

# Servicing Personnel Office News

## United States Coast Guard Pay & Personnel Center



### CO's corner 2010 SPO/Admin Workshop

I am pleased to announce the dates for our annual PPC Topeka SPO/Admin Workshop to be held 13 through 16 September 2010, here in Topeka.

We have a new location for the workshop this year. With more than 25,000 square feet of meeting space, the Capitol Plaza Topeka will be a great location for this year's workshop.

We are working to develop an agenda of relevant topics for SPOs and administrative yeoman based upon your feedback from last year's training workshop and the many changes currently taking place within the Coast Guard.

It is important to note that this training workshop is considered "mission critical" for field personnel working in the personnel services arena for travel guidance purposes. We will have many subject-matter experts from Headquarters and other units providing the instruction, as well as our own PPC experts presenting a wealth of information.

Similar to past years' events, PPC Topeka and other subject-matter experts will provide training and information on Direct Access, T-PAX, accessions, enlisted contracts, and reserve transactions. You will also learn about advancements, separations, PCS orders, as well as the most effective and efficient ways to interact with PPC to quickly address challenges.

2010 SPO/ADMIN Workshop  
Sept 13-16, 2010  
Capital Plaza Hotel  
1717 SW Topeka, Blvd  
Topeka, KS 66683

#### Workshop Registration:

Registration is simple! To register, e-mail CPO Zandra Sneed at [zandra.sneed@uscg.mil](mailto:zandra.sneed@uscg.mil).

#### Room Reservations:

We have a block of rooms available at the per diem rate. Please note that conference registration and room reservations are handled separately. Room reservations can be made online [using this link](#). Or you can visit the Capital Plaza's website at [www.capitolplazahoteltopeka.com](http://www.capitolplazahoteltopeka.com). Click on "book online" and you will be redirected to reservations page. In the top paragraph you will see "click here" to continue for secure bookings. After clicking there you will be redirected to the reservation booking page. Select "group reservation" to continue booking. If you are using Flash the link will be located at the top center in BLACK. If using HTML the link will be located in BLUE at the bottom left of the page. The attendee code for the discounted rate is **COAST**. Once the code is entered, you will be able to select the dates and book your reservation. OR, call the hotel directly at (785) 431-7200 (please mention you are part of **US COAST GUARD SPO 2010** or group code **USCG**).

We strongly encourage SPO staff members and unit admin personnel to attend this important workshop if at all possible. Put in your request for travel funds with your command (No PPC funding is available) and come out to learn the latest in your world of work so that you can take the information and improved skills back to your unit!

PPC values are: Customers First; Committed to Employees; Stewardship and Integrity.

Semper Paratus!  
J. D. Phillips, Captain, USCG  
Commanding Officer, PPC Topeka

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## State Tax Exemption Status for Residents Of Kentucky

[E-Mail ALSPO message A/10](#) announces the implementation of exemption from state income tax for members claiming Kentucky as their state of legal residence.

Effective for taxable years beginning on or after 1 January 2010, all military pay received by active duty or reserve members of the Armed Forces will be exempt from Kentucky income tax.

The military pay exemption applies to all Kentucky military members regardless of where the member is stationed.

Effective 1 January 2010, PPC stopped withholding of state income tax for members claiming Kentucky as their state of legal residence.

### About the SPO Newsletter

An authorized publication, the SPO Newsletter is published under the direction of the U.S. Coast Guard Pay & Personnel Center. Views and opinions expressed are not necessarily those of the Department of Homeland Security or the U.S. Coast Guard. The SPO Newsletter shall not be considered an authority for any official action and is non-record material. The SPO Newsletter is published quarterly. Articles are solicited from all readers. Back issues are available at: <http://uscg.mil/ppc/sponewsletter.asp>.

### How to submit an article

Articles for the SPO Newsletter may be submitted by e-mail to the Procedures & Development branch e-mail address "PPC-PF-PD". Articles may also be submitted via our web form at <http://www.uscg.mil/ppc/newitemform.asp>. **All items approved for publication will immediately be posted on our SPO news web page** (<http://uscg.mil/ppc/alspo/>).

Unit Address:

Commanding Officer  
USCG PPC (P&D)  
444 SE Quincy St.  
Topeka, KS 66683  
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### Contacting PPC Customer Care

#### How to contact us:

1. Online Trouble-Ticket:  
<http://uscg.mil/ppc/ccb/> or  
<http://cgweb.psc.uscg.mil/ccb/> (Use this link if you have attachments to send with your inquiry)
2. Email:  
PPC-DG-CustomerCare@uscg.mil
3. Telephone: (866) 772-8724 (toll free) or (785) 339-2200 (0700 to 1600 weekdays). The call center will be staffed on the following weekends in FY10:
  - 15-16 May
  - 12-13 June
  - 17-18 July
  - 21-22 August
  - 18-19 September

Telephone hours of coverage, on the above weekends, will be 0600-1600 (Central Time) on Saturdays and 0600-1400 (Central Time) on Sundays

### U. S. Coast Guard Pay & Personnel Center

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## ***Dual Dislocation Allowance (DLA) Payments In Member-Married-To-Member Permanent Change of Station (PCS) Transfer Situations***

*By CWO Dan Shearin Military Compensation Specialist Commandant (CG-1222)*

There have been an increasing number of waiver and remission cases involving member-married-to-member PCS where two DLA payments were erroneously authorized by the members' SPO. When determining the DLA entitlement for member-married-to-member PCS cases it is essential that the chart in JFTR Par. U5635 be used. The most common error by SPOs when counseling members on DLA is the misinterpretation of rule (1) at the bottom of the authorization chart. The rule reads:

'When one member moves incident to a PCS at one time and establishes a permanent household at the new PDS while the other member maintains a permanent household at the old PDS and, at a later date, the second member moves incident to a PCS and occupies the same residence as the first member ([DOHA case 96110801 26 June 1997](#)).

- (a) Both member are authorized DLA at the 'without-dependent' rate under Rule 1
- (b) The member who has no dependent at the 'without-dependent' rate, and the member with a dependent at the 'with-dependent' rate under Rule 5.'

Read the Defense Office of Hearings and Appeals (DOHA), case listed above ([click on the URL link](#)) and you will find that two separate dislocation allowances are not authorized when: 'both obtain permanent change of station orders which transfer them to the same new duty station; they move from one household at the old duty station and reestablish one household at the new duty station; they move substantially at the same time; and one household mover moves the personal effects of both service members to the same destination.' In this DOHA case there was a 16 day difference in departure dates from the same household at the old PDS to the same household at the new PDS and two payments of DLA were not authorized. In almost all cases where a member-married-to-member PCS mirrors

the above DOHA case scenario during the same summer, two payments of DLA will not be authorized.

It is not so much that the member-married-to-member couple moved at different times, but the necessity of actually setting up a new household at the old PDS by the member left behind that creates the entitlement to a second DLA. For example, if a member-married-to-member couple were both ordered to a new PDS, but one had a reporting date at the beginning of the summer and the other at the end of the summer, if some of their household goods (HHGs) were shipped from the old PDS home to the new PDS home and later the remainder of the HHGs were shipped from the same old home to the new home, there would be no entitlement to a second DLA. On the other hand, if the first shipment of HHGs coincided with the termination of the lease on the old PDS home, forcing the second member to establish a new (albeit temporary) home at the old PDS, that member's transfer and HHGs shipment at the end of the summer would entitle the couple to a second DLA payment. Similarly, if a member-married-to-member couple were PCS'd from a common residence at the old PDS to two separate PDSs that required each member to set up separate households at their respective new PDS, they would clearly be each entitled to their own DLA payment.

If a SPO YN is ever in the slightest doubt about the entitlement of two DLA payments he or she should seek prior guidance from CG-1222 (through your chain of command, of course!) before counseling the member-married-to-member couple. We'd much rather get the right information out for action than clean up misinterpretation by a SPO member through the waiver/remission process. It's all about administrative professionalism and good customer service!



## ***Reserve Retirement Requests***

By [YNCS Brad Bartsch, PSC \(rpm-3\)](#).

Greetings from [PSC-rpm-3](#). I recently took over the processes of Reserve Retirements and Conditional releases. In the past three months we have experienced a vast array of errors on the reserve retirement requests. Some of the more prominent errors are as follows:

1. **Members request retirement without sufficient service.** Members requesting RET-2 or RET-1 early MUST have received a 20-year letter in JUMPS. This prerequisite can be viewed in JUMPS on page 3 of the A1 inquiry. Please verify your personnel in question have a 20 year letter via JUMPS before submitting the Reserve Retirement Transfer Request, (CG PPC-2055A) to us at RPM.
2. **Members are not following the 90-day rule in regards to dates requested.** Members have been requesting retirement with as little as a one week turnaround. PPC (ras) needs a minimum of 90 days to process a RET-2 request; RET-1 requests will be effective on the member's 60th birthday.
3. **Members find they don't have enough creditable time for Retirement.** Usually this occurs with personnel who have served in other components of the Armed Forces. Upon annual verification of Retirement Point Statements, ensure your personnel are actually reviewing the history and checking whether they had "good" years in the past, both recent and distant. Please be proactive on this and submit a request for a Statement of Creditable Service to ensure that JUMPS reflects the correct information.
4. **On the recently revised Reserve Retirement Transfer Request, (CG PPC-2055A), personnel are not checking block 13.** If block 13 ("*I understand the opportunity to transfer benefits under the Post 9/11 GI Bill (if eligible) to a*

*dependent terminates upon transfer to RETIRED status. I also understand MGIB-SR terminates when a member separates or retires.*") is not checked on the CG PPC-2055A, RPM will NOT process the retirement request. All personnel in question must certify that they understand they will not be able to transfer their Post 9/11 GI Bill benefits once they enter RETIRED status. Also by checking this block, they acknowledge that the MGIB-SR terminates upon Retirement or Separation.

On the issue of Conditional Releases, only two prominent errors have been surfacing:

1. **"DUAL SERVICES"** Member's who join another service do not provide us with a copy of the DD-4 Enlistment Contract. We will not process a separation on the member unless they present proof that they have enlisted with another component. Please ensure these members either fax or scan an email copy of the document to us for out-processing.
2. **No contact for Recruiters.** If an accurate contact number or email address of the servicing recruiter is provided to us with the DD-368 Conditional Release form, the process would be expedited greatly. Quite often the street addresses that are provided for Recruiting Offices are not accurate.

### ***Critical Skills Training Bonus (CSTB)***

The Critical Skills Training Bonus (CSTB) program authorizes incentive payments to non-rated members who affiliate with critical ratings by attending Class "A" school or enrolling in a striker program.

As announced in [ALCOAST 092/10](#), effective 01 April, 2010, new CSTBs are only authorized for OS "A" school candidates and the amount of the bonus is now

\$5,000. The member must complete OS "A" School **AND** agree to obligate a minimum of 04 years active duty upon graduation.

More information about the CSTB program and the agreement form can be found in Chapter 3.F of the Coast Guard Personnel Manual.

## Who Should be Contacting PPC for Pay and Personnel Issues?

By PPC Direct Access Customer Care

Good day all Yeoman. PPC would like to thank you for all of your hard work and pass that SPO data entry errors declined by 9.4% in 2009 from the previous year, great job! We have been working diligently to improve our DA / SPO guides (<http://www.uscg.mil/ppc/spoman>) and HR workshops (<http://www.uscg.mil/ppc/pd.asp#hr>) to meet the needs of the fleet. Your ideas, comments and suggestions are welcome and encouraged.

Pay and personnel is a combined effort and as always, PPC needs your help to continue to provide the best service possible.

At the 2009 SPO/Admin Workshop, the Customer Care Branch supervisor, CWO4 Tim "Mark" Taylor addressed an issue that now needs to be revisited - The issue of non-YN personnel bypassing their ship's office, unit admin office or SPO and contacting PPC directly. When a member contacts DA Customer Care, the first question asked by our Customer Care Representative is "Did you contact your YN for assistance?" The two responses we receive are: "No, I just called you." -

If the member bypasses the SPO, how is the SPO to know there is even a problem? The second: "My YN told me to call you." - We take this answer with a skeptical ear, as many times the real answer is the member bypassed their YN entirely.

Both of these responses are not productive for the member or the Coast Guard. As you know, PPC cannot circumvent a SPO and enter or correct DA data; we will task the SPO

to take corrective action and then will correct any "behind the scenes" data issues. If PPC and SPOs can educate personnel on the proper chain of command procedures regarding all pay and personnel issues, together, we will be able to assist our members as quickly and accurately as possible.

*"YNs are key problem-solvers, counselors, and sources of information to personnel on questions ranging from career moves, entitlements, and incentive programs to retirement options and veterans' benefits. They are the men and women who make things happen, the indispensable behind-the-scenes personnel that make any well-oiled organization hum."*

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The optimal scenario would be that the member contacts their YN for assistance. If the YN has questions or needs guidance, they visit with their YN supervisor and/or SPO supervisor. If the supervisor cannot assist, the YN then contacts PPC for assistance. By following this path, the YN can inform PPC of what the problem is; what corrective steps were attempted and which step did not work. PPC can then focus on the precise problem and usually resolve the issue the very same day. The YN is aware of the issue and the customer is satisfied that the issue will be resolved, allowing both parties to focus on their Coast Guard mission.

Please be proactive and ask your CWO / Personnel Officer / XO / CO to pass to your units that the ship's office, admin office and SPO are integral in the process and MUST be the primary point of contact for all pay and personnel issues. Clear instruction and open communication are vital to success.

*Semper Paratus.*

## Do Your Customers Know Who You Are?



By YNI Jennifer Hull  
PPC Customer Care

"I Don't Have a Yeoman" -- This is a common statement that we in the PPC Call Center hear every week. Too many members don't know who their Yeoman is, particularly the junior personnel. However, it is surprising how many rated personnel don't know who their Yeoman is either.

Although these are members that are mainly at stations without even an admin or unit Yeoman, it is still important to remember the responsibility we have to our members and one of those should be to ensure that your members know who you are.

Please take the time to inform your members of who you are and what you do for them, particularly your junior members coming from Basic Training.

## ***PCS Reporting Endorsement on Orders and SPO Metrics***

*By: Chris Gambers, PPC (mas/ert)*

**Always approve the PCS Reporting Endorsement before approving the PCS entitlement rows!**

The PCS Reporting Endorsement must be approved first by the CGHR SUP Role User. After the PCS Reporting Endorsement is approved, then its time to review the member's current pay entitlements by clicking the Employee Entitlements link and submit entitlement rows as necessary to start Pay and Allowances applicable for the member's new duty station and/or duty status.

When the PCS pay entitlements are incorrectly approved prior to approving the PCS Reporting Endorsement, pay delays and/or pay problems result for our members. The PCS Reporting Endorsement is designed to "stop" certain pay entitlements in JUMPS. When approved out of sequence, the PCS Reporting Endorsement can

incorrectly shut down allowances the member is entitled to receive.

Submitting the PCS reporting Endorsement and PCS entitlement rows out of correct sequence in Direct Access will also create unnecessary exceptions on your SPO/PSSU exception report, affecting your SPO Metrics. These exceptions can be avoided, by submitting the PCS Reporting Endorsement and entitlement rows in the correct order/sequence.

See ["PCS Reporting Endorsement" in Part IV, Chapter 5, of the DA SPO Manual.](#)

### ***More on the timing of PCS entitlement transactions***

*Source: PPC SPO Manual, Part IV, PCS Transfer, Chapter 4, PCS Pay entitlements Auto Stops and Starts*

Many times an SPO will approve a departing or reporting PCS endorsement, save it, then look at the member's entitlement rows in Direct Access and it will look like the stop dates were not inserted when the endorsement was approved. This sometimes causes the SPO to attempt to insert the dates manually. If the dates do not show up in entitlements, click 'Return to Search' and then go back into the member's entitlements summary. The dates will be inserted.

When an SPO inserts the date manually causes several problems:

- When the auto stop function is allowed to work it does not create an audit record. Therefore no transaction is sent to JUMPS. If it is manually entered an audit record is created and will kick out on the exception report because the JUMPS auto stop program already closed the segments on the correct date.

- There have been numerous occasions where the SPO entered an incorrect date when manually entering the dates, most frequently, when entering ENLBAS. Remember that ENLBAS stops effective the day of PCS reporting. Therefore, transactions to start ENLBAS or BASDMR at the new PDS should be input with an effective date the day after the date or reporting.

It is also important to remember that the JUMPS auto stop program is shutting down the proper segments when the departing or reporting endorsement is transmitted to JUMPS.

The Direct Access auto stop function is inserting the dates to reflect what JUMPS is doing. No transaction is sent to JUMPS when these dates are inserted. Due to deferred processing there is a delay before the system-generated stop entries will appear in the entitlements section.

### **Notice of Basic Eligibility for MGIB-SR**

*By CWO Maureen E. Alexander, PSC (rpm)*

To centralize the completion and distribution of the Notice of Basic Eligibility (NOBE) DD-Form 2384-1 for MGIB-SR, local SPOs should no longer complete the NOBE.

The NOBE is a controlled form and must not be posted nor blank forms given to anyone. Please shred all blanks.

Only the following commands are authorized to issue NOBEs:

- TRACEN Cape May for REBI graduates,
- TRACEN Petaluma & Yorktown for "A" School graduates.
- PSC (rpm-3) will handle all other reservists including all prior service.

If a reservist is requesting a NOBE, please direct them to email ["reserveVAeducation@uscg.mil"](mailto:reserveVAeducation@uscg.mil) with MGIB-SR and their name in the Subject line.

SPOs with any questions may email ["reserveVAeducation@uscg.mil."](mailto:reserveVAeducation@uscg.mil) (Reserve VA Education Office).

## Information for Travel Approving Officials

By CWO J. Benbow, Chief, PPC Travel Branch.

Approving Officials, I wanted to touch base with everyone again and pass some very important information with TDY and PCS travel. For starters, please be aware that as an AO, you are fully accountable to the Coast Guard and may be found liable for erroneous or improper payments. Take your time and seek assistance if you have questions before you approve a travel claim. Determine that the travel expenses were necessary, reasonable, justified, and consistent with completing the assigned objectives or mission.

For my previous e-mail, please review the Blog post at <http://uscgppc.blogspot.com/2010/01/ppc-travel-chiefs-letter-to-approving.html>

Review [ALCOAST 001/10](#), new Travel Management Center (TMC) service contracts have been awarded with an effective date of 1 Jan 2010. SATO has two services, one for TDY and the other for PCS. All official travel is to be arranged through the TMC. A government traveler that uses a non-contract carrier without authorization may be required to bear any additional costs or penalties and is at personal financial risk for cancellations or changes.

### TDY

ATM fees may be reimbursed if the JP Morgan travel card is used (GTCC). If the ATM fees in block 18 look excessive, you should request a copy of the member's travel card statement from the member or from the government travel card coordinator to verify the claimed expense.

A high number of claims are still being submitted with Laundry/Dry-Cleaning Expenses for military and

civilians that do not meet the JFTR/FTR requirements. For example, a military member who had traveled within CONUS with three nights had claimed \$58 for laundry and the AO approved and submitted the claim. The costs for personal laundry, dry-cleaning and/or pressing of clothing incurred during TDY travel (not after returning to/arriving at PDS) is a separate reimbursable travel expense based on ACTUAL expenses (NOT AN ENTITLEMENT) up to but not to exceed \$2 per day and requires at least 7 consecutive nights of TDY lodging in CONUS. It is NOT an authorized OCUNUS expense. Civilian TDY or PCS travel within CONUS requires at least four consecutive nights lodging. Again, the laundry expense is based on actual expense, it's not an entitlement. As an AO if you feel something is not correct, seek assistance from your chain of command. If you have a member on long term TDY who claims \$60 each month for laundry/dry cleaning, you can require that the member provide receipts.

Once a claim has been submitted, advise the member they must retain travel claim records for six years, three months. TDY claims that exceed \$2500 will be 100% audited by PPC, anything under the \$2500 threshold has a 15% +/- chance to be audited.

### PCS

**PASSPORT FEES:** Refer to [ALCOAST 113/07](#), Official (red) passports are no-fee, the only expenses authorized for reimbursement is the photo and visa associated with that passport. The tourist passport fee will only be reimbursed if it was approved by the order issuing authority, not the departing/reporting unit.

**TLE:** The JFTR references the following for distance, 'must be in the vicinity of the old and/or new PDS/DESIGNATED PLACE.' PPC determines vicinity as having to be within a distance that is commutable on a daily basis, a two hour round trip rule. If PPC determines the TLE site is outside the vicinity, the departing/reporting unit will need to amend the orders stating the location of the TLE site being claimed is authorized. All lodging receipts for TLE must be itemized with name/address of the lodging establishment. If the member is claiming M&IE for staying with friends or family, the member must include the dates, name, address, and phone number of the residence in the remarks block and provide documentation showing the date when the HHGs were picked up or delivered.

**DEPENDENTS:** If the member's dependent(s) traveled on separate dates, submit a separate travel claim with itinerary that accompanies the member's travel claim. Thoroughly review block 5 for accuracy and check all that applies. If the member is entitled to DLA and it's authorized on the orders, the DLA block should be checked, even if they were paid DLA in their advances. This allows PPC to liquidate the advance and not put the member in debt.

**PETS:** Members are authorized reimbursement for pet quarantine fees not to exceed \$550.00 with a valid receipt for OCONUS. Other animals (horses, fish, birds, various rodents, etc.) are excluded as pets covered by the pet quarantine reimbursement because of their size, exotic nature, or restriction on shipping, host country restriction, and/or special handling difficulties.

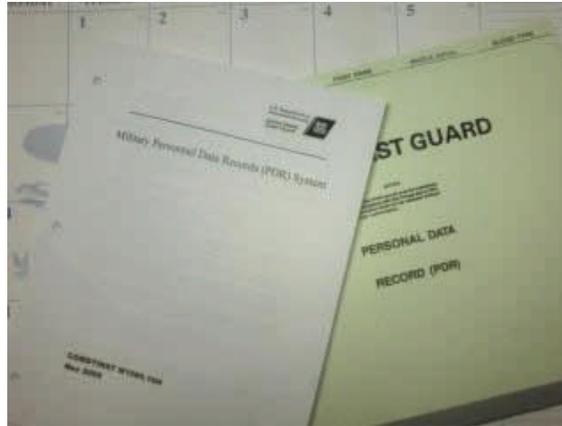
## New PDR Manual Released

The Assistant Commandant for Human Resources (CG 1) released a new version of the [Military Personnel data Records \(PDR\) System Manual, COMDTINST M1080.10\(series\)](#). The manual provides policy and procedures for maintenance of Coast Guard military personnel records.

Revisions to the PDR system include more than just unit name and staff symbol changes. Here are some of the highlights:

- The Personnel Service Center (PSC) Electronically Imaged (EI) PDR is the official record for the military workforce.
- Unit PDRs are mandatory regardless of whether the unit is located with the Servicing Personnel Office (SPO). *Note: Units that are also SPOs do not need to have unit PDRs for personnel assigned to same physical location. For example, a Sector office that has a SPO would not need to maintain Unit PDRs for personnel assigned to that Sector office. Units serviced by the Sector SPO would need to have Unit PDRs, even if the unit is collocated on the same installation.*
- The use of an approved Department of Homeland Security (DHS) commercial carrier (e.g. FedEx, UPS, DHL, etc.) or U. S. Postal Service (USPS) First-Class Certified mail is now required when mailing SPO PDRs. Previously, the use of these special services was specifically "not authorized". Hand carrying the SPO PDR is still authorized, provided all the conditions listed in paragraph 2.C.1. of the new manual are met. See [U.S. Coast Guard Postal Manual, COMDTINST M5110.1B](#), Sec. 5-C, for guidance on properly packaging and mailing personally identifiable information (PII).

**Note:** Be sure to send the PDR to the correct SPO and to use the correct mailing address. Mail containing PII, believed to be lost or compromised constitutes a privacy incident. Upon discovery, personnel shall immediately report all suspected or confirmed privacy incidents to the Commanding Officer in accordance with Privacy Incident Response, Notification, and Reporting Procedures for Personally Identifiable Information (PII), COMDTINST 5260.5 (series). All SPOs should ensure they verify, in JUMPS, the correct SPO address when mailing a PDR.



- PDR reviews will be conducted jointly with the member. In the previous version of the PDR Manual it was "highly desirable to conduct these reviews jointly with the member". The occasions for conducting PDR reviews are listed in paragraph 2.E.2. of the new manual.

- SPOs are no longer required to forward "temporary" documents to the member. It should be noted however, that prior to destroying a PDR document, the SPO Supervisor must formally approve any removal or destruction of records on file.

This revision to the PDR Manual also incorporates the contents of [ALCOAST 209/09; Policy Change to Military Personnel Data Record System](#), which announced the requirement to collect and maintain the following source documents in the EI & SPO PDRs:

1. Member's birth certificate.
2. Promotion/Advancement Authorizations (e.g. OPAL, EPAA, or ERAA, message).
3. Marriage Certificate/Divorce Decree.
4. Dependent Birth Certificate.
5. Adoption Papers/Court Orders.
6. Current Executed PCS orders.

It is not specifically stated whether or not the new documentation requirements (1 thru 6 above) apply to records for all personnel, or per ALCOAST 209/09, only to the records for those personnel coming into the Coast Guard after 15 April 2009. Absent any conflicting guidance issued by PSC or CG-1, SPOs should ensure the:

- member's birth certificate is present for any member accessed after 15 April 2009.
- promotion/advancement authorization is present for any member promoted or advanced after 15 April 2009.
- source documents for dependency changes (items 3 thru 5 above) occurring after 15 April 2009 are obtained **and filed** for all members (regardless of service entry date).