7.A.6 Funeral Honors Duty Allowance for Reservists

7.A.6.1 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.

7.A.6.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 12-O
(b) Reserve Policy Manual, COMDTINST M1001.28 (series), Chap 2
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part VII, Reserve Unique Transactions, Chap 3.
(d) Direct Access Online Help Schedule/Approve Drills Topic (http://www.uscg.mil/ppc/ps/idt/schedule_drills_commands.htm)

7.A.6.3 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 or in accordance with reference (c) or reference (d). Reimbursement for travel expenses require separate TDY orders to be issued and claims filed in accordance with Section 2-B of this manual.

7.A.6.4 Amount of Funeral Duty Pay for Reservists

See reference (a) for the current rate.

7.A.7 Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS)

7.A.7.1 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.

7.A.7.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 5-E
(b) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 11-K

7.A.7.3 Procedures to start HDIP-VBSS

Use these procedures to start HDIP-VBSS when a member is eligible in accordance with reference (a). SPOs will complete the data entry in accordance with the procedures provided in reference (b).

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 reference (a) for additional qualifications.

Continued on next page

7.A.7 Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS), Continued

7.A.7.3 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) Coast Guard Pay Manual, COMDTINST M7220.29 (series) 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 reference (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.

7.A.8 Combat-Related Injury Rehabilitation Pay

7.A.8.1 Introduction

This section provides the procedures for payment of Combat-Related Injury Rehabilitation Pay (CIP).

7.A.8.2 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.

7.A.8.3 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

7.A.8 Combat-Related Injury Rehabilitation Pay, Continued

7.A.8.4 Procedure

The member's Commanding Officer shall notify Commandant (CG-1222) and the Pay and Personnel 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.

Pay and Personnel Center (mas) will commence payment of CIP the month beginning after the date on which the member is eligible.

7.A.9 Foreign Language Proficiency Pay (FLPP)

7.A.9.1 Introduction

This section provides the procedures for Foreign Language Proficiency Pay (FLPP).

7.A.9.2 References

The following references provide additional information about FLPP.

(a) U.S. Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec. 4-K
(b) Performance Education and Training Manual, COMDTINST 1500.10(series), Sec 9-B.
(c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 11-H

7.A.9.3 Auto-stop upon PCS departure

FLPP stops automatically on ***the day prior*** to PCS departure. Do not enter a Stop FLPP transaction when a member departs PCS. The system will not reflect the FLPP stop until the departing endorsement on orders transaction is approved and saved.

7.A.9.4 Auto-stop on lapse date

FLPP stops automatically on the date the member's language proficiency exam certification expires. Normally 1-year after the date the exam was administered. The lapse date is visible on the Foreign Language Test Results page and the Licenses and Certificates page. The stop date will not be reflected on the member's Employee Entitlements page until the compute cycle for the pay period in which the FLPP is stopped and the JUMPS/DA resynch process is completed.

7.A.9.5 Supporting documentation

Per section Figure 4-8 of reference (a), the Commanding Officer of the unit shall designate members for Interpreter or Linguist positions in writing. A copy of the designation is supporting documentation for this transaction.

Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.6 Unit Interpreter and Linguist allocations

FLPP for Foreign Language Speakers (FLS) is limited by the type/number of allocations assigned to a unit. Unit Interpreter and Linguist allocations are listed in the Coast Guard Portal (Home » Training & Education » Education » Foreign Language) on the *Interpreter and Linguist Allocations* spreadsheet.

https://cgportal.uscg.mil/delivery/Satellite/TRAINED/FOREIGNLANGUAGE

7.A.9.7 FY 2011 FLPP Rates

Effective 1 October 2011, the monthly rates for FLPP increased and the Defense Language Proficiency Test (DLPT) score levels for which FLPP is paid expanded.

The new rates and FLPP levels are as follows:

Interpreter Level	DLPT Score	FLPP Monthly Rate
Interpreter 1	1 +/1 +	$100
Interpreter 2	1 +/2 or 2/1 +	$125
Interpreter 3	2/2 or 2 +/2 or 2/2 +	$150
Interpreter 4	3/2 or 2/3 or 2 +/2 +	$200

Linguist Level	DLPT Score	FLPP Monthly Rate
Linguist 1	3/2 + or 2 +/3	$250
Linguist 2	3/3 or higher	$300

7.A.9.8 FLPP for Linguists filling Interpreter allocations

FLPP for Foreign Language Speakers (FLS) is limited by the type/number of allocations assigned to a unit. A member in an Interpreter Allocation is limited to the highest authorized level for an Interpreter with the maximum monthly rate of $200, **even if their DLPT score is higher**.

7.A.9.9 FLPP for Interpreters filling Linguist allocations

A member in a Linguist Allocation draws FLPP based on their DLPT score and is authorized to collect FLPP at the lower interpreter rates. For example, if a member is filling a Linguist Allocation with a 2 +/2 + DLPT score, the member be is paid $200 a month at the Interpreter 4 level.

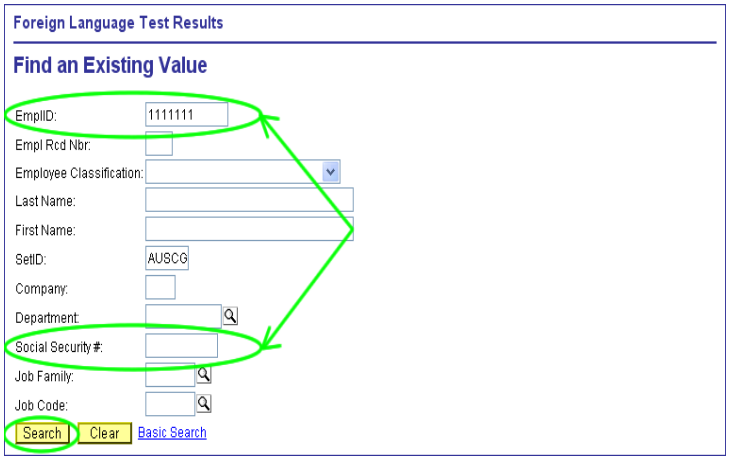
Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.10 Entering DLPT Results

This section provides the procedure for the unit **Educational Services Officer (ESO)** to enter a member's Defense Language Proficiency Test (DLPT) results in the system. Entering DLPT test results will automatically add/update the member's language skills and certifications in the system.

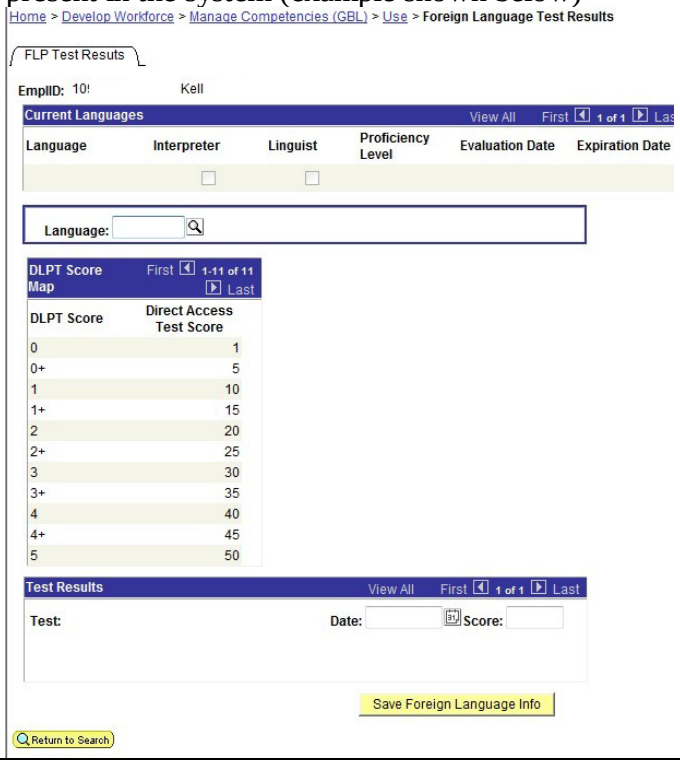
Note: In order for the member to be eligible for FLPP, Foreign Language/DLPT Test results must be entered following this procedure. Attempting to enter Foreign Language/DLPT Test results in the Test Results or Licenses and Certifications menus will not update the appropriate areas of the system.

Step	Action
1	Select menu items in the following order: Enterprise Menu or Direct Access Content Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Foreign Language Test Results**
2	The **Foreign Language Test Results** screen will display. Enter the member's Employee ID Number in the **EmplID** field or the SSN in the **Social Security #** field and click the **Search** button.  ***Note:*** When choosing a member from the search results, please be sure you are choosing the person you actually want to change data on. Verify the employee ID or national ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure you are selecting the correct Employee Classification.

Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.10 Entering DLPT Results **(continued)**

Step	Action
3	The **FLP Test Results** page will display. All the fields will be blank if the member does not have any Foreign Language skills present in the system (example shown below) 

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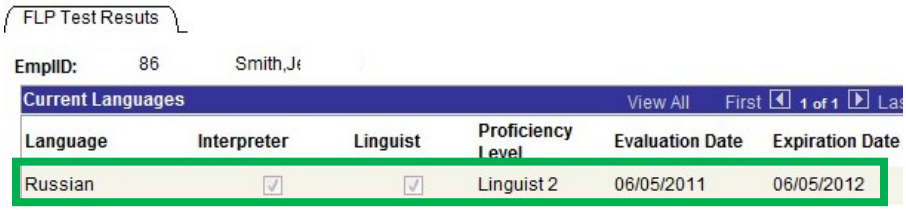
7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

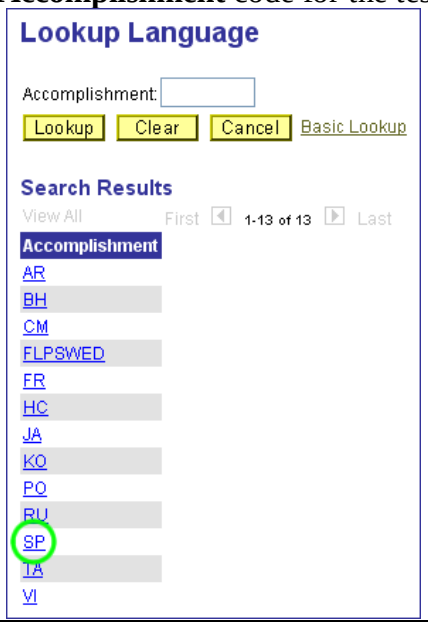
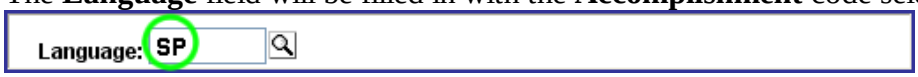
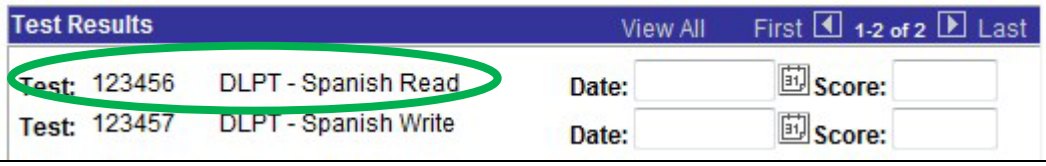
7.A.9.10 Entering DLPT Results **(continued)**

Step	Action
3	The **Current Languages** section will display any language data for a member who has previous test results entered (example shown below). These fields are **READ ONLY**. The **Interpreter** and **Linguist** qualification check-boxes will be marked by the system, based on the test scores entered. The Language and Test Results will not be displayed. Historical test data is not displayed on this page. Go to **Test Results** to view a member's previous test scores.  If the member has been tested in more than one language you can use the View All or arrow links to view the other results
4	Click the lookup icon in the **Language** field to search for and select a language skill code.

Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.10 Entering DLPT Results **(continued)**

Step	Action
5	The **Lookup Language** page will display. From the **Search Results**, click the **Accomplishment** code for the test you are recording  **Accomplishment** / **Meaning** AR – Arabic BH – Bahasa (Indonesian) CM – Mandarin Chinese FLPSWED – Swedish FR – French HC – Haitian-Creole JA – Japanese KO – Korean PO – Portuguese RU – Russian SP – Spanish TA – Tagalog (Phillipines) VI – Vietnamese
6	The **FLP Test Results** page will display again. The **Language** field will be filled in with the **Accomplishment** code selected.  The **Test Results** section will display the test number and description based on the **Accomplishment** code selected. 

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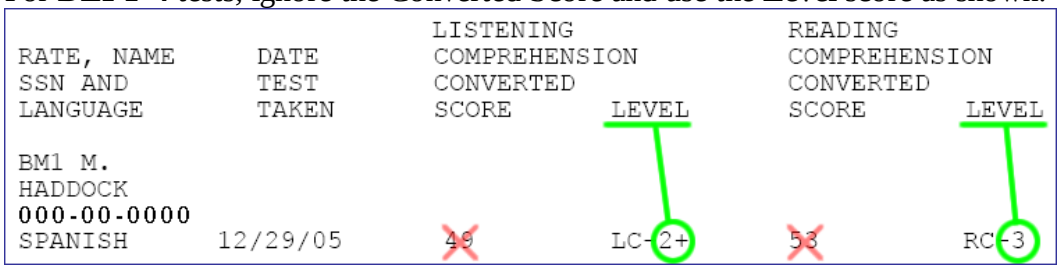
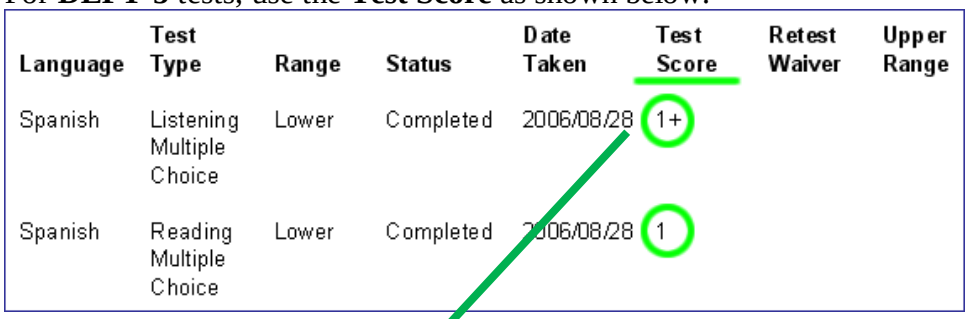
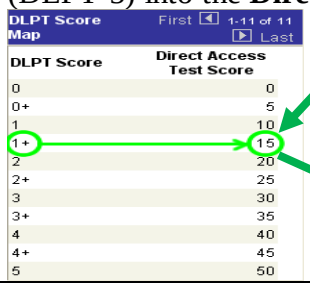
Entering Foreign Language Test Results, Continued

7.A.9.10 Entering DLPT Results **(continued)**

Step	Action
7	Enter the test **Date** and test **Score** into the **Test Results** section. For **DLPT-4** tests, ignore the Converted Score and use the **Level** score as shown:  RATE, NAME SSN AND LANGUAGE | DATE TEST TAKEN | LISTENING COMPREHENSION CONVERTED SCORE | LEVEL | READING COMPREHENSION CONVERTED SCORE | LEVEL BM1 M. HADDOCK 000-00-0000 SPANISH | 12/29/05 | 49 | LC-2+ | 53 | RC-3 For **DLPT-5** tests, use the **Test Score** as shown below.  Language | Test Type | Range | Status | Date Taken | Test Score | Retest Waiver | Upper Range Spanish | Listening Multiple Choice | Lower | Completed | 2006/08/28 | 1+ Spanish | Reading Multiple Choice | Lower | Completed | 2006/08/28 | 1 Utilize the **DLTP Score Map** to convert the **Level** score (DLPT-4) or the **Test Score** (DLPT-5) into the **Direct Access Test Score**.  DLPT Score Map First 1-11 of 11 Last DLPT Score | Direct Access Test Score 0 | 0 0+ | 5 1 | 10 1+ | 15 2 | 20 2+ | 25 3 | 30 3+ | 35 4 | 40 4+ | 45 5 | 50
8	Enter the test **Date** and **Direct Access Test Score** into the **Test Results** section. Note: You cannot enter a “0”. Leaving the score as blank results in writing a "0" to the database. Test Results View All First 1-2 of 2 Last Test: 123456 DLPT - Spanish Read Date: 08/10/2011 Score: 15 Test: 123457 DLPT - Spanish Write Date: 08/10/2011 Score: 10

Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.10 Entering DLPT Results **(continued)**

Step	Action
9	Click the Save Foreign Language Info button to save the test scores. This will update the member's **Test Results**, **Languages**, and **Licenses & Certifications** and permit the SPO to start **Foreign Language Proficiency Pay** if the member's Commanding Officer authorizes it. **Note**: If you receive an error when attempting to save, it may be due to a missing test date on the member's **Test Results** page. Click the ***Open a New Window*** link and path to Enterprise Menu > Develop Workforce > Manage Competencies (GBL) > Use > **Test Results.** Review the existing test results entries and ensure each entry has a date. If a date is missing, enter the test completion date if known. If you do not know the test completion date use 01/01/1951, this is the default entry when an actual date is not available. Save any changes to the Test Results page, close the new window and return to the Foreign Language Test Results page and attempt to save again.

7.A.9.11 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.
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 per section 7.A.9.10 of this manual. • 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-7421B) and forwarding it to PPC Customer Care for account update.

Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.11 Process (continued)

Stage	Description
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 (c). 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 the Direct Access online help at http://www.uscg.mil/ppc/ps.

Continued on next page

7.A.9 Foreign Language Proficiency Pay (FLPP), Continued

7.A.9.12 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.

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 ID	Topic	See Page
7.B.1	Refund for Missed Meals – Discounted Meal Rate (DMR)	7-B-2
7.B.2	Family Separation Allowance (FSA)	7-B-3
7.B.3	Family Separation Housing Allowance (FSH)	7-B-8
7.B.4	Overseas Housing Allowances (OHA)	7-B-9
7.B.5	Family Subsistence Supplemental Allowance (FSSA)	7-B-10
7.B.6	Officer Uniform Allowance Claim Worksheet (CG-5100)	7-B-11
7.B.7	Combat SGLI Allowance	7-B-12

7.B.1 Refund for Missed Meals – Discounted Meal Rate (DMR)

7.B.1.1 Introduction

This section provides procedures for crediting Discount Meal rate charges to a member who is unable to eat meals that are normally furnished at a government dining facility.

7.B.1.2 Reference

(a) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 3-A-5(f)
(b) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Chapter 5, Subsistence Allowance, Sec. B, Refund of Discount Meal Rate for Missed Meals

7.B.1.3 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.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Log meals throughout the month</td></tr>
<tr><td>2</td><td>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-A-5(f), Enlisted BAS Policy

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:
<table>
<tr><td>Rate/Name:</td><td colspan="3">BM2 John G. Smith, USCG</td></tr>
<tr><td>EMPLID:</td><td colspan="3">1234567</td></tr>
<tr><td>Date(s)</td><td>Breakfast</td><td>Lunch</td><td>Dinner</td></tr>
<tr><td>2/14/12</td><td>X</td><td></td><td></td></tr>
<tr><td>2/15/12</td><td>X</td><td>X</td><td></td></tr>
<tr><td>2/18/12</td><td></td><td></td><td>X</td></tr>
<tr><td>Total for month</td><td>2</td><td>1</td><td>1</td></tr>
</table>
2. Process transaction in Direct Access (earn code RMM) to credit the member for the missed meals per reference (a).</td></tr>
</table>

7.B.2 Family Separation Allowance (FSA)

7.B.2.1 Introduction

This section provides the procedure for reporting entitlement to Family Separation Allowance (FSA).

7.B.2.2 Reference

(a) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 3-H
(b) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Chapter 11, Special and Incentive Pays, Section F, Family Separation Allowance

7.B.2.3 Types of FSA

See PAYMAN, Section 3.H.1, Family Separation Allowance (FSA).

7.B.2.4 Eligibility of FSA Entitlement

Refer to PAYMAN, Section 3-H for detailed information concerning “with dependent” requirements for FSA.

7.B.2.5 Verification of FSA on the FSA Worksheet

FSA entitlement verification will be completed on the FSA Worksheet (CG -2035), which is available on PPC’s web site at: http://www.uscg.mil/ppc/forms/.

Continued on next page

7.B.2 Family Separation Allowance (FSA), Continued

7.B.2.6 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 or message 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, E-mail or message, the SPO will submit a FSA transaction in Direct Access 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 or message was sent by the unit (See section 1.2.5 of this manual).

7.B.2.7 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.
2	The unit will endorse the FSA Worksheet and forward to the SPO. An E-mail or message 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, E-mail or message, the SPO will submit a FSA transaction in Direct Access on the member to start FSA-S. **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 or message was sent by the unit (See section 1.2.5 of this manual).

Continued on next page

7.B.2 Family Separation Allowance (FSA), Continued

7.B.2.8 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.
2	Unit notifies SPO by message or email of start date and member's names and EMPLIDS who are entitled to FSA-S and/or forwards COPIES of the worksheets.
3	Upon receipt of the message, email or worksheets, 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 email with the names and EMPLIDS of the members. The date FSA-S ends must also be included in the message or email (normally the end date will be the day prior to the day returning to homeport) and forwards the ORIGINAL worksheets, with item 8.c.3 completed.
5	Upon receipt of the message, email or worksheets, the SPO will submit a single FSA transaction for each member to establish a stop of FSA-S.

7.B.2.9 Procedures for FSA-T 60 days or less

For members who are TDY for 60 days or less, use the following procedures:

Step	Action
1	Upon return to the unit from TDY, the member will complete a FSA Worksheet.
2	The unit will endorse the FSA Worksheet and forward it with a copy of the TDY/TEMDU orders to the SPO.
3	Upon Receipt of the FSA Worksheet and copy of TDY/TEMDU orders, the SPO will submit a FSA transaction on the member to establish a one time credit of FSA-T.

Continued on next page

7.B.2 Family Separation Allowance (FSA), Continued

7.B.2.10 Procedures for FSA-T over 60 days

For members who are TDY for over 60 days, use the following procedures:

Step	On the 31st day away from unit
1	The member must complete a FSA Worksheet, leaving block 8.c.3. "Date Returned to PDS" blank.
2	The TDY unit will endorse the FSA Worksheet and send a copy of it with a copy of the TDY/TEMDU orders to the SPO servicing the member. (Unit retains original worksheet until member returns to unit)
3	Upon receipt of the copy of the FSA Worksheet and copy of the TDY/TEMDU orders, the SPO will submit an FSA transaction on the member to establish a start of FSA-T.
	Upon return to unit
4	Upon return from TDY, the member will complete block 8.c.3 of the FSA Worksheet
5	The unit will endorse the FSA Worksheet and send it with a copy of the TYD/TEMDU orders to the SPO.
6	Upon receipt of the FSA Worksheet and copy of the TDY/TEMDU orders, the SPO will submit an FSA transaction on the member to establish a stop of FSA-T.

7.B.2.11 FSA-T entitlements for Reserve Component members on active duty

The table, on the following page, provides the rules for determining FSA-T entitlement for Reserve Component members on active duty.

Continued on next page

7.B.2 Family Separation Allowance (FSA), Continued

FSA-T Entitlement for Reserve Component (RC) Members
With-Dependents on Active Duty (Notes 1 and 2)

RULE	Reserve Component (RC) members with dependents called/ordered to	and	and	and	then FSA-T
1	active duty in support of a Secretary of Defense (SECDEF) designated contingency operation (not T14)	their primary residence at the time called/ordered to active duty is not within a reasonable commuting distance to the unit location ordered to (Note 3)	the member's dependents do not accompany the member to the unit location ordered to	the member remains away from their primary residence for 30 continuous days or more (Note 4)	is authorized effective back to the first day the 30-day qualifying period began
2	ADOT for more than 180 days and not authorized HHG transportation at govt expense				
3	ADT or IADT for 140 days or more and not authorized HHG transportation at govt expense				
4	ADT or IADT for less than 140 days				
5	ADOT for less than 140 days				
6	ADT for 140 days or more and authorized HHG transportation at govt expense				is not authorized
7	ADOT for more than 180 days and authorized HHG transportation at govt expense				
8	active duty for 30 or fewer days (Note 5)				is not authorized (Note 5)

Notes:

1. RC members must be on consecutive active duty for training (ADT) (which includes initial active duty for training – IADT) or active duty-for-other-than-training (ADOT) under temporary duty/temporary additional duty (TDY/TAD) conditions. These rules also apply for involuntary active duty under the authority of title 14, USC §712, which are considered ADOT in nature. RC members on orders of a PCS nature are not eligible for FSA-T – see the CG Pay Manual, section 3-G, for FSA-R general conditions of entitlement.
2. The primary residence is considered the permanent station for RC members under ADT, IADT, or ADOT orders.
3. A member's return or visit to the PDS (see Rule 3 above) for any reason interrupts the initial 30-day qualifying period. The initial 30-day qualifying period count starts from zero on the day the RC member returns to duty away from PDS visitation.
4. A Reserve Component member initially ordered to active duty of 30 or fewer days who during this order receives an order modification or assignment extension with a prospective (new) active duty period of more than 30 days under Rules 1 thru 5, may be authorized FSA-T. **Do not add periods of active duty previously serviced to obtain the 30-day qualifying period for FSA-T. The 30-day qualifying period begins on the order modification or assignment extension effective date.**

7.B.3 Family Separation Housing Allowance (FSH)

7.B.3.1 Introduction

This section provides the procedure for reporting a member's entitlement to Family Separation Housing Allowance (FSH).

7.B.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 3-G-13

7.B.3.3 Procedures for Family Separation Housing (FSH)

Use the following procedure to report entitlement to FSH to the SPO and PPC (mas):

Step	Action
1	The member must complete form CG-2005, PCS Reporting Worksheet, when he/she reports to a new PDS and becomes entitled to FSH.
2	The unit will endorse the PCS Reporting Worksheet and forward to the SPO.
3	Upon Receipt of the PCS Reporting Worksheet the SPO will: (a) Submit a BAH transaction on the member to start BAH W/dependents using the zip code of the member's dependents. (b) Complete the endorsement on the reverse (2nd page) of the PCS Reporting Worksheet and forward it to PPC (mas), via fax to (785) 339-3760.
4	PPC (mas) will start the member's FSH entitlement in a monthly amount equal to the BAH (FSB-B) or OHA payable (FSH-O) (for the PDS) to a member without dependents in the same pay grade.

7.B.4 Overseas Housing Allowance (OHA)

7.B.4.1 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.

7.B.4.2 Reference

(a) Joint Federal Travel Regulations (JFTR), Vol I (Military), Chapter 9
Appendix K, Overseas Housing Allowance
Appendix N, Move-In Housing Allowance

7.B.4.3 Starting OHA

To start OHA complete the following forms and forward to the SPO with a copy of the lease/purchase agreement and the BAH/Housing Worksheet, CG-2025:

- Sign an Overseas Housing Allowance Briefing Sheet (found in the JFTR, Appendix K)
- Complete an Individual Overseas Housing Allowance form (DD Form 2367)

7.B.4.4 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).

7.B.5 Family Subsistence Supplemental Allowance (FSSA)

7.B.5.1 Introduction

This section provides procedures for payment of the Family Subsistence Supplemental Allowance (FSSA).

7.B.5.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 3-M

7.B.5.3 Definition

See reference (a) for definitions, background information and limitations to FSSA.

7.B.5.4 Application

Applications for FSSA, CG-2075 (Family Subsistence Supplemental Allowance Application, can be obtained from the PPC web site: http://www.uscg.mil/ppc/forms/ (CG-2075).

Or call PPC 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 PPC
444 SE Quincy
Topeka, KS 66683-3593.

7.B.5.5 Recertification

See reference (a), 3-M-10.

7.B.6 Officer Uniform Allowance Claim Worksheet (CG-5100)

7.B.6.1 Introduction

The CG-5100 is used to substantiate payment of uniform allowances to Coast Guard regular and reserve officers.

7.B.6.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series),
Section 3-I, Clothing Allowances for Officers
Section 3-K, Uniform Allowances for Reserve Officers

7.B.6.3 Procedure

The CG-5100 can be found at http://www.uscg.mil/ppc/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-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-5100) and forward to the SPO.

7.B.7 Combat SGLI (Servicemembers Group Life Insurance) Allowance

7.B.7.1 Introduction

This section provides the procedures for payment of Combat Servicemembers' Group Life Insurance (SGLI) Allowance.

7.B.7.2 Reference

(a) National Defense Authorization Act for Fiscal Year 2007 (Public Law 109-364)

(b) DoD Financial Management Regulation, Volume 7a: Military Pay Policy and Procedures - Active Duty And Reserve Pay, Chap 44, Par 440103.A - Combat Zone Defined and Figure 44-2 Combat Zone Tax Relief Areas for list of authorized areas

7.B.7.3 Discussion

Per reference (a), members serving in Operations Enduring Freedom (OEF) or Operation New Dawn (OND) Theaters shall receive an allowance equal to the amount of the cost for the maximum SGLI coverage plus the cost of Traumatic SGLI coverage.

7.B.7.4 Rules for Entitlement to Combat SGLI Allowance

A member must be serving in OEF or OND Theaters in order to be eligible for Combat SGLI Allowance. See reference (b) for authorized areas.

- Orders in support of OEF or OND may be specific orders to the member, or general tasking to an entire unit such as a ship. The member must be in theater. 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

7.B.7 Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

7.B.7.5 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").

7.B.7.6 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 <u>will not appear</u> in the member's SGLI elections in DA**.**

Continued on next page

7.B.7 Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

7.B.7.7 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 section 7-A of this manual for the procedures for reporting entitlement to HF/ID and Combat Tax Exclusion. See section 8-B for procedures for reporting entitlement to Combat Tax Exclusion.

7.B.7.8 SPO Action

SPOs shall record entitlement to Combat SGLI Allowance in Direct-Access for any eligible member.

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 OEF or OND theaters is also entitled for Combat SGLI Allowance.

7.B.7.6 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

7.B.7 Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

7.B.7.6 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.

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Section Overview

Introduction

This section provides the procedures for the Savings Deposit Program.

In this section

Topic ID	Topic	See Page
7.C.1	About the Savings Deposit Program	7-C-2
7.C.2	Procedures for the Savings Deposit Program	7-C-3

7.C.1 About the Savings Deposit Program

7.C.1.1 Introduction

This section provides general information about the Savings Deposit Program and provides references for detailed information.

7.C.1.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec 6-F
(b) Department of Defense Financial Management Regulation, Vol 7A, Chapter 51 (http://comptroller.defense.gov/fmr/07a/07a_51.pdf)

7.C.1.3 Discussion

Uniformed Services members on permanent or temporary duty assignment in a qualifying area are authorized to make deposits of their un-allotted current pay and allowances to the Savings Deposit Program.

7.C.1.4 Qualified areas for savings deposit program

The Secretary of Defense designates areas eligible for the Savings Deposit Program. These qualifying areas are listed in reference (b).

7.C.1.5 Rules for Savings Deposit Program

Please see reference (a), section 6-F-3 for limitations on amounts of deposits to the Savings Deposit Program.

7.C.2 Procedures for the Savings Deposit Program

7.C.2.1 Introduction

This section provides the procedures for enrolling in, and withdrawing from, the Savings Deposit Program.

7.C.2.2 Enrollment procedure

Members who elect to participate in the Savings Deposit Program may make their deposits into the program via **cash remittance** to PPC 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.

7.C.2.3 Cash remittance procedure

Members, or their properly designated agents, desiring to make deposits by cash remittance shall mail their deposit to PPC. A memo/letter providing the member's name, employee ID number, and duty station shall accompany deposits. If the request is from other than the member, attach a copy of the power of attorney. A copy of the memo/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 memo/letter, to:

Commanding Officer (MAS-DC)
Coast Guard Pay & Personnel Center
444 SE Quincy St
Topeka KS 66683-3591

7.C.2.4 Allotment procedure

Members, or their properly designated agents, desiring to make deposits via allotment shall complete an Allotment Worksheet (CG-2040). Complete the CG-2040 as detailed below, and forward the form, along with a copy of the power of attorney (if applicable) to PPC (MAS-DC) (see 7.C.2.3 for mailing address) 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.

Continued on next page

7.C.2 Procedures for the Savings Deposit Program, Continued

7.C.2.4 Allotment procedure (cont'd)

- 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.

7.C.2.5 Withdrawal procedure

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 PPC (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 PPC (MAS-DC), via the member's commanding officer and SPO upon departure from the overseas duty station. If no letter is received within 90 days of departure from the permanent duty station, PPC (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 PPC (MAS) via the member's commanding officer and SPO. The request shall provide the reason motivating the withdrawal and the dollar amount of withdrawal requested. Upon receipt of an approved request, PPC (MAS) shall issue refund to member's bank account via electronic funds transfer.

Section Overview

Introduction

This section will guide you through the procedures for issuing **a Career Status Bonus.**

In this section

Topic ID	Topic	See Page
7.D.1	Career Status Bonus (CSB)	7-D-2

7.D.1 Career Status Bonus (CSB)

7.D.1 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).

7.D.2 Reference

(a) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 5-F

7.D.3 Procedures

This table describes the CSB election process.

When	Who Does It	What Happens
Six months prior to member's fifteenth active duty anniversary	PPC (MAS)	Sends CSB Election Form, CG-2426 and a Fact Sheet of Information for Eligible Career Status Bonus Members to member's unit
Upon receipt of CSB Election Form (CG-2426)	Command	Reviews and verifies Sections I and II of CG-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-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-2426)	Member	Completes Section III, IV, or V of the CG-2426 to indicate his/her election. The commanding officer or his/her designee shall witness member's signature.
After member signs CG-2426	Command	Distributes form: **1.** Original to PPC (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

7.D.3 Procedures
(continued)

When	Who Does It	What Happens
Not later than the third month after the member completes fifteen years active service	PPC (MAS)	Issues CSB payment to the member.
Each year in January	PPC (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 CGPSC (PSD-MR) as prescribed in PDR Manual. The CG-2426 shall be one of these documents. ▪ Sends copy of PPC-2426 to PPC (RAS)
	PPC (RAS)	Files copy of CG-2426 in member's retired pay file. Retired pay is calculated per member's election on the CG-2426.
Member separates prior to completion of twenty years active service	PPC (SES)	Recoups CSB as appropriate.

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Chapter Overview

Introduction

The objective of this chapter is to provide a concise, user friendly job aid or starting, stopping, or changing an allotment, claiming non-receipt of an allotment, 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	8-A-1
B	Taxes	8-B-1
C	Thrift Savings Plan (TSP)	8-C-1

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Section Overview

Introduction

This section provides you with the procedures needed to start, stop or change an allotment. It also provides the procedure for submitting a claim for non-receipt of an allotment.

In this section

Topic ID	Topic	See Page
8.A.1	Allotments	8-A-2
8.A.2	Allotment Checklist	8-A-4
8.A.3	Nonreceipt of an Allotment	8-A-5

8.A.1 Allotments

8.A.1.1 Introduction

The allotment system is a convenience provided to active duty members (or reservists on long-term active duty) 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.

8.A.1.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap. 7, Allotments From Pay

8.A.1.2 Procedures

To start, change or stop an allotment or a bond:

- Assist the member in using the Self Service option in Direct Access to start, stop, or change the following types of allotments:
  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) Purchase of U.S. Saving Bonds other Treasury securities through *TreasuryDirect*
  7) Support of Dependents
- Self Service users see http://www.uscg.mil/ppc/ps for instructions.
- For all other types of allotments and for members without access to Direct Access:
  - Submit an Allotment Worksheet (CG-2040), or if starting a CFC allotment, submit the CFC pledge card (provided with CFC fund raising materials) to the SPO.

8.A.2 Allotment Checklist

8.A.2.1 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.

8.A.2.2 Checklist

Standard procedures for allotments.

Step	Item	Applies To	Check Off
1	Allotment must be for an authorized purpose. Refer to Coast Guard Pay Manual, COMDTINT M7220.29 (series), Section 7-A or the reverse side of the Allotment Worksheet (CG-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 in the online help 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	

8.A.3 Nonreceipt of an Allotment

8.A.3.1 Introduction

This job aid explains the process for reporting nonreceipt of an allotment.

8.A.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Section 7, Allotments from Pay

8.A.3.3 Procedures

Follow these procedures for claiming nonreceipt of an allotment.

When Allotment Type is	Then the....	Does This....

An allotment	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 PPC-DG-CustomerCare@uscg.mil or submit an online trouble ticket (http://www.uscg.mil/ppc/ccb) 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

	PPC (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

8.A.3.3 Procedures (continued)

When Allotment Type is	Then the....	Does This....		
		If	**Then**	**And**
An allotment		The member does not have access to E-mail	Complete a Nonreceipt Worksheet, CG-2050	Mail to PPC (mas)

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Section Overview

Introduction

This section provides information needed to change federal tax withholding,, 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 or to request a federal or state tax adjustment.

In this section

Topic ID	Topic	See Page
8.B.1	Federal Income Tax Withholding	8-B-2
8.B.2	State Income Tax Withholding	8-B-4
8.B.3	Changing State of Legal Residence	8-B-5
8.B.4	State Tax Listing	8-B-6
8.B.5	Income Tax Exclusion for Duty in Combat Zone	8-B-12
8.B.6	Information About the W-2 Form and How to Request a Duplicate or Corrected W-2 Form	8-B-15
8.B.7	Request for Federal or State Tax Adjustments	8-B-20

8.B.1 Federal Income Tax Withholding

8.B.1 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.

8.B.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 8-A, Withholding of Federal Income Tax
(b) Internal Revenue Service (IRS), Publication 919, How Do I Adjust My Tax Withholding - http://www.irs.gov/pub/irs-pdf/p919.pdf
(c) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 13.

8.B.3 Change Federal Income Tax Withholding

Federal income tax withholding should be reviewed whenever:

- There is a change in marital status.
- There is a change in the number of exemptions claimed.

Members should also review and adjust their withholding if they prepare their annual tax return and find they are due a large refund or have a balance due that is more than they can comfortable pay or is subject to a penalty. Reference (b) provides worksheets and guidance for accurately determining the amount to be withheld.

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/ppc/ps/self_service/members/change_federal_or_state_tax_withholding.htm For SPO procedures see reference (c).

Note: DA Self-service cannot be used to claim an exemption from federal income tax withholding. See 8.B.4 on the following page.

Continued on next page

8.B.1 Federal Income Tax Withholding, Continued

8.B.4 Exempt from withholding

DA Self-service cannot be used to claim an exemption from federal income tax withholding (FITW). Members, who meet the conditions for an exemption from FITW, must submit a signed IRS form W-4 to the Pay & Personnel Center (MAS), via their SPO, for processing. Members claiming exemption from federal withholding must file a new IRS Form W-4 each year by 15 February.

8.B.5 Advance of Federal Earned Income Credit (EIC)

The option of receiving advance payroll payments of EIC expired on December 31, 2010.

8.B.2 State Income Tax Withholding

8.B.2.1 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.

8.B.2.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec. 8-B, Withholding of State Taxes
(b) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 13.

8.B.2.3 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 in section 8.B.4 of this chapter)
2	If only changing marital status or the number of exemptions, 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/ppc/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 in reference (b).

8.B.3 Changing State of Legal Residence

8.B.3.1 Legal Residence

State of Legal Residence information is required for determining the correct State of legal residence for purposes of withholding State income taxes from military pay.

Each member must designate a legal residence, and report any changes thereto. A member's legal residence does not change because of change of permanent station. The legal residence at the time of entry into the Service remains the same until changed by the member.

Members should be counseled not to confuse the State of Legal Residence with their "home of record". The home of record is used for fixing travel and transportation allowances upon separation from the service. A home of record can only be corrected, it cannot be changed.

8.B.3.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec. 8-B, Withholding of State Tax
(b) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chap. 13.

8.B.3.3 Changing State of Legal Residence

If a member has met all the requirements necessary to establish a new legal residence/domicile, the member must complete a DD Form 2058, State of Legal Residence Certificate, and submit it to the SPO. The SPO will enter the change in "Employee Tax Data" in Direct Access.

- DD Form 2058 is available at: http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd2058.pdf
- SPO procedures for processing a change of state of legal residence can be found in reference (b).

8.B.4 State Tax Listing

8.B.4.1 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.dfa.arkansas.gov/Pages/default.aspx
California	http://www.ftb.ca.gov/
Colorado	http://www.colorado.gov/revenue
Connecticut	http://www.ct.gov/drs
Delaware	http://revenue.delaware.gov/
D.C.	http://cfo.dc.gov/otr/site/default.asp
Florida	http://dor.myflorida.com/dor/taxes/
Georgia	https://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://iowa.gov/tax/ Excludes all military earnings from state tax
Kansas	http://www.ksrevenue.org/
Kentucky	http://revenue.ky.gov/ Exempts all military earnings from state tax.
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.dor.ms.gov/ Withholding Exemption Certificate: Mississippi Form 89-350

Continued on next page

8.B.4 State Tax Listing, Continued

Missouri	http://dor.mo.gov/index.php
Montana	http://revenue.mt.gov/default.mcpx
Nebraska	http://www.revenue.ne.gov/index.html
Nevada	http://www.tax.state.nv.us/
New Hampshire	http://www.nh.gov/revenue/
New Jersey	http://www.state.nj.us/treasury/taxation/
New Mexico	http://www.tax.newmexico.gov/Pages/TRD-Homepage.aspx
New York	http://www.tax.ny.gov/
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 No state income tax
Texas	http://www.window.state.tx.us/
Utah	http://www.tax.utah.gov/
Vermont	http://www.state.vt.us/tax/
Virginia	http://tax.virginia.gov
Washington	http://www.dor.wa.gov/
W. Virginia	http://www.wva.state.wv.us/wvtax/default.aspx
Wisconsin	http://www.dor.state.wi.us/
Wyoming	http://revenue.state.wy.us/

Continued on next page

8.B.4 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
Commonwealth of Northern Marianas Islands	Yes		Department of Finance PO Box 5234 CHRB Saipan, MP 96950
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".**

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8.B.4 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	Yes	Federal Form W-4*	Taxpayer Services Idaho State Tax Commission PO Box 36 Boise, ID 83722-0036
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Illinois 800-732-8866	Yes (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 (Excludes all military pay from state tax)	State Form IA-W4	Iowa Department of Revenue PO Box 10460 Des Moines IA 50306-0460
Conditions for exemption from state tax: all military pay received by active duty or reserve members of the Armed Forces is excluded from Iowa income tax. The military pay exclusion applies to all Iowa military members regardless of where the member is stationed.			
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 (exempts all active duty military pay effective 1 Jan 2010)		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	Yes (exempts all active duty military Pay)		Michigan Department of the Treasury Treasury Building Lansing, MI 48922
Minnesota (651) 296-3781 800-652-9094	Yes (exempts all military pay)	Federal Form W-4 *	Minnesota Department of Revenue Individual Income Tax Division Mail Station 5510 St. Paul, MN 55146-5510
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			

*** These states use Federal W-4 annotated "For SITW Purposes Only".**

Continued on next page

8.B.4 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, to claim the exemption and forward it to their SPO. SPO will enter exemption in DA. http://tax.ohio.gov/divisions/ohio_individual/individual/military_service_ohio_taxes_deduction.stm			
Oklahoma (405) 521-3160	No (exempts all active duty military pay effective 1 July 2010)		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".**

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8.B.4 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 STATE INCOME TAX		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	Yes		Department of Tax & Revenue Taxpayer Services Division PO Box 3784 Charleston, WV 25337-3784
Conditions for exemption from state tax: Military Pay For residents who are stationed outside of WV, and who are not present in WV for more than 30 days during the tax year, military pay is not taxed. For all other residents, military pay is taxable to the extent it is taxable on the federal return.			
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".**

8.B.5 Income Tax Exclusion for Duty in Combat Zone

8.B.5.1 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.

8.B.5.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 8-G, Income Tax Exclusion for Duty in a Combat Zone
(b) DoD Financial Management Regulation, Volume 7a: Military Pay Policy and Procedures - Active Duty And Reserve Pay, Chap 44, Par 440103.A - Combat Zone Defined and Figure 44-2 Combat Zone Tax Relief Areas for list of authorized areas
(c) Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (series), Part II, Pay Entitlements, Chapter 11, Special and Incentive Pay, Section D, Combat Tax Exclusion

8.B.5.3 Rules for Combat Tax Exclusion

Per reference (a), 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.

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8.B.5 Income Tax Exclusion for Duty in Combat Zone, Continued

8.B.5.4 Qualified Areas for Combat Tax Exclusion

Reference (b) 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.

8.B.5.5 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, income which exceeds the maximum monthly MCPOCG basic pay amount, plus the amount of imminent danger pay to which the officer is authorized, is considered taxable wages and is not exempt.

Note 1: Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)(if entitled) is not included in the 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.

8.B.5.6 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

Continued on next page

8.B.5 Income Tax Exclusion for Duty in Combat Zone, Continued

8.B.5.7 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 section 7-A of this manual for the procedures for reporting entitlement to HF/ID and, if applicable Combat Servicemember's Group Life Insurance (SGLI) Allowance. See section 7-B of this manual for Combat SGLI procedures.

Direct Access data entry procedures for SPOs are contained in reference (c).

8.B.6 Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form

8.B.6.1 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.

8.B.6.2 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: BASE (BEQ) 4000 CG Blvd
Portsmouth, VA 23703-2199

Example of Bad Address: 4000 CG Blvd BASE (BEQ)
Portsmouth, VA 23703-2199

Continued on next page

8.B.6 Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

8.B.6.3 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.

Example:

A member enlists on 16 December 2011, but was not paid by until 15 January 2012. The member will not receive a W-2 for 2011. The taxable wages earned by the member during calendar year 2011 will be reported on the member's 2012 IRS Form W-2 (as per IRS regulations).

8.B.6.4 Taxable wages are reported when paid vice when earned

Taxable wages are reported when paid not when earned.

Example:
An E-5 serves aboard a Career Sea Pay eligible vessel from 12 to 16 December 2011, but the member does not receive payment for the Career Sea Pay earned in 2011 until 15 January 2012. Per IRS regulations, the taxable income is reported on the IRS Form W-2 for 2012.

8.B.6.5 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

8.B.6 Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

8.B.6.7 W-2 Information Available in Direct Access Self-Service

IRS Form W-2 information is loaded into Direct-Access Self-Service for Coast Guard military personnel (active duty and reserve only) in late January (after the January end-month payroll compute cycle usually around the 20th of the month).

The W-2 data is not an *"electronic"* W-2 that a member can print and mail with their tax return. However, the W-2 data reflects the information on the paper W-2 that is mailed annually at the end of January.

If the member is an electronic filer, the member can use the information on the Direct Access Self Service W-2 data page to prepare and file their annual return.

Earnings and withholding information from our pay system is transmitted to the IRS, but **we do not exchange W-2 data with any commercial software or tax preparation firms**.

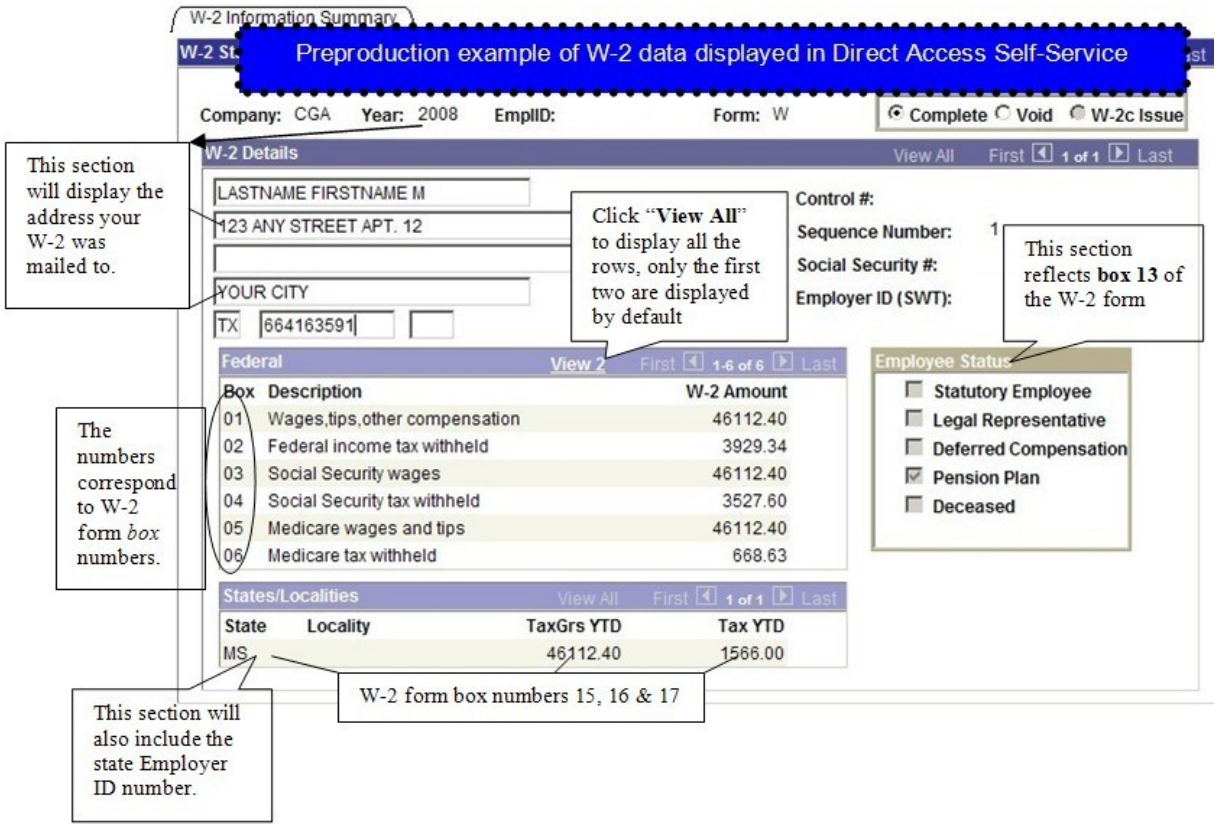
Here's an example of the self-service W-2 data is on the following page

Continued on next page

8.B.6 Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

8.B.6.7 W-2 Information Available in Direct Access Self-Service (Continued)

DA Self Service "View My W2 Data" Page



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8.B.6 Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

8.B.6.8 How to request a duplicate IRS Form W-2

Active duty, reserve, separated or retired members use CG-2016, W-2 request form to request a duplicate IRS Form W-2. Completely fill in the pertaining areas, and email to PPC Customer Care at the following address: ppc-dg-customercare@uscg.mil. If submitting via CG Workstation, a digital signature will be accepted.

No requests will be processed before 15 February to allow for mail delivery delays.

Note: The CG-2016 form is for only W-2 requests. To change your address in the system, you can use Direct Access Self-Service or go through your SPO.

8.B.6.9 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 PPC (ses) via online trouble ticket (http://cgweb.ppc.uscg.mil/ccb/) and provide calculations.

8.B.7 Request for Federal or State Tax Adjustments

8.B.7.1 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 PPC (ses). **Note:** The request must be received at PPC 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 PPC (ras). **Note:** The request must be received at PPC 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.

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8.B.7 Request for Federal or State Tax Adjustments, Continued

8.B.7.2 IRS Form W-2c

A statement of Corrected Income and Tax Amounts (IRS Form W-2c) is prepared by PPC (ses) in cases where it becomes necessary to report corrected tax information. PPC (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 2011. On 15 February 2012, 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, PPC (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, PPC cannot refund the FITW or SITW that was withheld in October 2011. 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.

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Section Overview

Introduction

This section provides the guidelines and procedures for the Thrift Savings Plan (TSP).

In this section

Topic ID	Topic	See Page
8.C.1	Thrift Savings Plan (TSP) Overview	8-C-2
8.C.2	TSP Enrollment	8-C-6
8.C.3	Account Maintenance/Contribution Changes	8-C-8
8.C4	TSP Catch-Up Program	8-C-10

8.C.1 TSP Overview

8.C.1.1 Introduction

This section provides an overview of the TSP. Information that is more detailed can be found in the references listed below.

8.C.1.2 References

The following provide detailed information on the policy and procedures for the TSP.

(a) http://www.tsp.gov/ TSP website
(b) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Sec. 6-G, Uniformed Services Thrift Savings Plan (TSP

8.C.1.3 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.

Traditional Contributions are deducted from a member's pay before taxes are computed and the earnings are tax-deferred.

The Thrift Savings Plan Enhancement Act of 2009, Public Law 111-31, authorized the TSP to add a Roth feature to the plan. This benefit allows participants to contribute on an after tax basis to their TSP accounts and receive tax free earnings when the funds are withdrawn, as long as they are at least age 59 and a half and the withdrawal is made at least five years after the beginning of the year in which their first Roth contribution was made.

8.C.1.4 Employer Matching Contributions

At the present time, the Coast Guard does NOT make matching contributions to military TSP accounts.

Continued on next page

8.C.1 TSP Overview, Continued

8.C.1.5 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. The TSP Web Site provides the limits for contributions: https://www.tsp.gov/whatsnew/rates/currentLimitsAndRates.shtml.

Members age 50 and over, or who will reach age 50 on or prior to 31 December, are eligible to invest an additional amount (up to $5,500 in 2013) into TSP under the TSP catch-up program. (See TSP Catch Up Program in section 8.C.4).

8.C.1.6 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).

Continued on next page

8.C.1 TSP Overview, Continued

8.C.1.7 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 (https://www.tsp.gov/index.shtml) or complete (Form TSP-U-20) Loan Application.

Continued on next page

8.C.1 TSP Overview, Continued

8.C.1.8 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. The TSP Web Site provides the limits for contributions: https://www.tsp.gov/whatsnew/rates/currentLimitsAndRates.shtml.

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 amount (up to $5,500 in 2013) into TSP under the TSP catch-up program.
- Members serving in a combat zone are subject to a special elective deferral limit. The TSP Web Site provides the limits for contributions: https://www.tsp.gov/whatsnew/rates/currentLimitsAndRates.shtml.
- 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.

Continued on next page

8.C.2 TSP Enrollment

8.C.2.1 Introduction

This section provides the procedure for enrolling in TSP.

8.C.2.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Sec. 6-G.

8.C.2.3 Before You Begin

Members may enroll anytime.

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.

8.C.2.3 Process

There are two ways to enroll in the TSP.

Self-Service	PPC Assisted
Coast Guard Military personnel, using DA Self Service, have the ability to enroll in the Thrift Savings Plan and manage "Catch-Up" contributions. Members can fully manage their TSP elections in DA Self Service as well as make changes to contribution amounts. Refer to the Thrift Savings Plan Overview topic in the Direct Access Online Help for more information. A video, demonstrating the new features is also available.	At enrollment (or reenrollment), a TSP-U-1 Election Form must be filled out. This form may be obtained through https://www.tsp.gov under Forms and Publications from the **Uniformed Services** section. Fax the completed form to PPC (MAS-TSP) at (785) 339-3760 or mail it to: Commanding Officer (MAS-TSP) Coast Guard Pay & Personnel Center 444 SE Quincy Street Topeka, KS 66683-3591
A TSP-U-3 Designation of Beneficiary Form must be mailed to the TSP Service office regardless of the enrollment method used: Thrift Savings Plan Service Office P.O. Box 385021 Birmingham, AL 35238	

Continued on next page

8.C.2 TSP Enrollment, Continued

8.C.2.4 Quarterly Participant Statements

The Account Access section of the TSP Web site is your only source for quarterly participant statements, unless you elected to receive your statements in the mail (you can make this election using the Account Access web page). New statements are posted on the Web site after the end of each calendar quarter (i.e., March 31, June 30, September 30, and December 31). The statement shows your account balance and a detailed summary of the activity in your account during the previous reporting period. If you have a loan, your quarterly loan information will also be included on your participant statement. The best source of information about your TSP account is the Account Access section of the TSP Web site. You will need your SSN and your PIN to access your account. Once you access your account, you can find out your daily account balance, check on your loan, see the status of a loan or withdrawal request, see what your current contribution allocation is, etc. You can also use this Web site to perform a number of transactions, such as making interfund transfers or contribution allocations, requesting a new computer-generated or custom PIN, requesting that quarterly participant statements be mailed to you, or initiating a loan or withdrawal.

8.C.3 Account Maintenance/Contribution Changes

8.C.3.1 Introduction

This section provides the procedures for maintenance of a member's TSP account data.

8.C.3.2 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.

8.C.3.3 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 https://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/ppc/ps/index.htm#self_service/members/tspoverview.htm) or by completing Form TSP-U-1 (https://www.tsp.gov/forms/formsPubs.shtml) and mailing or faxing it to:

Commanding Officer (mas-tsp)
Coast Guard Pay & Personnel Center
444 SE Quincy Street
Topeka, KS 66683-3591
Fax: (785) 339-3760

Continued on next page

8.C.3 Account Maintenance/Contribution Changes, Continued

8.C.3.4 TSP Separation Notification

For members participating in the TSP who are separating from the Coast Guard (Discharge, RELAD or Retirement), the Pay & Personnel Center (PPC) will 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. This will usually occur the month following your month of separation. If a member separates late in the month (after the end-month payroll processing cutoff) or if the separation transactions are input late or incorrectly by the Servicing Personnel Office, the notification will occur the month following the month the transactions are processed through JUMPS.

If a separated member needs to access TSP funds before the normal separation notification process timeline, they should complete a TSP Separation Notification form, and forward it to PPC (MAS-TSP), so that we may notify the TSP Service Office of the separation from active duty.

- TSP Separation Notification form

Note: For the purposes of the TSP, either of the following actions will be considered a separation from the uniformed services:

- Discharge from active duty or the Ready Reserve.
- Transfer to inactive status or to a retired list pursuant to any provision of U.S.C. title 10.

The discharge or transfer may not be followed by a resumption of duty, an appointment to a civilian position (covered by FERS, CSRS, or equivalent system), or continued service in **or affiliation with the Ready Reserve within 31** days from the effective date of the discharge or transfer. A member who is released from active duty (RELAD) and assigned to the SELRES is not considered separated for the purposes of the TSP. A member RELAD'ed to the IRR is considered separated for the purposes of the TSP. See: https://www.tsp.gov/lifeevents/lifeEvents.shtml for more information.

8.C.3.5 TSP Questions:

For questions on enrollment, un-enrollment, deductions or form completion, contact PPC Customer Service via phone (785-339-2200) or via the web form at http://www.uscg.mil/ppc/ccb/. .

Question on TSP investments, loans, and PINS, contact TSP Thrift Line via phone (1-877-968-3778).

8.C.4 TSP Catch-Up Program

8.C.4.1 Introduction

This section provides procedures for members desiring to participate in the TSP Catch-Up program.

8.C.4.2 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 listed on the TSP website at:
https://www.tsp.gov/whatsnew/rates/currentLimitsAndRates.shtml

- 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.

8.C.4.3 Enrollment/ Contribution Changes

Self-Service	PPC Assisted
Coast Guard Military personnel, using DA Self Service, have the ability to enroll in the Thrift Savings Plan and manage "Catch-Up" contributions. Members can fully manage their TSP elections in DA Self Service as well as make changes to contribution amounts. Refer to the Thrift Savings Plan Overview topic in the Direct Access Online Help for more information. A video, demonstrating the new features is also available.	Catch-up elections are made on Form TSP-U-1-C. Please note, when completing Section II, Line 7 of the form that "Pay Period" is the amount to be deducted per month, not per payday. Complete the Tsp-U-1-C form (form for catchup contributions) and mail to: Commanding Officer (MAS-TSP) Coast Guard Pay & Personnel Center 444 SE Quincy Street Topeka, KS 66683-3591

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

9.A 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 PPC (mas) 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, PPC. 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 ID	Topic	See Page
9.A.1	Collection of JUMPS Overpayments	9-A-2
9.A.2	Collection of Other Debts	9-A-4

9.A.1 Collection of JUMPS Overpayments

9.A.1.1 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.

9.A.1.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap.11, In-Service Debt Collection

9.A.1.3 How a member is notified of an overpayment

PPC (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.

9.A.1.4 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.

9.A.1.5 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

9.A.1 Collection of JUMPS Overpayments, Continued

9.A.1.6 Overpayment collection process

Overpayments are collected according to the following rules.

Note: The rules 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.

a. Personnel indebted to the Coast Guard through no fault of their own will repay their debt at a rate of 15% of their disposable pay. An overpayment of pay or allowances determined to be caused by fault of the member will be recovered in monthly installments not to exceed two-thirds of the member's disposable monthly pay. Indebted personnel will only be considered at fault, for the purpose of this policy, if they submit a waiver or remission application and are denied due to a determination that they were partially at fault.

b. The 15% cap shall apply to the sum of all debt when a member has multiple in-service debts.

c. All in-service debts to the Coast Guard, including household goods and travel debts are subject to these terms of collection.

d. Personnel who are in a retired status are also subject to the 15% maximum withholding of disposable pay.

e. Personnel have the option to repay their debt at a rate higher than 15%, if requested.

9.A.1.7 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 disposable pay will only be approved in cases of legitimate financial hardship. If a financial hardship exists, a Financial Statement, CG-5489B (http://www.uscg.mil/forms/cg/cg_5489.pdf), must be completed and forwarded to PPC (mas) for review and approval.

9.A.2 Collection of Other Debts

9.A.2.1 Introduction

There are several types of debts that a member may incur that can be collected directly from their pay.

9.A.2.2 Reference

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap.11, In-Service Debt Collection

9.A.2.3 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	PPC (tvl)	Issues *dunning letter to member.
	FINCEN	Initiates collection (Active duty members).
	PPC (mas)	Initiates collection (Reserve members).
IRS Tax Levy	Unit	• Forwards notice of levy to PPC (mas) • Notifies originating IRS unit that notice of levy has been forwarded.
	PPC (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 PPC (lgl) for action.
	PPC (lgl)	Prior to starting an involuntary allotment, PPC (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 PPC mailed the documentation. Specific procedures to be followed by the member and the command will be included with the documentation provided by PPC.
Private Damages	Unit	Submits the report of investigation to PPC (mas).
	PPC (mas)	Initiates collection.

*dunning – "An important demand for payment"

Continued on next page

9.A.2 Collection of Other Debts, Continued

9.A.2.3 Type of Debts
(continued)

Type	Who Does It	Action Taken
Bankruptcy	Unit	Forwards notice of bankruptcy to PPC (lgl).
	PPC (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 (http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd0139.pdf), by the Unit to PPC (mas).
Duplicate Payments	PPC (mas)	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 PPC (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.
	PPC (ses)	Initiates deduction from separation pay and forwards payment to CGMA.

Continued on next page

9.A.2 Collection of Other Debts, Continued

9.A.2.3 Types of Debts (continued)

Type	Who Does It	Action Taken
Debts Owed Other Service Relief Society	Other Armed Service	Forwards PAA (http://www.dtic.mil/whs/directives/infomgt/forms/eforms/dd0139.pdf).
	PPC (ses)	Initiates deduction from separation pay.
Unpaid DOD Hospital Charges	Care Provider	Forwards statement of charges to PPC (mas).
	PPC (mas)	Initiates collection.
Damage to Government Quarters	Housing Officer	Forwards PAA to PPC (mas).
	PPC (mas)	Initiates collection.
Bad Check/ Defaulted Payment Plan	NAFA/AAFES	Forwards PAA to PPC (mas).
	PPC (mas)	Initiates collection
Bad Check to CG	FINCEN	Forwards PAA to PPC (mas).
	PPC (mas)	Initiates collection.
Tuition Assistance Recoupment	Navy	Forwards PAA to PPC (mas).
	PPC (mas)	Initiates collection.
Delinquent Government Travel Card	Travel Charge Card Contractor	Forwards PAA to HQ.
	HQ	Reviews and forwards PAA to PPC (mas).
	PPC (mas)	Initiates collection.
Health & Comfort Items	Exchange	Forwards PAA and DD-504 to PPC (mas).
	PPC (mas)	Initiates collection.

Section Overview

Introduction

This section will guide you through the procedures for requesting a remission or waiver.

In this section

Topic ID	Topic	See Page
9.B.1	Remissions	9-B-2
9.B.2	Waivers	9-B-3

9.B.1 Remissions

9.B.1.1 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 the Coast Guard web site at http://www.uscg.mil/forms/cg/cg_5489_1.pdf.

9.B.1.2 References

(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series), Chap. 11-G, Remission of Indebtedness for Enlisted Members

9.B.1.3 Who can apply

Any enlisted member on active duty can request a remission.

9.B.1.4 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 PPC Customer Care (http://www.uscg.mil/ppc/ccb/), indicating date application is to be forwarded (must be submitted within 60 days).

9.B.1.5 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 (if a financial hardship exists) • Forwards to PPC (mas)	• Within 5 working days of receipt of CG-5489-1 from member
3	PPC (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

9.B.2 Waivers

9.B.2.1 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 the Coast Guard web site at http://www.uscg.mil/forms/cg/cg_5489_2.pdf.

9.B.2.2 References

(a) Coast Guard Pay Manual, COMDTINST M7220.29(series), Chap. 11-F, Waiver of Claims for Erroneous Payment

9.B.2.3 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.

9.B.2.4 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 • Forwards to PPC (mas)	• Within 5 working days of receipt of CG-5489-2 from member
3	PPC (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 PPC Customer Care (http://www.uscg.mil/ppc/ccb/), for information on waiver requests.

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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

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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 ID	Topic	See Page
10.A.1	Administrative Remarks (CG-3307)	10-A-2
10.A.2	Reporting Medals and Awards	10-A-3
10.A.3	How to Complete Enlisted Employee Review Worksheet for Units Without Access to Direct Access	10-A-5
10.A.4	Administrative Review of the Enlisted Employee Review Worksheet	10-A-10

10.A.1 Administrative Remarks (CG-3307)

10.A.1.1 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.

10.A.1.2 Reference

(a) Preparation and Submission of Administrative Remarks CG (3307), COMDTINST 1000.14(series)

10.A.1.3 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 reference (a).

10.A.1.4 Example entries

See Enclosure (6) to this manual for examples.

10.A.1.5 Distribution

The CG-3307 must be prepared in original and two copies. The **unit** completing the entry distributes the CG-3307 as follows:

(1) The original is forwarded to the SPO to be filed in section 2 of the SPO PDR.
(2) A copy is mailed to Commander, Coast Guard Personnel Service Center (PSD-MR) for electronic imaging into the EI PDR.
(3) Files a copy in section 2 of the Unit PDR.

See paragraph 4-D-(2) of reference (a) for exceptions.

10.A.2 Reporting Medals and Awards

10.A.2.1 Introduction

All medals and awards that have been presented to the member must be reported to the SPO for entry into Direct Access and a copy (with the member's EMPLID on the upper right hand corner of the citation) mailed to Commander, Coast Guard Personnel Service Center (PSD-MR) for electronic imaging into the EI PDR.

10.A.2.2 References

(a) Medal and Awards Manual, COMDTINST M1625.25(series)

10.A.2.3 Administrate procedures following award approval

Immediately upon approval of an award the awarding authority shall forward a copy to the Servicing Personnel Office (SPO) and forward a copy to Commander, Coast Guard Personnel Service Center (PSD-MR) for electronic imaging into the EI PDR.

- Both copies must have the member's EMPLID on the upper right hand corner of the citation.

See paragraph 1-I of reference (a) for additional administrative responsibilities.

10.A.2.4 Awards from other organizations and agencies

CG personnel are not authorized to wear awards from non-military organizations or government agencies except those specifically allowed by reference (a).

CG personnel who have served in another branch of the Armed Forces who have received personal, good conduct, unit, campaign and/or service awards (as listed in reference (a), enclosure 22) are authorized to wear them on the Coast Guard uniform with the exception of marksmanship medals and ribbons.

Members may complete form CG 2030, Career Development Worksheet, and forward it to their SPO with supporting documentation to have awards, which are authorized in reference (a) and have not been previously recorded, added to their PDRs and Direct Access.

Continued on next page

10.A.2 Reporting Medals and Awards, Continued

10.A.2.5 SPO action

Upon receipt of documentation the SPO shall enter the award in Direct Access utilizing the appropriate code and file a copy of the certificate or citation in section 3 of the SPO PDR. If the honor or award code is not present, contact COMDT (CG-1221) to see if the award should be added to the database. If the award should be added, the SPO can contact PPC Customer Care to initiate the process of having the code added so that the can complete the transaction.

10.A.2.6 Processing Good Conduct Awards

Process table for active duty and reserve Good Conduct Awards.

Stage	Who Does It	What Happens
1	SPO (See note 1)	Forwards a list to the unit of members who are eligible for 2nd or subsequent awards between the 15th of the current month to the 14th of the next month
2	Unit (See note 2)	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 1: Direct Access does not provide a report or query to track eligibility for the first Good Conduct award. This must be tracked manually. Units can create a simple spreadsheet listing initially eligibility dates for personnel upon reporting to their first PDS.

Note 2: If unit has no administrative support attached, the SPO will complete the Good Conduct Award Certificate and forward to the unit.

10.A.3 How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access

10.A.3.1 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 5 of Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2, for information about the Enlisted Employee Review System.

10.A.3.2 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 PPC (adv) for processing.

10.A.3.3 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 PPC website at the following location http://www.uscg.mil/ppc/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.

Continued on next page

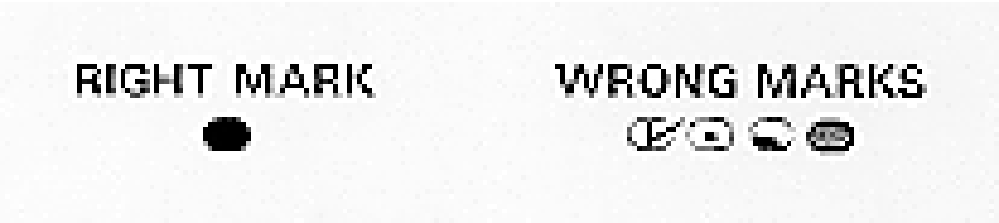
10.A.3 How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

10.A.3.4 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:



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10.A.3 How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

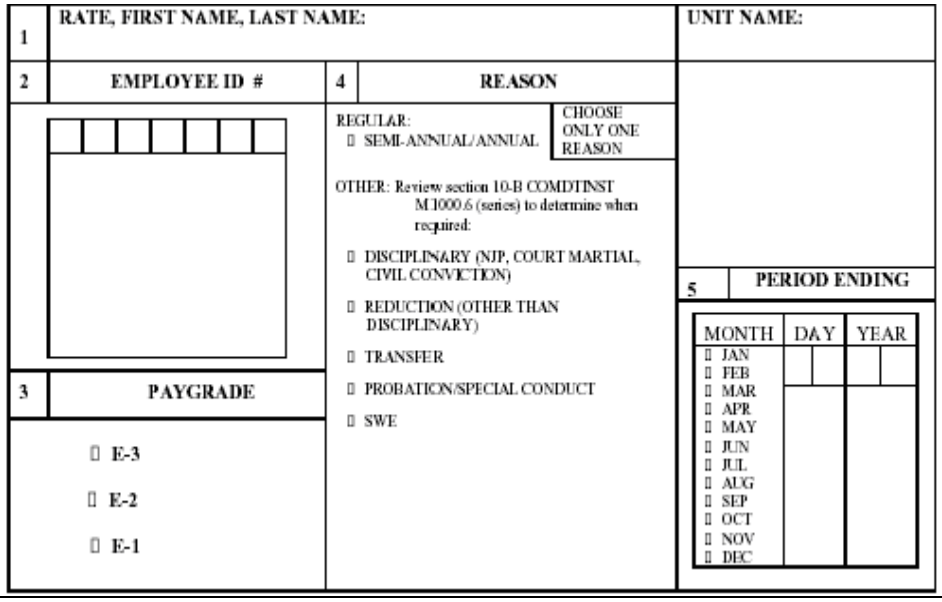
10.A.3.5 Completing the EERW

Follow these steps and examples to complete the EERW.

Note: If you have any questions after reading these directions, please contact PPC (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

10.A.3 How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

10.A.3.5 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

10.A.3 How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

10.A.3.5
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

10.A.4 Administrative Review of the Enlisted Employee Review Worksheet

10.A.4.1 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.

10.A.4.2 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.

10.A.4.3 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.

10.A.4.4 For more information or assistance

Any questions concerning the Enlisted Employee Review Worksheet should be referred to PPC (ADV) at 785-339-3400. You can also e-mail Advancements at: PPC-DG-ADV@uscg.mil.

Section Overview

Introduction

This section will guide you through the procedures following disciplinary actions.

In this section

Topic ID	Topic	See Page
10.B.1	Nonjudicial Punishment (NJP) Checklist	10-B-2
10.B.2	Courts-Martial Checklist	10-B-4
10.B.3	Confinement Processing	10-B-7
10.B.4	Appellate Processing	10-B-10
10.B.5	Unauthorized Absence	10-B-11
10.B.6	Desertion	10-B-14
10.B.7	Reporting Return of Absentee or Deserter	10-B-17
10.B.8	Reporting Civil Arrest or Conviction	10-B-20
10.B.9	Alcohol Incident (AI) Checklist	10-B-22
10.B.10	Reserve Involuntary Order to Active Duty for Discipline	10-B-23
10.B.11	Reserve Confinement Processing	10-B-28
10.B.12	Reserve Appellant Processing	10-B-31
	Exhibit 1	10-B-32
	Exhibit 2	10-B-33

10.B.1 Nonjudicial Punishment (NJP) Checklist

10.B.1.1 Introduction

This checklist has been provided to assist the unit/HRS/SPO in completing all necessary tasks required after NJP proceedings. This checklist is designed to be reproduced locally.

10.B.1.2 Reference

(a) Military Justice Manual, COMDTINST M5810.1(series)
(b) Direct Access Online Manual, EER Instructions (www.uscg.mil/ppc/ps)
(c) Discipline and Conduct, COMDTINST M1600.2 (series)
(d) Performance, Training & Education Manual, COMDTINST M1500.10 (series)
(e) Medals and Awards Manual, COMDTINST M1650.25(series)
(f) Personnel Security and Suitability Program, COMDTINST M5520.12 (series)
(g) PAYMAN – Coast Guard Pay Manual, COMDTINST M7220.29(series)
(h) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2(series)
(i) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3(series)

10.B.1.3 NJP process table

Follow these procedures after NJP proceedings.

Step	Action	Reference	Date
1	Forward a copy of the CG 4910 to the SPO Note: If a hearing was held, but no punishment was awarded, then no further action is necessary, regardless of whether the matter was dismissed, dismissed with a warning, dismissed with administrative action taken, referred to courts-martial, or resulted in a recommendation for a general court-martial.	Ref (a), 1.G.3.a.	
2	For Enlisted: 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. Note: An Administrative Remarks Entry (CG-3307) to document termination of eligibility for the Coast Guard Good Conduct Award is not required. The member’s signature on the EER Counseling Sheet indicates acknowledgment of the impact of their employee review on their Good Conduct eligibility.	Ref (h) Direct Access Enlisted Employee Review Instructions	

10.B.1 Nonjudicial Punishment (NJP) Checklist, continued

10.B.1.3 NJP process table **(continued)**

Step	Action	Reference	Date
3	For Officers: Complete an Officer Evaluation Report (OER). Prepare a Special OER including the Reported-on Officer's performance and any other matter on which the officer may be evaluated. This OER does NOT count for continuity. If the conduct resulting in non-judicial punishment occurs during the current reporting period, a special report is not required if the process is completed, i.e., not subject to further review, by the time that the regular report is due to be submitted for the current period. The basis for the non-judicial punishment shall be reported in the regular report.	Ref (c), 1.B.4.b Ref (i), 5.A.3.c	
4	Cancel "A" School, if applicable.	Ref (d), 7.F.4	
5	File the original Report of Offense and Disposition (CG-4910), Acknowledgment of Rights Acceptance of NJP, PIO report and appeals in the unit punishment log.	Ref (a), 1.G.4	
6	Initiate report (CG-5588) to the CG Security Center.	Ref (f), 3-S	
7	For members who are reduced in Pay Grade from E-4 and above to E-3 or below and assigned to a sea duty vessel and authorized to reside in private sector quarters who receive BAH or OHA at the without dependent rate, or BAH or OHA at the with-dependents rate based on payment of child support: Advise command, SPO and the service member that they are no longer authorized BAH or OHA without dependent rate, or BAH or OHA with dependents based on payment of child support, and effective the reduction date are only authorized BAH Partial, or if paying child support to a former spouse that is not an active duty uniformed service member, BAH-DIFF. If a member is paying child support to a former spouse that is an active duty member of a uniformed service and who is receiving BAH/OHA on behalf of the dependent, BAH-DIFF or BAH with-dependents is not authorized.	Ref (g), 3-G-1(e)	

10.B.2 Courts-Martial Checklists

10.B.2.1 Introduction

These checklists have been provided to assist the unit and SPO in completing all necessary tasks required after a courts-martial. This checklist is designed to be reproduced locally.

10.B.2.2 Reference

(a) MJM - Military Justice Manual, COMDTINST M5810.1(series)
(b) PERSEC - Personnel Security and Suitability Program, COMDTINST M5520.12(series)
(c) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2
(d) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3(series)
(e) Discipline and Conduct, COMDTINST M1600.2(series)

10.B.2.3 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 SPO: • Copy of DD-Form 2329. • Acknowledgment of Rights. • Copy of Report of Results of Trial.	Ref (a), 2.G	
2	For Enlisted: 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. Note: An Administrative Remarks Entry (CG-3307) to document termination of eligibility for the Coast Guard Good Conduct Award is not required. The member’s signature on the EER Counseling Sheet indicates acknowledgment of the impact of their employee review on their Good Conduct eligibility.	Ref (c) Direct Access Enlisted Employee Review Instructions	

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10.B.2 Courts-Martial Checklists, continued

10.B.2.3 Summary Courts-Martials **(continued)**

Step	Action	Reference	Date
3	For Officers: Complete an Officer Evaluation Report (OER). Prepare a Special OER after the Summary Courts-Martial after the convening authority has taken action and the finding of guilty has NOT been disapproved including the Reported-on Officer's performance and any other matter on which the officer may be evaluated. This OER does NOT count for continuity. If the conduct resulting in the court-martial occurs during the current reporting period, a special report is not required if the process is completed, i.e., not subject to further review, by the time that the regular report is due to be submitted for the current period. The basis for the court-martial shall be reported in the regular report.	Ref (d), 5.A.3.c Ref (e) 1.B.4.b	
4	Initiate report (CG-5588) to the CG Security Center.	Ref (b), 3-S	

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10.B.2 Courts-Martial Checklists, continued

10.B.2.4 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 copies of all initial and supplementary promulgating orders SPO.	Ref (a), 5.G	
2	Notify SPO of member's fine repayment intentions (if fine imposed).	Ref (a), 5.D	
3	For Enlisted: 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. Note: An Administrative Remarks Entry (CG-3307) to document termination of eligibility for the Coast Guard Good Conduct Award is not required. The member's signature on the EER Counseling Sheet indicates acknowledgment of the impact of their employee review on their Good Conduct eligibility.	Ref (c) Direct Access Enlisted Employee Review Instructions	
4	For Officers: Complete an Officer Evaluation Report (OER). Prepare a Special OER after the Court-Martial after the convening authority has taken action and the finding of guilty has NOT been disapproved including the Reported-on Officer's performance and any other matter on which the officer may be evaluated. This OER does NOT count for continuity. If the conduct resulting in the court-martial occurs during the current reporting period, a special report is not required if the process is completed, i.e., not subject to further review, by the time that the regular report is due to be submitted for the current period. The basis for the court-martial shall be reported in the regular report.	Ref (d), 5.A.3.c Ref (e) 1.B.4.b	
5	Initiate report (CG-5588) to the CG Security Center.	Ref (b), 3-S	

10.B.3 Confinement Processing

10.B.3.1 Introduction

This section will assist the unit and SPO in completing all necessary tasks required when a member is sentenced to confinement.

10.B.3.2 References

(a) Discipline and Conduct, COMDTINST M1600.2 (series)
(b) Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)

10.B.3.3 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 Ref (a) 1.F.
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, 4-3, 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.

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10.B.3 Confinement Processing, continued

10.B.3.4 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 PPC 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.

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	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, 4-3, 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. 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 2/3^{rds} pay after forfeiture for Special Courts-Martial, then the allotments are stopped.

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10.B.3 Confinement Processing, continued

10.B.3.4 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 PPC (PERS). The Medical PDR will be maintained by the assigned brig. • Faxes a copy of Court Memorandum to PPC (pers) to (785)339-3790.
	PPC SPO (pers)	1. Transfers member to confinement facility: • Obtains the Department ID and Position number for facility. • Issues PCS order to transfer member to Department/Position obtained above. o Effective date of PCS is the day before confinement begins. o Next Succession Plan Date is day of confinement. • Completes PCS Endorsements. o Actual Depart Date is same as Court Memorandum. 2. Updates DEERS/RAPIDS with confinement status. 3. Enters member into the Confinement/Appellate database. 4. 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 PPC zip code (66683). o Changes special pay and allowances accordingly (e.g. Flight Pay, HDIP, etc).

****Note**: Appellate Leave issues are maintained by PPC (pers).

10.B.4 Appellate Processing

10.B.4.1 Process

This is the appellate leave process.

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 PPC SPO.
	PPC SPO (PERS)	• Follows procedures in PPC 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 CGPSC(epm/opm/rpm).

10.B.5 Unauthorized Absence

10.B.5.1 Introduction

Follow these procedures when a member is in an unauthorized absence (UA) status.

10.B.5.2 References

(a) Discipline and Conduct, COMDTINST M1600.2, 1.C (series)

10.B.5.3 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.

10.B.5.4 UA for over 24 hours

Process table.

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 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 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 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 CGPSC (opm).

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10.B.5 Unauthorized Absence, continued

10.B.5.4 UA for 10 days

When the member has been UA for 10 days, notify the next of kin by letter as follows:

> I regret the necessity of informing you that your (son/daughter/spouse/other relationship as appropriate), (insert full name and rate), who enlisted (or was commissioned) in the Coast Guard on (date of enlistment or commissioning) and was attached to this unit has been on unauthorized absence since (date). Should you know the whereabouts of your (son/daughter/spouse/other relationship), I suggest that you urge your (son/daughter/spouse/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/spouse/other relationship) remain absent for 30 days, your (son/daughter/spouse/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. In addition, you may be entitled to Overseas Housing Allowance for up to 2 months, if overseas. To be eligible for BAH or BAH/OHA you must not be assigned to Government Quarters, and cannot be residing with the member. Your request for BAH or BAH/OHA 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 PAY & PERSONNEL 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.

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10.B.5 Unauthorized Absence, continued

10.B.5.5 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) ****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 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 CGPSC (PSD-MR), copy to 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.

10.B.6 Desertion

10.B.6.1 Introduction

Follow these procedures for declaring a member to be a deserter.

10.B.6.2 Reference

(a) Discipline and Conduct, COMDTINST M1600.2, 1.A

10.B.6.3 Procedure for declaring a member a deserter

Process table.

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 CGPSC (PSD-MR) Distribute signed copies of DD Form 553 to: • Deserter's SPO. • District Commander (o) of the district that the deserter is absent from. • District Commander (o) of the district where deserter's home of record is located. • CG Personnel Service Center (epm/opm/rpm). • 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 deserter may have proceeded.

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10.B.6 Desertion, continued

10.B.6.3 Procedure fo 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 deserter 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 to the SPO within 2 days.
4	Inventory and transfer deserter's personal effects.
5	If deserter is mentally irresponsible at the time of absence from a hospital, inform CGPSC (epm/opm/rpm), via chain-of-command, by letter.

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10.B.6 Desertion, continued

10.B.6.3 Procedure fo 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/spouse/other relationship as appropriate) (full name and rate), who enlisted (or was commissioned) in the Coast Guard at (place of enlistment) on (date of enlistment or commissioning), 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/spouse/other relationship), I suggest that you urge your (son/daughter/spouse/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/spouse/other relationship). You should return this card to the nearest U. S. Coast Guard unit.

10.B.7 Reporting Return of Absentee or Deserter

10.B.7.1 Introduction

Follow these procedures when reporting the return of an absentee or deserter.

10.B.7.2 Reference

(a) Discipline and Conduct, COMDTINST M1600.2, 1.C (series)

10.B.7.3 Delivery by civil authorities

Process table.

Step	Action
1	Before accepting delivery by civil authorities ensure: • No criminal charges are pending. • If charges are pending, forward a full report to CGPSC (epm/opm/rpm). • 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.

10.B.7.4 Adequate facilities for retention

Before accepting delivery of an absentee or deserter, ensure the unit is considered an adequate facility per Ref (a), 1.C. 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 the unit does not meet these requirements, units should request instruction from District Commander (o).

Continued on next page

10.B.7 Reporting Return of Absentee or Deserter, continued

10.B.7.5 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.

10.B.7.6 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.

10.B.7.7 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: CGPSC (epm/opm/rpm).
Unit other than from which absent	under the operational control of a Sector	Sector commander by telephone or other rapid means Sector will take action according to the Uniform Code of Military Justice.
Unit in same district	not under the operational control of a Sector	District commander, Info: CGPSC (epm/opm/rpm). Unit from which absent.
Unit outside district	not under the operational control of a Sector	District commander from which absent, Info: CGPSC (epm/opm/rpm). Unit from which absent. Info: Local district commander. Unit from which absent. ****Note**: If absentee was apprehended or delivered (vs surrendered), report return to CGPSC (epm/opm/rpm).

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10.B.7 Reporting Return of Absentee or Deserter, continued

10.B.7.8 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 CGPSC (epm/opm/rpm) 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 PPC (mas-dc) for checkage of the member's pay account for travel costs.

10.B.7.9 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: • CGPSC (epm/opm/rpm) • 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.

10.B.8 Reporting Civil Arrest or Conviction

10.B.8.1 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.

10.B.8.2 Reference

(a) Discipline and Conduct, COMDTINST M1600.2. (series), Article 1.B
(b) Coast Guard Pay Manual, COMDTINST M7220.29(series) Para. 2.C
(c) Personnel Security and Suitability Program, COMDTINST M5520.12 (series), Article 3-S
(d) Coast Guard Servicing Personnel Officer (SPO) Manual, PPCINST M5231.3 (series)

10.B.8.3 Process table

Follow these procedures when reporting civil arrest or conviction.

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 Sector level this will be the Sector Security Officer). • Notifies SPO if the member is not entitled to service credit while in the custody of civil authorities.	Ref (a) Ref (b) 2.C
2	Security Officer	Upon notification of member's arrest	• Completes a Personnel Security Action Request (CG-5588). • Sends completed CG-5588 to Coast Guard Security Center. • Sends copies of the report to: CGPSC (epm/opm/rpm) and (PSD-MR). • Sends a copy of the report to the district or area security officer (if not co-located).	Ref (c), Article 3-S

Continued on next page

10.B.8 Reporting Civil Arrest or Conviction, continued

10.B.8.3 Process table (continued)

Stage	Who Does It	When	What Happens	References
3	SPO	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. • Upon the member's return to duty, completes a "General Absence" and "Employee Entitlements" transaction to start allowances.	Ref (b), 2.C Ref (d), Part III, General Transactions Ref (d), Part II, Pay 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 CG SECCEN using form CG-5588. • Sends a copy of the report to the district or area security officer (if not collocated), CGPSC (epm), (opm) or (rpm) and (PSD-MR). ****Note**: Ref (a),1.B specifies 30 days as the interval for interim reports, however PERSEC, 3-S, which specifies 60 days.	Ref (c), 3-S
5	Security Officer	Upon notification of the final disposition of the case	• Submits a Final report to CG SECCEN, using form CG-5588. • Sends a copy of the report to the district or area security officer (if not co-located), CGPSC (epm/opm/rpm) and (PSD-MR).	Ref (c), 3-S

10.B.9 Alcohol Incident (AI) Checklist

10.B.9.1 Introduction

This checklist will assist the unit/HRS/SPO in completing all necessary tasks required after an AI. This checklist is designed to be reproduced locally.

10.B.9.2 Reference

(a) Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
(b) Direct Access Online Manual, EER Instructions (www.uscg.mil/ppc/ps)
(c) Performance, Training & Education Manual, COMDTINST M1500.10 (series)
(d) Medals and Awards Manual, COMDTINST M1650.25 (series)
(e) Personnel Security and Suitability Program, COMDTINST M5520.12 (series)
(f) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
(g) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series)

10.B.9.3 AI Checklist

Follow this process table when a member has been involved in an AI:

Step	Action	Reference	Date
1	Forward the original CG-3307 (P&D-13) or (P&D-14) to the SPO. (CG-3307 is prepared by unit CDAR.)	Ref (a), and Ref (g), Encl (6)	
2	For Enlisted: 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. Use the date of the AI for the “Effective date”. Note: An Administrative Remarks Entry (CG-3307) to document termination of eligibility for the Coast Guard Good Conduct Award is not required. The member’s signature on the EER Counseling Sheet indicates acknowledgment of the impact on their Good Conduct eligibility.	Ref (f) Chap 5 and Ref (b)	
3	For Officers: Document Alcohol Incidents involving officers by memorandum with a copy to CGPSC (opm) for regular active duty officers or CGPSC (rpm) for reserve officers. Officer Evaluation Reports (OER) should reflect alcohol incidents.	Ref (a), 1.C.5.c	
4	Cancel “A” School, if applicable.	Ref (c), 7.F.4	

10.B.10 Reserve Involuntary Order to Active Duty for Discipline

10.B.10.1 Introduction

Coast Guard Reservists are subject to the provisions of the Uniform Code of Military Justice (UCMJ) while performing Active Duty (AD), Active Duty for Training (ADT), and Inactive Duty Training (IDT) until the date the member is released from that status.

A reservist may be involuntarily ordered to active duty under Title 10 U.S.C. § 802(d) for an offense committed during periods of active or inactive duty for the purpose of:

- Article 15, Non-Judicial Punishment (NJP)
- Article 32 Investigation
- Courts-Martial

10.B.10.2 Reference

(a) Reserve Policy Manual, COMDTINST M1001.28A
(b) Military Justice Manual, COMDTINST M5810.1E
(c) Personnel Security and Suitability Program, COMDTINST M5520.12(series)
(d) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
(e) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series)
(f) Title 10 U.S.C. § 651; 802; 815; 830; 832; and 12302

10.B.10.3 Authority to Recall

A reserve member may only be involuntarily ordered to active duty under Title 10 U.S.C. § 802(d) by a person empowered to convene a General Courts-Martial, as defined in chapter 3 of reference (b).

A reserve member ordered to active duty under Title 10 U.S.C. § 802(d) for disciplinary purposes may not be sentenced to confinement, or be required to serve a punishment consisting of any restriction on liberty without prior authorization from CG-13. (See Article 2(d)(5), UCMJ; chapter 3 of reference (b)).

Continued on next page

10.B.10 Reserve Involuntary Order to Active Duty for Discipline, continued

10.B.10.4 Non-Judicial Punishment

Article 15, UCMJ, provides commanding officers with the authority to impose NJP without resort to the judicial forum of a courts-martial. Chapter 1 of reference (b) addresses current policy on administering NJP. This section addresses the procedures for involuntarily ordering a reservist to active duty for the purpose of imposing NJP.

NJP may be imposed while a member is performing IDT and ADT; however, a reservist may not be retained on IDT or ADT solely for the purpose of maintaining NJP authority. In order to preserve IDT and ADT training days for actual training or if it is impractical to wait for the next scheduled IDT or ADT period or the member fails to report for duty, commanding officers may request to involuntarily order a reservist to active duty and place the member on 10 U.S.C. § 802(d) ADOS-AC orders. Whenever practical, the requested period of active duty should coincide with the member's regular IDT schedule (e.g., same day of the week as normal IDT).

The financial responsibility to involuntarily order a reservist to active duty for the purpose of imposing NJP is incurred by the unit recalling the member for discipline. Follow the checklists in chapter 10.B.1 for the proper disposition of the NJP.

10.B.10.5 Process Table

Follow these procedures when recording NJP for a reserve member.

Step	Who does it	Action
1	Unit	• After the NJP date has been determined by the Executive Officer or Executive Petty Officer, follow the processes and procedures in section 10.B.1 of this chapter. **For Involuntary Order to Active Duty**: • Prepares *Exhibit 1* requesting involuntary order to active duty. • The memorandum shall address the purpose of the orders, (i.e., NJP, the reason for involuntarily ordering to active duty and the estimated duration). • Forwards memorandum to servicing (dxr). • Enters reserve orders in DA with unit accounting string and forwards to SPO.

Continued on next page

10.B.10 Reserve Involuntary Order to Active Duty for Discipline, continued

10.B.8.3 Process table (continued)

Step	Who does it	Action

2	SPO (if ordering to active duty)	• Completes the Reserve Orders Manager portion in DA.
		  • Use ADOS-AC as duty type in DA with Title 10 U.S.C. § 802 (d) as the legal authority.
		  • Completes Per Diem Entitlements (if applicable).
		  • Completes Other Authorized Expenses (if applicable).
		  • Completes Partial Entitlements tab.
		  • Completes Order Notes tab:
		  "Member has been involuntarily ordered to active duty other than training under Title 10 U.S.C. § 802(d)."
		• Forwards Reserve Orders to servicing (dxr).

3	Servicing (dxr)	• Endorses and forwards memorandum requesting involuntary order to active duty to the Officer Exercising General Court-Martial Jurisdiction (OEGCMJ). • Verifies ADOS-AC orders request for accuracy. • Approves the request for orders in DA, upon receiving approval from the OEGCMJ.
4	Officer Exercising General Court-Martial Jurisdiction (OEGCMJ)	• Approves or denies request to involuntarily order member to active duty. • Obtains prior approval from CG-13 if confinement or other restraints on liberty are considered for punishments. • Returns approved or denied memorandum to servicing (dxr).
5	CG-13	• Approves or denies request for involuntary Title 10 U.S.C. § 802 (d) orders if confinement or other restraints on liberty are considered for punishments. • Returns approved or denied memorandum to OEGCMJ.
6	SPO	• Prints, signs, and mails the orders to the member prior to the effective date of orders. • Sends email confirmation to member stating date orders were mailed. • Cancels orders if the member notifies the OEGCMJ, in writing, of a demand to trial by court-martial in lieu of NJP.

Continued on next page

10.B.10 Reserve Involuntary Order to Active Duty for Discipline, continued

10.B.10.6 Investigation/ Courts-Martial

Commanding officers shall use the Title 10 U.S.C. § 802(d) recall authority for the purpose of Special or General Courts-Martial. Involuntary Title 10 U.S.C. § 802(d) orders shall be initiated in DA and may be issued on a day-for-day basis. Commands who pursue disciplinary action for Courts-Martial with the intent of confinement or restriction must request authorization from CG-13 thru the officer exercising general Courts-Martial authority over the member. All requests must contain supporting documentation justifying the request for involuntary activation.

Reserve involuntary recall orders will be funded accordingly:

- Short-term orders of 180 days or less shall be funded by the charging unit (or convening authority).
- Long-term orders of 180 days or more shall be funded by CG (AFC-01) and approved by PSC-rpm-2.

Upon approval of long-term reserve orders, PSC-rpm-3 will assume administrative responsibility of the reserve member. CG-8 and PSC-rpm-2 will collaborate to provide a legal support billet for the reserve member while awaiting disciplinary actions. Use the checklists provided in section 10.B.2 of this chapter for final disposition of the Courts-Martial.

10.B.10.7 Process Table

Step	Who does it	Action
1	Unit	• Prepares *Exhibit 2* requesting involuntary order to active duty indicating the purpose of the orders, (i.e., Administrative Investigation, Courts-Martial and estimated duration of orders, etc.) • Forwards memorandum to CG-13 thru chain of command and the OEGCMJ over the member. • Enters reserve orders in DA with unit accounting string, if required, and forwards to SPO or PSC-rpm-3 following positive endorsement of request for orders.
2	Officer Exercising General Court-Martial Jurisdiction (OEGCMJ)	• Reviews memorandum and endorses request. • Forwards memorandum to CG-13, if confinement or other restraints on liberty are considered for punishments, otherwise PSC-rpm-2.

Continued on next page

10.B.10 Reserve Involuntary Order to Active Duty for Discipline, continued

10.B.8.3 Process table (continued)

Step	Who does it	Action
3	CG-13	• Approves or denies request for orders. • Forwards endorsement to PSC-rpm-2.
4	PSC-rpm-2	• Requests Legal Support Billet from CG-8.

5	SPO or PSC-rpm-3
	
	****NOTE**:
	PSC-rpm-3 will provide admin support if orders are greater than 180 days
		• Completes the Reserve Orders Manager portion in DA.
		  • Use ADOS-AC as duty type in Direct Access with Title 10 U.S.C. § 802 as the legal authority.
		  • Completes Per Diem Entitlements (if applicable).
		  • Completes Other Authorized Expenses (if applicable).
		  • Completes Partial Entitlements tab.
		  • Completes Order Notes tab:
		
		"*Member has been involuntarily recalled to active duty other than training under Title 10 U.S.C. § 802(d).*"
		
		"*This call to Active Duty is in a temporary duty status (TDY). PCS entitlements are not authorized.*"
		
		• Forwards Reserve Orders to servicing (dxr).
		• Upon completion of disciplinary proceedings, makes appropriate entries in DA (see discipline checklist as appropriate in this chapter).

6	Servicing (dxr)	• Verifies ADOS-AC order request for accuracy. • Approves the request for orders in Direct Access.
7	Unit SPO or PSC-rpm-3	• Prints the orders. • Signs the orders. • Mails the orders to the member prior to the effective date of orders. • Send email confirmation to member stating date orders were mailed. • Upon conclusion of the proceedings and confinement is ordered, mail the PDR to PPC Topeka.
8	PPC	• PPC maintains the reservist's PDR and processes them according to adjudication/discharge.

10.B.11 Reserve Confinement Processing

10.B.11.1 Introduction

Follow these procedures when a member is sentenced to confinement.

10.B.11.2 References

(a) Discipline and Conduct, COMDTINST M1600.2 (series)
(b) Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)

10.B.11.3 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 Ref (a) 1.F.
2. Issue TDY orders to confinement facility.

The SPO will:

1. Stop pay entitlements as applicable. See Figure 3-2, 4-3, 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. 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

10.B.11 Reserve Confinement Processing, continued

10.B.11.4 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 PPC 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)	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. See Figure 3-2, 4-3, 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. 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

10.B.11 Reserve Confinement Processing, continued

10.B.11.4 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 PPC (pers). The Medical PDR will be maintained by the assigned brig. • Faxes a copy of Court Memorandum to PPC (pers) to (785)339-3790.
	PPC SPO (pers)	1. Stops Title 10 U.S.C. § 802(d) orders effective day before confinement begins 2. PCS transfers member to confinement facility: • Obtains the Department ID and Position number for facility • Issues PCS order to transfer member to Department/Position obtained above • Effective date of PCS is the day before confinement begins. • Next Succession Plan Date is day of confinement. 3. Completes PCS Endorsements. • Actual Depart Date is same as Court Memorandum. 4. Issues new Title 10 U.S.C. § 802(d) orders without pay in one year increments 5. Updates DEERS/RAPIDS with confinement status. 6. Enters member into the Confinement/Appellate database. 7. Ensures entitlements have stopped and court memorandum has been entered. • If total forfeiture of pay and allowance is awarded, stops SGLI after the 31st day of confinement. Use Benefit Plan code "Y". • Changes BAH accordingly. Effective date will be date of confinement. (BAH-F) • Enlisted - Stops BAS entitlement. Starts BAS minus DMR. • Officer – Continues BAS entitlement. • Changes COLA to PPC zip code (66683). • Changes special pay and allowances accordingly (e.g. Flight Pay, HDIP, etc)

Note: Appellate Leave issues are maintained by PPC (pers).

10.B.12 Reserve Appellate Processing

10.B.12.1 Process

This is the appellate leave process.

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 PPC SPO
	PPC SPO (pers)	• Follows procedures in PPC Appellate Leave Checklist. • Ensure Title 10 U.S.C. § 802(d) orders are issued annually during appellant process. • The reserve member will remain in an active orders status for the duration of the appellant leave process. • Final pay will be determined upon transfer to appellate leave status. DD-214 is issued when discharge authority is provided by CG PSC (rpm).

Exhibit 1

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

Commanding Officer
United States Coast Guard

Coast Guard Island
Alameda, CA 94501
Phone: xxx-xxx-xxxx
Email: A.B.Sea@uscg.mil

5812
21 Sep 2011

MEMORANDUM

From: A. B. Sea, CAPT
CG SECTOR SAN FRANCISCO

Reply to J. Jones, LT
Attn of: (415) 555-5555

To: CGD Eleven (d) ← (THIS IS THE OEGCMJ OVER THE MEMBER)
Thru: CGD Eleven(dxr) ← (SERVICING (dxr))

Subj: REQUEST FOR TITLE 10 U.S.C. § 802(d) ORDERS FOR MILITARY JUSTICE PROCEDINGS

Ref: (a) Military Justice Manual, COMDTINST M5810.1E
(b) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2A

1. Request to involuntarily order to active duty IT1 Sam Iam, EMPLID 1110000 under Title 10 U.S.C. § 802(d) for the purpose of administering Non-Judicial Punishment (NJP).

2. (Provide information supporting your request for involuntary active duty orders.)

3. (Expected duration of the orders.)

4. (Unit POC.)

#

Exhibit 2

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

Commanding Officer
United States Coast Guard

Coast Guard Island
Alameda, CA 94501
Phone: xxx-xxx-xxxx
Email: A.B.Sea@uscg.mil

5812
21 Sep 2011

MEMORANDUM

From: A. B. Sea, CAPT
CG SECTOR SAN FRANCISCO

Reply to J. Jones, LT
Attn of: (415) 555-5555

To: COMDT (CG-13)
Thru: CGD Eleven(d) ← (THIS IS THE OEGCMJ OVER THE MEMBER)
CGD Eleven (dxr) ← (SERVICING (dxr))

Subj: REQUEST FOR TITLE 10 U.S.C. § 802(d) ORDERS FOR MILITARY JUSTICE PROCEDINGS

Ref: (a) Military Justice Manual, COMDTINST M5810.1E
(b) Manual for Courts-Martial, United States (2012Ed.)
(c) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2A

1. Request to involuntarily order to active duty IT1 Sam Iam, EMPLID 1110000 under Title 10 U.S.C. § 802(d) for the purpose of disciplinary action under the Uniform Code of Military Justice.

2. (Provide information supporting your request for involuntary active duty orders.)

3. (Expected duration of the orders.)

4. (Unit POC.)

#

Enclosures: Include all documentation for request

Copy: PAC-1
CG PSC-rpm

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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.

In this chapter

Section	Description	See Page
A	Title 10 Mobilization	11-A-1
B	Title 14 Mobilization	11-B-1

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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 use 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 ID	Topic	See Page
11.A.1	The Mobilization Process	11-A-2
11.A.2	Types of Title 10 Mobilization	11-A-5
11.A.3	Mobilization Orders	11-A-6
11.A.4	Pay Entitlements When Mobilized	11-A-9
11.A.5	Travel Entitlements When Mobilized	11-A-18
11.A.6	Other Entitlements When Mobilized	11-A-23
11.A.7	Mobilization Checklist	11-A-25
11.A.8	SPO Mobilization Procedures	11-A-28
11.A.9	Recall of Retired Members	11-A-31
11.A.10	Travel Claims During Mobilization Status	11-A-34
11.A.11	Monthly Verification Procedures	11-A-39
11.A.12	Continuance On Active Duty	11-A-40
11.A.13	The Demobilization Process	11-A-42
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11.A.1 The Mobilization Process

11.A.1.1 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.

11.A.1.2 Reference

(a) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3, Part VII, Reserve Unique Transactions, Chap 4, Active Duty Orders
(b) Coast Guard Manpower Mobilization And Support Plan, COMDTINST M3061.1

11.A.1.3 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, RFRS 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	District (dxr)	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	District (dxr)	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

11.A.1 The Mobilization Process, Continued

11.A.1.3 Process **(cont'd)**

Stage	Who Does It	What Happens
5	Member's Regularly Assigned SPO	Prepares Reserve orders in Direct Access and routes to District (dxr) for approval.
6	Servicing District (dxr)	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 Internet 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	PPC (tvl)	Processes requests for travel advances.
12	SPO / PPC	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

11.A.1 The Mobilization Process, Continued

11.A.1.3 Process (cont'd)

Stage	Who does it	What Happens
14	PSC (tvl)	Processes travel claims.
15	Mobilization Site & District (dxr)	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 45 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	PPC (ses)	Processes final active duty payment to member. Collects CG Mutual Assistance debts.

11.A.2 Types of Title 10 Mobilization

11.A.2.1 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.

11.A.2.2 Legislative Authority

The legislative authorities under which a member may be mobilized, under Title 10 U.S.C, are listed below.

Citation	Enabling Authority	In Response to:	Type & Limitations
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, ADOS, Retired recall, etc.	Voluntary (ADOS-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.

11.A.3 Mobilization Orders

11.A.3.1 Introduction

The mobilization orders authorized by the District (dxr) 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.

11.A.3.2 Reference

(a) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3, Part VII, Reserve Unique Transactions, Chap 4, Active Duty Orders
(b) Coast Guard Manpower Mobilization And Support Plan, COMDTINST M3061.1

Duration and Document Type Of Mobilization Orders		
Citation	**Type & Limitations**	**Travel Document Type Recommended**
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 (ADOS-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

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11.A.3 Mobilization Orders, Continued

11.A.3.3 Order "Notes" / Standard Remarks

Orders issued under Title 10 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).
-
- 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/Legal_Assistance_SCRA_Guide.asp"

- 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) AND include "IAW the JFTR, Par. U4105-I, Member is authorized the contingency operation flat rate per diem rate in the amount of 55% of the locality per diem rate (lodging and M&IE). Member must incur an actual lodging expense to be entitled to the lodging portion of the contingency operation flat rate per diem rate. A member who lodges at a relative's or friend's residence is only authorized 55% of the M&IE portion of the contingency operation flat rate per diem rate."

Continued on next page

11.A.3 Mobilization Orders, Continued

11.A.3.3 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) 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).

  (b) 10 U.S.C. 12301(d) (ADOS-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).

  (c) Involuntary recall orders must specify the dates for unit training and for post-deployment leave periods

Direct Access Template for Order "Notes"

The required remarks listed above are available in Direct Access. Add Order Note "COR" or search for "Contingency OCO Orders Reserve"

11.A.4 Pay Entitlements When Mobilized

11.A.4.1 Introduction

Pay entitlements depend on the legislative authority under which the orders are issued (Title 10 or Title 14, U.S. Code). See section 11-B for more information on pay entitlements for Title 14 recall orders.

11.A.4.2 Reference

(a) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series)
(b) JFTR – Joint Federal Travel Regulations

11.A.4.3 Summary

This table is a summary of mobilization pay entitlements:

Pay Entitlement	Title 10 Orders	Reference
Basic Pay	Basic Pay	PAYMAN Figure 2-1
Officer Basic Allowance for Subsistence (BAS)	OFF BAS	PAYMAN Section 3-A-2
Enlisted Basic Allowance for Subsistence (BAS)	**Ashore unit:**	
	ENL BAS No government dining facility available	PAYMAN Section 3-A-3
	ENL BAS minus Discount Meal Rate (ESM or EUM)	PAYMAN Section 3-A-4
	Afloat unit with an established dining facility:	
	ENL BAS minus DISCOUNT MEAL RATE (ESM)	PAYMAN Section 3-A-5.a
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.	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 PPC (MAS) via the member's command and SPO.)

Continued on next page

11.A.4 Pay Entitlements When Mobilized, Continued

11.A.4.3 Summary (cont'd)

Pay Entitlement	Title 10 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.	PAYMAN Section 3-G-11.b PAYMAN Section 3-G-11.b
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.	JFTR Para U8011,

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11.A.4 Pay Entitlements When Mobilized, Continued

11.A.4.3 Summary (cont'd)

Pay Entitlement	Title 10 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.	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.	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.	PAYMAN Section 3.H
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.	PAYMAN Section 3-M

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11.A.4 Pay Entitlements When Mobilized, Continued

11.A.4.3 Summary (cont'd)

Pay Entitlement	Title 10 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 CG-1222 for guidance.	
Enlisted Clothing Maintenance Allowance	BMA if receiving RBMA prior to mobilization. SMA if receiving RSMA prior to mobilization.	PAYMAN Section 3-J Figure 3-27
Civilian Clothing Monetary Allowance	STADCMA-CIV Use CG-5150	PAYMAN 3-I-3 (Officer) 3-J-5 (Enlisted)
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.	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.	PAYMAN Section 4-A Figure 4-1
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.	PAYMAN Section 4-B Figure 4-5
Diving Duty Pay	When assigned by orders to diving duty.	PAYMAN Section 4-G
Hostile Fire or Imminent Danger Pay	When on official duty in a designated imminent danger pay area.	PAYMAN Section 4-H
Board Certified Pay for Physician Assistants	Officers designated as physician assistants.	PAYMAN Section 4-J

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11.A.4 Pay Entitlements When Mobilized, Continued

11.A.4.3 Summary (cont'd)

Pay Entitlement	Title 10 Orders	Reference
Combat Zone 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.	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.)	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.	PAYMAN Section 5-C
Leave	When on active duty for 30 or more consecutive days, members accrue 2.5 days of leave per month.	
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.	PAYMAN (10-A-1.a.(2)

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11.A.4 Pay Entitlements When Mobilized, Continued

11.A.4.3 Summary (cont'd)

Pay Entitlement	Title 10 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.	PAYMAN Section 6-A
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.	PAYMAN Section 6-F
Advance Pay / BAH / OHA	When recalled to active duty is not entitled to advance pay or advance BAH / OHA.	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.	PAYMAN Section 5-E
FLPP Interpreter FLPP Linguist	Same allowances as Active duty component.	PAYMAN Section 4-K

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11.A.4 Pay Entitlements When Mobilized, Continued

11.A.4.3 Summary (cont'd)

Pay Entitlement	Title 10 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.	PAYMAN Section 6-G 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.	PAYMAN Section 6-C

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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. http://www.defensetravel.dod.mil/site/bah Calc.cfm
INCONUS Cost of Living Allowance		X	X	X	X			X		Special mbr to mbr rules. http://www.defensetravel.dod.mil/site/per iem.cfm
Overseas Housing Allowance		X	X		X			X		ONLY if Residense OUTCONUS http://www.defensetravel.dod.mil/site/oha cfm
OUTCONUS Cost of Living Allowance		X	X	X	X			X		ONLY if Residense OUTCONUS http://www.defensetravel.dod.mil/site/col .cfm
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 payabl > once within 2 years
Hardship Duty Pay for Location		X					X			$50-$150

	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.
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 COMDT
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. No limit on sale for T10
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				
FLPP Linguist			X				X			

11.A.5 Travel Entitlements When Mobilized

11.A.5.1 Introduction

Effective 1 October 2012: All reservists on long-term Contingency ADOS, serving in the same location, outside of a reasonable commenting distance from the member's place of residence, for more than 180 days, shall be authorized the contingency operation flat-rate per diem of 55 percent of the full locality per diem as prescribed by section U4105-I of reference (a). The contingency operation flat-rate per diem shall be noted on the member's contingency ADOS orders. Contingency ADOS orders issued to start 1 October 2012 or later, shall be issued or amended to reflect the contingency operation flat-rate per diem of 55 percent as of 1 October 2012. Reservists must ensure their long-term lease/rental agreements contain a termination clause, which conforms to the requirements of Section 305 of the Servicemembers Civil Relief Act (SCRA), Public Law 108-189.

Effective 1 October 2013: All reservists on contingency ADOS over 180 days in the same location shall be issued PCS orders with full PCS entitlements.

11.A.5.2 References

(a) JFTR – Joint Federal Travel Regulations
(b) Lodging Plus Per Diem rates online at http://www.defensetravel.dod.mil/site/perdiem.cfm

11.A.5.3 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.

There have been a significant number of reserve component (RC) members under orders in Support of a Contingency Operation (Title 10) erroneously authorized per diem when performing active duty at a location within the local area of their primary residence/home. This has resulted in enormous debts, with some exceeding over $100,000. When an RC member is called/ordered to active duty order under a designated contingency operation, use the flowchart (*Figure 11-A-1*) on the next page to determine the entitlement to per diem.

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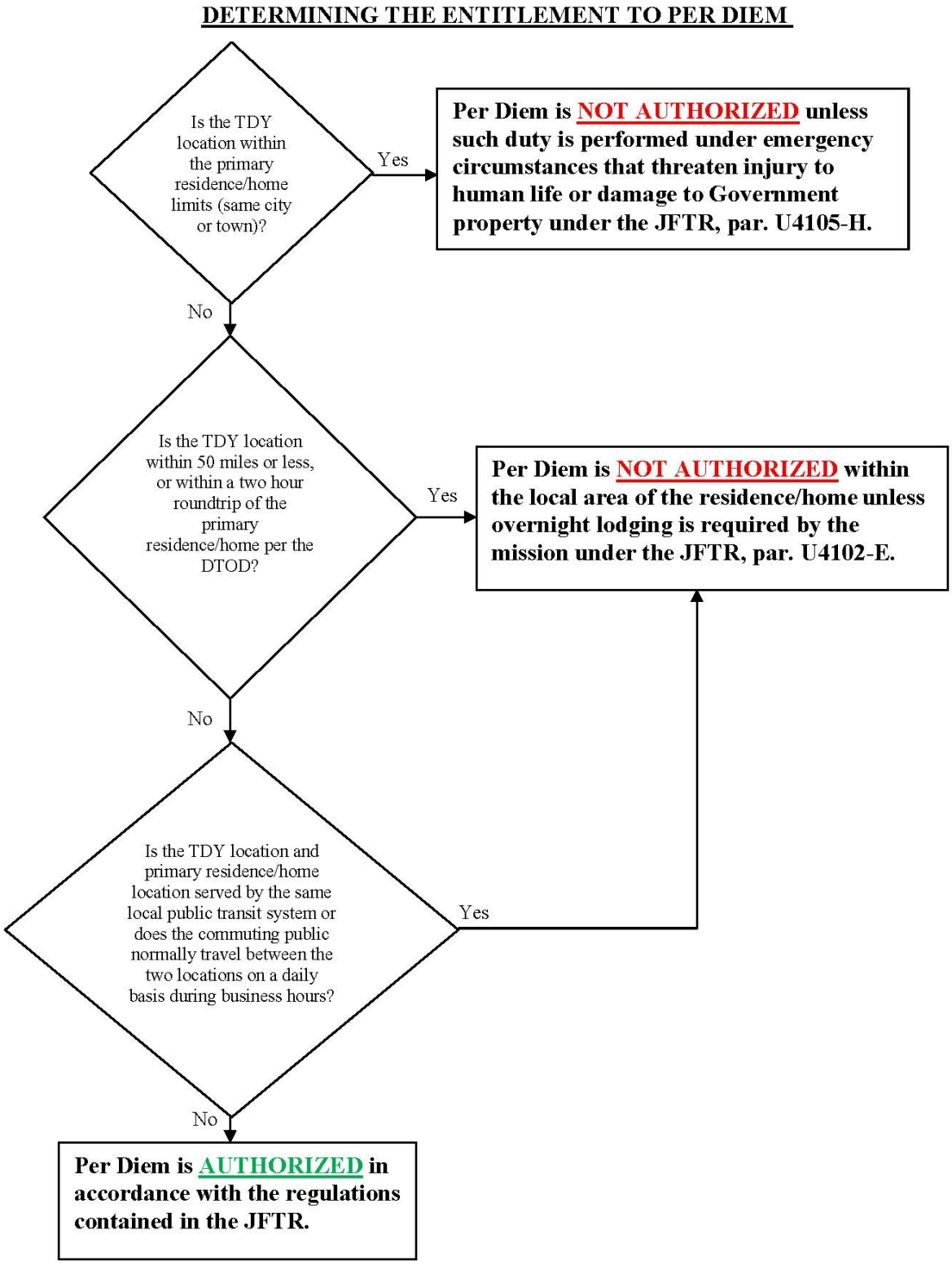
11.A.5 Travel Entitlements When Mobilized, Continued

Figure 11-A-1, Determining the Entitlement to Per Diem



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11.A.5 Travel Entitlements When Mobilized, Continued

11.A.5.4 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.

11.A.5.5 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. *(Continued on next page)*	Contingency operation flat-rate per diem of 55 percent of the full locality per diem rate. See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	JFTR U4105-I

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11.A.5 Travel Entitlements When Mobilized, Continued

11.A.5.5 Summary (cont'd)

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
Lodging, Meals, And Incidental Expenses (M&IE) *(Continued from previous page)*	Notes: (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 in accordance with the JFTR, par. U4135. The orders must specifically authorize dual lodging and state the location and period of time. Dual lodging exists to cover lodging expenses that arise because of unexpected circumstances beyond the traveler's control, dual lodging must be approved after the fact by an amended order or by the AO on the travel voucher. Any period of dual lodging reimbursement is limited to a maximum of 14 consecutive days, extensions beyond 14 consecutive days for unexpected circumstances may only be approved after the fact by COMDT (CG-1222) (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.		JFTR U4135
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 PPC (tvl). They cannot be processed through the TPAX system.	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	JFTR U4125

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11.A.5 Travel Entitlements When Mobilized, Continued

11.A.5.6 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 55% 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.

11.A.6 Other Entitlements When Mobilized

11.A.6.1 Introduction

Mobilized members have other entitlements and benefits in addition to pay and travel.

11.A.6.1 References

(a) JFTR – Joint Federal Travel Regulations
(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) U. S. Coast Guard Pay Manual, COMDTINST M7220.29 (series)
(e) Reserve Policy Manual, COMDTINST M1001.28 (series)

11.A.6.2 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/reserve •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

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11.A.6 Other Entitlements When Mobilized, Continued

11.A.6.2 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/reserve
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 section 11-A-17, 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

11.A.7 Mobilization Checklist

11.A.7.1 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.

11.A.7.2 Unit Checklist

Step	Action	Date
1	Send letter to member's employer concerning mobilization status (see exhibit 11.A.7.1).	
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 PPC (tvl).	

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11.A.7 Mobilization Checklist, Continued

11.A.7.2 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-2020) to their SPO.	
14	Ensure member verifies beneficiaries on the Designation of Beneficiaries form (CG-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 in section 11.A.4.3). 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 PPC (MAS) via their command and SPO. See http://www.defenselink.mil/ra/ for more information.	

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11.A.7 Mobilization Checklist, Continued

Exhibit 11.A.7.1 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

11.A.8 SPO Mobilization Procedures

11.A.8.1 Introduction

The following checklists provide listings of the transactions to be completed by the servicing SPO when a Reservist is mobilized.

11.A.8.2 Title 10 Checklist

Use this checklist when processing Title 10 mobilizations.

Checklist for Title 10 Mobilizations		
Required / Optional	**Transaction / Input**	**Reference**
Required	Reserve Orders in Direct Access.	SPO Manual, Part VII
Required if primary residence is INCONUS	Change BAH. Be sure the transaction shows: Postal Code = zip code of primary place of residence as prescribed in section 11.A.4.3 of this chapter.	SPO Manual Part II
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 in section 11.A.4.3 of this chapter.	SPO Manual Part II
Required if member is enlisted	Start Subsistence Allowance. Be sure the transaction starts the appropriate subsistence prescribed in section 11.A.4.3 of this chapter.	SPO Manual Part II
Optional	FSA-T or FSA-S. Submit only if a member with dependents meets requirements prescribed in section 11.A.4.3 of this chapter.	SPO Manual Part II
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.	SPO Manual Part II
Optional	Start OUTCONUS COLA. Submit only if ordered to active duty from OUTCONUS residence.	SPO Manual Part II

Continued on next page

11.A.8 SPO Mobilization Procedures, Continued

11.A.8.2 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 (CG-1222) at (202) 475-5927.	
Optional	Additional Reserve Officer Uniform Allowance. Submit only if the officer meets requirements prescribed in section 11.A.4.3 of this chapter.	SPO Manual Part II
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 in section 11.A.4.3 of this chapter.	SPO Manual Part II PAYMAN
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PPC (mas).	PPPM, 7-B-8
Optional	Board Certified Pay for Physician Assistants. If meets the requirements prescribed in section 11.A.4.3 of this chapter, fax copy of orders to PPC (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 PPC (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

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11.A.8 SPO Mobilization Procedures, Continued

11.A.8.2 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 SPO Manual, Part III
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 SPO Manual, Part III
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.	SPO Manual, Part III
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.	SPO Manual, Part III
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.	SPO Manual, Part II
Optional	Change in Dependency/Emergency Data if there is a change in dependents or beneficiaries. Required for Retire Recall	SPO Manual, Part III
Required at beginning of mobilization	Reserve Orders in Direct Access.	SPO Manual, Part VII

11.A.9 Recall of Retired Members

11.A.9.1 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

11.A.9.2 Process

This is the process for recalling a reserve retiree.

Stage	Who does it	What Happens
1	CG Personnel Service Center (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 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	PPC (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	PPC (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

11.A.9 Recall of Retired Members, Continued

11.A.9.2 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 PPC-RAS and PPC-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	PPC (ses)	Processes final active duty payment. Collects CG Mutual Assistance debts if requested.
15	PPC (ras)	If retired with pay (RET-1) or reached 60th birthday during mobilization, starts/restarts retired pay.

11.A.9 Recall of Retired Members, Continued

11.A.9.3 Mobilization Checklist

The unit shall follow the mobilization checklist in section 11.A.7 of this chapter.

11.A.9.4 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.	SPO Manual, Part VIII
Required	Send an E-Mail to PPC-Customercare@uscg.mil and PPC-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 in section 11.A.8 of this chapter, with the following exceptions: (1) The Reserve Orders transaction in section 11.A.8 shall <u>not</u> be prepared. (2) The first six transactions in section 11.A.8 are ***<u>required</u>*** transactions for a recalled retiree.		

11.A.10 Travel Claims During Mobilization Status

11.A.10.1 Introduction

Members submit travel claims to be reimbursed for travel, lodging, meals, and incidental expenses.

11.A.10.2 Methods for Submitting Travel Claims

Travel claims may be submitted by 2 methods:

- Travel Preparation and Examination System (Web-TPAX) – the preferred method.
- Hardcopy DD Form 1351-2.

11.A.10.3 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 TPAX claims, this documentation shall be provided to the approving official; for manually submitted claims, this documentation shall be sent to PPC (tvl) with DD Form 1351-2.

11.A.10.4 Recording of Leave Taken

Members shall indicate all leave days used on the TDY travel claim. The leave shall be indicated as follows:

- In TPAX, on the Itinerary and Exceptions-To-Daily-Expense screens.
- On DD Form 1351-2, in Block 29 (Remarks) on page 2.

Note: (1) Do <u>not</u> start or end a TPAX claim in a leave status.
(2) Mobilized Reservists are entitled to Per Diem for lodging while on leave.

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11.A.10 Travel Claims During Mobilization Status, Continued

11.A.10.5 Liquidation of Advance Funds

Advances are to be claimed for the same travel period as they are received.

Record advance funds on the travel claim in the block entitled "Previous Government Payments/Advances" (Block 9 in TPAX; block 10 for manual claims).

Report only electronic deposit advances (PPC processed), or advances made in the form of traveler's checks on the travel claim. DO NOT report prior settlement payments or cash advances from credit cards.

Funds advance requested through TPAX are already posted. DO NOT record this advance on a TPAX settlement as the TPAX system automatically applies the advance to the settlement and deducts from total reimbursable entitlement(s).

11.A.10.6 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).

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11.A.10 Travel Claims During Mobilization Status, Continued

11.A.10.7 Special Procedures For Long-Term Mobilization Status

Complete subsequent claims under blanket orders 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.

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11.A.10 Travel Claims During Mobilization Status, Continued

11.A.10.8 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.

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11.A.10 Travel Claims During Mobilization Status, Continued

11.A.10.9 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 TPAX, 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 TPAX, or Block 18 of DD Form 1351-2, this claim will be submitted as any other claim. In the Reimbursable Expenses Block in TPAX, 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 TPAX, 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 TPAX, 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.

11.A.11 Monthly Verification Procedures

11.A.11.1 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.

11.A.11.2 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 section 11.A.4 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.

11.A.11.3 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.

11.A.12 Continuance on Active Duty

11.A.12.1 Introduction

A mobilized member's orders may be extended by the District (dxr). Alternatively, a member may complete the initial mobilization assignment and be issued new long-term or short-term AD orders (ADT, ADOS, Title 14, EAD, etc.).

11.A.12.2 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 District (dxr) 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.	SPO Manual, Part VII
Reservist is extended under Voluntary Title 10 orders (ADOS-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.	SPO Manual, Part VII
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 and a PCS move is authorized, 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). If no PCS authorized, continue BAH at 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) if PCS is authorized. If no PCS authorized, continue CCOLA at member's principal place of residence	SPO Manual, Part VII SPO Manual, Part II SPO Manual, Part II

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11.A.12 Continuance on Active Duty, Continued

If	Submit	Reference
Reservist is released from Title 10 orders and <u>immediately</u> 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.	SPO Manual, Part VII

11.A.13 The Title 10 Demobilization Process

11.A.13.1 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.

11.A.13.2 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. District (dxr)s shall be the approving level for these exceptions as requested by units.

11.A.13.3 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 District (dxr) 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-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.

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11.A.13 The Title 10 Demobilization Process, Continued

11.A.13.3 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**
Date of release from active duty	PPC (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 PPC (ses) will have to manually calculate and process the final active duty payment.

Continued on next page

11.A.14 Unit Demobilization Checklist

11.A.14.1 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.

11.A.14.2 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-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. Ensure transitional health-care benefits are recorded in the DEERS database.	
5	Counsel member concerning civilian reemployment rights.	
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).	

11.A.15 Medical Readiness

11.A.15.1 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.

11.A.15.2 Post-Deployment Health Assessment

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.

11.A.15.3 Process

If a member, on active duty orders, incurs or aggravates an injury, illness or disease in the line of duty, the command, with member's consent, may request Medical Hold orders, Active Duty for Health Care (ADHC) orders, or Notice of Eligibility (NOE) as appropriate to PSC-rpm IAW ALCOAST 161/12 and ALCGPSC 065/12.

Under an approved NOE, member may be entitled to incapacitation pay as outlined in the Reserve Policy Manual, CIM1001.28 Chapt 6.

11.A.16 Title 10 SPO Demobilization Procedures

11.A.16.1 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.

11.A.16.2 Checklist

Transactions required to release a mobilized member (including a recalled retiree) are listed below.

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 PPC (ses) via email.	SPO Manual, Part VI	
2	Family Separation Allowance stop transaction (if applicable).	PAYMAN, figure 3-22 SPO Manual, Part II	

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11.A.16 Title 10 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.	SPO Manual, Part VI	
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 CGPSC (rpm) prior to separating the member. A DD-214 is not authorized for non-contingency active duty of less than 90 days.	DD 214 Manual	
6	Member Competencies. Input any competencies, awards or school completions earned by the member in Direct Access.	PPPM Chap 4-C SPO Manual, Part III	
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 SPO Manual, Part III	

11.A.17 TRICARE Benefits

11.A.17.1 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.

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.
(2) Post-mobilization coverage (free of charge). Note: See Transitional Assistance Management Program (TAMP) on the next page for more detail. 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.

Continued on next page

11.A.17 TRICARE Benefits, Continued

11.A.17.2 Transitional Assistance Management Program (TAMP)

TAMP provides reservists and their dependents 180 days of transitional health care benefits upon completion of orders for contingency operations as defined by Title 10 U.S.C. 101(a)(13). The FY13 National Defense Authorization Act, Public Law 112-239 amended Title 10 U.S.C. 101(a)(13). By including mobilization of Coast Guard Reservists under 14 U.S.C. 712 for domestic contingencies.

Additional information regarding TAMP eligibility and enrollment options is available at www.tricare.mil/TAMP or by calling the Coast Guard Health Benefits help line at 1-800-9HBA-HBA.

11.A.17.3 TAMP DEERS enrollment

After the completion of qualifying orders, reservists and their dependants are coded as TAMP-eligible in the Defense Enrollment Eligibility Reporting System (DEERS) and will automatically be covered under TRICARE Standard. During TAMP, a reservist may enroll or re-enroll in TRICARE Prime, including US Family Health Plan, which is offered in certain designated service areas of the United States and overseas. TAMP status will not be changed in DEERS unless the member executes new orders greater than 30 consecutive days. Members on Active Duty for Training (ADT) or Inactive Duty Training (IDT) maintain TAMP status within DEERS.

11.A.17.4 TAMP eligibility while serving on non-contingency orders

For TAMP eligible reservists who execute non-contingency orders in excess of 30 days, such as ADOS, TAMP eligibility continues to run concurrently with the orders. Members released from non-contingency orders must contact their assigned Servicing Personnel Office (SPO), DEERS, and Managed Care Support Contractor (MCSC) (regional TRICARE office) to ensure TAMP eligibility.

11.A.17.5 New contingency orders

Reservists who execute new contingency orders of greater than 30 consecutive days, as defined in Title 10 U.S.C. 101(a)(13), would earn a new 180-day period of TAMP upon release from active duty.

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Section Overview

Introduction

This section provides procedures for issuing recall to active duty orders under Title 14 U.S.C. in support of response to natural or man-made disasters. This section also provides procedures for issuing voluntary Active Duty for Operational Support-Active Component (ADOS-AC) orders in accordance with Title 10 U.S.C. section 12301 (d).

Contents

The following topics are covered in this section.

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Exhibits

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11.B.1 Coast Guard Reserve Title 14 Mobilization

11.B.1.1 Introduction

Title 14 U.S.C., Section 712 provides authority to effect **involuntary** recall of ready reservists to active duty (AD) in support of domestic natural or man-made disasters. Reservists may be involuntarily recalled for a maximum of 60 days in any four-month period, or 120 days in any two-year period. There are no exceptions to the active duty limitation.

In conjunction with mobilization of Title 14 involuntary recall orders, reservists with critical skills may be offered voluntary Short Term Active Duty for Operational Support (ADOS) orders under Title 10 U.S.C. 12301(d) for a duration of no more than 180 days, after the initial 60 days of Title 14 has been completed.

11.B.1.2 Mobilization Process

The mobilization process requires communication between several participants. This process is divided into stages detailing what needs to be completed and who is responsible. The following entities own the mobilization process: Commandant; PAC/LANT-51; District (dxr); permanent unit; SPO; SERA/Supervisor; and the reservist.

The following applications are used in the activation/mobilization process:

- Mobilization Readiness Tracking Tool (MRTT)
- Coast Guard Business Intelligence (CGBI)
- Direct Access (DA)
- Coast Guard Message System (CGMS)
- Homeland Security Information Network (HSIN) (A Department of Homeland Security application)
- Web TPAX

11.B.1.3 Administration procedures

Field commands and District (dxr) staff must complete diligent reviews of recall candidates before selecting a reserve member for activation. Commands must verify a reserve member's physical ability to perform duty prior to deployment.

Continued on the next page

11.B.1 Coast Guard Reserve Title 14 Mobilization, continued

11.B.1.4 Process

The process to activate ready reservists for mobilization is outlined below. This chart provides a general overview beginning with the activation order through the final stages of the mobilization. For reservists assigned to Deployable Forces Units, DG-13 will assume the role of the District (dxr).

Stage	Who Does It	What Happens
1	Commandant	• Delegates recall authorization for Title 14 via CGMS
2	Area	• Issues involuntary recall authorization message via CGMS to Districts • Directs PSC-SSB to engage in mobilization via CGMS • Provides reporting procedures and recall guidance • Sends 48 hour recall notification to SELRES within AOR
3	PSC-SSB	• Tasks District Commanders and DCMS units to fill open positions in MRTT
4	District (dxr)/DCMS Units	• Solicits units within AOR for mobilization ready SELRES
5	Unit/ RFRS Staff/ SPO	• Identifies SELRES for mobilization • Notifies SELRES of recall • Prepares SELRES civilian employer memo indicating activation status • Prepares orders in DA and forwards to District (dxr)
6	District (dxr)	• Reviews orders and approves in DA • Routes orders back to the SPO for signature • Notifies SSB of positions filled in MRTT • Sources SELRES in MRTT • Issues mobilization message via CGMS
7	Unit/SPO	• Prints, signs, and delivers orders to the SELRES • Starts pay entitlements in DA for SELRES upon reporting to unit
8	SELRES	• Notifies civilian employer of activation status • Reports to unit for pre-activation counseling • Mobilizes to incident site as directed on orders • Completes mobilization orders and returns to permanent unit • Completes travel claim
9	Unit/SPO	• Processes final transactions on orders in DA • Approves final travel claim in Web TPAX
10	PPC (tvl)	• Processes travel claim

Continued on next page

11.B.2 TITLE 14 Activation/Mobilization Checklist

11.B.2.1 Introduction

The process required to facilitate the rapid deployment of personnel requires an understanding of the roles and responsibilities of all entities involved during the activation period.

- Permanent Unit
- District (dxr)
- Surge Staffing Branch (SSB)
- Senior Enlisted Reserve Advisor (SERA)
- Reserve Force Readiness System (RFRS)
- Admin/SPO
- SELRES

The checklists and exhibits created in this chapter are designed to facilitate the activation and mobilization of reserve personnel. A sample recall authorization is provided on the following pages.

The checklist below is to be used by the District (dxr).

Step	Action	District (dxr) initials	Date
1	Receives tasking from Operational Commander or PSC-SSB.		
2	Engages with Sectors for SELRES activation candidates.		
3	Sector identifies SELRES for activation.		
4	Verifies SELRES does not require a 16/18 year waiver.		
5	Verifies BOG/Dwell time for SELRES with previous T-14 orders.		
6	Issues Title 14 mobilization message.		
7	Sources SELRES in MRTT requirement.		
8	Receives orders from SPO in DA for funds approval.		
9	Approves orders in DA. Forwards to SPO for orders completion.		
10	De-obligates funds previously approved for any active duty period that coincides with the Title 14 activation.		

Continued on the next page

11.B.2 TITLE 14 Activation/Mobilization Checklist, continued

Exhibit 1 – Sample Involuntary Recall authorization message from AREA to District:

```
R 000000Z MMM YY
FM COMLANTAREA COGARD PORTSMOUTH VA//LANT-1//
TO CCGDONE BOSTON MA//DXR/IMT//
CCGDFIVE PORTSMOUTH VA//DXR/IMT//
CCGDEIGHT NEW ORLEANS LA//DXR//
INFO COMDT COGARD WASHINGTON DC//CG-1/CG-DCO/CG-53/CG-13/CG-00//
CCGDNINE CLEVELAND OH//DXR//
CCGDELEVEN ALAMEDA CA//DXR//
CCGDTHIRTEEN SEATTLE WA//DXR//
CCGDFOURTEEN HONOLULU HI//DXR//
CCGDSEVENTEEN JUNEAU AK//DXR//
CCGDSEVEN MIAMI FL//DXR//
COGARD DOL NORFOLK VA//DOL-31/DOL-4//
COMPACAREA COGARD ALAMEDA CA//PAC-51//
BT
UNCLAS //N01330//
SUBJ: ALLOCATION OF TITLE 14 USC 712 INVOLUNTARY RECALL AUTHORITY ISO (Name of event)
A. CCGDFIVE PORTSMOUTH VA 251533Z AUG 11 (NOTAL)
B. COMDT COGARD WASHINGTON DC 252259Z AUG 11
C. TITLE 14 USC 712
D. CG MANPOWER MOBILIZATION AND SUPPORT PLAN, COMDTINST M3061.1
E. CG PAY MANUAL, COMDTINST M7220.29A (SERIES)
F. ATLANTIC AREA CONTINGENCY OPLAN 9700-06
G. ALCOAST 381/07 CHANGES TO RESERVE MOBILIZATION POLICY
H. ALCOAST 321/09 REVIEW OF AUTHORITIES FOR UTILIZATION OF RESERVISTS
I. ALCOAST 591/09 CHANGE IN TDY AUGMENTATION AND SURGE STAFFING PROCEDURES
1. PER REF B AND IAW REF C, LANTAREA AUTHORIZES THE FOLLOWING DISTRICTS TO
INVOLUNTARILY RECALL SELRES MEMBERS FOR UP TO 60 DAYS:
DISTRICT ONE - 150
DISTRICT FIVE - 150
DISTRICT EIGHT - 50
NOTE: DISTRICTS SHALL USE THIER ALLOCATION TO SUPPORT THE MOBILIZATION OF SELRES
MEMBERS ASSIGNED TO DCMS UNITS IN THEIR AOR.
2. REPORT THE NUMBER OF RESERVISTS BEING INVOLUNTARILY RECALLED TO LANT-1 FOR CAP
MANAGEMENT IAW DAILY SITREP REPORTING REQUIREMENTS, AND ENSURE TRACKING IN MRTT.
3. SELRES MEMBERS CURRENTLY MOBILIZED FOR OCO (FORMERLY OIF/OEF) SHALL NOT BE DEPLOYED
UNLESS THEIR ORIGINAL ORDERS ARE CANCELLED AND NEW ONES ISSUED UNDER THIS CONTINGENCY.
4. T14 DWELL: IF POSSIBLE, AVOID MOBILIZING SELRES MEMBERS WHO HAVE
BEEN DEPLOYED ON T14 IN THE LAST 24 MONTHS.
5. ACCOUNTING DATA, COST CENTER, AND ORDER NOTES FROM REF B AND E APPLY. RESERVE
ORDERS ISSUED IN DIRECT ACCESS SHOULD UTILIZE THE APPROPRIATE AUTHORITY NOTED ON THE
CONTINGENCY TAB AND MUST CITE REF B IN THE ORDER NOTES. ENTITLEMENTS FOR RESERVISTS
RECALLED UNDER 14 USC 712 SHALL BE IN ACCORDANCE WITH REF E AND OTHER FORTHCOMING
SPECIFIC GUIDANCE.
6. PERSONNEL RESOURCES REQUIREMENTS THAT CAN NOT BE SOURCED FROM WITHIN THE DISTRICT
SHOULD BE FORWARDED IN RFF FORMAT VIA RECORD MSG TRAFFIC TO (appropriate AREA office).
7. POCS: (enter POCs)
8. MINIMIZE CONSIDERED.
BT
NNNN
```

Continued on the next page

11.B.2 TITLE 14 Activation/Mobilization Checklist, continued

Exhibit 2 – Sample Select and Direct message from District (dxr) to Sector:

```
P XXXXXXZ MMM YY
FM CCGD (Impacted District requiring activation authority)//DXR//
TO COMCOGARD SECTOR (Name of Sector)//SLA/SPO/SXR//
INFO (List as many message addresses as necessary)
COMCOGARD PSC ARLINGTON VA//PSD-SSB/RPM-3//
COMDT COGARD WASHINGTON DC//CG-311/CG-5//
COMLANTAREA COGARD PORTSMOUTH VA//LANT-1/LANT-IMT/LANT-30-CC//
COMPACAREA COGARD ALAMEDA CA//PAC-51//
SUBJ: TITLE 14 USC 712 RSV ACTIVATION ISO (Name of Event)
A. RESERVE POLICY MANUAL, COMDTINST M1001.28A (SERIES)
B. PAY AND PERSONNEL PROCEDURES MANUAL, PSCINST M1000.2
C. MEDICAL MANUAL, COMDTINST M6000.1C
D. JOINT FEDERAL TRAVEL REGULATIONS (JTFR)
E. ALCOAST (List ALCOAST).
F. TITLE 14 USC 712, INVOLUNTARY RECALL OF RESERVISTS
G. COMDT COGARD WASHINGTON DC XXXXXXX XXX XX
(List all Activation Authorization messages)
1. PER REF A-F ISSUE TDY/TITLE 14 USC 712 ORDERS ISO (Name of Event) FOR THE FOLLOWING
RESERVE MBR(S) TO REPORT TO THE CG IN-PROCESSING FOR CHECK-IN FOR ASSIGNMENT AS
XXXXXXXXXXXXXXXXX.
RATE/NAME        COMP    EMPLID    PERM UNIT   TONO  BEGIN DT END DATE URI/RTN
-----------------------------------------------------------------------
                                 RES     XXXXXXX      XXXXXXXX    XXX   XXXXXX
XXXXXXX
-----------------------------------------------------------------------
MBR(S) TO REPORT ON XXXXXX.
----------------------------
1.A. MBRS UNIT IS RESPONSIBLE FOR NOTIFYING MBRS OF PENDING ORDERS WITHIN 24 HOURS OF
RECEIPT OF THIS MESSAGE. UNITS SHALL NOTIFY DISTRICT DXR OF NOTIFICATION DATE OR IF
UNABLE TO CONTACT MBR NLT 48 HOURS FROM DTG OF THIS MESSAGE.
1.B. THIS MESSAGE CONSTITUTES OFFICIAL NOTIFICATION THAT PERSONNEL LISTED IN PARAGRAPH
1 HAVE BEEN IDENTIFIED TO BE MOBILIZED UNDER TITLE 14 USC ISO (Name of Event).
RESERVISTS WILL NOT TRAVEL W/O DA ORDERS IN HAND AND ARE REQUIRED TO PROVIDE A COPY OF
THEIR ACTIVATION MESSAGE UPON CHECK-IN.
1.C. PERIOD OF ORDERS IS 60 DAYS TO INCLUDE TRAVEL TO/FM DUTY LOCATION, MBRS SHALL NOT
EXCEED 60 DAYS OF T14 DUTY IN A FOUR MONTH PERIOD. DEACTIVATION DATE OF MBR IS SUBJECT
TO CHANGE BASED UPON OPERATIONAL REQUIREMENTS. MBRS MAY BE RELEASED EARLY.
2. USE THE FOLLOWING FOR COMPLETING TDY ORDERS:
2.A. TONO AND ACCOUNTING DATA FOR TRAVEL AND PER DIEM COSTS INCURRED BY MBR DURING THE
EXECUTION OF THESE ORDERS.
-------------------------------------------------------------------
      TONO: XXXXXXXXXX-000
      ACCT DATA: 2/X/XX/XXX/XX/0/XXXXXX/XXXXX/XXXX
-------------------------------------------------------------------
2.B. MEMBER IS ENTITLED TO THE FOLLOWING TRAVEL ENTITLEMENTS:
2.B.1. QUARTERS:
2.B.2. MESSING:
2.B.3. MODE OF TRAVEL:
2.B.4. LOCAL TRAVEL:
2.B.5. RENTAL CAR:
2.B.6. AUTHORIZED REIMBURSEMENT OF ATM FEES (GOVT TVL CARD ONLY).
2.B.7. EXCESSES BAGGAGE FEES:
2.B.8 GOVT TRAVEL CARD IS THE PREFERRED METHOD FOR PURCHASING AIR TRAVEL. TONO SHOULD
ONLY BE USED IF MBR IS W/OUT GOVT CARD.
```

Continued on the next page

11.B.2 TITLE 14 Activation/Mobilization Checklist, continued

Exhibit 2 – Sample Message from District (dxr) to Sector with Select and Direct message, continued

```
3.B. SPO YN ARE REMINDED TO PLACE TONO AND ACCT DATA IN THE BEGINNING OF ORDER NOTE
RS4 WITH AN ESTIMATED COST.
3.D. USE ORDER NOTE Y22 AND ENTER THE FOLLOWING TDY SPECIFIC INFO.
    (1) MBR ASSIGNED TO MRTT URI/RTN (ENTER URI/RTN FRM PARA 1).
    (2) CONUS MBR IS AUTH 01 DAY TRAVEL FM HOME TO MOBILZATION SITE.
        OCONUS MBR IS AUTH 02 DAYS TRAVEL FRM HOME TO MOBILIZATION SITE.
    (3) ORDERS SHALL BE ISSUED FOR A DURATION OF 60 DAYS NOT TO BE
        EXCEEDED FOR ANY REASON. MBRS MAY BE RELEASED PRIOR TO 60 DAYS
        IF OPERATIONS DICTATE.
    (4) DUTY TO BE PERFORMED AT VARIOUS LOCATIONS IN SUPPORT OF
        (Name of Event)
   4. RESERVE MBR SPECIFIC: BEFORE ISSUING TITLE 14 ORDERS, ORIGINATING COMMANDS ARE
RESPONSIBLE TO:
4.A. PER REF E AND F, ENSURE PERIOD OF ACTIVATION FOR ANY RESERVIST DOES NOT EXCEED 60
DAYS PER SET OF ORDERS OR 120 DAYS (UNDER 14 USC 712) IN ANY TWO YEAR PERIOD. REF E,
REQUIRES RESERVE MEMBERS TO BE GIVEN 48 HOUR ADVANCED NOTIFICATION FOR INVOLUNTARY
RECALL.
4.B. VERIFY RESERVIST'S TOTAL ACTIVE SERVICE FROM ALL SOURCES OF ACTIVE DUTY (I.E.
EAD, ADT, ADOS-AC, ADOS-RC). IF MBR WILL ACCRUE 16 OR MORE YEARS OF ACTIVE DUTY UPON
COMPLETION OF SUBJ ORDERS, REQUESTING UNIT MUST OBTAIN APPROVAL PER REF A AND E, PRIOR
TO ISSUANCE OF ORDERS.
4.C. MEDICAL:
      (1) IAW REF (J), RESERVISTS MUST ENSURE THEY ARE GREEN IN COAST GUARD BUSINESS
INTELLIGENCE (CGBI) FOR THEIR INDIVIDUAL MEDICAL READINESS. LOCAL VERIFICATION THAT
MEMBER MEETS MEDICAL READINESS STANDARDS PRIOR TO MOBILIZATION IS REQUIRED. IF THE MBR
EXCEEDS MAW (MAXIMUM ALLOWABLE WEIGHT) OR IS CLASSIFIED WITH A DENTAL CLASS OF 3 OR 4,
THEY WILL NOT BE MOBILIZED. IF A RESERVIST IS FOUND AFLD WITHIN THE FIRST 30 DAYS OF
ACTIVE DUTY, CONTACT ARL-SG-CGPSC-RPM-3(AT)USCG.MIL FOR GUIDANCE ON IMMEDIATE RELAD.
      (2) IF A RESERVIST IS FOUND AFLD AFTER BEING ON ACTIVE DUTY 31 DAYS OR MORE,
CHAPTER 6 OF REF B APPLIES.
4.D. RESERVISTS ARE REMINDED TO NOTIFY THEIR EMPLOYER, PREFERABLY IN WRITING, THAT
THEY HAVE BEEN CALLED TO ACTIVE DUTY.
4.E. RESERVISTS WITH DEPENDENTS SHOULD CONTACT THEIR SERVICING SPO TO ENSURE THEIR
FAMILY MBRS ARE REGISTERED IN DEERS AND TO OBTAIN APPROPRIATE MILITARY IDENTIFICATION
CARDS.
10. POCS: XXX XXXX XXXX
BT
NNNN
```

Continued on the next page

11.B.2 TITLE 14 Activation/Mobilization Checklist, continued

11.B.2.2 Introduction

This checklist is designed to be used by the unit SERA and/or supervisor to provide counseling/guidance to the SELRES prior to mobilization. The individual readiness completion dates can be verified through CGBI.

11.B.2.3 Reference

Senior Enlisted Reserve Advisor Program, COMDITINST 1306.3

Step	Action	Supervisor/ SERA Initials	Date
1	Verifies Individual Readiness and date completed in CGBI: • Physical Health Assessment (PHA) _____ • Immunizations _____ • Individual medical equipment _____ • Medical readiness labs _____ • Dental _____ • Weight _____ • Deployment Limiting Medical Condition (DLMC) _____ • Annual Screening Questionnaire (ASQ) _____ • Mandated Training (MT) _____		
2	Verifies: • Family plan • Power of Attorney (as needed) • Mutual Assistance • Financial accountability (automatic bill pay) • Any logistical issues with regard to activation		
3	Verifies the SELRES has a GTCC. Ensure the credit limit is increased to an appropriate level with current pin.		
4	Ensures SELRES Common Access Card (CAC) with current certificates and passcode.		
5	Counsels SELRES on HSWL Worklife resources.		
6	Counsels SELRES regarding medical benefits and privileges, and dependent ID card authorization.		

Continued on the next page

11.B.2 TITLE 14 Activation/Mobilization Checklist, continued

11.B.2.3 Introduction

This checklist is designed to be used by the Administrative and Servicing Personnel Offices (SPO) to administratively activate and mobilize SELRES.

Step	Action	ADMIN/SPO Initials	Date
1	Verifies military enlistment obligation: • Prepares enlistment contract as necessary • Informs SELRES to update ID card with newly obligated service		
2	Ensures all dependent information is current; including all required documentation for the PDR: • Birth Certificates • Marriage Certificate/Divorce Decree • Social Security Card • SGLI • Family SGLI • CG-2020D		
3	Verifies personal and recall information in DA.		
4	Assists SELRES with GTCC application or travel advances.		
5	Increased limit for GTCC for SELRES.		
6	Ensures SELRES has active Web TPAX account with primary and secondary passwords.		
7	Ensures SELRES reports to local DEERS site to update active duty status and dependent ID cards for orders 30 days or more.		
8	Prepares and sends letter to SELRES civilian employer regarding mobilization (see 11.A.7 of this manual).		
9	Assists SELRES in making travel arrangements to activation site via SATO.		
10	Prepares Reserve Orders in DA and sends to District (dxr) for approval.		
11	Provides original approved Reserve Orders to SELRES.		

Continued on next page

11.B.3 Title 14 Mobilization Entitlements

11.B.3.1 Introduction

In this section policy clarification concerning entitlements for recalled reserve personnel will be outlined. Ensure recalled reserve personnel receive all compensation authorized under law or regulation under the terms of their orders.

11.B.3.2 PDS and PCS clarification

Reservists recalled to AD under involuntary recall orders in accordance with Title 14 U.S.C., Section 712 will not be ordered to a new Permanent Duty Station (PDS).

Reservists who volunteer to serve on Title 10 U.S.C. Section 12301 (d) ADOS-AC orders for a duration of no more than 180 days will not be ordered to a new Permanent Duty Station (PDS).

This distinction precludes the issuance of Permanent Change of Station (PCS) entitlements and is the foundation for the pay and allowance entitlements cited in this section. Separate Title 14 and Title 10 ADOS-AC orders, even if performed consecutively with no break in service will not constitute a PCS entitlement.

11.B.3.3 Travel entitlements

In accordance with Title 14 U.S.C., Section 712 (as amended by Coast Guard and Maritime Transportation Act Of 2006 (P.L. 109-241 Of July 11, 2006)), reservists may be involuntarily ordered to active duty for up to 60 days and are authorized travel allowances. This **involuntary** order is considered temporary duty (TDY) orders and must reflect the availability of government quarters and messing. Government quarters and messing shall be used to the maximum extent possible.

Title 10 U.S.C. Section 12301(d) ADOS-AC orders are considered TDY type orders and must reflect the availability of government quarters and messing. Government quarters and messing shall be used to the maximum extent possible.

****Note:** For travel purposes, consecutive Title 14 orders and Title 10 12301 (d) ADOS-AC orders are treated as separate travel/TDY periods. Therefore, each order authorizes the member one round-trip travel to home.

Continued on the next page

11.B.3 Title 14 Mobilization Entitlements, continued

11.B.3.4 Per diem Authority

Reservists **involuntarily** recalled to Title 14 orders for up to 60 days, or serve on ADOS orders under Title 10 U.S.C. 12301(d) for a duration of no more than 180 days, whose principal place of residence is not within commuting distance of the AD site, are entitled to applicable travel/per diem allowances for the entire period. Absent a determination from local order-issuing authorities, a one-way reasonable commuting distance is considered 50 miles/one hour within their Area of Responsibility (AOR). Areas within a reasonable commuting distance are described in par. U2800 of Joint Federal Travel Regulations (JFTR).

In any event, regardless of the distance actually traveled, a member who voluntarily commutes between home and duty location is not authorized per diem or daily travel allowances, even if their residence lies outside the local reasonable commute distance. Recalled reservists in the local travel area, residing outside the limits of the duty location, may be authorized per diem when their duties require them to remain away from their principal place of residence. One round trip mileage to/from their residence is authorized for the entire TDY period.

Members assigned to career sea pay eligible vessels are not authorized per diem.

11.B.3.5 Entitlements pay table

The table on the subsequent pages provides a list of pay entitlements for SELRES activated for Title 14 orders.

11.B.3.5 Entitlements pay table (continued)

Pay Entitlement	Rule/Note	Reference
Basic Pay	Basic Pay	PAYMAN Figure 2-1
Officer Basic Allowance for Subsistence (BAS)	OFF BAS	PAYMAN Section 3-A-2
Enlisted Basic Allowance for Subsistence (BAS)	Ashore unit:	
	ENL BAS No government dining facility available	PAYMAN Section 3-A-3
	ENL BAS minus Discount Meal Rate (ESM or EUM)	PAYMAN Section 3-A-4
	Afloat unit with an established dining facility:	
	ENL BAS minus DISCOUNT MEAL RATE (ESM)	PAYMAN Section 3-B-5-b
Basic Allowance For Housing (BAH) Basic Allowance For Housing – Reserve Component (BAH-RC) Overseas Housing Allowance (OHA)	Member is entitled to BAH-RC when ordered to AD for 30 days or less for the respective pay grade and dependency status. Member is entitled to **Locality-Based BAH** (based upon the members residence) or Overseas Housing Allowance (OHA) (if outside the united states) when ordered to AD for 31 days or more for the respective pay grade and dependency status. **BAH is based upon the principal place of residence from which recalled in all circumstances.** **Orders shall not be amended, extended, combined, or changed from BAH-RC to Locality-Based BAH for the purpose of entitlement that was not previously approved**. All original orders must be completed. If the reserve member requests an extension on active duty, a new set of orders shall be issued with the reflected start and finish dates. If the orders are terminated prior to the original end date, an amendment must be completed to indicate the new actual end date.	PAYMAN Section 3-B-9 Figure 3-9 Figure 3-21 ALCOAST 462/06
Cost of Living Allowance in CONUS (CONUS COLA).	**CONUS COLA is not authorized for Title 14 orders.** Reservists volunteering to serve on T-10 ADOS-AC orders for 140 or more days are entitled to CONUS COLA. See JFTR, para **U8038,** for entitlement to CCOLA for Reserve Component members on active duty.	JFTR Para U8038
Overseas Cost of Living Allowance (OUTCONUS COLA)	OUTCONUS COLA is only payable when ordered to active duty from an OUTCONUS residence for 31 days or more. The OUTCONUS COLA rate will be based on the location of the member's **primary residence**.	JFTR Para U9145

Continued on next page

11.B.3.5 Entitlements pay table (continued)

Pay Entitlement	Rule/Note	Reference
Overseas Housing Allowance (OHA)	OHA is only payable when ordered to active duty from an OUTCONUS residence for 31 days or more. The OHA rate payable will be based on the location of the member's primary residence.	JFTR Para U10428
Family Separation Allowance (FSA)	**Member with dependents**. FSA is authorized when the member with dependents is away from home for 30 continuous days without family visits at the onset of the mobilization. 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.H
Family Supplemental Subsistence Allowance (FSSA)	Recalled reservists may be eligible for FSSA.	PAYMAN Section 3-M
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 CG-131 for guidance.	
Enlisted Clothing Maintenance Allowance	Enlisted reservists are entitled to Basic Maintenance Allowance (BMA) or Standard Maintenance Allowance (SMA) for orders of 30 or more days duration. RBMA/RSMA for orders less than 30 days duration.	PAYMAN Section 3.J.7 Figure 3-28
Civilian Clothing Monetary Allowance	Authorized for enlisted members who are REQUIRED to wear civilian clothing. All requests must be submitted to CG-1222 via Civilian Clothing Allowance Worksheet (CG-5150)	PAYMAN Section 3.J.5
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.	PAYMAN Section 3.K
Hardship Duty Pay for Location (HDP-L)	If mobilized to a designated Hardship Duty Location for over 30 consecutive days.	PAYMAN Section 4.A Figure 4-1
Career Sea Pay (CSEAPAY)	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level-1 rate or the Level-3 rate if operating in-theater.	PAYMAN Section 3.B.8 Figure 4-2
Diving Duty Pay	When assigned by orders to diving duty.	PAYMAN Figure 4-6
Special Duty Assignment Pay (SDAP) Enlisted	If ordered to duties which qualify for SDAP. Orders must state entitlement to SDAP.	PAYMAN Section 4-I COMDTINST 1430.1P

Continued on next page

11.B.3.5 Entitlements pay table (continued)

Pay Entitlement	Rule/Note	Reference
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.)	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.	PAYMAN Section 5-C
Leave	Leave is only earned for active duty periods of 30 or more consecutive days. In instances where the AD period is extended by changing the type of orders all members who serve a combined consecutive period of 30 days or more, accrue 2.5 days of leave per month of active duty. If earned leave is not taken while on AD orders, the leave may be saved and be used when on active duty orders greater than 30 days. Leave accrued under orders of 365 days or less are not subject to the 60 day career limitation on sale of leave. Members completing Title 14 recall orders and **immediately** continuing on AD under another order for 30 or more days may carry unused leave over into the new active duty period.	PAYMAN Article 7.I ALCOAST 449/05 ALCOAST 462/06 ALCOAST 519/11
Servicemembers' Group Life Insurance (SGLI)	All reservists recalled to active duty under Title 14 U.S.C. 712 are insured (if previously elected) under SGLI and Traumatic SGLI (TSGLI). Children are automatically covered under FSGLI-Child. When demobilized from duty under Title 14, members transitioning to IRR, without scheduled training, will no longer be eligible for SGLI, but will retain 120 days of coverage following demobilization, providing they do not decline coverage during or after their active duty period.	PAYMAN Section 6-A ALCOAST 462/06
FLPP Interpreter FLPP Linguist	Same allowances as Active duty component.	PAYMAN Section 4.K ALCOAST 585/05 ALCOAST 275/06
Thrift Savings Plan (TSP)	All members in a pay status may participate in the Thrift Savings Plan by completing form TSP-U-1 and mailing it to PPC (mas-tsp). To avoid an overpayment situation, reservists should ensure that sufficient funds are available in their pay account after TSP deductions to cover any outstanding garnishments or debts (such as SGLI).	PAYMAN Section 6-G ALCOAST 462/06 TSP Web site http://www.tsp.gov/

Continued on next page

11.B.3.5 Entitlements pay table (continued)

Pay Entitlement	Rule/Note	Reference
Defense Enrollment Eligibility Reporting System (DEERS) & ID Cards	All sponsors (active duty, retired, National Guard and Reserve) are automatically registered in DEERS. The sponsor must register eligible family members. Once registered, personal information such as addresses and phone numbers may be updated.	
Dependent ID Cards	Dependents must have an updated ID card if the sponsor is on orders greater than 30 days. Reserve and National Guard dependents will be issued ID cards up to 14-days prior to sponsor's active duty reporting date.	
TRICARE Reserve Select (TRS)	TRS premiums are suspended for members ordered to active duty for 31 days or more. Following demobilization, reserve members may purchase premium-based health insurance through TRS at a discounted cost. To enroll, a member must be in the SELRES and not eligible for Federal Employee Health Benefits (FEHB).	http://www.humana-military.com/library/pdf/trs.pdf
TRICARE Medical Benefits	Reservists ordered to active duty under Title 14 U.S.C. 712 or Title 10 U.S.C. Section 12301 (d) ADOS-AC orders for 31 days or more and their dependents are entitled to active duty TRICARE benefits and must be correctly enrolled in DEERS. SPOs issuing AD orders are responsible to ensure proper enrollment of dependents into DEERS via the nearest Uniformed Service RAPIDS terminal. Active duty under Title 14 or Title 10 ADOS in support of response to natural or man-made disasters does qualify as contingency orders for any post-active duty benefit purposes, such as Transitional Assistance Management Program (TAMP) benefits. Family members enrolled in TRICARE Prime during mobilization must re-enroll to continue benefits. The location and contact information for the nearest RAPIDS site can be found via the RAPIDS site located at https://www.dmdc.osd.mil/rsl Information for procedures to access medical care and TRICARE benefits can be found on the CG-11 webpage: http://www.uscg.mil/hq/cg1/cg112/cg1121/default.asp	

Continued on next page

11.B.3.5 Entitlements pay table (continued)

Pay Entitlement	Rule/Note	Reference
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. If previously enrolled in TDP before activation, members will be automatically re-enrolled upon deactivation/demobilization. Family members will remain enrolled in TDP, but the premium rate will increase to the reserve family member rate. Further information is available at 800-866-8499, or http://www.tricaredentalprogram.com/tdptws/home.jsp	PAYMAN Section 6-C ALCOAST 462/06 United Concordia Web Site @ http://www.ucci.com/ or United Concordia Customer Service @ 1-800-866-8499
Transitional Assistance Management Program (TAMP)	TAMP provides reservists and their dependents 180 days of transitional health care benefits upon completion of orders for contingency operations as defined by Title 10 U.S.C. 101(a)(13). The FY13 National Defense Authorization Act, Public Law 112-239 amended Title 10 U.S.C. 101(a)(13). By including mobilization of Coast Guard Reservists under 14 U.S.C. 712 for domestic contingencies.	FY13 National Defense Authorization Act, Public Law 112-239
Reserve Educational Assistance Program (REAP).	SELRES mobilized under Title 14 are not entitled to REAP benefits.	
GI Bill	SELRES mobilized under Title 14 are not entitled to the Post 9/11 GI Bill Educational Assistance program. SELRES who elect to remain on active duty under Title 10 ADOS-AC 12301(d) orders ***are*** eligible for Post 9/11 GI Bill Benefits.	

11.B.4 Preparation of Orders in Direct Access

Reference

(a) SPO Manual, Part VII Reserve Unique Transactions, Chapter 4 Reserve Active Duty Orders
(b) Obtaining Personnel Resources to Meet Surge Requirements COMDTINST 5400.1A
(c) Reserve Policy Manual, COMDTINST M1001.28 (series)
(d) ALCGPSC 161/12
(e) ALCGPSC 045/09

11.B.4.1 Introduction

This section provides the procedure for issuing a recall order under Title 14 U.S.C, Section 712, in Direct Access.

11.B.4.2 Verifying a Reservist's Prior Active Duty

CG-PSC-rpm has been delegated approval authority in accordance with ALCGPSC 161/12 for requests related to active duty beyond 16 and 18 years. Requests shall be submitted through the SELRES chain of command. Procedures are contained in ALCGPSC 045/09. A template, for the request, can be found on the Reserve Home Page at:

http://www.uscg.mil/rpm/rpm1/1618request.asp under Member Resources.

In accordance with the RPM 3-B-6b:

- Reservists shall not perform any type of active duty (except ADT-AT) if it will result in the member accumulating 16 years or more of combined active service, unless authorized by Commandant (CG-PSC-rpm).
- Reservists shall not perform any type of active duty (except ADT-AT) if it will result in the member accumulating 18 years or more but less than 20 years of combined active service, unless authorized by Commandant (CG-PSC-rpm).

In accordance with the RPM 8-B-4:

- Reservists shall not recalled to Active Duty under Title 14 or Title 10 12301 (d) ADOS-AC orders if it will result in the member accruing over 30 years total service, unless the member currently has a 30 year waiver letter or is authorized by Commandant (CG-PSC-rpm)

Years of combined active service are calculated in accordance with Appendix (C) to the Personnel and Pay Procedures Manual, PPCINST M1000.2 (series).

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

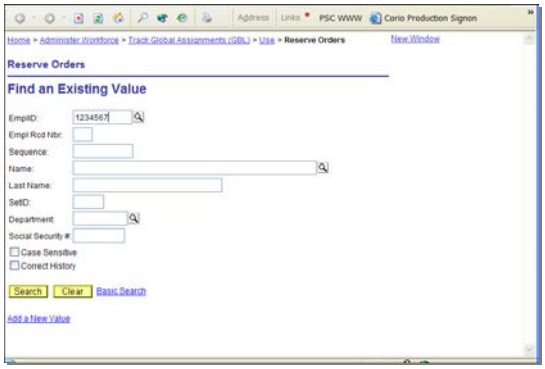
11.B.4.3 Travel and Per Diem Accounting Data

You do not have to use the TONO Accounting Data button to add Document ID numbers and Accounting Data for travel for Reserve Orders. You may enter the travel accounting string and document ID in the order notes (see, step 14 in the following procedure) along with an estimate of the total travel & per diem costs. This information is necessary in order to create a matching obligation in Finance and Procurement Desktop (FPD). Provide a copy of the orders to the funds manager.

****Note:** If issuing a Title 10 12301 (d) ADOS-AC order for voluntary continuance on active duty, **you must** enter the Document IDs and accounting data strings for pay & allowances and FICA using the TONO Accounting Data button.

11.B.4.4 Procedure

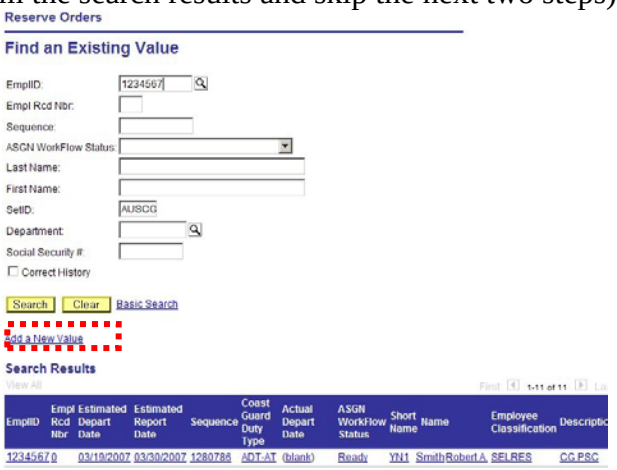
Follow these steps to create a new Reserve Order.

Step	Action
1	Log into the DA and select the following menu items: Administer Workforce > Track Global Assignments (GBL) > Use > **Reserve Orders** ****Note:** Reserve Orders can also be accessed using the Manage Reserve Member activity guide: Administer Workforce > Track Global Assignments (GBL) > Use > **Manage Reserve Member** Select the "*View/Complete Order Info*" link at the bottom of the activity guide page to go to the Reserve Orders Search record.
2	The Reserve Orders Search record will be displayed.  Enter the member's employee ID number in the EmplID field and select the Search button.

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

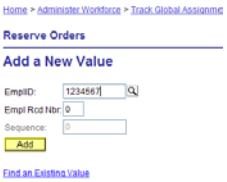
11.B.4.4 Procedure (continued)

Step	Action
3	Review the search results to ensure a new order has not already been started (if one exists, select it from the search results and skip the next two steps).  <u>Search Results Fields:</u> EmplID ..... Employee ID Number Empl Rcd Nbr..... Record Number Estimated Depart Date..... Order start date Estimated Report Date..... Order end date Sequence ..... System Identifier Coast Guard Duty Type ..... Type of duty (ADT-AT, ADOS-AC, etc.) Actual Depart Date..... Order start date (as endorsed by SPO) ASGN WorkFlow Status:..... See *About Orders' Status* below Short Name ..... Rate/Rank Name ..... Member's name (Last,First MI) Employee Classification ..... Member's status Description..... Department the Orders are designated to be performed at <u>About Orders' Status:</u> As Reserve Orders are created and processed the status will change from <u>Proposed</u> to <u>Ready</u> to <u>Enroute</u> and finally <u>Finished</u>. Proposed – Orders are in a request status. Ready – Orders have been District/COMDT approved and assigned a TONO. Enroute – The Actual Reporting and Departing Dates have been completed. Finished – Long-Term: Orders are complete. A RELAD document will trigger a Finish for orders ADT over 139 days or ADOT over 180 days. Short-Term: Order Status on Short-term orders to will always be 'Finished' when Approved and Actual dates entered. Cancelled – Orders were cancelled, no further action is possible.
4	Select the "**Add a New Value**" link to continue.

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

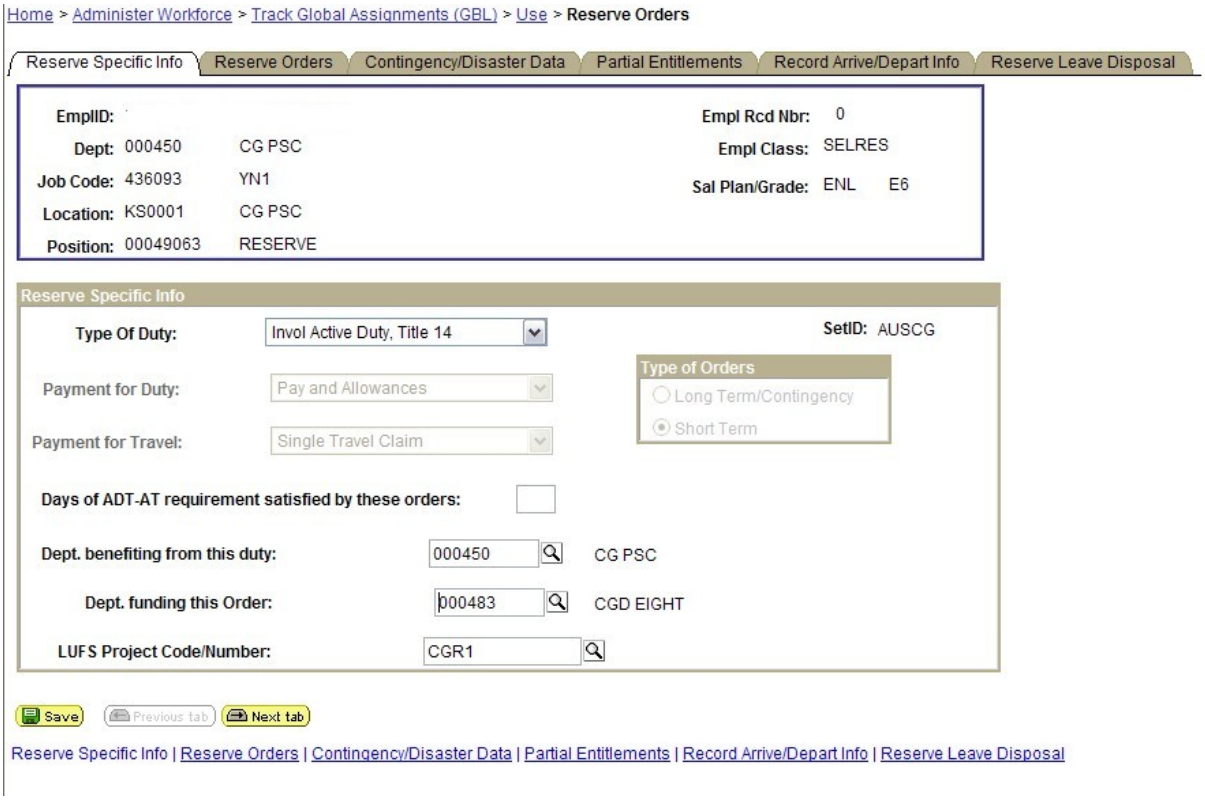
11.B.4.5 Procedure (continued)

Step	Action
5	The 'Add a New Value' page will display.  Enter the member's employee ID number in the EmplID field and Select the Add button.
6	Complete the **Reserve Specific Info** tab by selecting the appropriate entries for the following fields: **Field** — **Enter/Select** Type of Duty — Invol Active Duty, Title 14 Dept benefiting from this duty — This field defaults to the member's current reserve duty site. Depending on the situation, reporting personnel may be reassigned to a different duty station <u>after going on Active Duty at their IDT site</u>. Separate TDY orders can be used for this purpose. Add an "Order Note" (remark) with the name and location of the unit the member will be performing TDY at. Travel and Per Diem computations should be based on the TDY local, not the IDT drill site. Dept. funding this Order — This field defaults to the member's current District. There is no need to change as unique accounting data is auto-generated, by the system, for this type of order FPD Project Code Number — This field defaults to "CGR1." There is no need to change. The **Payment for Duty**, **Payment for Travel** and **Type of Orders** fields are set by the system when the *Invol Active Duty, Title 14* type of duty is selected. These fields cannot be changed. The Type of Orders is set to short-term. Short term orders are self-terminating; no separation transaction is required upon demobilization. However, leave must be disposed of. See the Demobilization section for more information. See Exhibit 1, on the next page, for an example of the completed tab.

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

Exhibit 3 – Reserve Specific Info Tab completed for Title 14 Recall Order:



Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

11.B.4.5 Procedure (continued)

Step	Action
7	Access the **Reserve Orders** tab (by selecting the tab title or the link at the bottom of the page). Complete the following items in the **Basic Information** section:

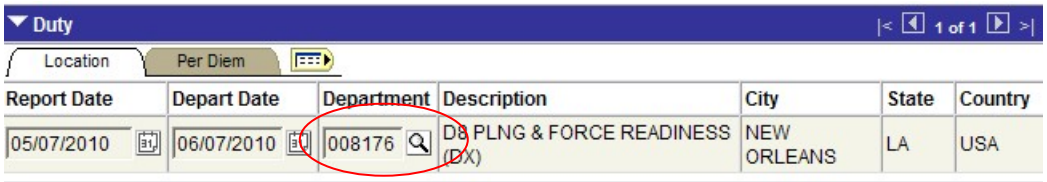
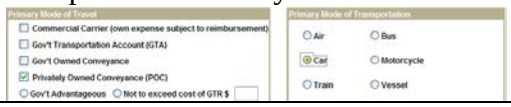
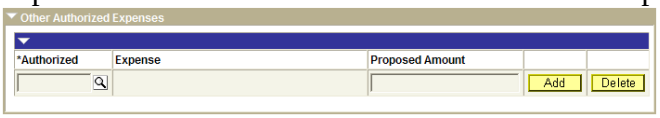
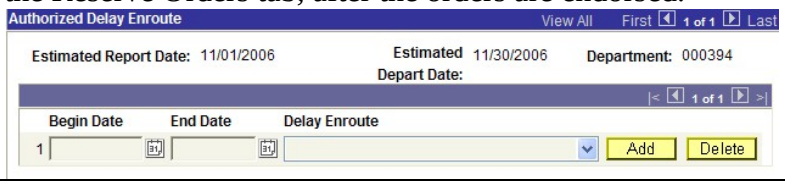
Field	Enter/Select
Purpose	"MC" for MEP Contin (short title)/Environmental Contingency (long title) or select the lookup button to search for and select the MC code.
Order Begin Dt	If any travel time of more than 24 hours is authorized, this is the date member departs home enroute to duty site. Otherwise, it is the date (NLT 2400 Hrs.) the member is scheduled to report for duty.
Order End Dt	Last day of Active Duty under this order, include any authorized travel time of more than 24 hours
Authority (REF)	The MRTT-RTN (The MRTT-RTN will be a nine digit number (e.g., 15336-0030).
Authorizing Official	Name, Rate/Rank and service of the authorizing official.
Gov't Credit Card Holder	Mark the checkbox **as applicable**
Is Travel Authorized for These Orders?	Mark the checkbox **as applicable**

Exhibit 4 – Reserve Orders Tab, Basic Information Section Completed for Title 14 recall order:

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

11.B.4.5 Procedure (continued)

Step	Action
8	Complete this step only if the member will not be reporting to their home unit (See instructions for "Dept benefiting from this duty" in step 6). Enter the Department ID number of the unit the member will be reporting to in the **Department** field of the **Duty-Location** section of the Reserve Orders tab.  Duty 1 of 1 Location Per Diem Report Date: 05/07/2010 Depart Date: 06/07/2010 Department: 008176 Description: D8 PLNG & FORCE READINESS (DX) City: NEW ORLEANS State: LA Country: USA **Note:** This will not create a PCS transaction; the member will remain assigned to their home unit. These are short-term active duty orders.
**Note	Do not complete the **Per Diem** tab in the Duty section of the orders. Per diem, messing & lodging information shall be entered in the order notes or on separate TDY orders. Ensure the travel accounting string and document ID appear in the order notes (see step 14) along with an estimate of the total travel & per diem costs. This information is necessary in order to create a matching obligation in FPD. Provide a copy of the orders to the funds manager.
9	Complete the Primary Mode of Travel and Primary Mode of Transportation sections  Primary Mode of Travel: Commercial Carrier (own expense subject to reimbursement); Gov't Transportation Account (GTA); Gov't Owned Conveyance; Privately Owned Conveyance (POC); Gov't Advantageous; Not to exceed cost of GTR $ Primary Mode of Transportation: Air; Bus; Car; Motorcycle; Train; Vessel
**Note	Do not make any entries in **Other Authorized Expenses** section. Reimbursable expenses shall be listed in the order notes or on separate TDY orders.  Other Authorized Expenses *Authorized Expense Proposed Amount Add Delete Ensure the travel accounting string and document ID appear in the order notes (see step 14) along with an estimate of the total travel & per diem costs. This information is necessary in order to create a matching obligation in FPD. Provide a copy of the orders to the funds manager.
**Note	The **Authorized Delay Enroute** section shall be left blank. This information is entered on the **Record Arrive/Depart Info** tab, by the SPO, and appears here on the Reserve Orders tab, after the orders are endorsed.  Authorized Delay Enroute View All First 1 of 1 Last Estimated Report Date: 11/01/2006 Estimated Depart Date: 11/30/2006 Department: 000394 1 of 1 Begin Date End Date Delay Enroute 1 Add Delete

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

11.B.4.5 Procedure (continued)

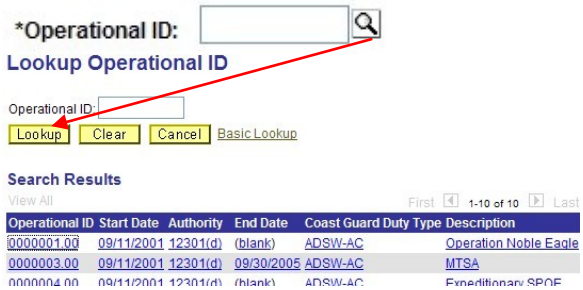
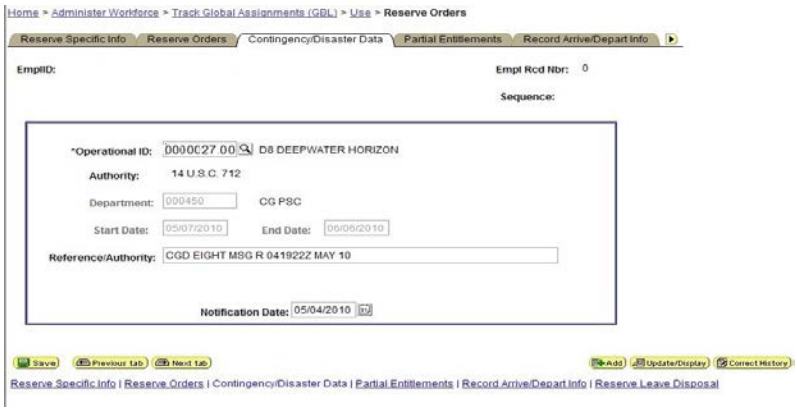
Step	Action
10	Access the Contingency/Disaster Data tab (by selecting the tab label or using the Contingency/Disaster Data link at the bottom of the page).
11	Enter the Operational ID number for this operation (be sure to select the ID that matches the order type in the "Coast Guard Duty Type" column. It is extremely important that the correct Operational ID number is entered to reduce any potential conflicts for future Active Duty service under Title 14, Title 10 or ADOS-AC orders. 
12	Enter the reference/authority (message-originator & Date Time Group (DTG), memo-originator & date/SSIC, telephone conversation-names & date) for the recall in the Reference/Authority field. Reference/Authority:
13	Enter the date the member was notified of this recall, regardless of what method was used. The notification date should be before the start date and **cannot** be after the start date. Notification Date:

Exhibit 5 – Contingency/Disaster Tab Completed for Title 14 recall order:

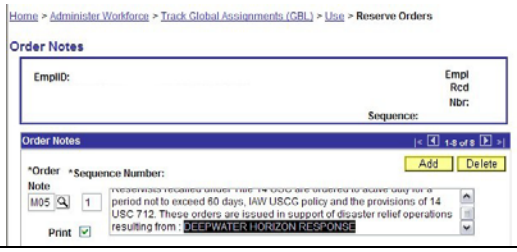
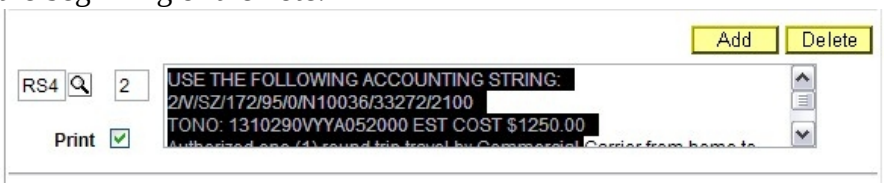


Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

11.B.4.5 Procedure (continued)

Step	Action
14	Return to the Reserve Orders tab (by selecting the tab title or the link at the bottom of the page) and scroll to the bottom of the page. Select the Order Notes button.
15	Default notes are added by the system. Review and edit the default entries.

Note ID	Action
M05	Enter the name of operation (e.g. *"Hurricane X Response"*) in the last line of the note. If applicable, enter the duty station/location if other than the member's normal drill site. 
RS4	Add the travel accounting string, document ID and estimated cost at the beginning of the note.  Edit the travel mode/cost information, remove non-applicable portions of the paragraph. Authorized one (1) round trip travel by Privately Owned Conveyance (POC) from home to place of duty (___ miles). [Not to exceed the cost of a GTR ($_____) **or** Travel by POC is more advantageous to the government.] Travel day is 00/00/00. - **OR** - Authorized one (1) round trip travel by Commercial Carrier from home to place of duty, subject to reimbursement, not to exceed the cost of a GTR ($_____). Travel day is 00/00/00.
RS0	Edit eligibility/readiness compliance and provide exam and screening dates and security clearance information. Eligibility / Readiness Requirements [have / have NOT] been met. Physical Exam: 00/00/00 Dental Exam: 00/00/00 Annual Screening Questionnaire: 00/00/00 Current Security Clearance / Date: [None, Classified, Secret, Top Secret]

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

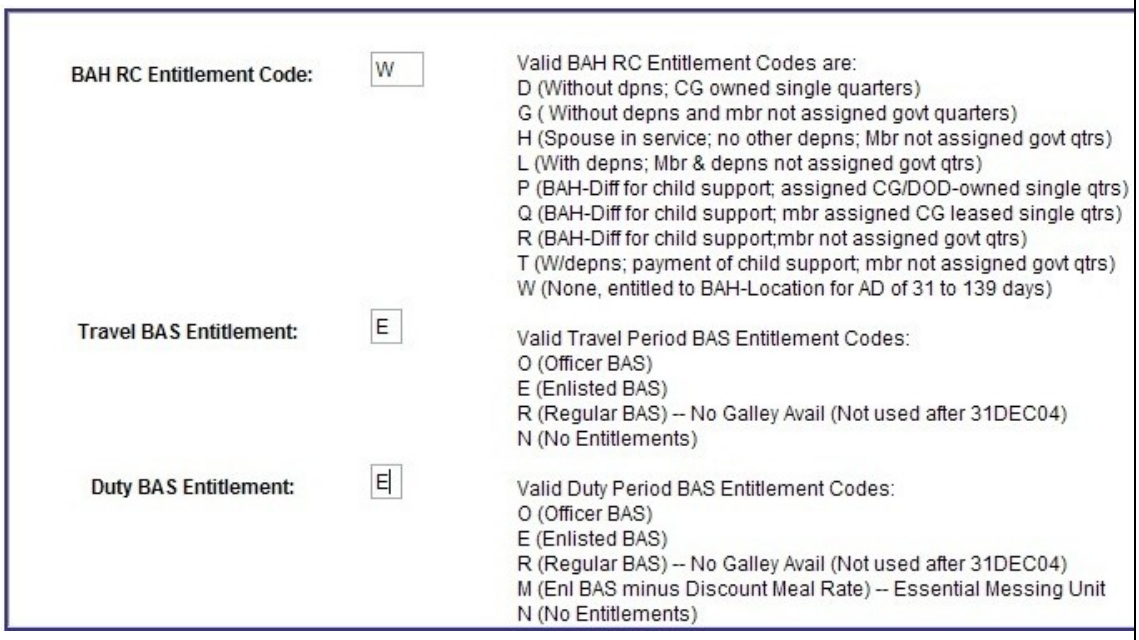
11.B.4.5 Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>15
(cont'd)</td><td>Default notes are added by the system. Review and edit the default entries.
<table>
<tr><th>Note ID</th><th>Action</th></tr>
<tr><td>RS6</td><td>Enter BAH code, availability of government quarters and messing and per diem authorization/rates.
BAH Code: [type, i.e. L, G, H, D]
Quarters / Messing: [Available / Not Available]
Per Diem: [Authorized / Not Authorized] [Lodging/M&IE Rates]</td></tr>
</table>
Example: Add order note DW1
<table>
<tr><th>Note ID</th><th>Description</th></tr>
<tr><td>DW1</td><td>All personnel 24 hours or less from arrival at Crowne Plaza New Orleans, shall call the duty YN at 555-222-1212 between the hours of 0700 and 2000 Central Daylight Time to provide an ETA to Central Staging.</td></tr>
</table>
Review any other default notes and edit if necessary.</td></tr>
<tr><td>16</td><td>Select the OK button to return to the Reserve Orders tab.</td></tr>
<tr><td>17</td><td>Access the Partial Entitlements tab by selecting the tab title or the link at the bottom of the page.</td></tr>
</table>

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

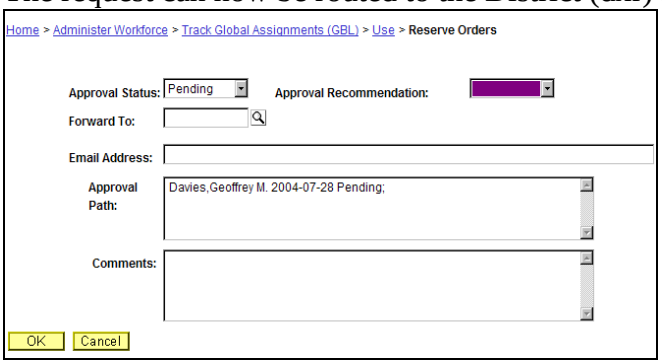
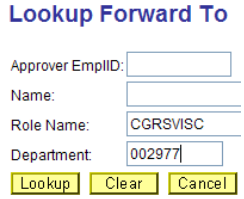
11.B.4.5 Procedure (continued)

Step	Action
18	Enter the member's BAH-RC and BAS entitlements on the Partial Entitlements tab. • BAS entitlements for reservists on short term active duty are started using the **Partial Entitlements tab** on the reserve orders page. • BAH-RC entitlements for reservists on active duty for 30 or less days are started using the **Partial Entitlements tab** on the reserve orders page. • BAH/OHA entitlements for reservists on active duty for 31 or more days are started, by the SPO, using the Employee Entitlements module (Home > Compensate Employees > Use > Maintain Entitlements), after the orders are approved and endorsed. Enter BAH-RC code "**W**" on the Partial Entitlements tab to denote entitlement to BAH/OHA.  BAH RC Entitlement Code: W Valid BAH RC Entitlement Codes are: D (Without dpns; CG owned single quarters) G (Without depns and mbr not assigned govt quarters) H (Spouse in service; no other depns; Mbr not assigned govt qtrs) L (With depns; Mbr & depns not assigned govt qtrs) P (BAH-Diff for child support; assigned CG/DOD-owned single qtrs) Q (BAH-Diff for child support; mbr assigned CG leased single qtrs) R (BAH-Diff for child support;mbr not assigned govt qtrs) T (W/depns; payment of child support; mbr not assigned govt qtrs) W (None, entitled to BAH-Location for AD of 31 to 139 days) Travel BAS Entitlement: E Valid Travel Period BAS Entitlement Codes: O (Officer BAS) E (Enlisted BAS) R (Regular BAS) -- No Galley Avail (Not used after 31DEC04) N (No Entitlements) Duty BAS Entitlement: E Valid Duty Period BAS Entitlement Codes: O (Officer BAS) E (Enlisted BAS) R (Regular BAS) -- No Galley Avail (Not used after 31DEC04) M (Enl BAS minus Discount Meal Rate) -- Essential Messing Unit N (No Entitlements)

Continued on next page

11.B.4 Preparation of Orders in Direct Access, continued

11.B.4.5 Procedure (continued)

Step	Action
****Note**	BAH **RC** (for orders of 30 days or less) and BAS will automatically start and stop based on the duty dates. Other entitlements, such as, BAH (for orders of 31 days or more), OHA, OUTCONUS COLA, CSP, and SDAP need to be manually started using the Employee Entitlements module (Home > Compensate Employees > Use > Maintain Entitlements), after the orders are approved and endorsed.
19	Scroll down to and Select the [Route For Approval] button. The request can now be routed to the District (dxr) for approval.  **Field** / **Description** **Approval Status** — The **Approval Status** field is only active for District (dxr) personnel. **Approval Recommendation** — The **Approval Recommendation** field is used for Supervisors/Command Users to note their recommendation before forwarding to the District (dxr). **Forward To** — Enter the Employee ID of the District (dxr) person who will be Working, Reviewing or Approving these orders. You can also select on the [🔍] button to look up an Employee ID.  **Email Address** — The e-mail address of the person selected in the "Forward To" block will auto-fill. Enter any additional e-mail address for others to receive notification of pending approval action. Separate multiple entries by a semicolon (;) **Approval Path** — This field will show who the orders have been routed to. **Comments** — Enter comments if desired. Comments are required if disapproval is recommend. Select the [OK] button.
20	Select the [Save] button. The District (dxr) must review, approve and notify the SPO for pay transactions.

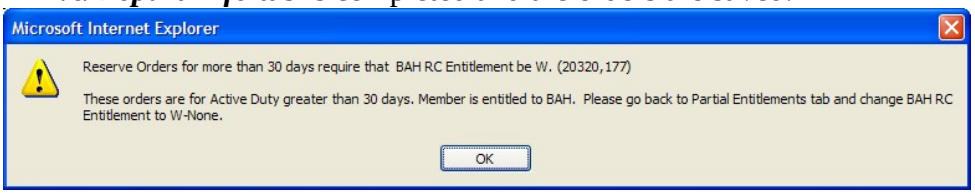
11.B.5 SPO Endorsement/Pay Actions

11.B.5.1 Introduction

Following approval of the orders by the District (dxr), the SPO must endorse the order and submit transactions to start pay and allowances.

11.B.5.2 Procedure

Follow these steps to access and endorse the reserve order.

Step	Action
1	Access the reserve order. Administer Workforce > Track Global Assignments (GBL) > Use > Reserve Orders Enter the member's employee ID number, and select Search. Select the Ready orders from the search results (first item listed).
2	The Reserve Orders will open. Review the data on the first three tabs (***Reserve Specific Info*** and ***Reserve Orders*** and ***Contingency/Disaster Data)*** to ensure all fields are completed correctly.
3	Verify the member's BAH-RC and BAS entitlements by selecting the Partial Entitlements tab. For orders more than 30 days duration, the BAH-RC code "**W**" (none) must be used. Reserve Component members on short-term AD for more than 30 days are entitled to BAH, which must be started using the Compensate Employees > Use > Employee Entitlements menu item after the ***Record Arrive/Depart Info*** tab is completed and the orders are saved.  *Error message generated when a BAH-RC code other than "W" is entered on the Partial Entitlements tab of any order for more than 30 days.*

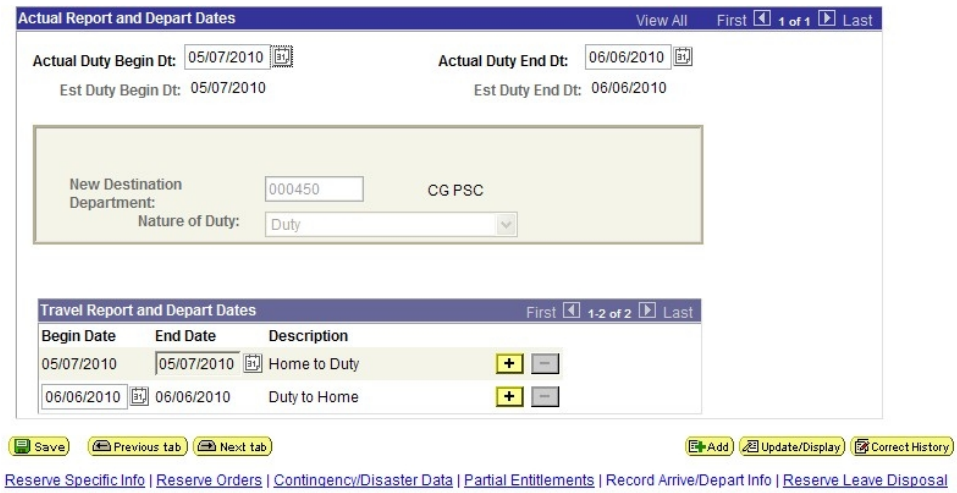
Continued on next page

11.B.5 SPO Endorsement/Pay Actions, Continued

11.B.5.2 Procedure (continued)

Step	Action
****Note**	Single members on a ADOT period of 31 to 180 days or a ADT period of 31 to 139 days are considered on temporary duty (TDY) for BAH/OHA purposes. They are authorized a housing allowance based on their principal place of residence location zip code at the time called/ordered to active duty, appropriate to their dependency status (i.e. BAH/OHA without dependents, BAH/OHA with dependents based on payment of child support), even if the member is assigned to single-type Government quarters at the site where the active duty is performed.
4	Select the ***Record Arrive/Depart Info*** tab.
5	Verify the Actual Duty Begin Date (system defaults this field with the date from the *Est. Duty Begin Dt*). If the member began duty on another date, you must cancel the order and reissue it with the Estimated and Actual begin date fields must match.
6	Enter the Actual Duty End Date. Initially, use the same date as the *Est. Duty End Dt.* This field may be changed to record amendments or extensions.
****Note**	The system will enter a "***Home to Duty***" row and a "***Duty to Home***" row, based on the Actual Duty Begin Date and the Actual Duty End Date. No changes are necessary.

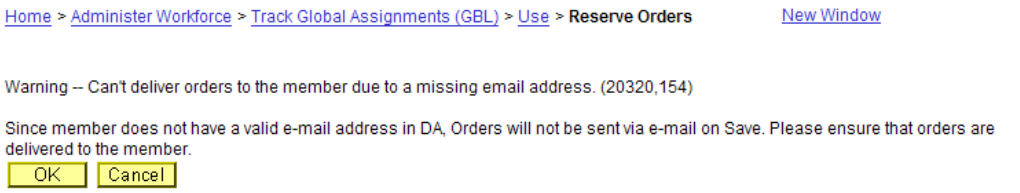
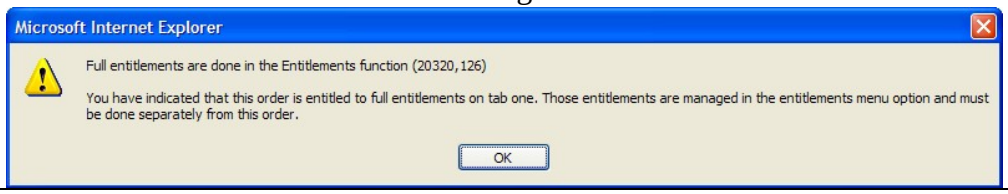
Exhibit 6 – Record Arrive/Depart Info Tab Completed for Title 14 recall order:



Continued on next page

11.B.5 SPO Endorsement/Pay Actions, Continued

11.B.5.2 Procedure (continued)

Step	Action
7	Select the Save button.
8	You may encounter this warning/informational message when saving reserve orders if the member does not have an e-mail address on file:  Select OK to dismiss the warning. You can use the E-Mail Printable Order button to e-mail the orders to yourself or the unit to print a copy of the orders. You will encounter this reminder message on all Full Entitlements orders: 
9	If this order is for **more than 30 days AD**, the path to complete the process: Compensate Employees > Use > Employee Entitlements menu item and start the member's BAH and other entitlements as applicable (refer to the Pay Manual for policy guidance and Part II (Pay Entitlements) of the Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3, for procedural guidance). ****Note**: BAS for all short-term orders is administered on the Reserve Orders Partial Entitlements tab even if the orders are for more than 30 days and BAH is authorized.

11.B.6 Extensions/Amend Duty Dates

11.B.6.1 Introduction

This section provides the procedure for the Servicing Personnel Office (SPO) amending an endorsed Reserve Order, or to report a change in the Actual Duty End date field (e. g. Member leaves early or stays on AD beyond originally planned end date). **You must cancel and reissue the order if the Actual Begin Date is not equal to the Estimated Begin Date**.

11.B.6.2 Limits

Title 14 recall orders cannot be extended beyond 60 days. Title 10 U.S.C. 12301 (d) ADOS-AC orders issued in support of this operation cannot be extended beyond 180 days.

11.B.6.3 Process

There are three key parts to the process of amending Reserve orders. They are:

- Amend the Actual Duty End Date in the Direct Access Reserve Orders component.
- Amend the Stop date(s) for any corresponding pay entitlement entries in the Direct Access Employee Entitlements component.
- Issue a memo to the member, a copy to the member's permanent unit, District (dxr), and TDY unit documenting the change(s). This step is necessary for travel claim documentation purposes, since original orders cannot be changed once approved and issued. Copies of orders printed out of Direct Access will not reflect any changes to duty dates.

11.B.6.4 Procedure

Follow these steps to access and amend the reserve order.

Step	Action
1	Log into the system and select the following menu items: Administer Workforce > Track Global Assignments (GBL) > Use > **Reserve Orders** ****Note:** Reserve Orders can also be accessed using the Manage Reserve Member activity guide: Administer Workforce > Track Global Assignments (GBL) > Use > **Manage Reserve Member** Select the "*View/Complete Order Info*" link at the bottom of the activity guide page to go to the Reserve Orders Search record.

Continued on next page

11.B.6 Extensions/Amend Duty Dates, continued

11.B.6.4 Procedure (continued)

Step	Action
2	The Reserve Orders Search record will be displayed. Enter the member's employee ID number in the EmplID field and select the Search button.
3	Select the order you want to amend from the search results.
4	Select the ***Record Arrive/Depart Info*** tab.
5	Enter the amended ***Actual Duty End*** date. **Note:** Be sure to include any leave taken and travel time authorized when constructing the Actual Duty End date. This date reflects the member's last day on active duty, not the "demob date," which is the date the member was out-processed at the mobilization site.
6	Select the Save button.
**Note	When you enter a new Ending Date (and save) the following warning will appear: Warning -- The Actual Depart Date is greater than the Order's original end date. (20320,76) By entering an Actual Depart Date greater than the original Order's end date, you are extending these orders. If that was not your intent, please press cancel and correct the Actual Depart Date. OK Cancel Select the OK button. A warning regarding email delivery of orders and a reminder to adjust pay entitlements will also appear. Select OK to dismiss these messages.
7	Path to the Compensate Employees > Use > Employee Entitlements menu item and review the member's entitlements. Use the table on the following page as guide to aid in determining if any action is necessary to synchronize the member's pay entitlements with the amended orders.
8	Issue a Memo Amendment to Reserve Travel Orders documenting the change(s). See example on page 33. Distribute the memo as follows: Original – Member Copy – Member's PDS Copy – Home District (dxr) Copy – TDY unit where member is performing duty

Continued on next page

11.B.6 Extensions/Amend Duty Dates, continued

11.B.6.4 Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>
<table>
<tr><th>If the original orders are</th><th>and the</th><th>then</th></tr>
<tr><td rowspan="2">Short Term for 30 days or less</td><td>actual duty begin date has changed(1)</td><td>delete the corresponding entitlement rows that were entered in connection with the order (e. g. SDAP, Career Sea Pay) and reenter them using the new actual duty begin date for the entitlement start date and the actual duty end date for the stop date.

**Note: BAS and BAH-RC for all short-term/partial entitlements orders, 30 days or less in duration, are administered on the Reserve Orders Partial Entitlements tab.</td></tr>
<tr><td>actual duty end date has changed</td><td>change the corresponding stop dates on any entitlements entered in connection with the order (e. g. SDAP, Career Sea Pay).

**Note: BAS and BAH-RC for all short-term/partial entitlements orders, 30 days or less in duration, are administered on the Reserve Orders Partial Entitlements tab.</td></tr>
<tr><td rowspan="2">Short Term order for more than 30 days AD</td><td>actual duty begin date has changed(1)</td><td>delete the corresponding BAH or OHA entitlement row and any other entitlement rows that were entered in connection with the order (e. g. SDAP, Career Sea Pay) and reenter them using the new actual duty begin date for the entitlement start date and the actual duty end date for the stop date.</td></tr>
<tr><td>actual duty end date has changed</td><td>change the corresponding stop dates on the BAH or OHA row and on any other entitlements entered in connection with the order (e. g. SDAP, Career Sea Pay).</td></tr>
</table>
</td></tr>
</table>

(1) You cannot change the Actual Duty Begin Date, it must equal the Estimated Begin Date. If it is incorrect, cancel the order and reissue with the correct date. Delete any pay entitlement entries and reenter with the correct start date.

Continued on next page

11.B.6 Extensions/Amend Duty Dates, continued

Exhibit 7 – Memo Amendment to Reserve Orders:

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

Commander
Personnel Service and Support Unit

Box 474
Anycity, St 90201-1234
Staff Symbol: SPO
Phone: (212) 555-1212
Fax: (212) 555-1234
Email: d05-dg-spo1234@uscg.mil

1326
15 Jun 2010

MEMORANDUM

From: A. B. SEA, YNC, USCG
Servicing Personnel Office

Reply to Attn of: SPO
YN2 I.Care
(212) 555-1212

To: BM1 Fred Flintstone, 1234567, USCGR

Subj: AMENDEMENT TO RESERVE TRAVEL ORDER #13-99-900Z17408-000

1. Per reference (a), subject order, which directed you to report to D8 Personal Resource Center, New Orleans, on 16 May 2010, is hereby amended to read as follows:

   a. Change date to depart from 14 June 2010 to 14 July 2010.

2. All other provisions of the original order remain the same.

3. This amendment shall remain attached to the original order at all times.

#

11.B.7 Monthly Verification Procedures

11.B.7.1 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.

11.B.7.2 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 section 11.B.3 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.

11.B.7.3 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.

11.B.8 Demobilization

11.B.8.1 Introduction

This section list actions required by the SPO, unit, mobilization site, and member when a member is demobilized following recall under Title 14 or following completion of a short-term Title 10 12301 (d) ADOS-AC order in support of a DHS operation.

11.B.8.2 References

(a) Reserve Policy Manual, COMDTINST M1001.28a (series), Chap 6
(b) Certificate of Release or Discharge from Active Duty, DD Form 214, COMDTINST M1900.4D
(c) Medals and Awards Manual, COMDTINST 1650.25(series)
(d) Military Justice Manual, COMDTINST M5810.1(series)
(e) Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series)
(f) Reserve Medical Guide
(g) ALCOAST 286/10

11.B.8.3 SOI

Do not submit a Statement of Intent (SOI) or Release From Active Duty Transaction (RELAD) for reservists completing Title 14 or short-term Title 10 ADOS-AC orders. These are short-term active duty orders. Separation transactions are only necessary when the member's orders were originally issued as long-term.

11.B.8 Demobilization, continued

11.B.8.4 Notification process

The mobilization site will send a daily message listing of reservists released from active duty. The message is sent to the member's unit and SPO.

The demobilization message provides the following information:

Column Title	Meaning
LAST NAME	Member's last name
EMPLID	Member's employee ID number
DEMOB	Date member was processed via mobilization site demobilization procedures. ****Note:** The demobilization date is not the member's last day of active duty (Orders Actual Duty End Date field). The member is permitted travel time and may have been granted compensatory liberty or is taking leave. Leave information will be sent to member's home command SPO.
RTN TVL	Date of travel to return to home. If the member is not taking leave, this would be the last day of active duty and should be used for the Actual Duty End Date field on the orders.
ORDER END	The Actual Duty End Date as specified on the member's original or amended original order. The Actual Duty End Date on the member's orders will need to be amended if the member was released from active duty earlier than planned.
HOME COMMAND	Name of member's unit

11.B.8 Demobilization, continued

11.B.8.5 Introduction

This checklist is designed to be used by the Administrative and SPO staff to administratively demobilize SELRES upon returning to the permanent unit.

Step	Action	ADMIN/SPO Initials	Date
1	Finalize pay transactions and reserve orders completion in DA.		
2	Instruct SELRES member to report to local DEERS with copy of reserve orders.		
3	Counsel SELRES member regarding TSP elections.		
4	Ensure GTCC is lowered to appropriate limit.		
5	Assist SELRES member with final travel claim in Web TPAX.		
6	Enter any awards or training certificates earned while deployed (e.g. Armed Forces Reserve Medal (AFRM) with M Mobilization Device) into DA.		
7	Issue Certificate of Release or Discharge from Active Duty (DD Form 214/5 Series) with the following statement in the remarks section: "Member performed active duty under Title 14 USC 712 in support of [enter contingency operation name e.g. "*Hurricane Sandy response*"] operations."		
8	Inform SELRES member of proximity to 16/18 years time in service.		
9	Validate member's current SGLI elections.		
10	Verify with local RFRS or District (dxr) staff of any pending medical actions.		
11	Inform SELRES member of IDT drill requirements and ADT status for remainder of current FY.		
12	Assist SELRES member with final travel to PLEAD.		

Continued on next page

11.B.8 Demobilization, continued

11.B.8.6 SPO Action

SPOs will:

- Amend the order's "Actual Duty End Date" if it doesn't already match the date of the member's last day on active duty:
  (****Note:** The demobilization date + leave taken en route (if applicable) + travel time = last day of active duty. See Extension/Amend Duty Dates section of this guide for the procedure used to amend the actual duty end date.)
- If member is immediately continuing on active duty under another set of orders, the leave balance may be carried forward. This requires no action by the SPO, JUMPS will maintain the balance. Use the charts in the Military Assignments and Authorized Absences, COMDTINST M1000.8 (Chap 2) to accurately calculate the number of days leave earned by the member.
- Per reference (c), Reservists recalled under Title 14 shall be issued the Armed Forces Reserve Medal (AFRM) and the Mobilization Device for Armed Forces Reserve Medal. Enter the award information in Direct Access. The "From" and "To" dates should be the same as orders begin and end dates.

11.B.8.7 Issuance of DD Form 214

Reserve Component personnel ordered to active duty for a contingency operation will be issued a DD Form 214 regardless of the number of days served on active duty [DoDI 1336.01, Enclosure (3), 2.d.(1)]. Include the following statement in the remarks section: "Member performed active duty under Title 14 USC 712 in support of [enter contingency operation name e.g. "*Hurricane Sandy response*"] operations."

Continued on next page

11.B.8 Demobilization, continued

11.B.8.8 Medical Examination

All Ready Reservists released from active duty shall complete a Limited PHA consisting of a face-to-face interview with a health services technician in accordance with ALCOAST 286/10, during the demobilization process.

Reservists reporting a change in health during deployment shall be evaluated by a Medical Officer for a focused examination and referred to the OMSEP Coordinator as needed. Encounters shall be entered into the Electronic Health Record.

Reservists must complete this Limited PHA prior to release from active status. This Limited PHA does not replace the Annual PHA requirement. Release from active duty RELAD/Retention Examinations are not required for this response.

11.B.8.9 Incapacitation benefits

Reservists ordered to active duty under Title 14 for 30 days or less are covered for injury, illness or disease incurred or aggravated in the line of duty. This includes injuries sustained when traveling directly to or from the place of duty.

The Reserve Medical Guide may also be used as a resource in assisting SELRES and commands with incapacitation benefits and situations related to injuries.

Medical and dental care shall be provided for reservists incurring or aggravating an injury, illness, or disease in the line of duty, and physical examinations shall be authorized to determine fitness for duty or disability processing.

Reservists who are not medically qualified to perform military duties because of an injury, illness, or disease incurred or aggravated in the line of duty may be eligible to receive incapacitation pay.

11.B.8 Demobilization, continued

11.B.8.10 Administrative Holds

Individuals pending disciplinary proceedings under the Uniform Code of Military Justice (UCMJ) may be retained on active duty without their consent, as provided by rule of Courts-Martial 202(C) and Title 10 U.S.C. 802(d), pending resolution of allegations. Reservists on active duty under Title 14 or Title 10 U.S.C. 12301 (d) ADOS orders whose status changes for administrative reasons shall have their orders modified on or before completing their orders, to reflect that they no longer serve under the provisions of Title 14 or Title 10 12301 (d) ADOS orders. Commands shall notify PSC-rpm and COMDT (CG-1311) for coordination and consultation as soon as possible.

11.B.8.11 Medical Hold

If a member is Available for Limited Duty (AFLD) at the end of their orders, they may be retained with their consent, or their command may request a Notice of Eligibility (NOE) in order to have the medical condition addressed/resolved, per chapter 6 of the Reserve Policy Manual. The RFRS staff of the member's permanent unit will facilitate the medical hold process.

- If the member is AFLD is unable to work in their civilian capacity, retention is preferred.
- If the member is AFLD and able to work in their civilian job, the NOE may be a better fit.
- Member shall submit their health care preference (either active duty retention or NOE) in writing to their command after their counseling session.
- For further guidance contact PSC-rpm at arl-dg-cgpsc-rpm(underscore)reserve(underscore)medical@uscg.mil.
- Reservists who elect to stay on active duty for medical treatment shall remain at a Coast Guard unit with the capacity and expertise to swiftly manage their care to conclusion in proximity to appropriate medical facilities and professionals. Contact PSC-rpm at arl-dg-cgpsc-rpm(underscore)reserve(underscore)medical@uscg.mil for specific guidance.
- Commands shall provide initial notification of the members medical hold status to PSC-rpm via arl-dg-cgpsc-rpm(underscore)reserve(underscore)medical@uscg.mil.

11.B.9 Continuance on Voluntary Active Duty

11.B.9.1 Introduction

This section provides procedure for issuing a short-term Title 10 Section 12301 (d) ADOS-AC order to a member voluntarily remaining on active duty following completion of a period of duty under Title 14. See the next section "Clarification of Entitlements When Transitioning From Title 14 to Title 10 U.S.C. Section 12301 (d) ADOS-AC Orders" for more information on travel and pay entitlements for these members.

11.B.9.2 Discussion

A new set of orders is required upon completion of 60 days of authorized Title 14 orders. The procedures are similar for each new period of active duty authorized under a short-term order. This section highlights the differences in procedures, provided elsewhere in this guide, for issuing Title 10 U.S.C. 12301 (d) voluntary recall orders.

11.B.9.3 SPO PDR Maintenance

The member's permanent unit SPO is responsible for maintaining the SPO PDR while deployed for Title 14 and Title 10 U.S.C. Section 12301 (d). The SPO will facilitate all pay and personnel transactions during the member's deployment. This exception to the guidance in the Military Personnel Data Records System Manual, COMDTINST M1080.10I, is necessary due to the unique nature of responses to natural or manmade disasters.

11.B.9.4 Entitlements

Pay entitlements and benefits for a member continuing on Title 10 U.S.C. Section 12301 (d) ADOS-AC orders of 30 to 180 days would continue as described in the Coast Guard Reserve Partial Mobilization Entitlements Policy section of this guide.

In accordance with ALCGRSV 051/09 - REQUESTING EARLY RETIREMENT, serving 90 consecutive days on voluntary Title 10 U.S.C. Section 12301 (d) ADOS-AC orders will qualify Reservists for early retirement credit.

****Note: New orders require new pay entitlement entries**! Entitlements, like BAH and FSA must be entered in new entitlement rows, do not change the stop date on the entitlements entries submitted in connection with the Title 14 recall order.

Continued on next page

11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.5
Warning!

Do not process any Reserve PCS transfers (change of drilling unit) while a member is on active duty. Effective date for all PCS transactions shall be completed once the active duty orders are complete. If a PCS transaction processes while a Reserve Component member is on active duty, JUMPS will auto-stop certain pay entitlements. See Coast Guard Servicing Personnel Office, PPCINST M5231.3, Part IV, Chapter 4 for a listing.

11.B.9.6
Procedure

Follow these steps upon notification that a member will be continuing on Title 10 U.S.C. 12301 (d) ADOS-AC orders following completion of a recall to active duty under Title 14.

Step	Action
1	Verify the member is eligible for **additional** active duty: • Member's total prior active service does not exceed 16/18 years upon completion of the proposed Title 10 U.S.C. 12301 (d) ADOS-AC orders (see "Verifying a Reservist's Prior Active Duty" in this chapter). • Reservists with 16 or more years of active duty may be considered for short term Title 10 U.S.C. 12301 (d) ADOS-AC orders with an approved waiver. CG-PSC-rpm is the authority for all waiver requests and will grant waivers on a case by case basis. See ALCGPSC 045/09. • Reservists shall not recalled to Active Duty under Title 14 or Title 10 12301 (d) ADOS-AC if it will result in the SELRES accruing over 30 years total service, unless the SELRES has a current 30 year waiver letter or is authorized by Commandant (CG-PSC-rpm). • Member has sufficient obligated service to complete the Title 10 U.S.C. 12301 (d) ADOS-AC orders.
2	Ensure the Actual Duty End date of the Title 14 recall order is the day prior to the start date of the new Title 10 U.S.C. 12301 (d) ADOS-AC order. Amend the Title 14 order, per the procedures in the Extensions/Amend Duty Dates section of this guide.

Continued on next page

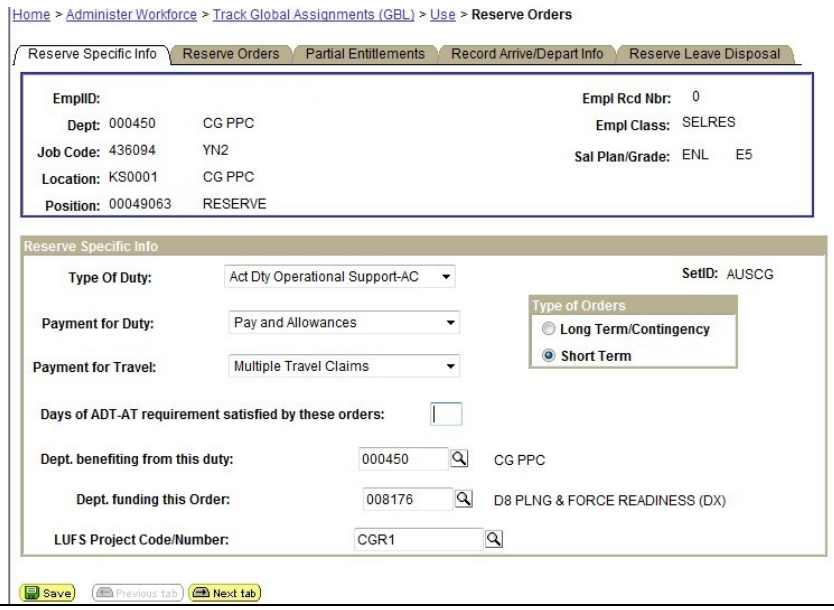
11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.6 Procedure (continued)

Step	Action
3	Issue the Title 10 U.S.C. 12301 (d) ADOS-AC order following the procedures outlined in the "Preparation of Orders in Direct Access" section of this guide. Highlighted below are the significant differences between the two types of orders.

Reserve Specific Info Tab:

Field	Select/Enter
Type of Orders	Short Term (NTE 180 days)
Type of Duty	Act Dty Operational Support-AC
Payment for Duty	Pay and Allowances
Payment for Travel	Multiple Travel Claims
Days of ADT-AT requirement satisfied by these orders	See Section 4.A.3 of the Reserve Policy Manual for determining the number of **Days of ADT-AT requirement satisfied by these orders** box.



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11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.6 Procedure (continued)

Step	Action
3	Issue the Title 10 U.S.C. 12301 (d) ADOS-AC order (differences from Title 14 order): **Reserve Orders Tab:** **Field** / **Enter/Select** Contingency Operation / Mark the checkbox **Contingency/Disaster Tab:** **Field** / **Enter/Select** Operational ID / Select the **ADOS-AC** ID code for the named operation/ response ****Note:** There are contingency IDs for named operations Title 14 and Med Holds (ADOS) present in the list, be sure you choose the correct ID.

Continued on next page

11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.6 Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Issue the Title 10 U.S.C. 12301 (d) ADOS-AC order (differences from Title 14 order):
Order Notes:
<table>
<tr><th>Note ID</th><th>Action</th></tr>
<tr><td>M05</td><td>Remove the first sentence (*Reservists recalled under …).* Enter the name of operation (*e. g. “Hurricane X Response*) in the last line of the note. And, if applicable, the duty station/location if other than the member’s normal drill/augmentation site.

</td></tr>
</table></td></tr>
<tr><td>4</td><td>Select the TONO Accounting Data button:
Document ID numbers and Accounting Data must be entered in the system manually for the Pay and Allowances, FICA and travel/per diem for short-term Title 10 U.S.C. 12301 (d) ADOS-AC order.

Note: See the procedures in the Coast Guard Servicing Personnel Office Manual, PPCINST M5231.3 (Part VII, Chapter 4), if you are not familiar with this process.</td></tr>
</table>

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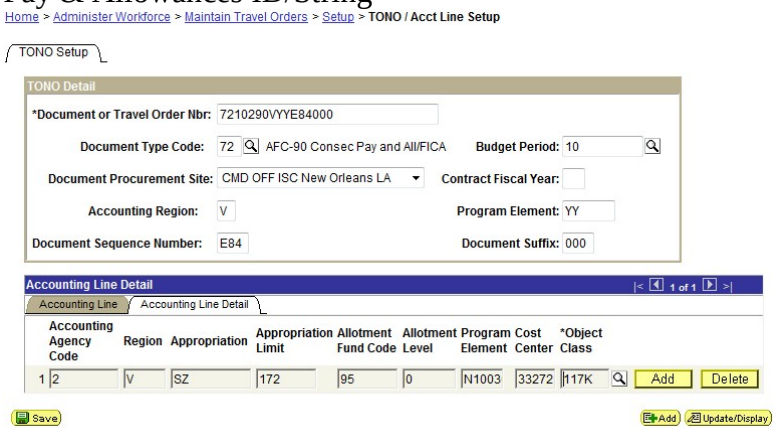
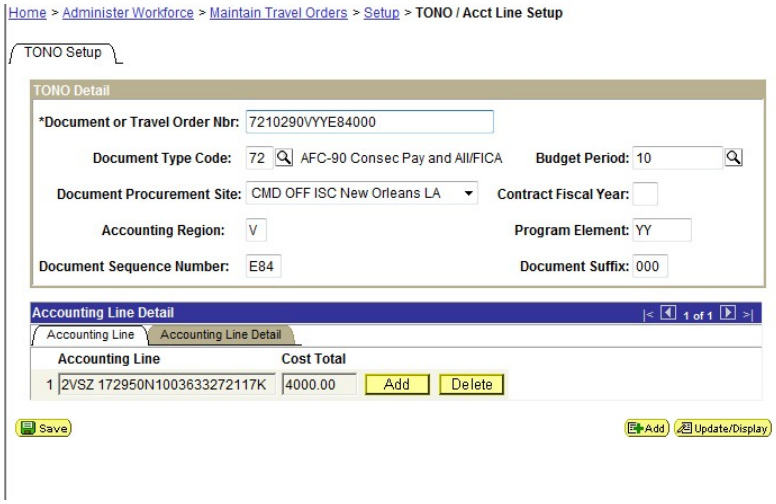
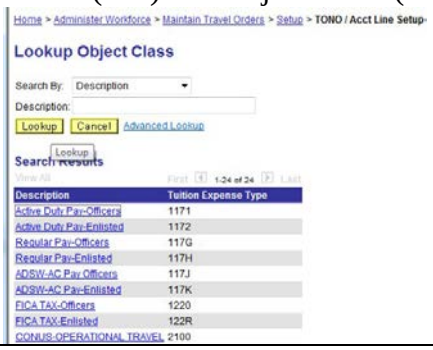
11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.6 Procedure (continued)

Step	Action
4	TONO Accounting Data (examples FY 10): Pay & Allowances ID/String   FICA ID/String would be the same except for the Document Suffix (001) and Object Class (select correct code from list). 

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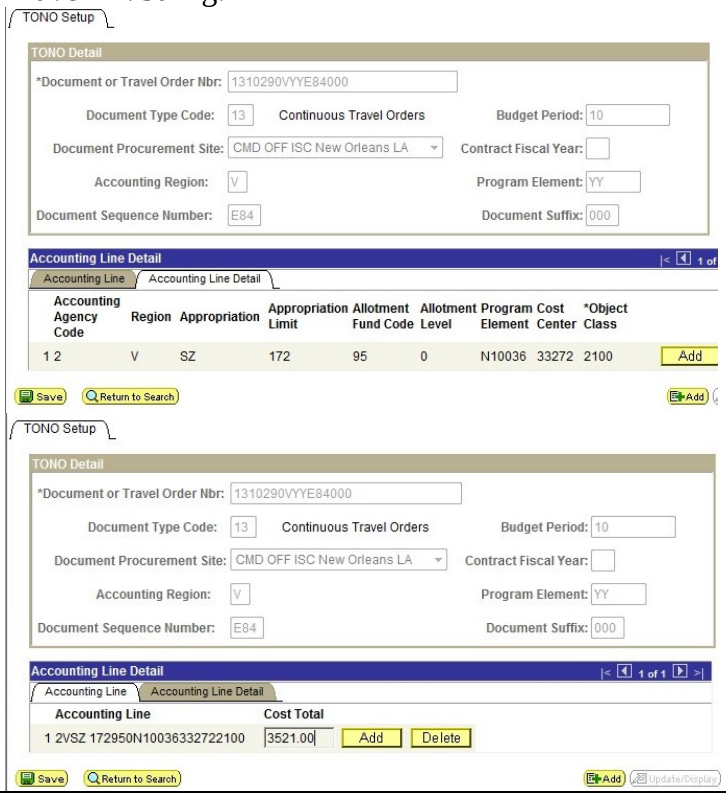
11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.6 Procedure (continued)

Step	Action
4	TONO Accounting Data (examples FY 10): Travel ID/String: 
5	Partial Entitlements tab – No changes from Title 14 procedure.
6	Route for Approval – No changes form Title 14 procedure.

11.B.9.7 SPO Endorsement/ Pay Actions

There are no differences in the SPO Endorsement/Pay Actions *procedures*. For example, BAH and FSA entitlements must be entered in new entitlement rows, do not change the stop date on the entitlements entries submitted in connection with the Title 14 U.S.C. recall order. Members are entitled to CONUS COLA if the Title 10 U.S.C. 12301 (d) ADOS-AC order is for 140 or more days. Please see the next section "Clarification of Entitlements When Transitioning From Title 14 U.S.C. to Title 10 U.S.C. 12301 (d) ADOS-AC Orders" for more information.

Continued on next page

11.B.9 Continuance on Voluntary Active Duty, continued

11.B.9.8 Extensions/ Amend Duty Dates

There are no differences in the SPO procedures for extensions or amending duty dates. Short-term orders cannot be extended beyond 180 days.

11.B.9.9 Reminder!

The member's permanent unit SPO is responsible for maintaining the SPO PDR while deployed for Title 14 and Title 10 12301 (d) ADOS orders. The SPO will facilitate all pay and personnel transactions during the member's deployment. This exception to the guidance in the Military Personnel Data Records System Manual, COMDTINST M1080.10I, is necessary due to the unique nature of responses to natural or manmade disasters.

11.B.10 Clarification of Entitlements When Transitioning From Title 14 to Title 10 U.S.C. 12301 (d) ADOS-AC Orders

11.B.10.1 Introduction

Partial mobilization orders for emergency augmentation of active forces due to natural or man-made disasters and Title 10 U.S.C. Section 12301 (d) ADOS-AC orders are authorized under separate statutory provisions. Each order set is considered a separate order for some entitlements while the total period of combined active duty is considered for other entitlements.

11.B.10.2 Entitlements based upon separate order sets

The following entitlements are based on separate sets of orders:

Pay Entitlement	Rule/Note	Reference
Basic Allowance for Housing (BAH).	Title 14 orders and Title 10 U.S.C. 12301 (d) ADOS-AC Orders are considered separate short-term orders for BAH purposes and thus the BAH rate for each order is always based upon the member's residence, even though a reservist's total active duty from consecutive Title 14 and Title 10 U.S.C. 12301 (d) ADOS-AC Orders may equal up to 240 days (60 days + 180 days = 240 days). ****Note:** Per CG PAYMAN Section 3-B-9, "A RC member who changes his or her place of residence for any reason other than official PCS orders upon or after starting Active Duty for Training (ADT) or Active Duty Other Than Training (ADOT) will continue to receive the principal place of residence (locality-based) BAH rate initially authorized."	PAYMAN Section 3-B-9 Figure 3-9 Figure 3-21 ALCOAST 462/06
Family Separation Allowance (FSA)	**Member with dependents**. FSA is authorized when the member with dependents is away for 30 continuous days without family visits at the onset of the mobilization. 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.H

Continued on next page

11.B.10 Clarification of Entitlements When Transitioning From Title 14 to Title 10 U.S.C. 12301 (d) ADOS-AC Orders, continued

11.B.10.2 Entitlements based upon separate order setsChart (continued)

CONUS-COLA	This entitlement is payable only when ordered to active duty for a period of 140 days or more. In cases of short term active duty orders (180 days or less), CONUS-COLA is payable based upon the member's residence. Accordingly, reservists under Title 14 orders are not entitled to CONUS-COLA, but if ordered to a consecutive period of ADOS-AC of 140 days or more, will be entitled to CONUS-COLA if the place from which ordered to duty (the member's residence) has a rate greater than zero.	JFTR Para U8038
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 and when ordered to AD for 31 days or more.	JFTR Para U9145
Leave	Leave is earned for active duty periods of 30 or more consecutive days at the rate of 2-1/2 days per month. Reservists should, consistent with their unit's operational requirements, be allowed and encouraged to use their leave. Members completing Title 14 recall orders and immediately continuing on ADOS-AC under another order for 30 or more days may carry unused leave over into the new active duty period. If earned leave is not taken while on AD orders, the leave may be saved and be used when on active duty orders greater than 30 days. Leave accrued by a reservist under orders of 365 days duration or less are not subject to the 60 day career limitation on sale of leave.	PAYMAN Article 7.I ALCOAST 449/05 ALCOAST 462/06 ALCOAST 520/10 ALCOAST 519/11

11.B.11 Travel Information

11.B.11.1 Introduction

This section provides information on travel claims unique to Title 14 Reserve Orders issued in support of response to natural or man-made disasters.

11.B.11.2 Travel Entitlements based on separate order sets

In accordance with the JFTR, members are entitled to transportation allowances to reimburse the costs for travel from the place ordered to active duty and return to that place at the completion of duty. Upon completion of Title 14 orders, members who perform travel from their out-processing point to the place from which ordered to active duty are entitled to reimbursement for eligible expenses. If ordered to a consecutive period of Title 10 U.S.C. 12301 (d) ADOS-AC order following their Title 14 order, members are entitled to transportation from the place from which ordered to duty and, upon completion of that duty, transportation back to the place from which ordered to active duty. If travel is not performed between consecutive Title 14 and Title 10 U.S.C. 12301 (d) ADOS-AC orders, no transportation reimbursement allowances are authorized.

11.B.11.3 Entitlements based upon separate order sets

In accordance with the JFTR, members are entitled to transportation allowances to reimburse the costs for travel from the place ordered to active duty and return to that place at the completion of duty. Upon completion of Title 14 orders, members who perform travel from their out-processing point to the place from which ordered to active duty are entitled to reimbursement for eligible expenses. If ordered to a consecutive period of ADOS-AC following their Title 14 order, members are entitled to transportation from the place from which ordered to duty and, upon completion of that duty, transportation back to the place from which ordered to active duty. If travel is not performed between consecutive Title 14 and ADOS-AC orders, no transportation reimbursement allowances are authorized.

11.B.11.4 Government Travel Charge Card

ALCGPSC message 044/10 provides helpful tips for using the Government Travel Charge Card (GTCC) and provides information to assist all members traveling in support of response to natural or man-made disasters and the support staffs assisting with travel coordination of members involved in the response:

- http://www.uscg.mil/announcements/alcgpsc/044-10_psc.txt

Continued on next page

11.B.11 Travel Information, continued

11.B.11.5 Amendments to Orders

As members return from the deployment, questions may arise regarding their TDY entitlements. Prior to approving a claim, verify authorized entitlements with the active duty orders and any amendments that may have been issued. If the member was authorized a rental car and that entitlement was not included in the original orders, an amendment will need to be generated. See chapter 2.B.12 of this manual on how to amend orders, they must be original and signed in blue ink by the Approving Official, even if the claim is submitted through TPAX.

11.B.11.6 Deductible Meals

If the member consumed meals that were being provided by the government or a contractor for free, they must deduct those meals on their travel claim.

If all three meals are consumed at no cost to the traveler, only the IE amount for that day is payable ($5 CONUS IE, or the applicable locality IE rate, or $3.50 OCONUS).

Use the Daily Exceptions screen in Web-TPAX to change the meal type code to the code for Deductible Meal (DED) for each meal provided. Access the Daily Exceptions screen by selecting the **Exceptions** button while on the Reimbursables tab of your request for TDY settlement:

- http://www.uscg.mil/ppc/webtpax/daily_exceptions.htm

11.B.11.7 Leave

All travel claims must be reviewed to ensure leave taken during the deployment is annotated as such on the DD-1351. Entitlement to travel allowances, i.e., Per Diem and M& IE, cease when a member takes leave. Failure to show leave on a travel claim will result in erroneous payment of travel allowances that will later be recouped.

Leave will not be charged via the DD-1351, all leave must be entered into DA.

Continued on next page

11.B.11 Travel Information, continued

11.B.11.8 TPAX profile settings for members with multiple affiliations

The Web TPAX profiles for Reservists who are also civilian Coast Guard employees needs to reflect their military status and rate/rank. If the claim is submitted and processed reflecting the civilian status, the member will receive different per-diem for days when there are deductible meals (50% of the daily rate vs. an individual meal deduction) and there are different rules for tips and phone calls.

Ensure the reservist verifies their TPAX profile and changes the status to military and appropriate rate/rank. The following links provide menu paths for accessing the traveler profile in TPAX and Web-TPAX. It is only necessary to update the profile in the version of TPAX you are using for your claim(s).

TPAX - http://www.uscg.mil/ppc/travel/t-pax/webhelp/Update_Profile.htm

Web-TPAX - http://www.uscg.mil/ppc/webtpax/Modify_or_View_Profiles.htm

11.B.12 Transitional Assistance Management Program (TAMP)

11.B.12.1 Introduction

TAMP provides reservists and their dependents 180 days of transitional health care benefits upon completion of orders for contingency operations as defined by Title 10 U.S.C. 101(a)(13). The FY13 National Defense Authorization Act, Public Law 112-239 amended Title 10 U.S.C. 101(a)(13). By including mobilization of Coast Guard Reservists under 14 U.S.C. 712 for domestic contingencies.

Additional information regarding TAMP eligibility and enrollment options is available at www.tricare.mil/TAMP or by calling the Coast Guard Health Benefits help line at 1-800-9HBA-HBA.

11.B.12.2 TAMP DEERS enrollment

After the completion of qualifying orders, reservists and their dependants are coded as TAMP-eligible in the Defense Enrollment Eligibility Reporting System (DEERS) and will automatically be covered under TRICARE Standard. During TAMP, a reservist may enroll or re-enroll in TRICARE Prime, including US Family Health Plan, which is offered in certain designated service areas of the United States and overseas. TAMP status will not be changed in DEERS unless the member executes new orders greater than 30 consecutive days. Members on Active Duty for Training (ADT) or Inactive Duty Training (IDT) maintain TAMP status within DEERS.

11.B.12.3 TAMP eligibility while serving on non-contingency orders

For TAMP eligible reservists who execute non-contingency orders in excess of 30 days, such as ADOS, TAMP eligibility continues to run concurrently with the orders. Members released from non-contingency orders must contact their assigned Servicing Personnel Office (SPO), DEERS, and Managed Care Support Contractor (MCSC) (regional TRICARE office) to ensure TAMP eligibility.

11.B.12.4 New contingency orders

Reservists who execute new contingency orders of greater than 30 consecutive days, as defined in Title 10 U.S.C. 101(a)(13), would earn a new 180-day period of TAMP upon release from active duty.

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Forms and Worksheets Referenced in this Manual

E.1.1 Introduction

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

CG worksheets are available on the internet at http://www.uscg.mil/ppc/forms/. CG 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*), on the internet at http://www.uscg.mil/forms/ or on the intranet at http://cgweb2.comdt.uscg.mil/CGFORMS/.

E.1.2 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-1001	Change in Reserve Component Category (RCC)
CG-1650	CG Award Recommendation
CG-2519	Leave Authorization
CG-2556	Move-In Housing Allowance Claim Form
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-4170	BAH/Dependency Data (Computer Generated)
CG-4178A	Good Conduct Certificate

Continued on next page

E.1.2 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-4600	Premium-Class Travel Authorization/Approval Request
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-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

E.1.2 Forms & Worksheets Referenced
(cont'd)

Form Number	Form name
CG-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-2000	PCS Departing Worksheet
CG-2001	Departing TAD or PCS/TEMDUINS to "A" School Worksheet
CG-2002	Assignment Data Worksheet
CG-2003	PCS Entitlements Advance Travel Worksheet
CG-2005	PCS Reporting Worksheet
CG-2010	Advances Worksheet
CG-2015	Pay Delivery Worksheet
CG-2020	Dependency Worksheet
CG-2020A	Support Statement
CG-2020B	Full-Time Student Statement
CG-2020C	Former Spouse Statement
CG-2020D	Designation of Beneficiaries & Record of Emergency Data
CG-2025	BAH/Housing Worksheet
CG-2025A	Housing Allowance (BAH/OHA) Protection Worksheet
CG-2025B	Member-Married-to-Member BAH Worksheet
CG-2026	Command request to COMDT (CG-1222) for ERD TONO/Line of Accounting (LOA)
CG-2030	Career Development Worksheet
CG-2035	Family Separation Allowance (FSA) Worksheet
CG-2040	Allotment Worksheet
CG-2045	Career Intentions Worksheet
CG-2050	Nonreceipt Worksheet
CG-2426	Career Status Bonus (CSB) Election
CG-3600	Designation Of Beneficiary For Payment Of Unpaid Retired Pay
CG-3799R	Reserve Annual Screening Questionnaire (ASQ)
CG-3867	Claim for Final Retired Pay

Continued on next page

E.1.2 Forms & Worksheets Referenced
(cont'd)

Form Number	Form name
CG-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election
CG-5100	Officer Uniform Allowance Claim Worksheet
CG-5150	Civilian Clothing Monetary Allowance Worksheet
CG-5155	Enlisted Supplementary Clothing Allowance Worksheet
CG-5200	Ethnicity and Race Self-Reporting Worksheet
CG-7221	Retired Allotment Authorization Form
CG-7270	COLA - Unique Expenses Reimbursement Worksheet
CG-7421	T-PAX/WINIATS User Access Authorization & Approving Official (AO) Designation
CG-7421/2	Direct Access User Authorization
CG-7421/3	JUMPS User Access Authorization
CG-7543	Statement of Financial Status Submitted for Consideration In Connection with Indebtedness to the United States
CG-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

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E.1.2 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

E.1.2 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

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.
AUTHMILASGN	Authorized in accordance with Military Assignments and Authorized Absences, COMDTINST M1000.8 (series), 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 JFTR
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.
PDRHEL	PDR(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

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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.

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Overview

Introduction

This enclosure will guide you through the process of completing block 19, Remarks, of the CG-4251 (Military temporary Duty (TD) or Civilian Temporary Duty (TD) Travel Orders).

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)
- 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.

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Purpose and Justification of Travel

Introduction

Every TDY order must describe

- why the travel is being performed and,
- what is to be accomplished during the TDY/TD 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 TDY/TD 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 TDY/TD 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 TDY/TD order needs to be as clear as possible as to what the order issuing authority wants the traveler to do (directs). The TDY/TD 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 TDY/TD order needs to be clear as to what applies to what.

Considerations

The description of the Mode of Travel on the TDY/TD order is probably the most complex component.

- It addresses the transportation to be provided to the member to perform the mission directed by the TDY/TD 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 a alternative means of transportation unless the appropriate authority - named on the order - endorses the order that the directed mode isn't available.

Note: TDY/TD travelers cannot be directed to travel using their personally owned privately owned conveyances (cars, motorcycles, planes, etc.). TDY/TD 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 TDY/TD 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 TDY/TD travel may be permitted either as being:

- Advantageous to the Government, or
- For the convenience of the member.

POC travel on a TDY/TD 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 TDY/TD 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 TDY/TD 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.

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 TDY/TD location

If a POC is authorized as advantageous to the Government, there is no guarantee that reimbursement for POC travel in and around the TDY/TD 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 TDY/TD 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 TDY/TD 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 TDY/TD 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 TDY/TD location(s)."
- You are authorized reimbursement for POC travel in and around the TDY/TD location(s) while on official business. You must provide an accurate record of the miles driven in and around the TDY/TD 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 TDY/TD location(s) (or)
- You are authorized reimbursement for any POC travel in and around the TDY/TD location(s). You must provide an accurate record of the miles driven in and around the TDY/TD 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 TDY/TD location(s) (or)
- You are authorized reimbursement for any POC travel in and around the TDY/TD location(s). You must provide an accurate record of the miles driven in and around the TDY/TD location(s) to enable correct reimbursement."

Miscellaneous Entries

Travel Advances

Select and enter one of the following remarks if appropriate.

- "No travel charge card, member authorized (amount) in travelers checks charged against Coast Guard Centrally Billed Account (CBA)."
- "Travel charge card not required, member authorized (amount) in travelers checks charged against the Coast Guard Centrally Billed Account (CBA)."

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/TD to a **military installation** to the maximum extent practical (when their use would not adversely affect the performance of the assigned mission). Government quarters are available only if use id directed on the order.

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/TD to ships or other deployed units.
- Personnel are ordered TDY/TD to formal courses of instruction at schools (including PCS/TEMDU) held at military installations of any service.

Requirements when TDY/TD 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/TD order regarding the availability of government quarters and government mess at the TDY/TD site.

The statement must also indicate whether or not the member is directed to use the government quarters and mess at the TDY/TD 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/TD 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/TD 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."

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Nondisability Retirements

1900
15 May 2012

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 Pay & Personnel Center (PPC) 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, PPC 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-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 PPC (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 PAY & PERSONNEL CENTER
444 SE QUINCY STREET
TOPEKA KS 66683-3591

5. Your IRS form W-2 for calendar year 20__ will be mailed by PPC to the address indicated on the Career Intentions Worksheet (CG-2045) unless PPC (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 PPC (ccb) at 1-866-PPCUSCG (1-866-772-8724).

#

Survivor Benefit Plan Election Requirements

1900
15 May 2012

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 PPC (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-4700) in the presence of a notary public.
- 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-4700 (http://www.uscg.mil/ppc/forms/) 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 Pay & Personnel Center, Retiree and Annuitant Services (RAS) at 1-800-PPCUSCG (800-772-8724) or (785-339-3415) are available to assist you and your spouse.

#

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-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).

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 SBP 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.

Continued on next page

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, which must be notarized if you concur with your spouse's election, 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,[Enter spouse's full name], [Enter "wife" or "husband"] of [Enter Retiree's Name, rank/rate and SSN] have been advised that my [Enter "husband" or "wife" has made the following election under the Survivor Benefit Plan: [enter retiree's election--must be identical to the fourth paragraph of the above letter].

☐ I do not consent to my spouse's election (Sign below and return this letter)

Spouse Signature: _____Date _____

☐ I hereby concur with the Survivor Benefit Plan election made by my spouse. I have received information that explains the options available and the effects of those options. I have signed this statement of my own free will.
(Sign below in the presence of a notary public and return this letter)

Spouse Signature: _____Date _____

Subscribed and Sworn to before me in County _____ State _____

NOTARY SEAL HERE

On Month_____ Day_____, 20_____

My Commission expires the_____ day _____,20_____

Notary Public (Signature) _____

Separation Pay (member due money)

1900
15 May 2012

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 Pay & Personnel Center (PPC) 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 PPC to the address indicated on your Leave and Earnings Statement (LES) unless PPC (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 PPC Customer Care (CCB) at 1-866-PPC-USCG/(785) 339-2200. Claims for reimbursement of Self Procured/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 Pay & Personnel Center (PPC) 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 PPC (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 PPC (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 PPC to the address indicated your LES unless PPC (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 PPC Customer Care (CCB) at 1-866-PPC-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 (PSC-mr), Personnel Service Center, US Coast Guard Stop 7200, 4200 Wilson Blvd Ste 1100, Arlington VA 20598-7200. 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-CG, 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 Pay & Personnel 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 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
(b) Reserve Policy Manual, COMDTINST M1001.28 (series)

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 component. 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 per Section 4.B.5 of reference (b).

3. You have stated that your mailing address is: **(insert correct final address)**

4. Subsequent to this date, your new unit will be **Commander, Personnel Service Center (rpm-3), MS 7200, 4200 Wilson Blvd, Ste 1100, 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 PSC-rpm-3 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. For more information on the IRR, visit: http://www.uscg.mil/PSC/rpm/rpm3/

#

Copy: Member PDR

Continued on next page

Release from Active Duty and Transfer to the IRR (continued)

Include the following Order Note on the member's separation orders:

R35 Order Note

YOU ARE ASSIGNED TO THE INDIVIDUAL READY RESERVE (IRR) CG-PSC-RPM-3.
WHILE A MEMBER OF THE IRR YOU ARE OBLIGATED TO:
- RESPOND TO OFFICIAL CORRESPONDENCE
- ADVISE CG-PSC-RPM-3 OF ANY CHANGES IN RESIDENCE, PHONE NUMBER, MARITAL/DEPENDENCY STATUS, MEDICAL READINESS AT THE ADDRESS BELOW.
- MAINTAIN PHYSICAL STANDARDS (PHA AND WEIGH-IN)
- COMPLETE YOUR ANNUAL SCREENING QUESTIONNAIRE (ASQ)

FAILURE TO COMPLY WITH THE ABOVE CONTRACTUAL OBLIGATIONS MAY RESULT IN DISCHARGE FROM THE COAST GUARD OR TRANSFER TO THE STANDBY RESERVE, INACTIVE STATUS LIST (ISL).

FOR ADDITIONAL INFORMATION ON THE IRR, VISIT
http://www.uscg.mil/rpm/

FOR SPO:
ENSURE MEMBER RECEIVES A COPY OF THESE ORDERS.
ENSURE ALL CONTACT INFORMATION IS UPDATED IN DIRECT ACCESS PRIOR TO RELAD.

MEMBER'S RECORDS (PERSONNEL AND MEDICAL) MUST BE SENT TO:

Commander, Personnel Service Center
PSC(rpm-3), MS 7200
4200 Wilson Blvd, Suite 1100
Arlington, VA 20598-7200

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

Administrative Remarks Overview

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

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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 (Note: If the example in this enclosure shows "Commanding Officer" in the signature, then the member's commanding officer (or "Acting" CO) should sign the entry. If the example shows "By direction" or a title, such as "Personnel Officer", then the entry may be signed by someone other than the member's commanding officer. 6. Member's Acknowledgement (if required). (Note: If a member is not available for signature, so state, and include the reason(s). If a member refuses to acknowledge an entry, refer the matter to the member's commanding officer. Commanding Officer's may seek additional guidance from legal advisors or COMDT (CG-1221) if needed.
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
3	Member's name in Last, First, Middle Initial format.
4	Member's Employee ID Number.
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, Personnel Service Center (psd-mr) for electronic imaging into the IPDR.

Note: If sending photocopies to CGPSC, ensure the original document is signed before copying. Alternatively, original signatures may appear on both the original and copy.

Continued on next page

Preparation and Distribution of CG-3307, Continued

Distribution (cont'd)

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 PPC (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.

CG-3307's for Accession (ACC)

ACC-02 DEP Discharge into USCG
ACC-03 Drug-Free
ACC-04 Pre-Training Physical
ACC-05 Missing Social Security Card
ACC-06 Resident Alien
ACC-07 Not a US citizen
ACC-08 Color Vision
ACC-09 E-3 without a designator
ACC-10 May be eligible for advancement to pay grade E-4
ACC-11 Withholding information is punishable under the UCMJ
ACC-12 Reserve over 40
ACC-13 Reserve Swim Test
ACC-14 Reserve Swim Test Member Not Attending Accession Training
ACC-15 Reserve Direct Deposit Member Not Attend Accession Training
ACC-16 Spouse on Active duty
ACC-17 Scholar Program Service Dates
ACC-18 Scholar Program Leave

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DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3307 (Rev. 10-08)

ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-2)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: Honorably discharged from the USCGR Delayed Enlistment Program (DEP) for the Convenience of the Government to enlist in the regular Coast Guard on DDMMMYYYY having served in the DEP since DDMMMYYYY. Time served in the DEP is creditable toward completion of the 8-year military obligation, but IS NOT creditable for purposes of longevity or pay and allowances.

I. M. GUARDIAN, MKC, USCG
Recruiter-in-Charge

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

PREVIOUS EDITION MAY BE USED The CG-3307 must be prepared in original and one copy as follows: The original is filed in the SPO PDR, and the copy is mailed/emailed to Commander (CG PSC-PSD-MR) for electronic imaging into the EI PDR.

DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3307 (Rev. 10-08)

ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-3)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: I have been advised that the illegal use or possession of drugs constitute a serious breach of discipline that will not be tolerated in the Coast Guard.

Also, illegal drug use or possession is counter to team spirit and mission performance and jeopardizes safety. I understand that I am not to use, possess or distribute illegal drugs, drug paraphernalia or hemp oil products.

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. I hereby affirm that I am drug-free and ready for recruit training.

I. M. GUARDIAN, MKC, USCG
Recruiter-in-Charge

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

PREVIOUS EDITION MAY BE USED The CG-3307 must be prepared in original and one copy as follows: The original is filed in the SPO PDR, and the copy is mailed/emailed to Commander (CG PSC-PSD-MR) for electronic imaging into the EI PDR.

DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3307 (Rev. 10-08)

ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-4)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: I am aware that upon arrival at the recruit training center, I will receive a complete and thorough pretraining physical examination, including a dental examination, which I must pass to be permitted to enter recruit training.

I. M. GUARDIAN, MKC, USCG
Recruiter-in-Charge

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-5)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: I do not 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 Coast Guard to cite my social security card for number identification purposes prior to forwarding it to me.

I. M. GUARDIAN, MKC, USCG
Recruiter-in-Charge

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-6)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: I certify that I am a resident alien and my number is:

I. M. GUARDIAN, MKC, USCG
Recruiter-in-Charge

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-7)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: 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.

Enlistee's Signature

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-8)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: 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, ME, MK, or OS, or during this period or subsequent enlistments. Furthermore, I have been advised that my defective color vision will prevent my application for an officer commission.

Enlistee's Signature

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-9)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
DDMMMYYYY: I am aware I am eligible to reenlist with a [Rating] designator; however, I intend to pursue a career as an [Rating] and desire to reenlist as an E-3 without a designator.

Enlistee's Signature

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-10)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: 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.

Enlistee's Signature

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Accession (Reserve) (ACC-11)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: I hereby certify that all information on my enlistment documents is current and accurate. I have not had any involvement with the police or had any changes in dependency unless noted on those documents. I understand withholding information is punishable under the Uniform Code of Military Justice (UCMJ) and may result in less than honorable discharge for fraudulent enlistment.

Enlistee's Signature

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ADMINISTRATIVE REMARKS

Entry Type: Accession (Reserve) (ACC-12)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
DDMMMYYYY: I am over the age of 40 and understand that I will not be able to complete 20 satisfactory years of federal service by the age of 60, and that I cannot earn Reserve Retirement under 49 C.F.R. 1.45(a)(1).

Enlistee's Signature

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ADMINISTRATIVE REMARKS

Entry Type: Accession (Reserve) (ACC-13)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
DDMMMYYYY: I have been advised that all members enlisting in the Coast Guard Reserve must take a difficult swimming test at recruit training (RP & RK), Reserve Officer Candidate Indoctrination (ROCI), and Reserve Enlisted Basic Indoctrination (REBI). I understand that I cannot graduate from recruit training, ROCI, or REBI unless I have passed this swimming test.

Enlistee's Signature

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Entry Type: Accession (Reserve) (ACC-14)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
DDMMMYYYY: (for all reserve applicants except RP & RK): I understand that inability to satisfy the swimming requirement detailed in E-2 Performance Requirements 2.05-P of the Enlisted Professional Military Education (E-PME) Manual, COMDTINST M1510.2 (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.

Enlistee's Signature

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-15)
Reference: Recruiting Manual, COMDTINST M1100.2 (series)
Responsible Level: Recruiter
Entry:
DDMMMYYYY: I hereby acknowledge and agree that I have the duty to establish and maintain an account with a financial institution for the direct deposit of my Coast Guard net pay and allowances. I understand that I am required to execute the appropriate forms at my first assigned drilling unit to ensure that my Coast Guard net pay and allowances are deposited directly into this account. I understand that I may freely choose to change financial institutions to satisfy this requirement. I understand that I will continue to have the duty to maintain such an account for the direct deposit of my Coast Guard net pay and allowances as long as I remain a member of the selected reserve unless I receive a specific exemption from this requirement from the Coast Guard. I understand that failure to establish and maintain such an account in the absence of a specific exemption may subject me to administrative and/or disciplinary action under the Uniform Code of Military Justice (UCMJ).

Signature of Enlistee/Applicant

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-16)
Reference: Recruiting Manual, COMDTINST M1100.2 (series) (2.B.1.e.3)
Responsible Level: Recruiter
Entry:

DDMMMYYYY: I understand I am accepted for enlistment with a spouse and [Number] dependents. My spouse is an active duty Coast Guard member in the grade of [PayGrade]. The Coast Guard shall make every attempt to co-locate me with my spouse, but co-location is not guaranteed.

_____
DDMMMYYYY

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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-17)
Reference: Coast guard Academy Scholar Program Administration, COMDTINST 5342.2(series)
Responsible Level: Academy Central Accession Point
Entry: Statement of Understanding Concerning Creditable Service as a Scholar and Cadet

DDMMMYYYY: I understand that per Title 10 U. S. Code §971, officers may not count service performed as a cadet or midshipman for any purpose and that service performed as a cadet is not creditable for longevity for pay purposes or retirement after appointment as an officer (commissioned or warrant). I further understand that non-Delayed Entry Program (DEP) prior enlisted active service performed prior to appointment to cadet status IS creditable for longevity for pay purposes and retirement.

I acknowledge that if I complete the U. S. Coast Guard Academy course of instruction and am appointed an Ensign in the Regular Coast Guard, all active service (other than DEP time) performed prior to cadet appointment will be creditable for pay purposes and retirement. If I am appointed to cadet status from prior enlisted service status and disenrolled from the Academy prior to graduation, my cadet service IS creditable for longevity for pay purposes and retirement if I return to enlisted status; however, if I am later appointed to commissioned or warrant officer status my Pay Base Date (PBD) and Active Duty Base Date (ADBD) must be adjusted to exclude the cadet service time.

I have been afforded the opportunity to read and understand the foregoing and have had all my questions answered to my satisfaction.

_____
SCHOLAR SIGNATURE

_____
FIRST MI LAST, RATE/RANK, USCG/USCGR
Signature of Counselor

_____
PARENT OR GUARDIAN SIGNATURE
(required if recipient is a minor)

_____
WITNESS SIGNATURE, at [City], [State]

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Accession (ACC-18)
Reference: Coast guard Academy Scholar Program Administration, COMDTINST 5342.2(series)
Responsible Level: Academy Central Accession Point
Entry: Statement of Understanding Concerning Leave earned while in the CGA Scholar Program

DDMMMYYYY: I understand that:

I will earn up to 25 days of annual leave (at the rate of 2.5 days per month) during my ten-month course of instruction and that I must use this leave in conjunction with any absences away from the immediate vicinity of my preparatory school campus that is not classified as temporary duty, permissive duty, sick leave, or liberty. I will read and comply with the Coast Guard Scholar Leave Request and Approval Policy & Procedures as established by the Coast Guard Academy. Annual leave will be deducted from my leave account whenever I am away from my preparatory school campus during holidays or other breaks in classes and that I must keep track of the days of leave that I take.

Any days of leave that I have not used when I complete my course of instruction, or otherwise separate from the Coast Guard Scholar Program, I may sell at the daily Basic Pay rate for my pay grade times the number of unused accrued days. Any days of leave sold when I separate from the Coast Guard Scholar Program will be counted against my future career leave sell-back cap of 60 days.

I further understand that if I have used more days of leave than I have earned (excess leave usage) when I leave the Coast Guard Scholar Program, I will incur a debt to the government that must be repaid. Indebtedness due to excess leave usage will not be considered for remission of indebtedness (per Title 14 U. S. Code §461) nor waiver of collection of erroneous overpayments (per Title 10 U. S. Code §2774).

I have been afforded the opportunity to read and understand the foregoing and have had all my questions answered to my satisfaction.

_____
SCHOLAR SIGNATURE

_____
FIRST MI LAST, RATE/RANK, USCG/USCGR
Signature of Counselor

_____
PARENT OR GUARDIAN SIGNATURE
(required if recipient is a minor)

_____
WITNESS SIGNATURE, at [City], [State]

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CG 3307's for Advancement and Reduction (AR)

AR-01 Reduction in Rate
AR-02 Obligated Service for Advancement to E-7 E-8 E-9
AR-03 Reduction in Rate Oberservation Period Complete
AR-04 Withdrawal of Advancement Recommendation
AR-05 Voluntary Removal from CWO Eligibility List
AR-06 Voluntary Removal from CWO Eligiblity List-Hardship
AR-07 Voluntary Removal from ADV List

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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-1)
Reference: Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Rate Last Name informed this date that he or she is a candidate for reduction in rate by reason of incompetence per Article 3.A.30.c., Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series). Rate Name's (provide specifics on which mark(s) meet the reduction in rate criteria) for the period ending (date). Advised that he or she has three months from this date to demonstrate satisfactory progress and meet the requirements or Article 3.A.30.c in order to retain his or her present rate, and that failure to do so will result in reduction in rate to (rate). A special performance evaluation will be completed at that time for the purpose of determining competency, particular areas that require improvement are: provid specifics.....

A. B. SEA, CAPT, USCG
Commanding Officer

: I have read and understand the above entry.

FIRST MI LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-2)
Reference: Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (Series)
Responsible Level: Unit
Entry:
DDMMMYYYY: As a result of being above the cutoff for advancement to (RATE) I understand that I will be required to meet the two year obligated service requirement per Article 3.A.19.e, Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (Series). I agree not to request voluntary retirement or early release to be effected prior to completion of required obligated service as stated above.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-3)
Reference: Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Rate Name's three month observation period to satisfy the requirements of Article 3.A.30.c, Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), completed this date. Rate Name has been determined to be incompetent in the rate of (RATE). The required special evaluation was completed this date. Effective this date, Rate Name is being reduced to (RATE).

A. B. SEA, CAPT, USCG
Commanding Officer

_____: I have read and understand the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-4)
Reference: Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Per Article 3.A.4.e(5)(b), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), recommendation and nomination for advancement and participation in the MONTH YEAR servicewide competition for RATE is withdrawn. (Explain Reason e. g. Unsatisfactory conduct, NJP, civil conviction)

A. B. SEA, CAPT, USCG
Commanding Officer

_____: I have read and understand the above entry.

FIRST MI LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-5)
Reference: Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (Series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have read and understand Article 1.D.10c, Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (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 (two or five 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).

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-6)
Reference: Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (Series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have read and understand Article 1.D.10.c, Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (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.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Advancement and Reduction (A&R-7)
Reference: Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (Series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have read and understand Article 3.A.19.f., Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (Series). I voluntarily elect to be removed from the eligibility lists for advancement to (Rate). I understand that I will not be eligible to participate in the Servicewide Exam for one year from the date of this election.

FIRST MI LAST

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CG-3307's for Assignment and Transfer (AT)

AT-01 Availability for Unrestricted Assignment
AT-02 HUMS Transfer
AT-03 Unsuitable for Special Duty
AT-04 Suitablity for Icebreaker Duty
AT-05 Member to Member OCONUS Re-assignment
AT-06 Overseas Screening
AT-10 Transfer to IRR

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

ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-01)
Reference: Section 1-B, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have been counseled on the requirement of Article 1-B-11, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series) regarding my availability for unrestricted worldwide assignment. I further certify that the situation, which occasioned my original request, in my memo 1326 of [insert date of memo], has been completely alleviated and I am now available for unrestricted worldwide assignment.

FIRST MI. LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-2)
Reference: Section 1-B, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Received orders for Humanitarian assignment (HUMS) under the provisions of Article 1-B-11, Military Assignments and Authorized Absences, COMDTINST M1000.8 (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 Commander (CG PSC-EPM) 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 Commander (CG PSC-EPM) approval to be granted.

FIRST MI. LAST

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ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-3)
Reference: Section 1-E, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Found to be unsuitable as (enter assigned special duty) due to (state reasons and specifics) per Article 1-E-4, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series). Commander (CG PSC-EPM) notified this date and reassignment requested.

A. B. SEA, CAPT, USCG
Commanding Officer
:

: I have been counseled and understand the reason(s) for the above action.

FIRST MI LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

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ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-4)
Reference: Section 1-C, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
Responsible Level: Unit
Entry:

DDMMMYYYY: I have read and understand Article 1-C-11, Military Assignments and Authorized Absences, COMDTINST M1000.8 (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.

FIRST MI. LAST

DDMMMYYYY: Compliance with the provisions of Article 1-C-11, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series), is certified. [Rate Last Name] is considered to be suitable in all respects for icebreaker duty.

A. B. SEA, CAPT, USCG
Commanding Officer

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ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-5)
Reference: Section 1-H, , Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I understand that neither my spouse nor I will be considered for reassignment under the provisions of Article 1-H-8b, Military Assignments and Authorized Absences, COMDTINST M1000.8 (series), until eligible for normal rotation.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-6)
Reference: Section 1-H, , Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
Responsible Level: Unit
Entry:

OVERSEAS SCREENING

(DDMMMYYYY): I, [Rate FirstName MI LastName, USCG or USCGR], 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.

FIRST MI LAST (Member's Signature)

FIRST MI LAST (Spouse's Signature)

DDMMMYYYY: On the basis of all available information I [endorse] or [do not endorse] the member's orders to the overseas assignment. (A copy of the completed checklist will be forwarded to the receiving command.)

A. B. SEA, CAPT, USCG
Commanding Officer

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ADMINISTRATIVE REMARKS

Entry Type: Assignment and Transfer (A&T-10)
Reference: Section 5-B, Reserve Policy Manual, COMDTINST M1001.28(series)
Responsible Level: Unit
Entry:
DDMMMYYYY: You are hereby transferred to the Inactive Ready Reserve (IRR) for the following reason [state reason(s)].

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 Commander (CG PSC-RPM).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I have been counseled and understand the reason(s) for the above action.

FIRST MI. LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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Selective Reserve (SELRES) Enlisted Bonus Programs (BON)

BON-01 SELRES Reenlistment - Extension Bonus Unit
BON-02 SELRES Enlistment Bonus - Recruiting Office
BON-03 SELRES Enlistment Bonus - Unit
BON-04 SELRES Affiliation Bonus - Unit
BON-05 SELRES Bonus Absence due to recall
BON-06 SELRES Bonus Authorized a period of non-availability
BON-07 SELRES Bonus with A School Requirement

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ADMINISTRATIVE REMARKS

Entry Type: Selective Reserve Reenlistment/Extension Bonus (BON-1)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have been advised that I am eligible for a [enter amount] dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through [enter date].

I hereby acknowledge that I have read and fully understand the contents and explanation of Military Bonus Programs, COMDTINST M7220.2 (series) and ALCOAST messge number and year.

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Selective Reserve Enlistment Bonus (BON-2)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Recruiting Office
Entry:
DDMMMYYYY: I have been advised that I am eligible for a [enter amount] dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through [enter date].

I hereby acknowledge that I have read and fully understand the contents of Military Bonus Programs, COMDTINST M7220.2 (series) and ALCOAST [message number and year].

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

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ADMINISTRATIVE REMARKS

Entry Type: Selective Reserve Enlistment Bonus (BON-3)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have been advised that I am eligible for a [enter amount] dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through [enter date].

I hereby acknowledge that I have read and fully understand the contents of Military Bonus Programs, COMDTINST M7220.2 (series) and ALCOAST [enter message number and year].

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Selective Reserve Affiliation Bonus (BON-4)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have been advised that I am eligible for a [enter amount] dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through [enter date].

I hereby acknowledge that I have read and fully understand the contents of Military Bonus Programs, COMDTINST M7220.2 (series) and ALCOAST Message Number/Year.

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

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ADMINISTRATIVE REMARKS

Entry Type: Selective Reserve Reenlistment/Extension Bonus (BON-5)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 Military Bonus Programs, COMDTINST M7220.2 (series).

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

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ADMINISTRATIVE REMARKS

Entry Type: Selective Reserve Reenlistment/Extension Bonus (BON-6)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 [enter reason for assignment].

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 Military Bonus Programs, COMDTINST M7220.2 (series).

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

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ADMINISTRATIVE REMARKS

Entry Type: Selected Reserve (SELRES) Affiliation Bonus (BON-7)
Reference: Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:

DDMMMYYYY: 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 [enter amount] based on [enter number of months] months of remaining Initial Military Obligation. The criteria of ALCOAST [enter message number/year applies. In addition, the bonus payment is contingent upon successful completion of [enter rating] "A" School and the request for payment will not be submitted by servicing SPO until I have successfully completed [enter rating] "A" School. My eligibility period will commence the day of assignment to the SELRES and commits me to SELRES participation through [enter date].

I hereby acknowledge that I have read and fully understand the contents of Military Bonus Programs, COMDTINST M7220.2 (series) and ALCOAST [enter message number/year].

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

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CG-3307's for Performance and Discipline (PD)

PD-01 Overweight-No Probation Reccomend Discharge_Sep_ISL
PD-01A Weight Probation Period Extension 30 Days
PD-01B Weight Probation Period Abeyance 6 months
PD-02 Weight Probation Semiannual / PD-02A Weight Probation Non Semiannual
PD-03 Weight Probation Complete_Met Weight Standards
PD-04 Weight Separation Post Probation
PD-05 Missed Vessel Movement
PD-06 General_Positive
PD-07 General_Negative
PD-08 UCMJ Code of Conduct Acknowledgement
PD-09 Obligation to Provide Continuous and Adequate Support of Dependents
PD-10 Failure to Pay Depts
PD-10A Counseled Government Travel Charge Card Payment 61 Days Late
PD-10B Counseled Government Travel Charge Card Misuse
PD-11 Unsat Conduct of Personal Affairs and Support of Dependents
PD-12 Counseling for Inappropriate Relationships
PD-13 Alcohol Incident
PD-14 Involved in an Alcohol Incident
PD-15 Involved in an Alcohol-Related Situation
PD-16 Completion of Afer Care_Alcohol Dependent
PD-16 Completion of After Care_Alcohol Abusive
PD-16 Completion of After Care_Self-Referral
PD-17 Alcohol Abusive or Alcohol-Drug Dependent
PD-18 Begin 90 Day Aftercare Program
PD-19 Begin 12 Month Aftercare Program
PD-20 Alcohol-Drug Screening and Determination
PD-21 Counseling for Placement on Performance Probation
PD-22 Awarded General Discharge
PD-23A Qualified Permanent Cutterman
PD-23B Failed to Maintain Cutterman Qualification
PD-24 OOD_Inport
PD-24 OOD_Underway
PD-25 EOIT Certified
PD-26 Completed PQS or qualified certified as (specify watchstation)
PD-27 Restraining Order_Military Protective Order
PD-28 Conviction for Domestic Violence

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-01)
Reference: Chapter 4.A.1., Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: You have this date been determined to be pounds overweight. Your measurements are: Height: (inches), Weight: (pounds), Waist: (inches), Neck: (inches), Buttocks (females only): _____ (inches). Your age is: [years] and your percent body fat is: . In accordance with Coast Guard Weight and Body Fat Standards Program Manual, 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 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 Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and understand I have not met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-01A)
Reference: Chapter , Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Your probationary period has warranted special consideration and is extended for thirty days, in accordance with the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series). If you fail to reach compliance by the end of this extension, 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

DDMMMYYYY: I acknowledge the above entry and understand I have met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-01B)
Reference: Chapter 5.C., Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYY: In accordance with the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series), you are hereby granted a one-time, six month exception 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 exception 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 Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and understand I have met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-02A)
Reference: Chapter 3.B., Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: You have this date been determined to be pounds overweight. Your measurements are: Height: (inches), Weight: (pounds), Waist: (inches), Neck: (inches), Buttocks (females only): _____ (inches). Your age is: [years] and your percent body fat is: . In accordance with Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series), you are hereby notified that you are required to lose pounds or drop to at least or below % body fat by [date]. 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. You are counseled that compliance is a condition of continued service. This non-compliant semiannual weigh-in is considered your first/second strike. 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 the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and understand I have not met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-02)
Reference: Chapter 3.B., Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: You have this date been determined to be pounds overweight. Your measurements are: Height: (inches), Weight: (pounds), Waist: (inches), Neck: (inches), Buttocks (females only): _____ (inches). Your age is: [years] and your percent body fat is: . In accordance with Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series), you are hereby notified that you are required to lose pounds or drop to at least or below % body fat by [date]. 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. You are counseled that compliance is a condition of continued service. This non-compliant weigh-in probation is considered your first/second probationary period within the last fourteen months. 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 the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and understand I have not met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-03)
Reference: Chapter 3.C.8., Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)

Responsible Level: Unit
Entry:
DDMMMYYYY: 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 Weight/Physical Fitness Standards for Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and understand I have met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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Entry Type: Performance and Discipline (P&D-04)
Reference: Chapter 4., Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: On this date your probationary period has come to an end OR this is your 3rd Strike OR this would have been your 3rd probationary period within 14 months. You weighed (pounds) and had a calculated % body fat. You have not achieved your maximum allowable weight and percent body fat. In accordance with chapter 4, Coast Guard Weight and Body Fat Standards Program Manual, 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

DDMMMYYYY: I acknowledge the above entry and understand I have not met the requirement of the Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series).

FIRST MI. LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-5)
Reference: Section 10-B., Personnel and Pay Procedures Manual, PPCINST M1000.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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

DDMMMYYYY: (if vessel deploys for 10 or more days): Member's records and personal effects transferred to (name of unit).

A. B. SEA, CAPT, USCG
Commanding Officer

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-6)
Reference: None
Responsible Level: Unit
Entry:
(General – Positive)

DDMMMYYYY: 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.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-7)
Reference: None
Responsible Level: Unit
Entry:
(General – Negative)

DDMMMYYYY: 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.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-8)
Reference: Art. 1.A.4.b., Discipline and Conduct, COMDTINST M1600.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Necessary articles of the Uniform Code of Military Justice (UCMJ), and the Code of Conduct explained upon completion of six months of active duty (or) upon reenlistment as required by Article 1.A.4.b., Discipline and Conduct, COMDTINST M1600.2 (series).

A. B. SEA, CAPT, USCG
Commanding Officer or By Direction

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-9)
Reference: Art. 2.E.4.a., Discipline and Conduct, COMDTINST M1600.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Counseled (or) Counseled, again, concerning civil and moral obligations to provide continuous and adequate support of lawful dependents.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-10)
Reference: Art. 2.D.4.d., Discipline and Conduct, COMDTINST M1600.2 (series)

Responsible Level: Unit
Entry:
DDMMMYYYY: 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

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-10A)
Reference: Art. 2.D.4.d., Discipline and Conduct, COMDTINST M1600.2 (series) and Government Travel Charge Card (GTCC) Program Policies and Procedures COMDTINST M4600.18 (series)

Responsible Level: Unit
Entry:
DDMMMYYYY: [RANK] [LASTNAME], you have been found unreliable due to failure to pay debts. Your Government Travel Card is past due at least 61 days in the amount of [$0.00]. Per a General Order issued in COMDTINST 4600.14(series) you were required to submit your travel claim within 3 work days of returning to this unit and were required to pay your account in full on or before the statement due date.

On this date you have been counseled that failure to meet financial obligations brings discredit upon the Service, burdens the command administratively, and jeopardizes your ability to maintain a security clearance. Additionally, you need to understand that failure to pay your debts can reflect negatively in performance evaluations and may become grounds for denial of reenlistment or discharge from the Service.

You are directed to pay your account balance in full immediately. Failure to do so may result in further administrative and/or disciplinary actions being taken against you.

Meeting your financial obligations is your responsibility. However, there are several resources available to assist you with financial planning. Your supervisor [or the command financial counselor or Command Master Chief] can assist you with setting up an appropriate appointment.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-10B)
Reference: Art. 2.D.4.d., Discipline and Conduct, COMDTINST M1600.2 (series) and Government Travel Charge Card (GTCC) Program Policies and Procedures COMDTINST M4600.18 (series)

Responsible Level: Unit
Entry:
DDMMMYYYY: [RANK] [LASTNAME], it has been found that on [enter number of occasions] occasions totaling [$enter the amount] you used your GTCC for purchases that were not authorized by an approved set of travel orders. This is in direct violation of a General Order issued in COMDTINST 4600.14(series).

Your GTCC account has been closed for misuse. You will need to ensure that future travel orders include authorization to use the Centrally Billed Account for common carrier transportation and authorization for travel advances as required to meet the travel requirements.

On this date, you have been counseled that misuse of your GTCC, which is only for authorized official travel related expenses, brings discredit upon the Service, burdens the command administratively, jeopardizes your ability to maintain a security clearance, and may prevent you from being assigned OCONUS. Additionally, you need to understand that this misuse can reflect negatively in your performance evaluations and may become grounds for denial of reenlistment or discharge from the Service.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-11)
Reference: Art. 2.E.4.a(4)(b)., Discipline and Conduct, COMDTINST M1600.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Unreliable due to unsatisfactory conduct of personal affairs and support of dependents. Describe circumstances surrounding entry-such as the dates, debts, and actions taken).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above counseling and understand the actions being initiated.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-12)
Reference: Art. 2.A.6.c., Discipline and Conduct, COMDTINST M1600.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Document formal counseling pertaining to improper relationships. Counseling may include a direct order to terminate a relationship.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-13)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-14)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 on (ENTER 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 Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-15)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series) concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-16)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Congratulations! On (date) you successfully completed your (3 or 12 month) after care plan as per Chapter 2, Health Promotion Manual, COMDTINST M6200.1 (series). I encourage you to continue to incorporate positive life style changes into your daily routine and remember what you have learned. You must abstain from alcohol indefinitely. A relapse or incident may lead to separation or re-instatement of a continued care program. You have been advised of the contents of Chapter 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series), concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-16)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Congratulations! On (date) you successfully completed your (3 or 12 month) after care plan as per Chapter 2, Health Promotion Manual, COMDTINST M6200.1 (series). I encourage you to continue to incorporate positive life style changes into your daily routine and remember what you have learned.
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.
You have been advised of the contents of Chapter 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series), concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-16)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Congratulations! On (date) you successfully completed your (3 or 12 month) after care plan as per Chapter 2, Health Promotion Manual, COMDTINST M6200.1 (series). I encourage you to continue to incorporate positive life style changes into your daily routine and remember what you have learned. You may now request removal of the screening letter and treatment plan from your Personnel Data Record as Chapter 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (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). You have been advised of the contents of Chapter 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series), concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-17)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 1, of Military Separations, COMDTINST M1000.4 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and hereby waive my right to benefits under the Department of Veterans Affairs program for treatment of chemical dependency.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-18)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-19)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series).
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:

DDMMMYYYY: 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 of (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 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-20)
Reference: Chap 2, Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (series)
Health Promotion Manual, COMDTINST M6200.1 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: On (date) you were screened by (Name) at (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 HSWL approved support group) each week.
You have been advised of the contents of Coast Guard Drug and Alcohol Abuse Program, COMDTINST M1000.10 (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

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-21)
Reference: Article 1.B.15.c and 1.B.17.c, Military Separations, COMDTINST M1000.4 (SERIES)
Responsible Level: Unit
Entry:
DDMMMYYYY: (document formal counseling pertaining to placing a member on probation, prior to recommending discharge, per articles 1-B-15.c or 1.B.17.c of the Military Separations Manual)

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-22)
Reference: Art. 1.B.2.f.(2), Military Separations, COMDTINST M1000.4 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: (summarize the basis for which a general discharge is awarded per section 1-B of the Military Separations Manual)

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-23A)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4(series), Para. 7.E.6.a.(4)
Responsible Level: Unit
Entry:
DDMMMYYYY: Member qualified as a permanent Cutterman and is certified to wear the Cutterman's Insignia. Member acknowledges issuance of Cutterman Insignia certificate.

A. B. SEA, CAPT, USCG
Comm anding Officer

DDMMMYYYY: I acknowledge the above entry and receipt of the Cutterman Insignia certificate.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-23B)
Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4(series), Para. 7.E.6.a.(6)
Responsible Level: Unit
Entry:
DDMMMYYYY: Member failed to maintain qualification as Cutterman in that (include specific rationale for disqualification). Member has been informed that as of this date, [he/she] is disqualified and is no longer authorized to wear the Cutterman insignia.

A. B. SEA, CAPT, USCG
Comm anding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

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:
: Completed all prescribed training and oral examinations, and is certified as an 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

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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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 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Completed all prescribed training and oral examinations, and is certified as an underway Officer of the Deck in accordance with the Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and the OOD PQS, COMDTINST M3502.5 (series)

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

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 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

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 (series).
Responsible Level: Unit
Entry:
DDMMMYYYY: Completed PQS or qualified/certified as (specify watchstation)

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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Entry Type: Performance and Discipline (P&D-27)
Reference: Coast Guard Policy on the Possession of Firearms and/or Ammunition by Coast Guard Military Personnel, COMDTINST 10100.1
Responsible Level: Unit
Entry:

DDMMMYYYY: You are advised that as the subject of a (Enter: "Restraining Order" or "Military Protective Order) issued on (Enter: Date), you are prohibited from accessing or possessing firearms or ammunition as explained in the Coast Guard Policy on the Possession of Firearms and/or Ammunition by Coast Guard Military Personnel, COMDTINST 10100.1, for the duration of the order. You are advised that this prohibition is a federal law and applies to personally owned firearms and ammunition as well as government owned firearms and ammunition. Possession of any firearm or ammunition, including those previously privately owned, for the duration of the order, is a violation of the law as contained in 18. U.S.C. Section 922 and if you are found to be in possession of a firearm or ammunition, you may be prosecuted by the civilian authorities or punished under the Uniform Code of Military Justice.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry, and fully understand the restrictions and prohibitions described above.

JOHN P. JONES

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Performance and Discipline (P&D-28)
Reference: Coast Guard Policy on the Possession of Firearms and/or Ammunition by Coast Guard Military Personnel, COMDTINST 10100.1
Responsible Level: Unit
Entry:

DDMMMYYYY: You are advised that as the result of a conviction for domestic violence on (Enter: Date), you are permanently prohibited from accessing or possessing firearms or ammunition as explained in the Coast Guard Policy on the Possession of Firearms and/or Ammunition by Coast Guard Military Personnel, COMDTINST 10100.1. You are advised that this prohibition is federal law and applies to personally owned firearms and ammunition as well as government owned firearms and ammunition. Possession of any firearm or ammunition, including those previously privately owned, is a violation of the law as contained in 18. U.S.C. Section 922 and if you are found to be in possession of a firearm or ammunition, you may be prosecuted by the civilian authorities or punished under the Uniform Code of Military Justice.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry, and fully understand the restrictions and prohibitions described above.

JOHN P. JONES

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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CG-3307's for Reserve Incapacitation Benefits (RIB)

RIB-01 Notice of Eligibility
RIB-02 Medical Hold Orders
RIB-03 Active Duty for Health Care Orders

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ADMINISTRATIVE REMARKS

Entry Type: Reserve Incapacitation Benefits (RIB-1)
Reference: Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Level: Unit
Entry:

(DATE): Counseled this date regarding authorization of reserve incapacitation benefits in the form of a Notice of Eligibility (NOE) for authorized medical care and treatment.

_____ Initial I understand I am authorized medical care for an injury/illness (list ICD9 code(s)) incurred in the line of duty on (DDMMMYYYY) while performing (Type of Duty, e.g., T10, ADOS, ADT-AT, IDT) at (unit).

_____ Initial I understand that I may be eligible for Incapacitation Pay IAW Chapter 6 of the Reserve Policy Manual.

_____ Initial I understand that I may request a TONO for travel and transportation expenses associated with this NOE.

_____ Initial I have been advised of the requirement to submit an updated physician's report form from my designated medical provider every 30 days to PSC-rpm-3via my command. I understand that failure to do so may result in the termination of my incapacitation benefits.

_____ Initial I have been advised that my medical care/treatment will be coordinated through my servicing clinic.

_____ Initial I understand that my NOE will not be approved, and is not in effect, until this signed acknowledgement is received by PSC-rpm-3.

Select one option below:

_____ I accept receipt of subject NOE and understand the requirements and provisions as set forth.

_____ Initial I decline receipt of subject NOE and understand that by declining, I will not receive medical care/treatment or compensation.

My current contact information is:

Home Phone: ( ) _____ - _____

Work Phone: ( ) _____ - _____

Email: _____

_____ (Signature of Member/Date)

_____ (Signature of Counselor)

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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Entry Type: Reserve Incapacitation Benefits (RIB-2)
Reference: Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Unit: Unit
Entry:

(DATE): Counseled this date regarding authorization of reserve incapacitation benefits in the form of Medical Hold Orders issued under authority of 10 U.S.C. 12301(h).

_____ I understand I am authorized medical care for an injury/illness (list ICD9 code(s)) incurred in the Initial line of duty on (DDMMMYYYY) while performing (Type of Duty, e.g. T10, ADOS) at (unit).

_____ I understand that I will receive active duty pay & allowances for the duration of authorized
Initial medical hold orders.

_____ I understand that PSC-rpm, in its role as Benefits Issuing Authority, may terminate my medical
Initial hold orders when I am found Available for Full Duty (AFFD) or earlier if it is determined that appropriate medical care can be provided via a Notice of Eligibility (NOE).

_____ I have been advised of the requirement to submit an updated physician's report form from my
Initial designated medical provider every 30 days to PSC-rpm-3 via my command. I understand that failure to do so may result in the termination of benefits.

_____ I have been advised that my medical care/treatment will be coordinated through my servicing Initial clinic.

_____ I understand that my orders will not be approved until this signed acknowledgement is received
Initial by PSC-rpm-3.

Select one option below:

_____ I consent to being retained on active duty in a Medical Hold status and understand the
Initial requirements and provisions as set forth.

_____ I do not consent to being retained on active duty in a Medical Hold status. I understand that by
Initial declining, I will not receive medical care/treatment or compensation.

My current contact information is:

Home Phone: ( ) _____ - _____

Work Phone: ( ) _____ - _____

Email: _____

_____ _____
(Signature of Member/Date) (Signature of Counselor)

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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Entry Type: Reserve Incapacitation Benefits (RIB-3)
Reference: Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Unit: Unit
Entry:

(DATE): Counseled this date regarding authorization of reserve incapacitation benefits in the form of Active Duty for Health Care (ADHC) orders issued under authority of 10 U.S.C. 12322.

_____ Initial I understand I am authorized medical care for an injury/illness (list ICD9 code(s)) incurred in the line of duty on (DDMMMYYYY) while performing (Type of Duty, e.g. IDT, ADT-AT) at (unit).

_____ Initial I understand that I will receive active duty pay & allowances for the duration of authorized ADHC orders.

_____ Initial I understand that PSC-rpm, in its role as Benefits Issuing Authority, may terminate my ADHC orders when I am found Available for Full Duty (AFFD) or earlier if it is determined that appropriate medical care can be provided via a Notice of Eligibility (NOE).

_____ Initial I have been advised of the requirement to submit an updated physician's report form from my designated medical provider every 30 days to PSC-rpm-3 via my command. I understand that failure to do so may result in the termination of benefits.

_____ Initial I have been advised that my medical care/treatment will be coordinated through my servicing clinic.

_____ Initial I understand that my orders will not be approved until this signed acknowledgement is received by PSC-rpm-3.

Select one option below:

_____ Initial I consent to being retained or ordered to active duty in an ADHC status and understand the requirements and provisions as set forth.

_____ Initial I do not consent to being retained on or ordered to active duty in an ADHC status. I understand that by declining, I will not receive medical care/treatment or compensation.

My current contact information is:

Home Phone: ( ) _____ - _____

Work Phone: ( ) _____ - _____

Email: _____

_____ (Signature of Member/Date)

_____ (Signature of Counselor)

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CG-3307's for Reserve Personnel Management (RPM)

RPM-01 Counseled for failure to report for scheduled IDT
RPM-02 Counseled for failure to report for scheduled ADT
RPM-03 Counseled for failure to notify change in address
RPM-04 Counseled for failure to complete the Annual Screening Questionnaire
RPM-05 Counseled for failure to complete annual dental or medical exam

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ADMINISTRATIVE REMARKS

Entry Type: Reserve Participation Management (RPM-1)
Reference: Reserve Policy Manual, COMDTINST M1001.28 (series), section 4.B.
Responsible Level: Unit
Entry:
(DDMMMYYYY of missed IDT drill): You failed to notify this unit of your inability to attend the scheduled IDT drill period. (NAME OF SUPERVISOR) contacted you on (DATE) to determine why you missed the drill period (enter details as appropriate). You are rescheduled to complete IDT drill(s) on (DATE). Your general deportment is (ENTER DETAILS), and quality of work is (ENTER DETAILS). To earn a qualifying year for retirement, you must earn a minimum of 50 points. The Reserve Policy Manual, Section 4.A.2., states unsatisfactory participation begins once you accumulate nine unexcused absences within a 12-month period, which will result in immediate processing for discharge at the convenience of the government. You are required to fulfill 90% of your Military Service Obligation (MSO). If the minimum MSO is not met, you risk being involuntarily recalled for a period not to exceed 24 months. The Counseling session included information/requirements regarding the process to have drills excused, potential negative impact on Montgomery GI Bill, and bonus payments for non-participation. Future incidents will result in additional administrative and/or disciplinary actions.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and have been afforded the opportunity to review the Reserve Policy Manual, COMDTINST M1001.28 (series).

J. P. JONES

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ADMINISTRATIVE REMARKS

Entry Type: Reserve Participation Management (RPM-2)
Reference: Section 4.B., Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: On this date, you were counseled for failure to report for scheduled ADT-AT period from (BEGIN DATE) to (END DATE) . You failed to notify this unit of your inability to attend the scheduled ADT-AT period. (NAME OF SUPERVISOR) contacted you on (DATE) to determine why you missed the drill period (enter details as appropriate). You have been rescheduled to complete ADT-AT period from (DATE) .to (DATE) . Future incidents will result in additional administrative and/or disciplinary actions.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and have been afforded the opportunity to review the Reserve Policy Manual, COMDTINST M1001.28 (series).

J. P. JONES

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3307 (Rev. 10-08)

ADMINISTRATIVE REMARKS

Entry Type: Reserve Participation Management (RPM-3)
Reference: Section 4.B., Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: On this date, you were counseled for failure to notify this command of your change in address in accordance with the reference listed above. (NAME OF SUPERVISOR) attempted to contact you via mail, email, and telephone on numerous occasions beginning (DATE) through (DATE) with no response. You have had no contact with this unit prior to your required IDT drill as of (DATE) . (NAME OF SUPERVISOR) contacted you during your IDT drill on (DATE) to determine why you failed to update your address with (UNIT NAME) , or in Direct Access (enter details as appropriate). Future incidents will result in additional administrative and/or disciplinary actions.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and have been afforded the opportunity to review the Reserve Policy Manual, COMDTINST M1001.28 (series).

J. P. JONES

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ADMINISTRATIVE REMARKS

Entry Type: Reserve Participation Management (RPM-4)
Reference: Section 4.B., Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: On this date, you were counseled for failure to complete the Annual Screening Questionnaire (ASQ) in accordance with the reference listed above. The Commanding Officer / Executive Officer directed all SELRES assigned to (Unit Name) to complete the ASQ between 1 August and 31 October (YYYY) . The Commanding Officer / Executive Officer reminded all SELRES at the October all hands training held on (DATE) . You stated that you were unable to complete the questionnaire due to (enter details as appropriate), but would do so on your next scheduled IDT drill. You have failed to complete the ASQ before the 31 October (YYYY) deadline. Future incidents will result in additional administrative and/or disciplinary actions.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY I acknowledge the above entry and have been afforded the opportunity to review the Reserve Policy Manual, COMDTINST M1001.28 (series).

J. P. JONES

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Reserve Participation Management (RPM-5)
Reference: Section 4.B., Reserve Policy Manual, COMDTINST M1001.28 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: On this date, you were counseled for failure to complete the required annual dental/medical exam scheduled on (DATE) per the reference listed above. (NAME OF SUPERVISOR) received a telephone call on (DATE) from medical indicating you failed to make the medical/dental appointment. (NAME OF SUPERVISOR) contacted you on (DATE) to determine why you missed the medical appointment (enter details as appropriate). You are directed to reschedule a medical/dental exam within the next 30 days and notify your supervisor of the new appointment date. Future incidents will result in additional administrative and/or disciplinary actions.

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: I acknowledge the above entry and have been afforded the opportunity to review the Reserve Policy Manual, COMDTINST M1001.28 (series).

J. P. JONES

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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CG-3307's for Separation (SEP)

SEP-01 Agree to withholding of final pay on sep date
SEP-02 Rights upon separation
SEP-03 Types of discharge certificates
SEP-04 Reenlistment interview
SEP-06 Counseled regarding the loss of entitlement to file for U.S citizenship
SEP-07 Reenlistment interview conducted not recommended for reenlistment
SEP-08 Discharged from active duty without immediate reenlistment
SEP-09 Discharge - Immediate Reenlistment
SEP-10 Released from active duty and transferred to the reserve to complete MSO
SEP-11 Retired from active duty
SEP-12 Must Reenlist within 3 months of sep
SEP-13 Waiver of med treatment desire to sep on EAOS
SEP-14 Desire to be discharged without further hearing and without disability
SEP-15 Discharge from USCGR inactive duty and immediate reenlistment.
SEP-16 Discharge from USCGR inactive duty without immediate reenlistment
SEP-17 Counseled upon assignment to the IRR
SEP-18 Retire in lieu of discharge due to High Year Tenure
SEP-19 High Year Tenure E3 and E4 Professional Growth Point Counseling
SEP-20 High Year Tenure E2 Professional Growth Point Counseling
SEP-21 Acknowledgement of Separation Pay and Recoupment from Retired PayP
SEP-22 Agreement of obligation for transfer of Post 9-11 GI Bill
SEP-24 Montgomery GI Bill Pre-Separation Counseling

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-1)
Reference: Section 3-B-5, Personnel and Pay Procedures Manual, PPCINST M1000.2(series)
Responsible Level: Unit
Entry:
DDMMYYYY: 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.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-2)
Reference: Section 1-B, Military Separations, COMDTINST M1000.4 (SERIES)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have read and been counseled on the contents of Article 1.B.36., Military Separations, COMDTINST M1000.4 (series) about my rights on separation from the Coast Guard. I understand my rights as described there and have had all my questions answered.

I have been advised per Article 1.B.4.a.(1) (Zone "A" SRB eligibility) or Article 1.B.4.b.(1) (Zone "B" SRB eligibility) of Military Bonus Programs, COMDTINST M7220.2 (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.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-3)
Reference: Section 1-B, Military Separations, COMDTINST M1000.4 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: The provisions of Article 1.B.2, Military Separations, COMDTINST M1000.4 (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.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-4)
Reference: Section 1.B, Military Separations, COMDTINST M1000.4 (SERIES)
Responsible Level: Unit
Entry:
DDMMMYYYY: Reenlistment interview conducted this date per Article 1.B.4.b, Military Separations, COMDTINST M1000.4 (SERIES). Member is recommended for reenlistment. Member has stated intentions are to:

- ☐ Reenlist or Extend Enlistment
- ☐ Separate (If member intends to separate the CG PSC (EPM-2) Assignment Officer has been notified).
- ☐ Member is undecided at this time

A. B. SEA, CAPT, USCG

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-6)
Reference: Article 1.B.30.b, Military Separations, COMDTINST M1000.4 (SERIES)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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).

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-7)
Reference: Section 1-B, Military Separations, COMDTINST M1000.4 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Reenlistment interview conducted this date per Article 1-B-4, Military Separations, COMDTINST M1000.4 (SERIES). Member is not recommended for reenlistment because (Include the reasons and the reenlistment and separation codes being assigned).

A. B. SEA, CAPT, USCG
Commanding Officer

DDMMMYYYY: 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 (CG PSC-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.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-8)
Reference: Section 1-B, Military Separations, COMDTINST M1000.4 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: Discharged from active duty without immediate reenlistment this date by reason of (enter reason). Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 1-B-36, Military Separations, COMDTINST M1000.4 (series). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) Thrift Savings Plan (TSP) withdrawal options and procedures; (3) provisions of the Continued Health Care Benefit Program, COMDTINST 1760.7 (series); and maintaining continuous service status.

A. B. SEA, YNCM, USCG
By Direction
CGD FOURTEEN (SPO), Honolulu, HI

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-9)
Reference: Section 1-B, Military Separations, COMDTINST M1000.4 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: Discharged this date by reason of (enter reason) 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.

A. B. SEA, YNCM, USCG
By Direction
CGD FOURTEEN (SPO), Honolulu, HI

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-10)
Reference: Section 1-B Military Separations, COMDTINST M1000.4 (series), COMDTINST 7220.1 (series), and DD 214 Manual.
Responsible Level: SPO
Entry:
DDMMMYYYY: 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 1-B-36, Military Separations, COMDTINST M1000.4 (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 CG PSC-RPM if in IRR, or the 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

DDMMMYYYY : I acknowledge the above entry.

Member's Signature

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-11)
Reference: Article 1.B.4.d, Military Separations, COMDTINST M1000.4 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: 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 1-B-36, Military Separations, COMDTINST M1000.4 (series). Member counseled regarding retirement rights, benefits, and responsibilities.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-12)
Reference: Article 1.B.4.d, Military Separations, COMDTINST M1000.4 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: As outlined in Article 1.b.4.d, Military Separations, COMDTINST M1000.4 (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.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-13)
Reference: Article 1.B.11.f, Military Separations, COMDTNST M1000.4 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: 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

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-14)
Reference: Article 1.B.11.f, Military Separations, COMDTNST M1000.4 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: 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

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ADMINISTRATIVE REMARKS

Entry Type: Separation USCGR (Inactive) (SEP-15)
Reference: Section 8-B, Reserve Policy Manual, COMDTINST M1001.28 (series) and DD 214 Manual.
Responsible Level: Unit
Entry:
DDMMMYYYY: Discharged this date from USCGR inactive duty by reason of (enter reason) and immediately reenlisted in the USCG or USCGR. Member provided USCGR discharge certificate and other separation documents as required by Article 1-B-36, Military Separations, COMDTINST M1000.4 (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 maintaining continuous service status.

DDMMMYYYY: Reenlisted this date in the USCG or USCGR.

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

DDMMMYYYY: I acknowledge the above entries.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation USCGR (Inactive) (SEP-16)
Reference: Section 8-B, Reserve Policy Manual, COMDTINST M1001.28 (series) and DD 214 Manual.
Responsible Level: SPO
Entry:
DDMMMYYYY: Discharged from USCGR inactive duty without immediate reenlistment this date by reason of (state reason). Member provided USCGR discharge certificate and other separation documents as required by Article 1-B-36, Military Separations, COMDTINST M1000.4 (SERIES). Documents mailed this date to: (enter address)

A. B. SEA, YNCM, USCG
By direction
CGD FOURTEEN (SPO), Honolulu, HI

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ADMINISTRATIVE REMARKS

Entry Type: Separation from Selected Reserve (SELRES)(SEP-17)
Reference: COMDTINST 1001.37 (series)
Responsible Level: SPO
Entry:
DDMMMYYYY: Member counseled this date upon assignment to the Individual Ready Reserve (IRR), regarding possible entitlement to/ineligibility to Reserve Transition Benefits (RTB). Commandant (CG-13) will make final determination of RTB entitlement.

A. B. SEA, YNCM, USCG

DDMMMYYYY: I acknowledge the above entry.

FIRST MI LAST

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-18)
Reference: Military Separations, COMDTINST M1000.4 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in Chapter 1-F of the Military Separations, COMDTINST M1000.4 (series).

I understand that based on my present pay grade of , my Professional Growth Point (PGP) is (# of years) 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.

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 (CG PSC-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

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

PREVIOUS EDITION MAY BE USED The CG-3307 must be prepared in original and one copy as follows: The original is filed in the SPO PDR, and the copy is mailed/emailed to Commander (CG PSC-PSD-MR) for electronic imaging into the EI PDR.

DEPARTMENT OF HOMELAND SECURITY
U.S. COAST GUARD
CG-3307 (Rev. 10-08)

ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-19)
Reference: Military Separations, COMDTINST M1000.4 (series)
Responsible Level: Unit
Entry:
: I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in Chapter 1-F of Military Separations, COMDTINST M1000.4 (series).

I understand that based on my present pay grade of (enter paygrade), 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 Military Separations, COMDTINST M1000.4 (series).

I understand that I will be separated from the Coast Guard upon reaching my PGP. I also acknowledge that waivers to this policy may only be granted by Commander (CG PSC-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

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

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DEPARTMENT OF HOMELAND SECURITY
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CG-3307 (Rev. 10-08)

ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-20)
Reference: Military Separations, COMDTINST M1000.4 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in Chapter 1-F of Military Separations, COMDTINST M1000.4 (series).

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 Coast Guard Personnel Manual, COMDTINST M1000.6 (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 (CG PSC-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

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6. PAGE 7

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DEPARTMENT OF HOMELAND SECURITY
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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-21), Acknowledgement of Separation Pay & Recoupment from Retired Pay
Reference: (a) Title 10 U. S. C. 1174;
(b) COMDTINST M7220.9(Series), CG Pay Manual, Chapter 10.H;
(c) Reserve Policy Manual, COMDTINST M1001.28(Series)
Responsible Level: Unit
Entry:

DDMMMYYYY: I acknowledge that I have read and understand the following statements regarding separation pay and recoupment from retired pay:

Per references (a) and (b), as a condition of entitlement for receipt of Separation Pay, I hereby agree to serve in the Coast Guard Ready Reserve for a period of at least three years. I understand that reference (b) states: "Actual accession into the Ready Reserve of a discharged member that is authorized SEP PAY under this Section and any subsequent assignment to duty as a reservist is solely at the discretion of Commander, USCG Personnel Service Center."

I understand that separation payments are subject to Federal income taxation and by law the Coast Guard is required to withhold 25% of a separation payment and report this withholding to the U.S. Internal Revenue Service (IRS). This withholding is also reported on the recipient's W-2 form for the tax year in which the separation benefit is paid. Under the authority of title 10 U.S. Code, §1174, a member who, subsequent to receipt of Severance or Separation Pay, becomes entitled to Retired Pay is required to pay back the entire amount of the separation payment.

The statutory requirement for recoupment makes no distinction between Retired Pay under any of the voluntary/involuntary retirement authorities for active duty service or non-regular retirement (Reserve Retired Pay) under title 10 U.S. Code, §12731. Further, the recoupment of Retired Pay is not bounded by the time limitations for collection of indebtedness per 5 CFR §550.1106 but is subject to the amount limitations under title 37 U.S. Code, §1007(c), which restrict collections to not more than two-thirds of Retired Pay. Since Separation or Severance Pay is not an erroneous payment at the time it is paid and its recoupment subsequent to entitlement to Retired Pay is required by title 10 U.S. Code, §1174, collection may not be waived or the amount remitted under the provisions of titles 10 U.S. Code, §2774 and 14 U.S. Code, §461, respectively.

Recoupment of Separation or Severance Pay may, at the retiree's option, be in lump sum form or may be accomplished by monthly reductions in Retired Pay until the accumulated reductions equal the total amount of the separation benefit. Under current regulations, Separation or Severance Pay is recouped at the rate of 40% of the retiree's gross Retired Pay. Ninety (90) days prior to implementation of recoupment deductions, the retiree will receive a notification letter and a Retiree Account Statement from the USCG Pay & Personnel Center Retiree & Annuitant Services Division (PPC-RAS) that indicates the amount of the monthly deduction. Retirees who submit a claim to PPC-RAS for monthly recoupment amount reduction due to financial hardship may have their recoupment rates reduced, but not less than 25% of gross Retired Pay (see Subsection 10-H-7-c. of the U.S. Coast Guard Pay Manual for details and instructions.)

Signature of Member

Signature of Witness

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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DEPARTMENT OF HOMELAND SECURITY
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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-22), SELRES Obligated Service for the Post 9/11 G.I.Bill
Reference: Under Secretary Of Defense Memorandum, 22 June 2009, Subject: Directive-Type Memorandum (DTM) 09-003: Post 9/11 G.I. Bill.
Responsible Level: Unit or SPO
Entry: DDMMMYYYY: I, FirstName MI. LastName, agree to obligate additional service to meet the requirements of the Post 9/11 GI Bill allowing the transfer of my education benefits to my dependents. (**Read and initial below**)

1. _____ I understand that the determination of remaining benefits is made by the Department of Veterans Affairs (DVA).
2. _____ I understand that I must have 6 years in the Armed Forces (Selected Reserve and/or Active Duty) to transfer benefits. My spouse may use benefits immediately and children may use benefits after I have served 10 years in the Armed Forces.
3. _____ I agree to remain in the Armed Forces (Selected Reserve and/or Active Duty) for the period required below from the date of my Transfer of Education Benefits (TEB) web application and that this time runs concurrent with any other contract or agreement: (**Read and initial applicable obligation (a), (b), (c) or (d) below**).
   - (a). _____ I will achieve 20 qualifying years of service towards retirement after August 1, 2009 and before August 1, 2010; **one year of additional service is required**.
   - (b). _____ I will achieve 20 qualifying years of service towards retirement on or after August 1, 2010 and before August 1, 2011; **two years of additional service is required**.
   - (c). _____ I will achieve 20 qualifying years of service towards retirement on or after August 1, 2011 and before August 1, 2012; **three years of service is required**.
   - (d). _____ I will achieve 20 qualifying years of service towards retirement on or after August 1, 2012; **four years of additional service is required**.
4. _____ I understand that if Service policy or statute does not allow me to complete my obligated service, I agree to serve the maximum amount of time allowed by such policy or statute.
5. _____ I understand that this agreement does not obligate the military service to retain me in the Selected Reserve or on Active Duty.
6. _____ I understand that failure to complete this service agreement after transferring entitlement may result in an overpayment of educational assistance and is subject to collection by DVA.

(Member: Sign and Date) (Supervisor Name/Title: Sign and Date)

Transfer of Education Benefits Approval Requirements.
Eligible TEB requests will be approved upon receipt of member's CG-3307 for obligated service. The CG-3307 may be faxed to 202-493-1776 or emailed to reservevaeducation@uscg.mil. The cover sheet or email should contain member's contact information.

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Separation (SEP-24), Montgomery GI Bill (MGIB) Pre-Separation Counseling
Reference: COMDTINST 1760.9 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: Member received pre-separation counseling on the Montgomery G.I. Bill (MGIB) this date in accordance with COMDTINST 1760.9 (series). The following items were covered in the counseling:

A. The benefits of the MGIB, the procedures for applying for such benefits and the advantages of affiliating with the selected reserves, if initial active duty is less than three years.

B. The consequences of requesting early separation from the Coast Guard prior to meeting the minimum requirements to be eligible for MGIB benefits.

C. The opportunity to enroll into the MGIB program if being involuntarily separated.

D. The procedures for converting to the MGIB program for VEAP, if being involuntarily separated.

In addition, member has been provided copies of enclosures (1) through (3) of COMDTINST 1760.9 (series)

A.B.SEA, YNCM, USCG
By Direction
CGD FOURTEEN (SPO), Honolulu, HI

DDMMMYYYY: I acknowledge the above entry.

Signature of Member

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
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CG-3307's for Selective Reenlistment Bonus (SRB)

SRB-01 Counseled on SRB member near EAOS
SRB-02 Counseled on SRB member near 6 or 10 year AD anniversary
SRB-03 Counseled on SRB member entering into an extension
SRB-04 Counseled on SRB payments for new rating

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DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD CG-3307 (Rev. 10-08)	**ADMINISTRATIVE REMARKS**

Entry Type: Selective Reenlistment Bonus (SRB-1)
Reference: Art. 1.B.11.1 and 1.B.9 (Recoupment), Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMYYYY: "I have reviewed Article 1.B.13. of Military Bonus Programs, COMDTINST M7220.2 (series) entitled "Frequently Asked SRB Questions and Answers". I have been informed that:

My curr ent S elective R eenlistment B onus (SRB) m ultiple is [enter m ultiple] and is l isted in ALCOAST [enter message number/year], which has been made available for my review.

In accordance with article 1-B-4, Military Separations, COMDTINST M1000.4 (series), I am eligible to reenlist/extend my enlistment for a maximum of [number of years] years. My SRB will be computed based on [number of months (If extension/reenlistment is for less than 36 months, enter "00")] months newly obligated service.

I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

Per article 1.B.9 (Termination of Bonus Entitlement and Recoupment), Military Bonus Programs, COMDTINST M7220.2 (series), I understand that I will receive payment for my bonus in one lump sum, less 25% for mandatory federal income tax withholding, and as such I must remain eligible for the entire term of the newly obligated service. If at any time I am found to be ineligible for the bonus (under the conditions listed in art. 1.B.9) the unearned amount will be recouped.

The following SRB policies were unclear to me, but my SRB counselor provided me with the corresponding answers: (list specifics)

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Selective Reenlistment Bonus (SRB-2)
Reference: Art. 1.B.5 (Special Conditions), 1.B.9 (Recoupment) & 1.B.13 (FAQs), Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I have reviewed Article 1.B.13. of Military Bonus Programs, COMDTINST M7220.2 (series) entitled "Frequently Asked SRB Questions and Answers". I have been informed that:

My current Selective Reenlistment Bonus (SRB) multiple is [enter multiple] and is listed in ALCOAST [enter message number/year], which has been made available for my review.

In accordance with article 1-B-4, Military Separations, COMDTINST M1000.4 (series),I am eligible to reenlist/extend my enlistment for a maximum of [enter number of years] years. My SRB will be computed based on [enter number of months (If extension/reenlistment is for less than 36 months, enter "00".)] months newly obligated service.

I must reenlist or extend on or within 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).

Per article 1.B.9 (Termination of Bonus Entitlement and Recoupment), Military Bonus Programs, COMDTINST M7220.2 (series), I understand that I will receive payment for my bonus in one lump sum, less 25% for mandatory federal income tax withholding, and as such I must remain eligible for the entire term of the newly obligated service. If at any time I am found to be ineligible for the bonus (under the conditions listed in art. 1.B.9) the unearned amount will be recouped.

The following SRB policies were unclear to me, but my SRB counselor provided me with the corresponding answers: (list specifics)

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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DEPARTMENT OF HOMELAND SECURITY
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ADMINISTRATIVE REMARKS

Entry Type: Selective Reenlistment Bonus (SRB-3)
Reference: Art. 3-C, Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: I hereby acknowledge that I have read and fully understand the contents and explanation of Article 1.B.13. of Military Bonus Programs, COMDTINST M7220.2 (series) entitled "Frequently Asked SRB Questions and Answers

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.

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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ADMINISTRATIVE REMARKS

Entry Type: Selective Reenlistment Bonus (SRB-4)
Reference: Article 1-C, Military Bonus Programs, COMDTINST M7220.2 (series)
Responsible Level: Unit
Entry:
DDMMMYYYY: 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.

FIRST MI LAST (Signature of Member)

FIRST MI LAST, RATE, USCG/USCGR
Signature of Counselor

1. NAME OF PERMANENT UNIT	2. NAME OF UNIT PREPARING THIS FORM		
3. NAME OF MEMBER *(Last, First, MI)*	4. EMPLOYEE ID NUMBER.	5. GRADE/RATE	6.

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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 (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 PSSU ANYWHERE USA (PSSU where Next Of Kin resides)
CCGDNUMBER ANYWHERE US (district where member's unit is located, if different from "To" line)
COGARD PSSU ANYWHERE USA (PSSU 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. **Add CG-131 if Reserve Component (RC) Member**)
INFO COGARD PPC TOPEKA KS
COMCOGARD PSC ARLINGTON VA//EPM (for enlisted personnel) *or* OPM (for officers) *and* RPM (if RC member)//
COMLANTAREA COGARD PORTSMOUTH VA//LANT-00//
AFNEWS LACKLAND AFB TX//HN//
FHTNC NORFOLK VA (Fleet Home Town News Center)
CCGDNUMBER ANYWHERE US (district where unit sending this msg is located, if different from above)
COGARD HSWL SUPACT NORFOLK VA
COMCOGARD TISCOM//HONOR GUARD OPS//

MESSAGE ROUTING TO REPORT A DEPENDENT DEATH

P 000000Z MON YR (date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COMDT COGARD WASHINGTON DC//CG-1222/CG-111//
COGARD PSSU ANYWHERE USA (PSSU where member resides)
INFO COGARD PPC TOPEKA KS

MESSAGE ROUTING TO REPORT A RETIREE DEATH

P 000000Z MON YR (date time group)
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)
TO COGARD PPC TOPEKA KS//RAS//
INFO COMDT COGARD WASHINGTON DC//CG-1222//
COMCOGARD PSC ARLINGTON VA//ADM//
COGARD PSSU ANYWHERE USA (PSSU 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, Employee ID Number (EMPLID), 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, EMPLID, 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 (CG-1222) at 202-475-5927.

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 section 1.D.3, Military Casualties and Decedent Affairs, COMDTINST M1770.9 (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 Designation of Beneficiaries/Record of Emergency Data (CG-2020D). 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 (Direct Access BAH/Dependency Report (Old 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 indicate 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-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-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-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, Employee ID) 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 $7,700, for burial in a private cemetery or $6,200 if remains are consigned to a funeral director prior to interment in a national cemetery or $850 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, Employee ID) 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).

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, Employee ID) 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 section 1.H.2, Military Casualties and Decedent Affairs, COMDTINST M1770.9 (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
Date

MEMORANDUM

From: M. R. Roberts
CG Sector Anywhere

To COMDT (CG-094)

Thru: (1) CGD Fourteen (a)

Subj: INCONCLUSIVE EVIDENCE OF DEATH

Ref: (a) Military Casualties and Decedent Affairs, COMDTINST M1770.9 (series) 1-D-3.

In accordance with reference (a), a death status determination is requested in the case of (indicate rate/rank, name, Employee ID, 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

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Direct-Access Procedures

Purpose

This enclosure establishes the Direct-Access online manual as the official reference for reporting personnel events and transactions.

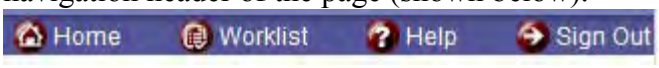
Policy

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 (CGOne) or over the Internet.

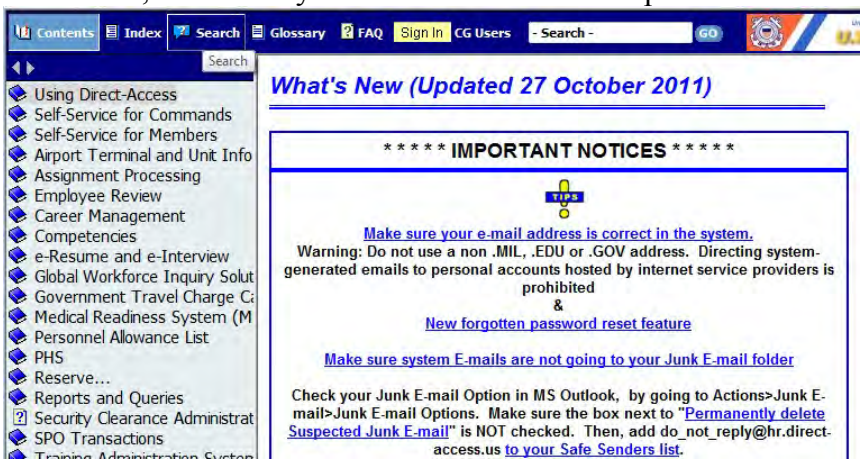
- To access the online manual from within Direct-Access you must first navigate to a data entry page then click on the **Help** link in navigation header of the page (shown below).



- To access the online manual over the internet start your web browser and enter http://www.uscg.mil/ppc/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 was last updated. 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

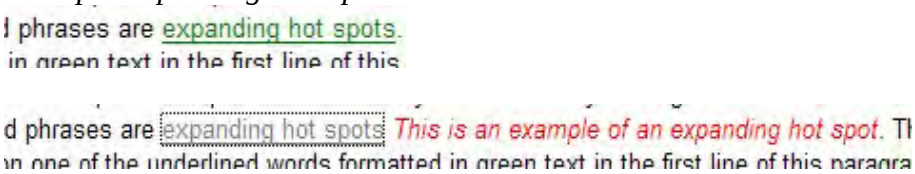
Direct-Access Procedures, Continued

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.

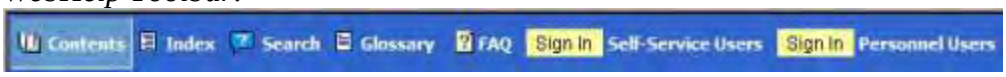
  Example Expanding Hot Spot Text:

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

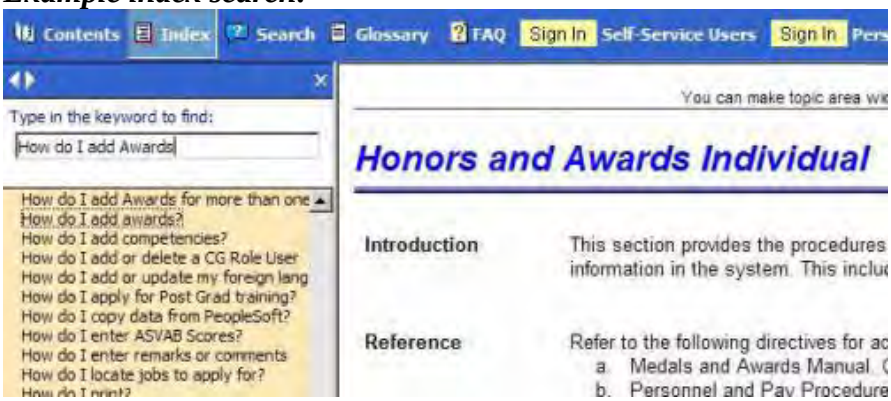
Direct-Access Procedures, Continued

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.

COMMENT FORM

The Pay & Personnel 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, PPC would like to know about them. Just copy this form, write your suggestions in the space below, and mail to PPC (P&D). Or simply E-mail your suggestion to PPC-PF-PD in the Global Address List.

COMMENTS / RECOMMENDATIONS

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For details, you can contact me at the following address and phone number:

Date: _____ Phone No: _____ Rank: _____

Print Name (First, Last): _____ Unit: _____

REPRODUCE LOCALLY

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Overview

Introduction

This appendix will guide you through the procedures needed to compute service.

In this appendix

Topic	See Page(s)
Introduction to Computation Procedures	2-10
Creditable Service	11-14
Deductible Time	15-24
Pay Base Date	25-27
Active Duty Base Date	28-29
Date of Rank	30-38
Expiration of Enlistment	39-43
Creditable Sea Duty/Sea Pay Premium	44-52
Quick Reference Tables	53-end

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 Table

There are procedure tables on each of the above throughout this section. Use the appropriate table on every computation.

Disclosure

Although the words “he”, “him”, “his”, “she”, and “her” are used in this document to enhance communication, they are not intended to be gender driven nor to discriminate against anyone reading this Appendix.

Continued on next page

Introduction to Computation Procedures, Continued

Rules

Here are a few rules you need to learn regarding computations of service for any pay related equation.

- When computing any pay related problem consider all months to have 30 days. Those computations dealing with **Creditable Service, Deductible Time (expect when computing for EOE), Active Duty Base Date, Pay Base Date, Date of Rank, and Creditable Sea Duty** all affect a member's pay and should be based on 30 days. There are a couple of exceptions which are listed below.

    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 date** 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 39).

- 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 a *period of time* from a date, **DO NOT** add a day.

Adding an Inclusive Date

An **inclusive date** is a date that needs to be accounted for in your computation. Inclusive meaning "to include"; this term represents the boundaries of the days that need to be account for in your equation. 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

Introduction to Computation Procedures, Continued

Adding an Inclusive Date, continued

Using the example on the previous page, it was determined 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).

```
  11  04  10  last day of leave (Ending date)
- 11  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 beginning date that was lost (in this case the 5th of April) can be accounted for in the total.

```
  11  04  10  Ending date
- 11  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 you answered **yes** 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 the answer must be **yes** to **all** four questions before you can change the date.

Continued on Next Page

Introduction to Computation Procedures, Continued

February

When using the month of February:

(a) In a leap year, if ending date is 29 February change to the 30th when computing for pay.

(b) In a leap year, if the ending date is 28 February, leave it as 28 February since the 28th isn't the last day of the month.

(c) In a **Non-Leap** year, if the ending date is 28 February change to the 30th when computing using the **30-Day Rule**.

COMMENT: Leap years occur every 4 years (i.e., 2008, 2012, 2016, 2020, etc.) and are in sequence with the summer Olympics.

Continued on Next Page

Introduction to Computation Procedures, Continued

Note: In these examples we are trying to find a member's creditable service however, ***you should note the rules used here can be applied to any computation regarding pay (30-day rule).***

Example #1 Let's take an arbitrary enlistment and discharge date and use the rules mentioned earlier to come up with an answer. In this example we are trying to figure out the member's creditable service. Use procedure table #1 when doing computations for creditable service. Creditable service answers are in a Year(s), Month(s), and Day(s) format.

Procedure Table #1

Step	Procedure
1	List the date of release from the Coast Guard or other Service (Ending Date). ***If the date of release is the last day of the month and other than the 30th then change it 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.

Seaman Smith enlisted in the Coast Guard on 27 March 2007 and discharged on 24 March 2011.

Notice the format: Year, Month, Day

- Step 1 - List the date of release from the Coast Guard.

  11 03 24 Discharge Date

The discharge date or ending date will always go on top

- Step 2 - Minus the date entered the Coast Guard.

  11 03 24 Discharge Date
  - 07 03 27 Enlistment Date

Continued on Next Page

Introduction to Computation Procedures, 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	
11	~~03~~	~~24~~	Discharge Date
- 07	03	27	Enlistment Date

We all know you cannot subtract 24 from 27 so you will 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 month's 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		
10	~~02~~	54	
~~11~~	~~03~~	~~24~~	Discharge Date
- 07	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 11 to 10.

We now have a workable problem. Subtract the days, months, and years.

	14		
10	~~02~~	54	
~~11~~	~~03~~	~~24~~	Discharge Date
- 07	03	27	Enlistment Date
03	11	27	

Continued on Next Page

Introduction to Computation Procedures, Continued

Example #1 Continued

- Step 3 - Plus 01 day for inclusive dates.

Anytime you subtract two dates you must add 01 inclusive day.

		14		
	10	~~02~~	54	
	~~11~~	~~03~~	~~24~~	Discharge Date
-	07	03	27	Enlistment Date
	03	11	27	
+			01	Inclusive day
	03	11	28	

- Step 4 - No prior military service in this problem.

- Step 5- No deductible time in this problem.

For total creditable service our member has 03 years, 11 months, 28 days.

Continued on Next Page

Introduction to Computation Procedures, Continued

Example #2

In this example you have to change the ending date.

YN1 Smith enlisted in the Coast Guard on 3 August 2006 and discharged on 31 July 2010.

- Step 1 - List the date of Release from the Coast Guard.

  10 07 31 Discharge Date

- Step 2 - Minus the date entered the Coast Guard

Again notice the Discharge Date is on top

```
  10 07 31  Discharge Date
- 06 08 03  Enlistment Date
```

Before we can do this problem we need to ask the following four questions, based on our rules.

1. Is the date an ending date? **Yes, the 31st of July.**
2. Is the computation base on Pay? **Yes, Creditable Service is a pay computation.**
3. Is the ending date the last day of the month? Yes, 31 July is the last day of July.
4. Is the ending date other than the 30th? **Yes, 31 July.**

Since the answer is YES to all these questions the rule is to change the 31st to 30th since **pay** is on a **30-day month basis.** Remember if the answer to any of these questions is **NO** you **DO NOT** change the ending date.

```
        30
  10 07 ~~31~~  Discharge Date
- 06 08 03  Enlistment Date
```

Continued on Next Page

Introduction to Computation Procedures, Continued

Example #2 Continued

Looking at the problem you can see that 07 cannot be subtracted from 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.

```
  09  19  30
  ~~10~~ ~~07~~ ~~31~~  Discharge Date
- 06  08  03  Enlistment Date
  03  11  27
```

- Step 3 - Plus 01 day for inclusive dates.

```
  09  19  30
  ~~10~~ ~~07~~ ~~31~~  Discharge Date
- 06  08  03  Enlistment Date
  03  11  27
+         01  Inclusive day
  03  11  28
```

- Step 4 - No prior military service in this problem.
- Step 5- No deductible time in this problem.

This member has a total creditable service of 03 years, 11 months, 28 days.

Remember

Never forget to ask yourself the four questions before changing a date.

1. Is the date an ending date?
2. Is the computation base on Pay (**30-day month basis**)?
3. Is the ending date the last day of the month?
4. Is the ending date other than the 30th?

Continue on Next Page

Creditable Service

Introduction

In this section we will deal with the rules and procedures for computing creditable service.

What is Creditable Service?

Creditable service is a period of time that determines a member's rate of basic pay. You compute it by adding all periods of active and inactive service as a commissioned officer, warrant officer, or enlisted member in any regular or reserve component minus any deductible time.

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 the date of release is the last day of the month and other than the 30th then change it 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

YN3 Thomas enlisted in the Coast Guard on 23 April 2006 and was discharged on 19 June 2010.

- Step 1 - List the date of release from the Coast Guard or other service.

(Notice the format: Year, Month, Day)

10 06 19 Discharge Date

- Step 2 - Minus the date entered the Coast Guard.

(Discharge Date is always on top)

```
  10 06 19   Discharge Date
- 06 04 23   Enlistment Date
```

Continued on next page

Creditable Service, Continued

Example #1, Continued

Now simply do the math. Remember to start the computation by subtracting from the day's column first, then months, and then year.

```
      05  49
  10  ~~06~~  ~~19~~  Discharge Date
- 06  04  23  Enlistment Date
  04  01  26
```

- Step 3 - Plus 01 day for inclusive dates.

```
      05  49
  10  ~~06~~  ~~19~~  Discharge Date
- 06  04  23  Enlistment Date
  04  01  26
+         01  Inclusive Day
  04  01  27
```

- Step 4 - No prior military service in this problem.

- Step 5- No deductible time in this problem.

This member has a total creditable service of **04 years, 01 months, 27 days**.

Continued on next page

Creditable Service, Continued

Example #2, Member enlisted in the Air Force on 30 June 2002 and was released from active duty on 29 June 2006. Member served from 30 June 2006 to 19 May 2010 in the Coast Guard. No deductible time.

- Step 1 - List the date of release from the Coast Guard.

  10 05 19 Discharge Date

- Step 2 - Minus the date entered the Coast Guard.

  10 05 19 Discharge Date
  - 06 06 30 Enlistment Date

Now simply do the math. Remember to start the computation by subtracting from the day's column first, then months, and then year.

16
09 ~~04~~ 49
~~10~~ ~~05~~ ~~19~~ Discharge Date
- 06 06 30 Enlistment Date
03 10 19

- Step 3 - Plus 01 day for inclusive dates.

16
09 ~~04~~ 49
~~10~~ ~~05~~ ~~19~~ Discharge Date
- 06 06 30 Enlistment
03 10 19
+ 01 Inclusive Day
03 10 20

03 years, 10 months, 20 days of Coast Guard time.

Repeat steps 1-3 to determine how much Air Force time the member has.

Continued on next page

Creditable Service, Continued

Example #2, Continued

- Step 1 - List the date of release from the Air Force.

  06 06 29 Discharge Date

- Step 2 - Minus the date entered the Air Force.

  06 06 29 Discharge Date
  - 02 06 30 Enlistment Date

Now simply do the math. Remember to start the computation by subtracting from the day's column first, then months, and then year.

04 17
~~05~~ ~~05~~ 59
~~06~~ ~~06~~ ~~29~~ Discharge Date
- 02 06 30 Enlistment Date
03 11 29

- Step 3 - Plus 01 day for inclusive dates.

  04 17
  ~~05~~ ~~05~~ 59
  ~~06~~ ~~06~~ ~~29~~ Discharge Date
  - 02 06 30 Enlistment Date
  03 11 29
  + 01 Inclusive Day
  03 11 30 (which can be converted to 04 years 00 months 00 days)

- Step 4 - Plus any prior military service

  04 00 00 (Air Force)
  + 03 10 20 (Coast Guard)
  07 10 20

- Step 5 - No deductible time

This member has a total of **07 years, 10 months, 20 days** creditable service.

Continued on Next Page

Deductible Time

Introduction

Deductible time is a period that does not count as creditable service. This is bad time -- time which needs making up. 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 courts-martial case.

When does 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 the computation 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 your 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 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.*
2	Determine the date of departure. This is the Beginning Date. **(Never Change)**
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 prior to returning to full duty status. This is the Ending Date. **(Day-for-Day, Never Change)**
2	Determine the date of departure. This is the Beginning 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 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.
2	Determine the date of departure. This is the Beginning Date. **(Never Change)**
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

Below are some examples of deductible time involving Pay & Expiration of Enlistment within the same month.

MK3 Anderson was on unauthorized absence (UA) starting at 0730, 15 March 2011 and returning at 1900, 21 March 2011.

Remember the 3 questions you must ask before we can work the computation?

1. Is the period of absence over 24 hours? Yes
2. Is the Purpose of computation for pay or expiration of enlistment? Both
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 (for pay purposes). Look at the example below:

Example #1

- Step 1 - Determine the date prior to returning to full duty status.

  11 03 20 Ending Date

- Step 2 - Determine the date of departure.

  11 03 15 Beginning Date

- Step 3 - Minus the Beginning Date from the Ending Date.

```
  11 03 20  Ending Date
- 11 03 15  Beginning Date
  00 00 05
```

- Step 4 - Add 1 day for inclusive date

```
  11 03 20  Ending Date
- 11 03 15  Beginning Date
  00 00 05
+       01  Inclusive day
  00 00 06  Total deductible time for pay
```

Continued on next page

Deductible Time, Continued

Example #1 Continued

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:

- Step 1 - Determine the date prior to returning to full duty status.

  11 03 20 Ending Date

- Step 2 - Determine the date of departure.

  11 03 15 Beginning Date

- Step 3 - Minus the Beginning Date from the Ending Date.

```
  11 03 20  Ending Date
- 11 03 15  Beginning Date
  00 00 05
```

- Step 4 - Add 1 day for inclusive date

```
  11 03 20  Ending Date
- 11 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 months unauthorized absence periods. Always use the correct procedure table.

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.

SN Seay went on UA at 0730, 15 March 2011 and returned 0730, 1 April 2011.

- Step 1 - Determine the date prior to returning to full duty status.

  11 03 31 Ending Date

- Step 2 - Determine the date of departure.

  11 03 15 Beginning Date

- Step 3 - Minus the Beginning Date from the Ending Date.

```
  11  03  31  Last day of the month member departed
- 11  03  15  Beginning Date
  00  00  16
```

- Step 4 - Add 1 day for inclusive dates.

```
  11  03  31  Last day of the month member departed
- 11  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 these examples. 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. Work it for pay first.

SN Johnson went UA at 1400, 29 July 2010 and returned 0830, 4 August 2010.

Always use procedure table #2 when computing for pay

- Step 1 - Determine the date prior to returning to full duty status.

  10 08 03 Ending Date

- Step 2 - Determine the date of departure.

  10 07 29 Beginning Date

- Step 3 - Minus the Beginning Date from the Ending Date.

```
      07 33
  10  ~~08~~ ~~03~~  Ending Date
- 10  07  29  Beginning Date
  00  00  04
```

- Step 4 - Add 1 day for inclusive dates.

```
      07 33
  10  ~~08~~ ~~03~~  Ending Date
- 10  07  29  Beginning Date
  00  00  04
+         01  Inclusive Day
  00  00  05  Total deductible time for pay
```

Continued on next page

Deductible Time, Continued

Now let's work the same problem for Expiration of Enlistment.

Use procedure table #4 when computing for EOE involving two different months

SN Johnson went UA at 1400, 29 July 2010 and returned 0830, 4 August 2010.

- Step 1 - Determine the last day of month in the month the member departed.

  10 07 31 Ending Date

- Step 2 - Determine the date of departure.

  10 07 29 Beginning Date

- Step 3 - Minus the Beginning Date from the Ending Date.

```
  10 07 31   Ending Date
- 10 07 29   Beginning Date
  00 00 02
```

- Step 4 - Add 1 day for inclusive dates.

```
  10 07 31   Ending Date
- 10 07 29   Beginning Date
  00 00 02
+       01   Inclusive Day
  00 00 03   Deductible time for July
```

- Step 5 - Add remaining days of deductible time in the next month(s).

```
  00 00 03   Deductible time for July
+ 00 00 03   Deductible time for 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

Pay Base Date (PBD) is defined as the actual or constructive date of entry into the service. Pay Base Dates are used to determine longevity increases in a member's basic pay. 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:
08 01 00	07 DEC 31
08 02 00	08 JAN 31
08 02 28	08 FEB 28
08 02 29	08 FEB 29
07 02 29	07 FEB 29*
08 02 30	08 MAR 01
08 02 31	08 MAR 01
08 03 00	08 MAR 01
08 04 00	08 MAR 31
08 05 00	08 APR 30
08 06 00	08 MAY 31
08 07 00	08 JUN 30
08 08 00	08 JUL 31
08 09 00	08 AUG 31
08 10 00	08 SEP 30
08 11 00	08 OCT 31
08 12 00	08 NOV 30
08 00 00	07 NOV 30
08 00 01	07 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 2008 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 2011. 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

  11 04 15

- Step 2 - Subtract prior military service

```
  11  04  15  Enlistment Date
- 04  00  00  Prior Military Service
  07  04  15
```

- Step 3 - No deducible time for this example

- Step 4 - Convert to a true date: **2007 April 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 Cain enlisted on 22 March 2010 and has 08 days deductible time (1 June 10 to 8 June 10 inclusive). No prior service.

- Step 1 - List the date of current entry in the Coast Guard

  10 03 22

- Step 2 - Subtract prior military service.

```
  10  03  22  Enlistment Date
- 00  00  00  Prior Military Service
  10  03  22
```

- Step 3 - Plus deductible time for pay.

```
  10  03  22  Enlistment Date
- 00  00  00  Prior Military Service
  10  03  22
+ 00  00  08  Deductible time
  10  03  30
```

- Step 4 - Convert to a true date: **2010 March 30**

Comment

Once you arrive at an actual date (one you know is on the calendar **DO NOT** change it).

Continue on Next Page

Active Duty Base Date

What is an Active Duty Base Date?

Active Duty Base Date (ADBD) is a constructive date computed from active service (only) performed in any branch of the Armed Forces, as modified by time lost or periods not creditable for active Federal service. Active Duty Base Dates are used for determining retirement eligibility. In this lesson you will learn how to compute or construct an active duty base date.

Only ACTIVE DUTY 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.

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 not 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.

Example #1

SK3 Thomas enlisted in the Coast Guard on 19 August 2010. 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.

  10 08 19

- Step 2 - Subtract the amount of prior Active Duty.

```
      19
  09  07  49
  ~~10~~ ~~08~~ ~~19~~  Enlistment Date
- 03  11  26  Prior Active Duty
  06  08  23
```

Notice an inclusive date was not added, due to 03 11 26 being a *period of time* and NOT A TRUE DATE.

- Step 3 - Add any deductible time. None

- Step 4 - Convert results into a True Date. **2006 August 23**

Continued on next page

Active Duty Base Date, 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 2010 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

  10 08 24

- Step 2 - Subtract the amount of prior Active Duty.

```
  10 08 24  Enlistment Date
- 04 00 00  Prior Active Duty
  06 08 24
```

- Step 3 - Add any deductible time.

```
  10 08 24   Enlistment Date
- 04 00 00   Prior Active Duty
  06 08 24
+ 00 00 08   Deductible time
  06 08 32
```

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.

- Step 4 - Convert to a True Date.

```
  06 08 32
-       30  days
  06 09 02
```

2006 September 02

Continued on Next Page

Date of Rank

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.

Continued on next page

Date of Rank, Continued

Example #1 Initial Enlistment

Member enlisted in the USCG on 19 August 2010 as a SR. The member has no prior Coast Guard or Coast Guard reserve service.

- Step 1 - Member enlists in the USCG as E1.

  10 08 19

- Step 2 - Subtract prior USCG/USCGR active service

```
    10 08 19  Date member enlisted in USCG as E1
+   00 00 00  prior USCG/USCGR active service
    10 08 19
```

- Step 3 - No deductible for this problem.

- Step 4 - Convert results into a True Date: **2010 August 19**

Example #2 Entered USCG, RELAD, reenlisted USCG in same rate/grade

Member reenlisted in the USCG on 19 August 2010 as a BM3. The member had prior active USCG service from 2 July 2006 to 1 July 2010. During this service the member's pay grade history was as follows:

06 07 02 E1
06 09 10 E2
07 06 01 E3
08 07 01 E4 (BM3)

- Step 1 - Member enlists in the USCG as E4 (BM3)

  10 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.

```
   10  07  01  Date of initial expiration of enlistment
-  08  07  01  Date member initially advanced to E4 (BM3)
   02  00  00
+          01  Inclusive Day
   02  00  01
```

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

```
   10  08  19  Date member reenlisted in the USCG as E4 (BM3)
-  02  00  01  Prior USCG/USCGR active service in pay grade E4(BM3) or above
   08  08  18
```

2008 August 18 New Date of Rank

Example #3 Entered USCG, RELAD, reenlisted USCG in lower rate/grade

Member reenlisted in the USCG on 19 August 2010 as a BM3. The member had prior active USCG service from 2 July 2006 to 1 July 2010. During this service the member's pay grade history was as follow:

06 07 02 E1
06 09 10 E2
07 06 01 E3
08 07 01 E4 (BM3)
10 01 01 E5 (BM2)

- Step 1 - Member enlists in the USCG as E4 (BM3)

10 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.

```
  10  07  01  Date of initial expiration of enlistment
- 08  07  01  Date member initially advanced to E4 (BM3)
  02  00  00
+         01  Inclusive Day
  02  00  01
```

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 (BM3) or above.

```
  10  08  19  Date member enlisted in the USCG as E4 (BM3)
- 02  00  01  Prior USCG/USCGR active service as an  E4 (BM3) or above
  08  08  18
```

2008 August 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 2011 as an E3 and enlisted in the USCG on 28 January 2011 as an E3. The member had prior USCGR service from 6 June 2009 to 27 January 2011. Member has the following pay grade history in the USCGR.

09 06 06 E1
09 07 28 E2
10 11 16 E3

- Step 1 - Member enlists in the USCG as an E3.

11 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 10 11 16 (date first made E3).

11 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
11 01 28	since 10 11 16 (date first made E3). ***NOTE: Member was not on AD during this time frame.***

2011 January 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 2010 as an SA. The member had prior USCGR service from 5 July 2009 to 2 November 2010 and was on active duty for the following periods:

09SEP07 - 09DEC23
10JUL29 - 10AUG11

Member has the following pay grade history in the USCGR:

09 06 05 E1
09 12 23 E2
10 07 01 E3

- Step 1 - Member enlists in the USCG as an E2.

10 11 03

- Step 2- Member's prior active service in pay grade **E2 or above**.

1. (1) day of ADT on 09 12 23
2. 14 days of ADT 10 07 29 through 10 08 11 (day for day, since less than 30 days active)

For a total of **15** days

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.

		10	33	
	10	~~11~~	~~03~~	Date member enlisted in the USCG as an E2
-	00	00	15	(Prior active service as an E2 or above)
	10	10	18	

2010 October 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 2011 as a BM3. The member had prior USCG service from 14 November 2007 to 31 October 2010. Member's pay grade history was as follows:

07 11 14 E1
08 01 30 E2
08 03 01 E3
09 01 01 E4 (BM3)
09 02 01 E3
09 08 01 E4 (BM3)

- Step 1 - member enlists in the USCG as an E4 (BM3).

11 01 03

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

Date of Rank is a Pay related equation and based on 30 days.

	10	10	30	Date of initial expiration of enlistment (for computation purposes 30 October 2010 will be used vice 31 October 2010)
-	09	08	01	Date member re-attained the rank of E4 (BM3)
	01	02	29	
+			01	Inclusive Day
	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 2009 to 31 October 2010).

```
  10  13
  ~~11~~ ~~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
  09  10  03   above (during period 1 August 2009 to 31 October 2010)
```

2009 October 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 2010 as a YN3. The member had prior USCG service from 9 May 2002 to 3 July 2009.

Member has the following pay grade history in the USCG:

02 05 09 E1
02 07 15 E2
03 01 17 E3
05 06 01 E4 (OS3)
06 09 25 E4 (YN3)

- Step 1 - Member enlists in the USCG as an E4 (YN3).

10 08 08

- Step2 - Prior USCG/USCGR active service in pay grade E4 or above

```
      18
  08  ~~06~~  33
  ~~09~~ ~~07~~ ~~03~~  Date of initial expiration of enlistment
- 06  09  25  Date member re-attained the rank of E4 (YN3)
  02  09  08
+         01  Inclusive Day
  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

- Step 3 - Subtract prior USCG/USCGR active service in pay grade E4 or above (same rating during period 25 September 2006 to 3 July 2009)

	19		
09	~~07~~	38	
~~10~~	~~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
07	10	29	(same rating during period 25 September 2006 to 3 July 2009)

2007 October 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 2010 as a BM1.

Member has the following pay grade history in the USCG:

96 06 14 E1
96 08 20 E2
97 11 16 E3
98 06 09 E4 (BM3)
99 10 01 E5 (BM2)
02 07 01 E6 (BM1)
03 10 19 E6 (Officer Candidate)
04 03 04 O1E
05 09 04 O2E

- Step 1 - Member resumes enlisted status in the USCG as an E6 (BM1).

  10 06 01

- Step 2 - Prior USCG/USCGR active service in pay grade E6 or above

03	15		
~~04~~	~~03~~	04	Date initially appointed as a temporary officer
- 02	07	01	Date of member's initial attainment of E6
01	08	03	
+		01	Inclusive Day
01	08	04	

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.

		17	
09	~~05~~	31	
~~10~~	~~06~~	01	Date member resumed enlisted status in the USCG as E6
- 01	08	04	Prior USCG/USCGR active service in pay grade E6 or
08	09	27	above (during period 1 July 2002 to 4 March 2004)

2008 September 27 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.
6	Plus, if applicable, any term of extension or re-extension.
7	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 convert a date to a true date it is very important you know how many days are in a given month. The number of days in each month is listed below.

• 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 with Deductible Time

YN2 Jacobs enlisted in the Coast Guard on 25 May 2008 for 04 years. She also has 17 days for deductible time for expiration of enlistment purposes.

- Step 1 - Determine date of entry into the Coast Guard.

  08 05 25 Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

```
  08 05 25  Date of entry (Enlistment)
+ 04 00 00  Term of Enlistment
  12 05 25
```

- Step 3 - Minus 01 day

```
  12 05 25
-        01  Minus Day
  12 05 24  Normal Expiration of Enlistment
```

- Step 4 - Plus deductible time for expiration of enlistment

```
  12 05 24
+        17  Days of deductible time
  12 05 41
```

- Step 5 - Convert to a true date using the day-for-day rule

```
  12 05 41
-        31
  12 06 10
```

Subtract the number of days that belong to the month in the month's column (in this case 31 days because May has 31 days in it). Add the remaining days to the next month(s).

2012 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 10 07 43 you would subtract 31 days from the days column (July has 31 days) and add the remainder to the next month. So 10 07 43 would convert to 10 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 re-extensions, the start date is the date following the expiration of enlistment as previously extended.

Example Extensions

ME2 Caldwell enlisted in the Coast Guard Reserve on 29 February 2003 for 08 years. He extended on 29 February 2004 for 4 years.

- Step 1 - Determine date of entry into Coast Guard

Leave as the 29th of Feb even though 2003 was not a leap year. Never change a beginning date.

03 02 29

- Step 2 - Plus term of enlistment

```
  03  02  29  Date of entry (Enlistment)
+ 08  00  00  Term of enlistment
  11  02  29
```

- Step 3 - Minus 01 day

```
  11  02  29
-         01  Minus Day
  11  02  28  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
  11  02  29   First extension start date (day after original or adjusted
+ 04  00  00   expiration of enlistment) Plus term of extension.
  15  02  29
-         01   Minus 01 day
  15  02  28
```

2015 February 28 New expiration of enlistment

Continued on next page

Expiration of Enlistment, Continued

Example Extensions continued

HS2 Hernandez enlisted in the Coast Guard on 31 October 2003 for 04 years. She extended on 31 October 2007 for 2 Years, reextended on 31 October 2009 for 8 months, and is reextending on 1 July 2010 for 4 months.

- Step 1 - Determine date of entry into Coast Guard.

  03 10 31 Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

```
   03  10  31  Date of entry (Enlistment)
+  04  00  00  Term of enlistment
   07  10  31
```

- Step 3 - Minus 01 day

```
   07  10  31
-          01  Minus Day
   07  10  30  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
   07  10  31     First extension start date (day after original or adjusted
+  02  00  00     expiration of enlistment)
   09  10  31     Plus term of enlistment
-          01
   09  10  30     Minus 01 day
                  New expiration of enlistment
```

- Step 5 - Add term of first reextension and subtract 1 day.

```
   09  10  31     First reextension start date
+  00  08  00     Plus term of reextension
   10  06  31
-          01     Minus 01 day
   10  06  30     New expiration of enlistment
```

- Step 6 - Add term of second reextension and subtract 1 day.

```
   10  07  01     First reextension start date
+  00  04  00     Plus term of reextension
   10  11  01
-          01     Minus 01 day
   10  11  00     Convert to a real date
   10  10  31
 2010 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 2004 for 04 years. He extended on 29 March 2008 for 2 years and 2 months, reextended on 29 May 2010 for 09 months, and is reextending on 1 March 2011 for 2 months.

- Step 1 - Determine date of entry into Coast Guard

  04 03 29

- Step 2 - Plus term of enlistment

```
    04 03 29  Date of entry (Enlistment)
+   04 00 00  Term of enlistment
    08 03 29
```

- Step 3 - Minus 01 day

```
    08 03 29
-          01
    08 03 28  Normal expiration of enlistment
```

- Step 4 - Add term of first extension and subtract 1 day

```
    08 03 29    First extension start date (day after original or adjusted
+   02 02 00    expiration of enlistment)
    10 05 29    Plus term of extension
-          01   Minus 01 day
    10 05 28
```

- Step 5 - Add term of first reextension and subtract 1 day

```
    10 05 29    First reextension start date
+   00 09 00    Plus term of reextension
    10 14 29
-          01   Minus 01 day
    10 14 28    Convert to a true date to arrive at the new
    11 02 28    Expiration of enlistment
```

- Step 6 - Add term of second reextension and subtract 1 day

```
    11 03 01    First reextension start date
+   00 02 00    Plus term of reextension
    11 05 01
-          01   Minus 01 day
    11 05 00    Convert to a true date
    11 04 30
```

2011 April 30 Final expiration of enlistment date

Continued on Next Page

Creditable Sea Duty/Sea Pay Premium

Introduction

Computation of creditable sea duty and sea pay premium 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 TDY on a day for day basis.

Note: To compute TDY use procedure table #10 located on page-44 (quick reference tables).

- Creditable sea duty terminates on the 30th calendar day at 2400 after departure on TDY.
- Leave taken in conjunction with TDY 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 TDY 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.

- TDY to a qualifying sea pay vessel from a shore unit is creditable sea duty regardless of length of time aboard vessel. However, TDY to a qualifying sea pay vessel from a shore unit **is not** creditable toward sea pay premium calculation. Refer to Chapter 4-C of the Coast Guard Pay Manual, COMDTINST M7220.29 (series) for rules of entitlement to Career Sea Pay Premium, and 36 months of consecutive sea duty.
- Time spent PCS enroute from one vessel to another is not creditable toward sea pay or sea pay premium.
- Member must be an E4 or above to receive sea pay premium.

Continued on Next Page

Creditable Sea Duty/Sea Pay Premium, Continued

Procedure Table #9 Creditable Sea Duty

Use the following steps to compute Creditable Sea Duty/Sea Pay Premium

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 TDY 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/Sea Pay Premium, Continued

Example #1 **Member stationed on CGC BEAR from 15 March 2010 to 31 March 2011. Member had no deductible time. While on board member departed TDY to TRACEN Yorktown on 2 May 2010 and returned on 5 June 2010.**

- Step 1 - List the date member departed the vessel.

  11 03 31 Ending Date

- Step 2 - Minus the date member reported to the vessel.

```
          30
 11  03   ~~31~~   Ending Date
-10  03  15   Beginning Date
 01  00  15
```

- Step 3 - Plus 01 day for inclusive Date

```
          30
 11  03  ~~31~~   Ending Date
-10  03  15   Beginning Date
 01  00  15
+         01   Inclusive Day
 01  00  16   C  reditable Sea Duty
```

- Step 4 - Minus deductible time. None in this example.
- Step 5 - Minus any period of TDY after 30 days. (**Day-for-Day**)

```
 10  05  31   Last day of month of departure
-10  05  03   Day after departure (account for 1 day of travel)
 00  00  28
+         01   Inclusive Day
 00  00  29   d  ays TDY in May
+00  00  04   days TDY in June
 00  00  33   Total days TDY
-         30   Max allowed days for TDY creditable sea duty
          03   days lost for TDY purposes

 01  00  16   C  reditable Sea Duty
-         03   Lost days from TDY
 01  00  13   T  otal Creditable Sea Duty
```

- 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

Continued on next page

Creditable Sea Duty/Sea Pay Premium, Continued

Example #2 In this example we will compute a TDY period when leave is involved

While on board the CGC STRATTON member departed TDY to Base Alameda on 13 March 2011 and returned on 29 April 2011. Member used 5 days leave en route to TDY unit.

- Step 1 - List date following departure on TDY

  11 03 14 Day following date of departure

- Step 2 – Add the number of days leave used en-route to the TDY unit. The result will be the adjusted TDY start date.

  11 03 14 Date of departure
  + 00 00 05 Days of leave
  11 03 19

- Step 3 - Determine the last day of the month in the month member departed. (Beginning date month)

  11 03 31 Last day of month

- Step 4 - Subtract the beginning date from the last day of month

  11 03 31 Last day of month
  - 11 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 TDY in March

- Step 6 - Add remaining days of TDY in the next month(s) up through prior date of return from TDY.

  13 days TDY in March
  + 28 days TDY in April
  41

- Step 7 - Subtract days leave used en route from TDY unit to permanent unit (if applicable). None in this example.

- Step 8 - If total is 31 or more subtract any period of TDY over 30.

  41 Total days TDY
  - 30 Maximum allowed days TDY creditable for sea duty
  11 Total days to deduct from sea duty.

Continued on next page

Creditable Sea Duty/Sea Pay Premium, Continued

Sea Pay Premium Examples

Example #1 **BM2 Jones reported to the CGC POLAR STAR on 18 July 2008. No deductible time or prior sea time.**

- Step 1 - List date member reported aboard CGC POLAR STAR.

  08 07 18 Beginning Date

- Step 2 – Plus 3 years.

```
  08  07  18  Beginning Date
+ 03  00  00  Time needed to serve for Sea Pay Premium
  11  07  18
```

- Step 3 – Add any period of TDY over 30 calendar days.

  None in this example

- Step 4 – Add any period of deductible time for pay purposes.

  None in this example

- Step 5 – Subtract prior creditable sea duty temporarily stopped due to neutral time.

  None in this example

- Step 6 – Convert to a true date using 30 day rule.

  11 07 18

  2011 July 18 First day of Sea Pay Premium

Simple Sea Pay Premium Computation

```
  11  07  18  Ending Date (Sea Pay Premium start date)
-  08  07  18  Begin Date  (reported PCS to CGC POLAR STAR)
  03  00  00  3 years
+         01  Inclusive Date
  03  00  01  3 years and 1 first day of 37th month
```

Continued on next page

Creditable Sea Duty/Sea Pay Premium, Continued

Sea Pay Premium Examples

Example #2 **MK1 Smith reported to the CGC CAMPBELL on 3 March 2009. His PCS departing unit was the CGC ACTIVE where he served from 7 August 2007 to 31 January 2009 1 year, 5 months, and 24 days of creditable sea duty. No deductible time or TDY time.**

- Step 1 - List date member reported aboard CGC CAMPBELL.

  09 03 03 Beginning Date/reported PCS to CGC CAMPBELL

- Step 2 – Plus 3 years

  09 03 03 Beginning Date/reported PCS to CGC CAMPBELL
  + 03 00 00 Time needed to serve for Sea Pay Premium
  12 03 03

- Step 3 – Add any period of TDY over 30 calendar days.

  None in this example

- Step 4 – Add any period of deductible time for pay purposes.

  None in this example

- Step 5 – Subtract prior creditable sea duty aboard CGC ACTIVE.

  08 13 30 **Since ending date is last day of month convert to 30th**

  ~~09~~ ~~01~~ ~~31~~ Date departed CGC ACTIVE
  - 07 08 07 Date reported to CGC ACTIVE
  01 05 23
  + 01 Inclusive Date
  01 05 24 prior creditable sea duty aboard CGC ACTIVE

  12 03 03 Sum of step 2 above
  - 01 05 24 prior creditable sea duty aboard CGC ACTIVE
  10 09 09 Sea Pay Premium start date

- Step 6 – Convert to a true date using 30 day rule.

  10 09 09

  2010 September 9 is first day of Sea Pay Premium

Continued on next page

Creditable Sea Duty/Sea Pay Premium, Continued

Sea Pay Premium Examples

Example #3

LT Equal reported to the CGC SHERMAN on 14 April 2008. Her PCS departing unit was the CGC ALEX HALEY where she served from 15 August 2006 to 29 February 2008, 1 year, 6 months, and 16 days of creditable sea duty. No deductible time or TAD time.

- Step 1 - List date member reported aboard CGC SHERMAN.
  08 04 14 Beginning Date/reported PCS to CGC SHERMAN.

- Step 2 – Plus 3 years
  08 04 14 Beginning Date/reported PCS to CGC SHERMAN
  + 03 00 00 Time needed to serve for Sea Pay Premium
  11 04 14

- Step 3 – Add any period of TAD over 30 calendar days.
  (None in this example)
- Step 4 – Add any period of deductible time for pay purposes.
  (None in this example)

- Step 5 – Subtract prior creditable sea duty aboard CGC ALEX HALEY.

07 14 30 **Since ending date is last day of month convert to 30th**
~~08~~ ~~02~~ ~~29~~ Date departed CGC ALEX HALEY
- 06 08 15 Date reported to CGC ALEX HALEY
01 06 15
+ 01 Inclusive Date
01 06 16 prior creditable sea duty aboard CGC ALEX HALEY

10 15 44
~~11~~ ~~04~~ ~~14~~ Sum of step 2 above
01 06 16 prior creditable sea duty aboard CGC ALEX HALEY
09 09 28 Sea Pay Premium start date

- Step 6 – Convert to a true date using 30 day rule.

09 09 28
2009 September 28 is first day of Sea Pay Premium

Continued on next page

Creditable Sea Duty/Sea Pay Premium, Continued

Sea Pay Premium Examples

Example #4 **YN3 Good reported to the CGC HEALY on 4 October 2011. His PCS departing unit was the CGC NORTHLAND where he served from 13 May 2009 to 15 September 2011, 2 years, 4 months, and 3 days of creditable sea duty. While aboard CGC NORTHLAND YN3 Good was UA from 18 October 2010 to 22 October 2010, 4 days of deductible time for pay purposes. No TDY time.**

- Step 1 - List date member reported aboard CGC HEALY.

  11 10 04 Beginning Date/reported PCS to CGC HEALY.

- Step 2 – Plus 3 years

  11 10 04 Beginning Date/reported PCS to CGC HEALY
  + 03 00 00 Time needed to serve for Sea Pay Premium
  14 10 04

- Step 3 – Add any period of TDY over 30 calendar days.

  None in this example

- Step 4 – Add any period of deductible time for pay purposes.

  10 10 21 Date prior to returning to full duty status
  - 10 10 18 Date of departure on Unauthorized Absence (UA)
  00 00 03
  + 01 Inclusive Date
  00 00 04 Total deductible time **for pay purposes**

  14 10 04 Calculated Sea Pay Premium Start Date in step 2
  + 00 00 04 Add 4 days deductible time **for pay purposes**
  14 10 08 New Calculated Sea Pay Premium Start Date

Continued on next page

Creditable Sea Duty/Sea Pay Premium, Continued

Sea Pay Premium Examples

- Step 5 – Subtract prior creditable sea duty aboard CGC NORTHLAND.

```
  11  09  15  Date departed CGC NORTHLAND
- 09  05  13  Date reported to CGC NORTHLAND
  02  04  02
+         01  Inclusive Date
  02  04  03  prior creditable sea duty aboard CGC NORTHLAND

  14  10  08  Sum of steps 2 and 4 above (calculated sea pay premium start date)
- 02  04  03  prior creditable sea duty aboard CGC NORTHLAND
  12  06  05  Sea Pay Premium start date
```

- Step 6 – Convert to a true date using 30 day rule.

12 06 05

2012 June 5 is first day of Sea Pay Premium

Quick Reference Tables

Procedure Table #1

Use the following steps in computing creditable service (30-day month basis computation).

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 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.
2	Determine the date of departure. This is the Beginning Date. (Never Change)
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 prior to returning to full duty status. This is the Ending Date. **(Never change)**
2	Determine the date of departure. This is the Beginning 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 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.
2	Determine the date of departure. This is the Beginning Date. (Never Change)
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 TDY 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 Duty for use in computing creditable sea duty. TDY is computed on a **day for day** basis.

Temporary Duty

Step	Procedure
1	List the date following departure on TDY.
2	Add the number of days Leave used en route to the TDY unit (if any). The result will be the adjusted TDY begin-date.
3	Determine the last day of the month, in which the member's adjusted TDY begin-date from step 2 was. **Don't change to the 30th.**
4	Subtract the TDY begin-date from the last day of the month in which the member's TDY began.
5	Add 1 day for inclusive date.
6	Add remaining days of TDY in the next month(s) up through the TDY period ending date. The TDY ending date is the last full day at the TDY site unless authorized multiple travel days. In cases where the member is authorized multiple travel days, the TDY ending date becomes the date prior to the last day of official travel.
7	If the total from step 6 is more than 30 days, add the number of days Leave taken en route from the TDY site returning to their permanent duty station. The member will accrue lost time from Creditable Sea Duty for the duration of their returning leave. If the total from step 6 is 30 days or less, the member will not accrue lost time from Creditable Sea Duty – insert 0 days in Step 5 of Procedure Table #9, Creditable Sea Duty.
8	Take the total number of days from step 7 and subtract 30 days. The resulting amount will be the number of days lost from Creditable Sea Duty due to TDY – insert this number in Step 5 of Procedure Table #9, Creditable Sea Duty.

Comments

Members are entitled to creditable sea service for periods of leave in conjunction with TDY 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 TDY. 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

Quick Reference Tables, 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:
08 01 00	07 DEC 31
08 02 00	08 JAN 31
08 02 28	08 FEB 28
08 02 29	08 FEB 29
07 02 29	07 FEB 29*
08 02 30	08 MAR 01
08 02 31	08 MAR 01
08 03 00	08 MAR 01
08 04 00	08 MAR 31
08 05 00	08 APR 30
08 06 00	08 MAY 31
08 07 00	08 JUN 30
08 08 00	08 JUL 31
08 09 00	08 AUG 31
08 10 00	08 SEP 30
08 11 00	08 OCT 31
08 12 00	08 NOV 30
08 00 00	07 NOV 30
08 00 01	07 DEC 01

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 2007 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. An easy way to remember it is the whenever the year of the summer Olympics are that year will be a leap year.

Employee

Profile | Tasks | View
Workflow | Languages | View Paycheck
Memberships

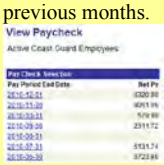
w Paycheck

New Window

Menu Path

If your address is not correct go to Self-Service > Employee > Tasks > **Home and Mailing Address** and update it.

Current month is shown. Use this link to view previous months.



Use this link to view remarks.

yPortalDirect – Member Self-Service Block

Comments

Guardian
23 Any St.
Topeka KS 66615

Job Title: First Class Yeoman
SSN: 012-34-5678

Department: 000450
Location: CG PPC
Pay End Date: 02/28/2009
Check Date: 03/01/2009

TAX DATA: Federal KS State
Marital Status: Married
Allowances:
Addl. Percent:
Addl. Amount:

Federal and, if applicable state income tax withholding allowances are shown in the **Tax Data** section. If you are claiming "0" the allowances lines are blank.

Leave info: **Begin** = Balance carried over from previous month. **Earned** = Leave earned this month. **Used** = Leave charged this month. **Balance** = Balance at the end of this month. **Sold CP** = Leave sold this month. **Lost Prv FY** = Number of days leave lost previous fiscal year. **Sold CTD** = Career total days leave sold.

Leave

Begin	Earned	Used	Balance	Sold CP	Lost Prv FY	Sold CTD
55.0	2.5	0.0	54.5	0.0	0.0	10.0

YTD 5,937.17

This section shows the year-to-date earnings, taxes and deductions.

Earnings

Description	Hours	Rate	Amount
Basic Pay			3,044.70
BAH WDEP			1,121.00
ENL BAS			323.87
CLTHNG STD			41.90

Taxes

Description	Amount	YTD Amount
Fed Withholdng	276.55	557.66
Fed MED/EE	232.92	465.84
KS Withholdng	29.41	60.90

Total:

Federal and, if applicable state income tax withholding amounts (current month and year-to-date) are shown in the **Taxes** section. Go to Self-Service > Employee > Tasks > **W-4 Tax Information** to change Federal withholding or Self-Service > Employee > Tasks > **State Tax Information** to change state withholding.

Earnings. Be sure your BAH entitlement is correct for your dependency/housing status. Be sure your BAS entitlement is correct for you unit assignment. Entitlements reflect amounts paid to a member during the period covered. This may also include amounts being credited for previous periods. For example, if a member terminated leased housing on the 27th of the previous month, the appropriate BAH would include those days payable during the previous month

Employer Paid Benefits

Description	Amount	YTD Amount

Description	Amount	Description	Amount
TSPBP	91.34	Fam SGLI	32.50

Before Tax Deductions include Thrift Savings Plan contributions. Go to Self Service > **Employee** > Tasks > **Thrift Savings Plan** to change.

After Tax Deductions include Allotments, Bonds, Dental and SGLI. Go to Self-Service > Employee > Tasks > **Allotments** to manage allotment or bond deductions. Deductions for Overpayments and Debt Liquidations would appear in this section if applicable.

The **Net Pay Distribution** section shows show the amount processed for payments (your actual deposit amount). These two amounts combined equal the Net Earnings amount. You can change your direct deposit account by going to Self-Service > Employee > Tasks > **Direct Deposit.**

Net Pay Distribution

Payment Type	Paycheck Number	Account Type	Account Number	
Direct Deposit		Checking		1,884.40
Direct Deposit		Checking		1,884.35
Total:				3,768.75

The Account Number is not displayed for privacy purposes.

Appendix (F) Direct Access View Paycheck Quick Reference

Home > Self Service > Employee > View > View Paycheck New Window

This section shows the remarks from the current month's LES. It is accessed by clicking the "**Comments**" link on the current month's View Paycheck page. The Remarks Section provides:

- General statements for all members
- Supporting information regarding:
- Changes to a member's pay file
- Debt Liquidations

If the View All, First, Last or Arrow links are active, use them to view additional lines.

Paycheck comments page

View Paycheck

Joe Guardian

Active Coast Guard Employees

Joe Guardiant		Employee I	
123 Any St.		Department:	000450
Topeka KS 66615		Location:	CG PSC
Job Title:	First Class Yeoman	Pay End Date:	02/28/2009
		Check Date:	03/01/2009

l Status:	Married
vances:	
dl. Percent:	
ddl. Amount:	

Comments View All First 1-18 of 18 Last

* TO REQUEST A REPLACEMENT OR CORRECTED W-2, FOLLOW THE PROCEDURES ON THE PSC WEB SITE AT HTTP://WWW.USCG.MIL/HR/PSC/W2.ASP.
* CHANGE IS UNDERWAY. TO FIND OUT MORE ABOUT THE COAST GUARD MODERNIZATION, GO TO THE CG MODERNIZATION SECTION ON CG CENTRAL (HTTP://CGCENTRAL.USCG.MIL) OR CLICK ON THE MODERNIZATION EFFORT LINKS FOR PRESENTATIONS, MEMOS, PODCAST, ETC.
* VERIFYING THE ACCURACY OF YOUR PAY AND INFORMATION ON YOUR LES IS YOUR RESPONSIBILITY; YOU MUST REPORT SUSPECTED ERRORS TO YOUR SERVICING PERSONNEL OFFICE (SPO).
* DID YOU KNOW? UPON SEPARATION, THE REMAINDER OF YOUR MILITARY SERVICE OBLIGATION (MSO) IS SERVED IN THE RESERVE COMPONENT. FOR MORE INFORMATION, CONTACT YOUR SERVICING PERSONNEL OFFICE (SPO).
* ARE YOU A RESERVIST WHO WAS CALLED TO ACTIVE DUTY AFTER 9/11/2001 IN SUPPORT OF OIF/OEF? YOU MAY BE ELIGIBLE FOR REAP. FOR MORE DETAILS, SEE HTTP://WWW.GIBILL.VA.GOV OR HTTP://WWW.USCG.MIL/RESERVE.
* THIS LES REFLECTS TRANSACTIONS PROCESSED AS OF 19FEB09.
* 12.5 DAYS LEAVE EARNED AND 14.0 DAYS LEAVE USED TO DATE IN FY09.
* YTD TSP TAX DEF: $152.23. CAREER TSP TAX DEF: $503.83.

OK Cancel

Click the "OK" button to return to the View Paycheck page.

Special Payments

If you are authorized a Special Payment, monies will be received off-line. The reason for this Special Payment should appear as an **Entitlement** on the next View Paycheck and LES (i.e. BAH).

To account for these monies, a **deduction** for the amount of the Special Payment will also appear on the View Paycheck and LES.

This **balances** your account – the correct item paid and the Special Payment accounted for at the same time.

Service Dates

The Active Duty Base Date, Expected Loss Date and Expected Active Duty Termination Date are shown on the Self-Service > Employee > View > **Member Info** page. The Pay Entry Base Date is not currently displayed in Direct Access Self Service.

- Pay Base Date – this determines your longevity for pay.
- AD Base Date – this determines when you are eligible for an Active Duty retirement. For Reserve Personnel: This field might be set to 00 00 00, or contain an invalid date since a Reservist can enter/depart AD frequently. Use your Reserve Points Statement to determine eligibility for retirement upon obtaining 20 Satisfactory years of service.
- Exp Ad Term Date – this shows your current Active Duty contract expiration date.
- Exp Loss Date – this shows the date all contracts expire.

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