PPC SPO Manual

Part VI, Separations

Overview

Introduction

Part VI covers the Separation process.

Contents

Part VI contains the following chapters.

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PPC SPO Manual

Part VI, Separations

Chapter 1, Viewing Separation Orders

Overview

Introduction

There are two ways Commands and Servicing Personnel Offices can view separation orders:

1. By department using the Airport Terminal.
2. By individual employee ID using the Career Management Menu.

In this chapter

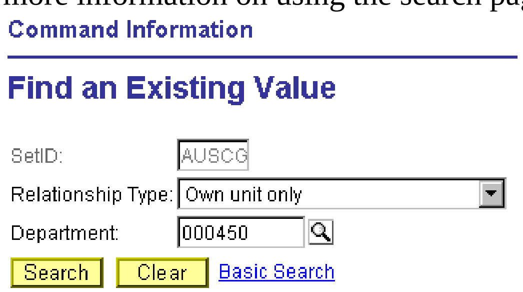
Airport Terminal Procedure

Introduction

This section will guide you through the process to access the airport terminal to view members that are due to separate.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

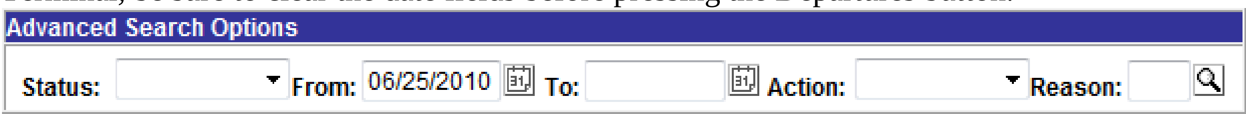
Step	Action
1	Select menu items in the following order: Enterprise Menu > Self Service >Self Service for Commands > Use > **Command Information** For SPO and other non-Command Users: Enterprise Menu > Develop Workforce > Administer Training (GBL) > Inquire > **Airport Panel** Enterprise Menu > Develop Workforce > Plan Careers > Inquire > **Arrivals And Departures**
2	The department lookup page will display. The relationship type field will show "Own unit only" and the department field will show your department ID number. **Note**: Depending on security settings in effect, the Department number displayed may be your sub-department and not your parent department. Click the next to the department number to search for the correct department number. See Search Tips for more information on using the search page.  Click the Search button to continue. If you have access to view data for other units (e.g. SPO user), you may choose a different Relationship Type by clicking on the drop-down and enter the department ID in the department field.

Continued on next page

Airport Terminal Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Press the Arrivals button to populate the rows with employees due to transfer in. Press the Departures button to populate with those due to leave this department. The sort field indicates the primary field the rows are sorted by. You may select another field from the list and the system will re-sort the information. It is important to note the effective date of the row when reviewing the information.

NOTE When searching for retirement or other CGPSC authorized separation orders in the Airport Terminal, be sure to clear the date fields before pressing the Departures button.


If the "From" or "To" date fields are not blank retirement or separation orders will not appear in the search results.

Note: Click the Department Info, Date Info, and Orders Info tabs to see additional information. Or you may click the yellow tab key to expand the view to include all of the columns on one page. If there are more rows returned than appear on one page, you may arrow through the pages or click the View All link to expand the rows to include all rows on one page.</td></tr>
<tr><td>4</td><td>To find approved separations in your department, press the Departures button and populate the table. You may sort the table by Reason. Then, go down the list to review the separation items returned.

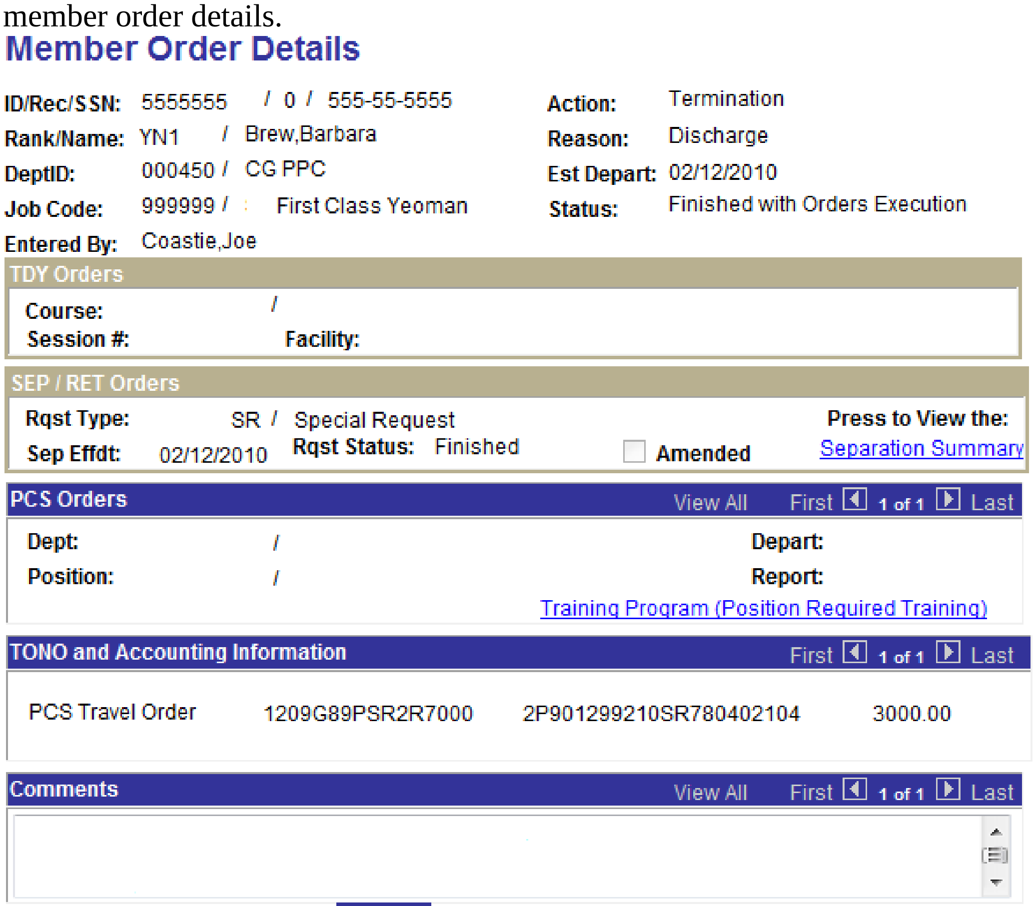
Home > Develop Workforce > Administer Training (GBL) > Inquire > Airport Panel
Cg Airport Term | Cg Dept Run
Department: 000450 CG PPC Rel Type: Own Unit *Sort: Position #
Arrivals DEPARTURES Departures
Find | View All First 1-13 of 13 Last
Gen Info | Department Info | Orders Info | Process Orders
<table>
<tr><th></th><th>Sel</th><th>EMPLID</th><th>Name</th><th>Rank</th><th>Status</th><th>Type</th><th>Action</th><th>Reason</th><th>Status Dt</th></tr>
<tr><td>1</td><td></td><td>9999999</td><td>Bleins,Katheline</td><td>YNC</td><td>Ready</td><td>Regular</td><td>XFR</td><td>TDY</td><td>06/14/2010</td></tr>
<tr><td>2</td><td></td><td>8888888</td><td>Hall,Terrence</td><td>PERS4</td><td>Apvd Std</td><td>Regular</td><td>XFR</td><td>PCS Depart</td><td>03/09/2010</td></tr>
<tr><td>3</td><td></td><td>7777777</td><td>Keen,David</td><td>YNC</td><td>Apvd Std</td><td>Regular</td><td>XFR</td><td>PCS Depart</td><td>02/22/2010</td></tr>
<tr><td>4</td><td></td><td>5555555</td><td>Brew,Barbara</td><td>YN1</td><td>Apvd Std</td><td>Regular</td><td>XFR</td><td>Discharge</td><td>02/12/2010</td></tr>
</table></td></tr>
</table>

Continued on next page

Airport Terminal Procedure, Continued

Procedure (continued)

Step	Action
5	As the mouse travels over the ***employee ID*** link, it will turn red (5555555) on the page. Click on a link for a member. This opens a new window and displays the member order details.

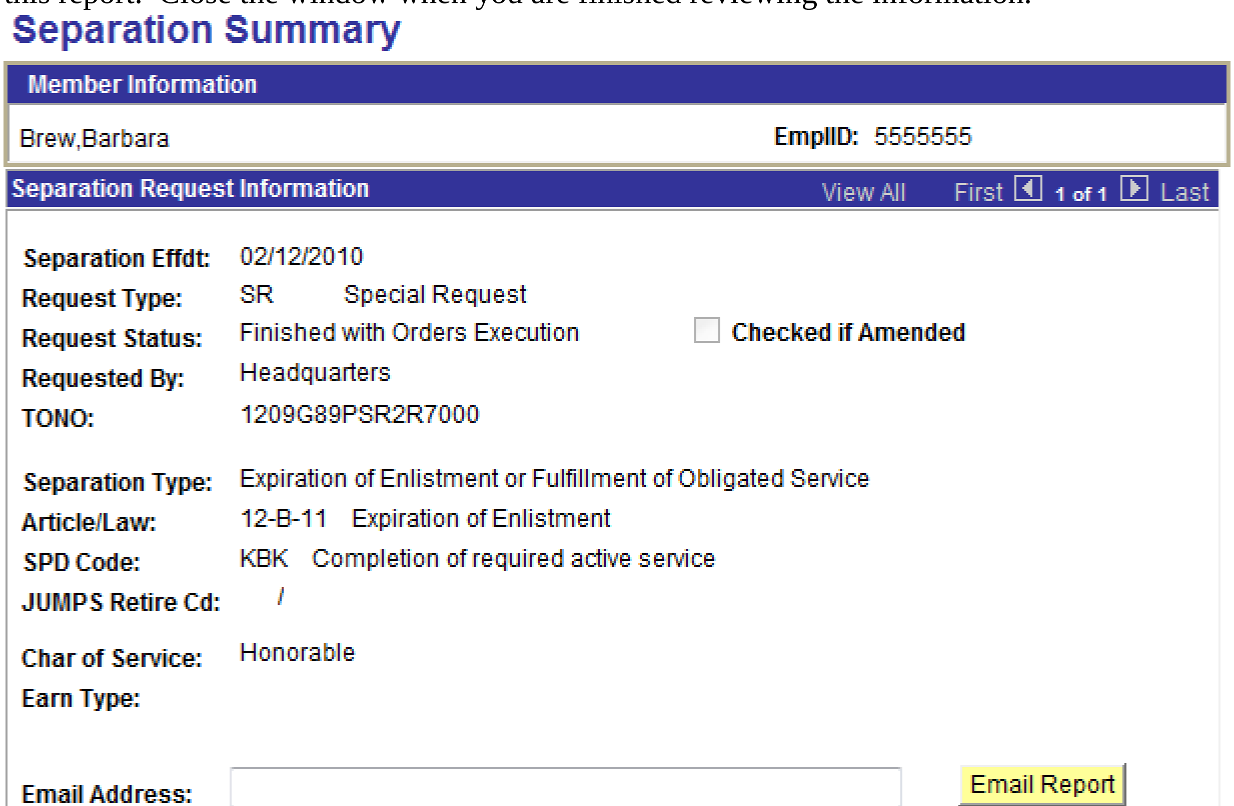


Note: Be sure to click the View All link (if it is active) to view all the comments.

Continued on next page

Airport Terminal Procedure, Continued

Procedure (continued)

Step	Action
6	Click the ***Separation Summary*** link. You may enter an email address at the bottom and email this report. Close the window when you are finished reviewing the information.  Separation Summary Member Information Brew,Barbara EmplID: 5555555 Separation Request Information View All First 1 of 1 Last Separation Effdt: 02/12/2010 Request Type: SR Special Request Request Status: Finished with Orders Execution Checked if Amended Requested By: Headquarters TONO: 1209G89PSR2R7000 Separation Type: Expiration of Enlistment or Fulfillment of Obligated Service Article/Law: 12-B-11 Expiration of Enlistment SPD Code: KBK Completion of required active service JUMPS Retire Cd: / Char of Service: Honorable Earn Type: Email Address: Email Report Warning: Do not use a non USCG.MIL/DHS.GOV/.EDU address as your **business** email address or in the Email Address List field of the Process Scheduler Request. Directing system-generated emails to personal accounts hosted by internet service providers is prohibited. To ensure compliance, always select "Web" from the **Type** menu.
7	You are returned to the populated airport terminal. You may continue reviewing the information or proceed to other functions. To repeat this function (review the airport terminal for another department), select Return to Search. To perform another function, choose from the menus. To exit, press the Sign Out link located at the top of the page

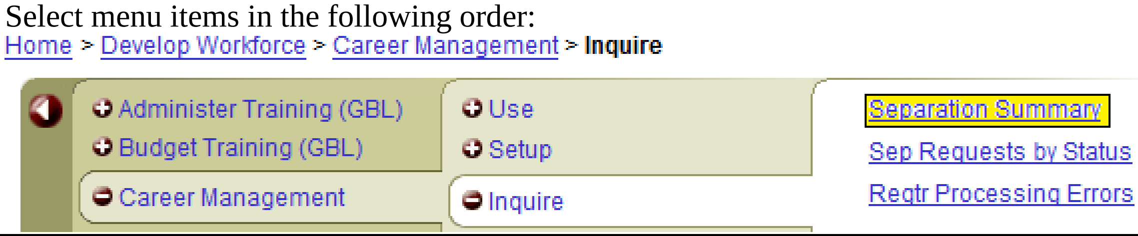
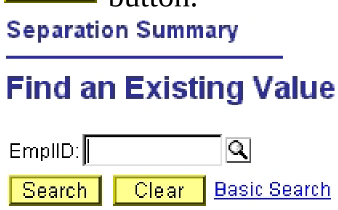
Career Management Menu Procedure

Introduction

This section will guide you through the process of using the Career Management Menu to view a member's separation summary.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:

</td></tr>
<tr><td>2</td><td>The employee ID lookup page will display. Enter the employee ID number and click the Search button.


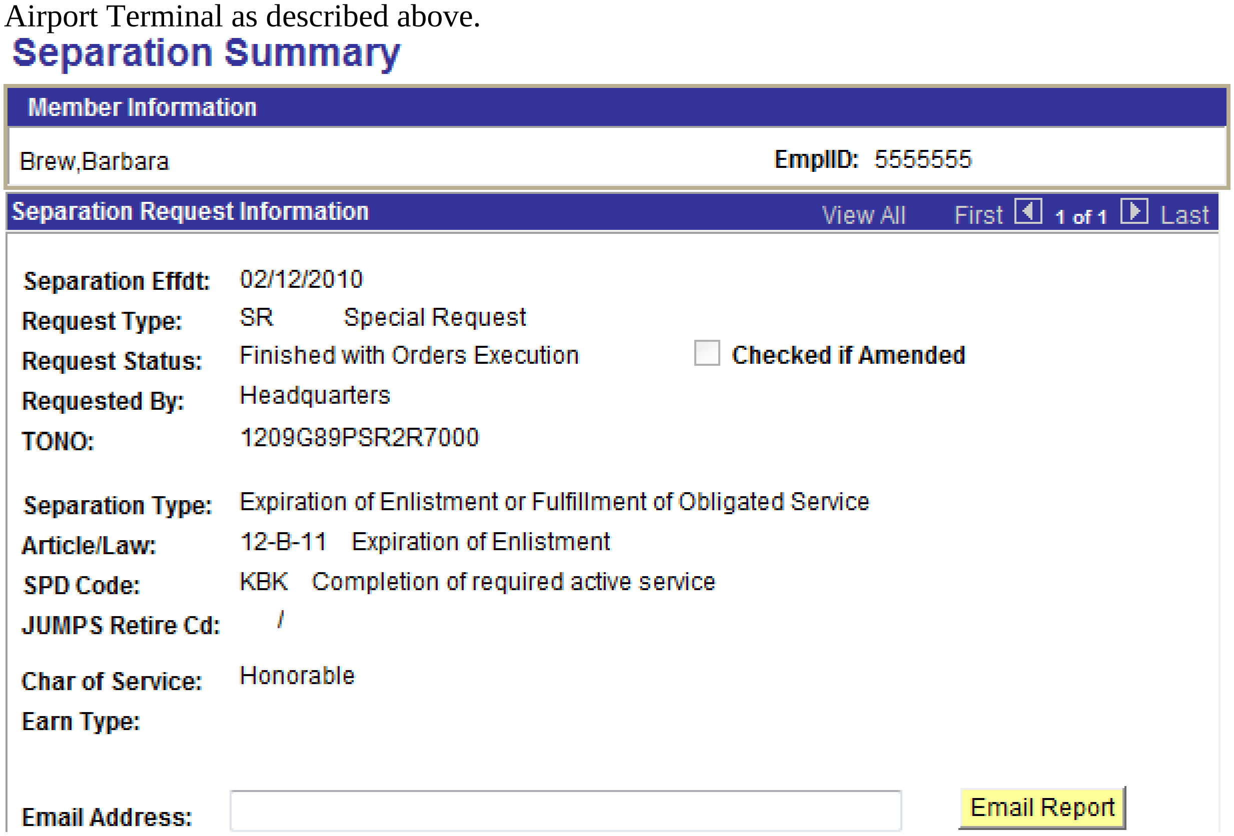
If a "No matching values were found" message displays, you have entered the wrong employee ID number or no separation orders have been issued for that member.

When choosing a member from the search results, please be sure it is the person that actually needs a data change. Verify the employee 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 to select the correct Employee Classification.</td></tr>
</table>

Continued on next page

Career Management Menu Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The Separation Summary will display. You may enter an email address at the bottom and email this report.
Note: To view the Order Details you must email the report to yourself or view the order in the Airport Terminal as described above.

Separation Summary
Member Information
Brew,Barbara EmplID: 5555555
Separation Request Information View All First 1 of 1 Last
Separation Effdt: 02/12/2010
Request Type: SR Special Request
Request Status: Finished with Orders Execution Checked if Amended
Requested By: Headquarters
TONO: 1209G89PSR2R7000
Separation Type: Expiration of Enlistment or Fulfillment of Obligated Service
Article/Law: 12-B-11 Expiration of Enlistment
SPD Code: KBK Completion of required active service
JUMPS Retire Cd: /
Char of Service: Honorable
Earn Type:
Email Address: Email Report
Note: To view the Order Details you must email the report to yourself or view the order in the Airport Terminal as described above.
Warning: Do not use a non USCG.MIL/DHS.GOV/.EDU address as your business email address or in the Email Address List field of the Process Scheduler Request. Directing system-generated emails to personal accounts hosted by internet service providers is prohibited. To ensure compliance, always select "Web" from the Type menu.</td></tr>
<tr><td>4</td><td>To repeat this function, select Return to Search. To perform another function, choose from the menus. To exit, press the Sign Out link located at the top of the page</td></tr>
</table>

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PPC SPO Manual

Part VI, Separations

Chapter 2, Statement of Intent (SOI)

Overview

Introduction

This chapter provides procedures for using Direct Access to create a Statement of Intent (SOI) transaction.

Topics in This Section

This chapter contains the following:

Guiding Principles

Before You Begin

Be sure to read, understand, and follow the guidelines below for both Retention and Separation type SOIs before creating the transactions.

Sale of leave (LSL)

Due to stricter audit requirements from DHS, every Direct Access Separation event must accurately reflect proper leave disposition. 100% leave accountability must be recorded in DA with leave sold or leave taken to zero balance the account. Emails from SPOs are not sufficient to meet audit requirements.

Below is the process that must be completed by the SPO in order to accurately account for all leave for a separating member.

Direct Access Statement of Intent (SOI) submission:

Enter and approve an SOI 45 days prior to the separation date.

DA SOIs can be entered and changed (with a new SOI) up to the Payroll Processing Date (Compute) prior to the separation date.

Approved DA SOIs must account for all leave (leave sale or terminal leave with dates) a member has accrued through date of Separation.

If the JUMPS payroll system does not reflect leave sale at time of processing, the initial separation payment will contain only pay and allowances due the member at date of separation. Any leave sold will be paid in the final (not initial) separation payment, approximately 30 days after separation.

The Separation SOI produces a "projected" amount to pay the member in the initial separation payment. It does not actually compute and clear out the leave balance. Leave is actually "sold" and accounted for in the separation action.

PPC (SES) cannot accept email SOIs for leave changes unless we are able to view those changes in Direct Access and JUMPS as well. Email SOIs should be sent only when requesting a change to the date of separation, member's intent to separate changes, or when a member's intent to use leave vice sell leave changes (this will prevent overpayment of leave sale).

Continued on next page

Guiding Principles, Continued

Sale of leave (LSL) (cont'd)

Direct Access Separation Documents:

When completing Separation Documents, the separation action must also account for all leave (leave sale or terminal leave with dates) a member has accrued through date of separation. The Separation Action/Order is the document that will produce an actual payment amount and charge terminal leave. It is imperative that separation documents contain correct leave disposition. PPC (SES) now requires SPOs to delete/correct these documents if they do not accurately reflect the disposition of all accrued leave through date of separation.

The SPO actually sells the leave in the separation event. PPC pays out the leave.

Separation Documents must be approved by the date the orders become effective, this means on the date the member begins terminal leave if taking terminal leave, not necessarily on the date of separation. By approving the separation action on the date member begins terminal leave; this allows the payroll system to stop various entitlements and prevent overpayments of Sea Pay, Cola, OHA, etc. and also allows entitlements to BAH, BAS, etc. to begin when authorized (such as leaving a ship or vacating government quarters). Payment for leave sale will not be made until the JUMPS system reflects the correct information.

Discharge, RELAD and Retirement SOIs

Information you need to know

Submission of the SOI is critical to ensure proper account settlement for members who are separating. A separation type SOI cannot be entered on a member, if the member's expected active duty termination date has elapsed.

Submit the SOI transaction and submit SOI E-mail (per section 3-B of the Pay and Personnel Procedures Manual) immediately in the following cases:

- Immediate or priority discharges.
- Temporary or permanent disability retirements.
- Members retained (voluntarily or involuntarily) within 15 days of their expiration of enlistment.

Submit the SOI transaction at least 45 days prior to one of the following events:

- Departure on terminal leave in connection with RELAD, expiration of enlistment, or period of active duty.
- Reserve on EAD being discharged to enlist on active duty.

Submit the SOI transaction at least 60 days prior to:

- Retirement.
- Departure on terminal leave in connection with retirement.

Do not Submit the SOI transaction in the following cases:

- A member in a non-pay status who is involuntarily retained (i.e., members in military confinement or in an appellate leave status).
- Enlisted members being promoted to warrant officer.
- Warrant Officers being promoted to Lieutenant.
- Members in military confinement whose enlistment expires.
- Members on appellate leave whose enlistment expires.
- After the Separation Transaction has been approved and transmitted.

If the member’s intentions or any information on this transaction changes following submission, re-submission with a new effective date is required. **In addition, immediately notify PPC (SES) by urgent email correspondence if the member’s intentions change within 15 days of the impending separation/retirement date.**

The Global Address Listing (GAL) e-mail address for PPC (SES) is "**PPC-PF-SES**". Append @uscg.mil" if you are sending the e-mail from outside of the Coast Guard Data Network.

SOIs for Extension, Re-extension, Reenlistment, Retention, Recall

Information you need to know

Do not Submit the SOI Approval transaction in the following cases:
- A member in a non-pay status who is involuntarily retained (i.e. members in military confinement or in an appellate leave status.
- Enlisted members being promoted to warrant officer.
- Warrant Officers being promoted to Lieutenant.
- Members in military confinement whose enlistment expires.
- Members on appellate leave whose enlistment expires.
- Extensions/re-extensions of enlistment, **where there is no SRB entitlement,** and where the member's separation date has already been set by an Extension transaction (P154), Re-extension transaction (P159), or Amend Active Duty Termination Date for a Reservist (P191) transaction submission.
- After the reenlistment contract, Retained Beyond Normal Expiration of Enlistment (P176), Extension transaction (P154), or Re-extension transaction (P159) has been approved and transmitted.

Note: This includes reenlistments for members whose separation date was set by an Extension transaction (P154) or Re-extension transaction (P159) and have decided to cancel the extension/re-extension and reenlist for a greater period of time.

Direct Access will not allow a retention type SOI to be entered more than 14 days after the member’s retention date.

Submit the SOI Approval transaction at least 45 days prior to one of the following events:
- Reenlistment; entry into a voluntary extension/re-extension of enlistment involving payment of an SRB (Selective Reenlistment Bonus). **Note: For SRB payment notification or questions, contact PPC (mas)**.
- Entry into a voluntary extension/re-extension of enlistment, or extension of reserve/retiree active duty period, which involves no SRB, only if transactions (Extension transaction (P154), Re-extension transaction (P159), or Amend Active Duty Termination Date for a Reservist (P191)) **have not been submitted and processed in JUMPS to adjust the members EXP-AD-TERM-DT.**
- Retention beyond normal expiration of enlistment where the member is entitled to continued pay and allowances (i.e. members in HAOS status, members retained due to failure to pass separation physical, etc.)
- An officer whose expected active duty termination date (EXP-AD-TERM) has been adjusted by CG PSC-opm.

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SOIs for Extension, Re-extension, Reenlistment, Retention, Recall, Continued

Information you need to know (cont'd)

Submit the SOI transaction and submit SOI E-mail (per section 3-B of the Pay and Personnel Procedures Manual) immediately in the following cases :

- Members retained (voluntarily or involuntarily) within 15 days of their expiration of enlistment.

If the member's intentions or any information on this transaction changes following submission, re-submission with a new effective date is required. In addition, immediately notify PPC (SES) by urgent email correspondence if the member's intentions change within 15 days of the impending separation/retirement date.

The Global Address Listing (GAL) e-mail address for PPC (SES) is "PPC-PF-SES". Append @uscg.mil" if you are sending the e-mail from outside of the Coast Guard Data Network.

Procedure

Procedure Follow these steps to create a Direct Access SOI transaction.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Statement of Intent**
2	A search page will appear. Enter the member's employee ID number or other search criteria and click the button to select the member you wish to display. When choosing a member from the search results, please be sure it is the person that actually needs a data change. Verify the employee 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 to select the correct Employee Classification.
3	Statement of Intent Page • The SOI Approval page will display if an SOI transaction has already been prepared or submitted, otherwise the page will open with a new blank SOI. • All previous SOIs are listed by effective date (Note the **SOIs Submitted** counter to the right of the effective date field). • Use the links to browse previously submitted SOIs. • If the most recent SOIs Approval Status is "**Pending**" then changes can be made. • If an **Approved** SOI is displayed, no changes can be made. Click the button to begin a new SOI. The Statement of Intent transaction can be saved with a status of **Pending**. It will not transmit until the status is set to **Approved** and the page is saved.

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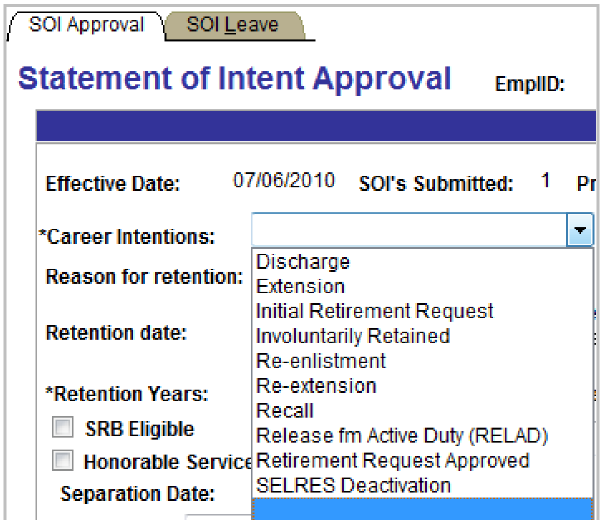
Procedure, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
Complete the Career Intentions block.
Click the drop-down arrow ( ) next to the Career Intention block and select an option from the list.


<table>
<tr><th>Option</th><th>Use When</th></tr>
<tr><td>Discharge</td><td>Member's military obligation is complete (more than 8 years total active service) and member does not want to reenlist or extend, or the member is being discharged involuntarily.</td></tr>
<tr><td>Extension</td><td>Member needs to obligate additional active duty to accept a school assignment, for advancement, for tuition assistance, for transfer or other authorized purpose including extending current enlistment in lieu of reenlisting.</td></tr>
<tr><td>Initial Retirement Request</td><td>Not used in SOI process.</td></tr>
<tr><td>Involuntarily Retained</td><td>Member is retained beyond expiration of enlistment (medical, disciplinary, etc.).</td></tr>
<tr><td>Re-Enlistment</td><td>Member wants to reenlist for a period of three or more years.</td></tr>
<tr><td>Re-Extension</td><td>Member needs to obligate additional active duty, and has already extended current enlistment, to accept a school assignment, for advancement, for tuition assistance, for transfer or other authorized purpose including extending current enlistment in lieu of reenlisting. The total of all extensions/re-extensions may not exceed a total of 6 years within an enlistment.</td></tr>
<tr><td>Recall</td><td>A Reserve/Retired member on active duty is extended.</td></tr>
</table>
</td></tr>
</table>

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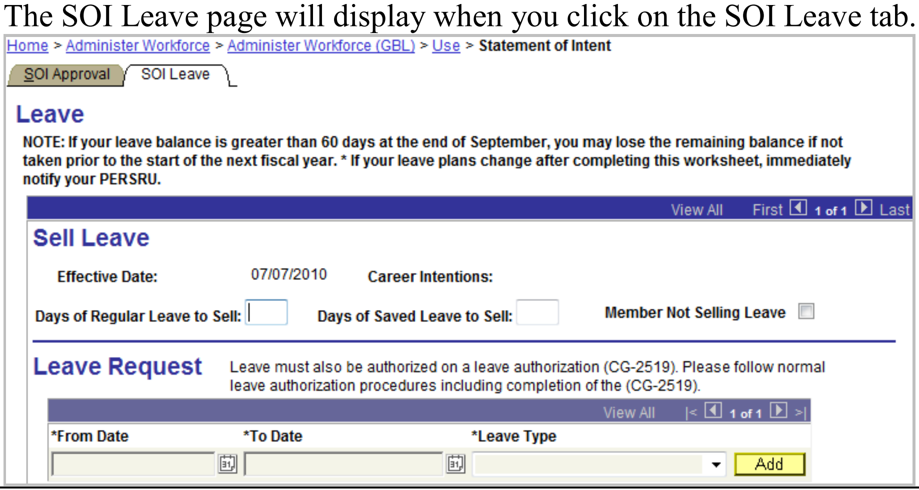
Procedure, Continued

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(cont.)</td><td>
<table>
<tr><th>Option</th><th>Use When</th></tr>
<tr><td>Release from Active Duty (RELAD)</td><td>Member’s initial active duty military obligation is complete (less than 8 year total active service) and does not want to reenlist or extend.
Note: Do not use for members of the Selected Reserve (SELRES) when releasing these members from active duty. Use SELRES Deactivation instead (see below).</td></tr>
<tr><td>Retirement Request Approved</td><td>Members request for retirement has been approved by Commander (opm/epm), or when a member, who was recalled to active duty from retirement, is to be released from Active Duty.</td></tr>
<tr><td>SELRES Deactivation</td><td>Use the code ‘SELRES Deactivation’, instead of ‘Release Fm Active Duty (RELAD)’ when submitting the Statement of Intent transaction to Direct Access for SELRES members.</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>The screen will change depending on which option you selected in Step 4. The following instructions are divided into sections for each type of Career Intention. Select the instructions for the type of SOI you are preparing and complete the data fields.
<table>
<tr><th>SOI Purpose</th><th>See Page</th></tr>
<tr><td>Reenlistment</td><td>VI-2-15</td></tr>
<tr><td>Extension/Re-Extension</td><td>VI-2-19</td></tr>
<tr><td>Recall</td><td>VI-2-23</td></tr>
<tr><td>Involuntary Retained</td><td>VI-2-25</td></tr>
<tr><td>Discharge</td><td>VI-2-27</td></tr>
<tr><td>RELAD/SELRES Deactivation</td><td>VI-2-29</td></tr>
<tr><td>Retirement</td><td>VI-2-31</td></tr>
</table>
</td></tr>
<tr><td>6</td><td>Click on the SOI Leave tab to continue. 
</td></tr>
<tr><td>7</td><td>The SOI Leave page will display when you click on the SOI Leave tab.

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

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Procedure, Continued

Procedure (continued)

Step	Action
8	Enter the number of days regular/saved leave the member desires to sell. If the member is not selling any leave the **Member Not Selling Leave** block must be checked.
9	Enter any periods of leave to be taken prior to the member's separation, which have not yet been posted to the member's LES. Use the Add button to add more leave dates.
10	Click on the SOI Approval tab to continue.
11	Select the Approval status from the drop down menu. Use: • Pending, if you want to save your work, but are not prepared to generate and transmit the SOI to JUMPS. • Approved, if you are ready to submit the SOI for processing by JUMPS. **Reminder**: **Do not Submit the SOI Approval transaction in the following cases**: • A member in a non-pay status who is involuntarily retained (i.e. members in military confinement or in an appellate leave status). • Enlisted members being promoted to warrant officer. • Warrant Officers being promoted to Lieutenant. • Members in military confinement whose enlistment expires. • Members on appellate leave whose enlistment expires. • Extensions/re-extensions of enlistment, **where there is no SRB entitlement,** and where the member's separation date has already been set by an Extension transaction (P154), Re-extension transaction (P159), or Amend Active Duty Termination Date for a Reservist (P191) transaction submission. • After the reenlistment contract, Retained Beyond Normal Expiration of Enlistment (P176), Extension transaction (P154), or Re-extension transaction (P159) has been approved and transmitted. **Note:** This includes reenlistments for members whose separation date was set by an Extension transaction (P154) or Re-extension transaction (P159) and have decided to cancel the extension/re-extension and reenlist for a greater period of time.
12	Click the Save button to save the SOI. If the approval status was set to Approved in the previous step the system will generate the JUMPS transaction. If the status was set to Pending you may return and complete the transaction at a later date.

Reenlistment Statement of Intent

Reenlistment Information

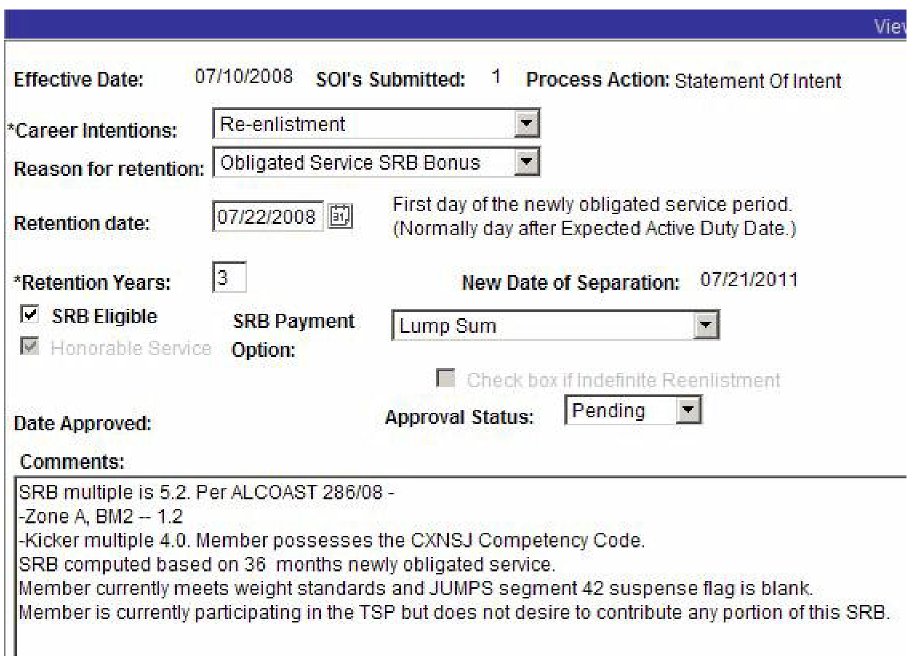
Follow these instructions to complete the data entry for a Reenlistment SOI.

Reminder: **Do not submit the SOI Approval transaction in the following cases**:

- Extensions/re-extensions of enlistment, **where there is no SRB entitlement,** and where the **member's separation date has already been** set by an Extension transaction (P154), Re-extension transaction (P159), or Amend Active Duty Termination Date for a Reservist (P191) transaction submission.
- After the reenlistment contract, Retained Beyond Normal Expiration of Enlistment (P176), Extension transaction (P154), or Re-extension transaction (P159) has been approved and transmitted.

  Note: This includes reenlistments for members whose separation date was set by an Extension transaction (P154) or Re-extension transaction (P159) and have decided to cancel the extension/re-extension and reenlist for a greater period of time.

Reenlistment Screenshot


Vie

Effective Date: 07/10/2008 SOI's Submitted: 1 Process Action: Statement Of Intent

*Career Intentions: Re-enlistment

Reason for retention: Obligated Service SRB Bonus

Retention date: 07/22/2008 First day of the newly obligated service period. (Normally day after Expected Active Duty Date.)

*Retention Years: 3 New Date of Separation: 07/21/2011

SRB Eligible

Honorable Service

SRB Payment Option: Lump Sum

Check box if Indefinite Reenlistment

Date Approved:

Approval Status: Pending

Comments:

SRB multiple is 5.2. Per ALCOAST 286/08 -
-Zone A, BM2 -- 1.2
-Kicker multiple 4.0. Member possesses the CXNSJ Competency Code.
SRB computed based on 36 months newly obligated service.
Member currently meets weight standards and JUMPS segment 42 suspense flag is blank.
Member is currently participating in the TSP but does not desire to contribute any portion of this SRB.

Continued on next page

Reenlistment Statement of Intent, Continued

Reenlistment Fields

Below is a list of all the fields in the Reenlistment SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this reenlistment.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Career Intentions	Select the re-enlistment reason from the drop-down list.
Reason for Retention	Select the reason from the drop-down list.
Retention Date	Enter the effective date of the reenlistment (first day of the newly obligated service period).
Retention Years	Enter the number of years for the term of this reenlistment. **Note:** Leave this field blank if this is an indefinite reenlistment.
New Date of Separation	Member's new end of service date, computed by system. Not editable. **Note:** If this is an indefinite reenlistment the date will show as the day prior to the retention date.
SRB Eligible	Check the box if the member is eligible for a Selective Reenlistment Bonus for this reenlistment.
SRB Payment Option	No longer used. All SRB payments are Lump Sum (Less 25% for FITW).
Check box if Indefinite Reenlistment	Check this box for indefinite reenlistment. **Note:** This field will not be available if there is an entry in the Retention Years field. Clear the Retention Years field to make the check box available for an indefinite reenlistment.
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.

Continued on next page

Reenlistment Statement of Intent, Continued

Reenlistment Fields (continued)

Field	Entry/Description
Comments	Enter any necessary comments. If member is eligible for a SRB provide the following information: 1. SRB multiple (Reference ALCOAST, Zone, base multiple and, if applicable "kicker" multiple and competency code). 2. Number of months of newly obligated service. 3. Statement that member complies with weight standards. 4. Statement that the SPO has checked JUMPS segment 42 to ensure no transaction to remove a previous bonus suspension is required (see Bonus Maintenance for more information). 5. Statement on member's intentions to contribute SRB to the Thrift Savings Plan (TSP). If the member desires to contribute to TSP they must first enroll in the program and be contributing at least 1% of their base pay. See http://www.uscg.mil/ppc/tsp.asp for enrollment procedures. Once enrolled, the member can use self-service to designate a percentage of their SRB for TSP. If there is insufficient time (less than 30 days) remaining before the reenlistment/extension to complete the enrollment and setup self-service access, fax the TSP-U-1 Election Form (with base pay and bonus elections completed) to PPC (MAS-TSP) at (785) 339-3760.

Extension/Re-Extension Statement of Intent

Extension/ Re-extension Information

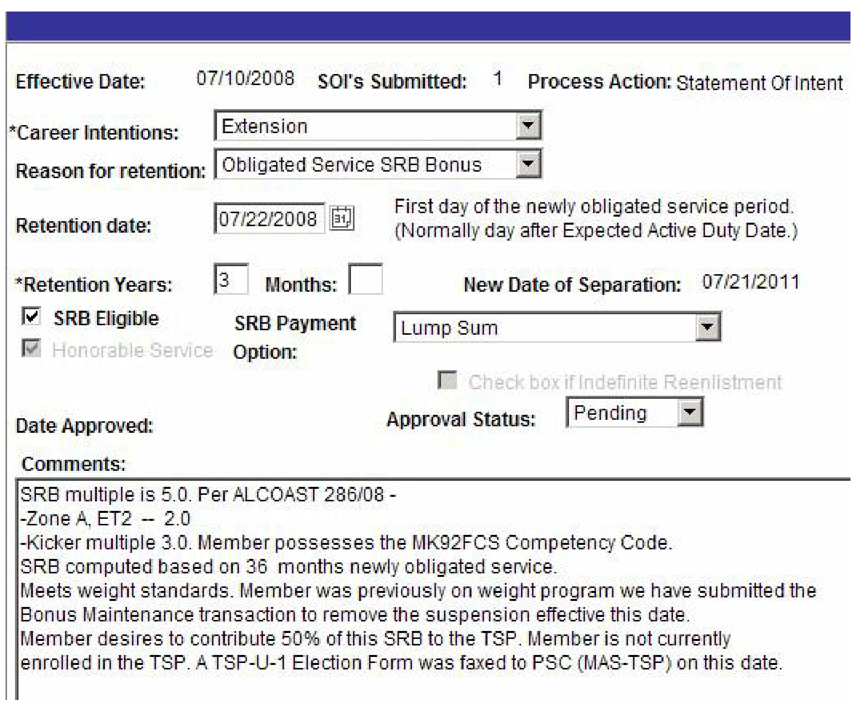
Follow these instructions to complete the data entry for an Extension or Re-Extension SOI.

Reminder: **Do not Submit the SOI Approval transaction in the following cases**:

- Extensions/re-extensions of enlistment, **where there is no SRB entitlement,** and where the **member's separation date has already been** set by an Extension transaction (P154), Re-extension transaction (P159), or Amend Active Duty Termination Date for a Reservist (P191) transaction.
- After the reenlistment contract, Retained Beyond Normal Expiration of Enlistment (P176), Extension transaction (P154), or Re-extension transaction (P159) has been approved and transmitted.

Note: This includes reenlistments for members whose separation date was set by an Extension transaction (P154) or Re-extension transaction (P159) and have decided to cancel the extension/re-extension and reenlist for a greater period of time.

Extension/ Re-extension Screenshot


Effective Date: 07/10/2008 SOI's Submitted: 1 Process Action: Statement Of Intent
*Career Intentions: Extension
Reason for retention: Obligated Service SRB Bonus
Retention date: 07/22/2008 First day of the newly obligated service period. (Normally day after Expected Active Duty Date.)
*Retention Years: 3 Months: New Date of Separation: 07/21/2011
SRB Eligible
Honorable Service
SRB Payment Option: Lump Sum
Check box if Indefinite Reenlistment
Date Approved:
Approval Status: Pending
Comments:
SRB multiple is 5.0. Per ALCOAST 286/08 -
-Zone A, ET2 -- 2.0
-Kicker multiple 3.0. Member possesses the MK92FCS Competency Code.
SRB computed based on 36 months newly obligated service.
Meets weight standards. Member was previously on weight program we have submitted the Bonus Maintenance transaction to remove the suspension effective this date.
Member desires to contribute 50% of this SRB to the TSP. Member is not currently enrolled in the TSP. A TSP-U-1 Election Form was faxed to PSC (MAS-TSP) on this date.

Continued on next page

Extension/Re-Extension Statement of Intent, Continued

Extension/ Re-Extension Fields

Below is a list of all the fields in the Extension/Re-extension SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this extension/re-extension.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Career Intentions	Select Extension/ Re-Extension (as applicable) from the drop-down list.
Reason for Retention	Select the extension/re-extension reason from the drop-down list.
Retention Date	Enter the effective date of the extension/re-extension (first day of the newly obligated service period).
Retention Years	Enter the number of years for this extension/re-extension (may be left blank if term is for 11 or less months).
Months	Enter the number of months for this extension/re-extension (may be left blank if term is all years and no months).
New Date of Separation	Member's new end of service date. Computed by system. Not editable.
SRB Eligible	Check the box if the member is eligible for a Selective Reenlistment Bonus for this reenlistment.
SRB Payment Option	No longer used. All SRB payments are Lump Sum (less 25% for FITW).
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.

Continued on next page

Extension/Re-Extension Statement of Intent, Continued

Extension/
Re-extension Fields (continued)

Field	Entry/Description
Comments	Enter any necessary comments. If member is eligible for a SRB provide the following information: • SRB multiple (Reference ALCOAST, Zone, base multiple and, if applicable "kicker" multiple and competency code). • Number of months of newly obligated service. • Statement that member complies with weight standards. • Statement that the SPO has checked JUMPS segment 42 to ensure no transaction to remove a previous bonus suspension is required (see Bonus Maintenance for more information). • Statement on member's intentions to contribute SRB to the Thrift Savings Plan (TSP). If the member desires to contribute to TSP they must first enroll in the program and be contributing at least 1% of their base pay. See http://www.uscg.mil/ppc/tsp.asp for enrollment procedures. Once enrolled, the member can use self-service to designate a percentage of their SRB for TSP. If there is insufficient time (less than 30 days) remaining before the reenlistment/extension to complete the enrollment and setup self-service access, fax the TSP-U-1 Election Form (with base pay and bonus elections completed) to PPC (MAS-TSP) at (785) 339-3760.

Recall Statement of Intent

Recall Fields

Below is a list of all the fields in the Recall SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this recall.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Retention Date	Enter the effective date of the extension/re-extension (First day of the newly obligated service period).
Retention Years	Enter the number of years for this recall (may be left blank if term is for 11 or less months).
Months	Enter the number of months for this recall (may be left blank if term is all years and no months).
New Date of Separation	Member’s new end of service date. Computed by system. Not editable.
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.
Comments	Enter any comments, such as authority for recall.

Involuntarily Retained Statement of Intent

Involuntarily Retained Fields

Below is a list of all the fields in the Involuntary Retention SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this retention.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Reason for Retention	Select the retention reason from the drop-down list.
Retention Date	Enter the effective date of the retention (Normally day after Expected Active Duty Date).
Retention Years	Enter the number of years for this retention (may be left blank of term is for 11 or less months).
Months	Enter the number of months for this retention (may be left blank if term is all years and no months).
New Date of Separation	Member's new end of service date. Computed by system. Not editable.
SRB Eligible	Check the box if the member is eligible for a Selective Reenlistment Bonus for this retention.
SRB Payment Option	No longer used. All SRB payments are Lump Sum (less 25% for FITW).
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.
Comments	Enter any comments, such as authority for extension/re-extension. May be left blank.

Discharge Statement of Intent

Discharge Fields Below is a list of all the fields in the Discharge SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this discharge.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Honorable Service	Check the box if the member is being separated under honorable conditions.
Separation Date	Enter the members discharge date. This is the last day of active duty.
Type Code	Select the termination type code from the drop-down list box
Severance pay object code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Disability Severance Pay Code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Severance years	If applicable, enter the number of years and months creditable for severance pay computation.
Lump Sum readjustment code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Reserve Separation Pay Code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.
Comments	Enter any comments, such as authority for discharge. May be left blank.

Release from Active Duty (RELAD)/SELRES Deactivation Statement of Intent

RELAD/SELRES Deactivation Fields

Below is a list of all the fields in the RELAD/SELRES Deactivation SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this RELAD.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Honorable Service	Check the box if the member is being separated under honorable conditions.
Separation Date	Enter the members RELAD date. This is the last day of active duty.
Severance pay object code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Disability Severance Pay Code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Severance years	If applicable, enter the number of years and months creditable for severance pay computation.
Lump Sum readjustment code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Reserve Separation Pay Code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.
Comments	Enter any comments, such as authority for RELAD. May be left blank.

Retirement or Release from Recall to Active Duty from Retirement Statement of Intent

Retirement Request Approved

Below is a list of all the fields in the Retirement Request Approved SOI process and their descriptions.

Field	Entry/Description
Effective Date	Pre-filled by system with current date. Not editable.
SOIs Submitted	Shows number of SOIs on file for a particular effective date. Review any previous SOIs to ensure one has not already been submitted for this retirement.
Process Action	Pre-filled by system with Statement of Intent. Not editable.
Honorable Service	Check the box if the member is being separated under honorable conditions.
Separation Date	Enter the member's separation date. This is the last day of active duty, which is the day prior to the retirement date.
Severance pay object code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Disability Severance Pay Code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Severance years	If applicable, enter the number of years and months creditable for severance pay computation.
Lump Sum readjustment code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Reserve Separation Pay Code	If applicable, select the code from the drop-down list. Leave blank if not applicable.
Date Approved	The date the SOI was marked Approved and saved. Not editable. Will remain blank until SOI is approved and saved.
Approval Status	The status of the SOI. Defaults to Pending, indicating the SOI is a work in progress. SOIs may be saved with a status of pending. Set the field to Approved only after all required fields are complete (including leave information), and the transaction will transmit to JUMPS.
Comments	Enter any comments, such as authority for retirement. May be left blank.

Corrections and Deletions

Corrections and Deletions

Corrections and deletions are not allowed. If you need to make a change or correction to an SOI, click the add button to create a new SOI. If a new SOI is not called for or if the DOS is within the next 15 days, notify PPC (SES).

Note: There's is no need to request changes to retention type SOIs when the member changes plans to sell leave. Simply ensure the sale of leave is accurately recorded on the Reenlistment Contract, the Begin Extension of Enlistment (P198) or Amend Active Duty Termination Date for a Reservist transaction.

Erroneous SOI

If an SOI is submitted erroneously (e. g. Wrong Employee ID number) and needs to be deleted, a PAO at the SPO must send an email to PPC-SES requesting deletion of the erroneously submitted SOI. Send only one request per email. The email must contain the following information within the body of the request (**do not send as an email attachment**):

1. Member’s Rank, Complete Name, EMPLID and Component
2. Date erroneous SOI was APPROVED in Direct Access
3. DOS on erroneous SOI
4. Brief explanation of why the SOI needs to be deleted
5. PAO releasing this request

Note: The SOI will NOT BE REMOVED FROM DIRECT ACCESS. PPC (SES) will submit an H876 transaction to remove the separation segment 75 from JUMPS. This will allow JUMPS to resume paying the member until their Expected Active Duty Termination Date without any further action from the SPO.

The Global Address Listing (GAL) e-mail address for PPC (SES) is "PPC-PF-SES". Append @uscg.mil" if you are sending the e-mail from outside of the Coast Guard Data Network.

Continued on next page

Corrections and Deletions, Continued

Sample Email to PPC (SES)

Items in red italics are notes and should NOT be included in the actual email.

```
To:      PPC-PF-SES
Subject: REQUEST SOI DELETION FOR SN SMITH
1. SN JOHN P. SMITH 7777777, USCGR (Member)
2. 2009JUL21 (Date Erroneous SOI Approved In DA)
3. 2009AUG15 (DOS On Erroneous SOI)
4. MEMBER WAS TO BE DEMOBILIZED ON 2009AUG15 BUT IS NOT
MEDICALLY QUALIFIED.  MEMBER WILL BE CONTINUED ON TITLE 10
ORDERS UNTIL MEDICALLY QUALIFIED FOR RELAD. (Reason)
5. PERSRU5302 (SPO Email)
6. IMA D. BOSS, YN1, PAO (PAO Releasing Request)
```

JUMPS Effect

The SOI creates the L6FB transaction in JUMPS, which updates segment 75.

Coast Guard Servicing Personnel Office Manual

Part VI, Separations

Chapter 3, Release from Active Duty (RELAD)

Overview

Introduction

This section provides the ***procedures*** for **Releasing a Member from Active Duty (RELAD)**. Within the Separation Transaction, a SPO may dispose of leave, set a member's reserve status, declare location of RELAD on orders and complete a DD-214.

Topics

The following topics are covered in this chapter. Use the other chapters of this manual for instructions on completing the DD-214 and for accessing the airport terminal.

Guiding Principles

Introduction

This section provides the ***guiding principles*** for **RELAD.**

Reference

The following references provide additional information about releasing a member from active duty.

- Military Separations, COMDTINST M1000.4 (series)
- Joint Federal Travel Regulations, Volume 1
- Personnel and Pay Procedures Manual, PPCINST Ml000.2 (series)
- Reserve Policy Manual, COMDTINST M1001.28 (series)
- Coast Guard Separation Program Designator Handbook & ALCOAST 125/10

Separation Pay

Separation Pay authorizations are entered in the separation request component by CGPSC (epm-1)/(opm-2), the separation pay data is carried over into the separation component. Contact CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are required. SPOs cannot edit the separation pay authorization data.

Separations for Active Duty and EAD Officers

Only CG PSC (opm) is authorized to approve separations for active duty officers and reserve officers on Extended Active Duty (EAD) contracts. If the separation is not present in the system the SPO should email ARL-PF-CGPSC-opm-1-Separations to let them know.

Before you begin

Normal Expiration of Enlistment type separations do not require prior authorization from CGPSC, and will not appear on the airport terminal. For all Normal Expiration of Enlistment type separations, the SPO will start the Separation transaction. After the **Save**, the **Separation Type, Termination Date** and **Departure Date** will not be editable. If a mistake is made with the **Separation Type** or **Termination Date,** delete the transaction and insert a new row.

Travel Order Numbers (TONOs) for Separation Orders are generated when the separation transaction is saved by the SPO Supervisor (CGHRSUP Role User). Do not request a separation TONO from PPC (SES).

Continued on next page

Guiding Principles, Continued

Before you begin (continued)

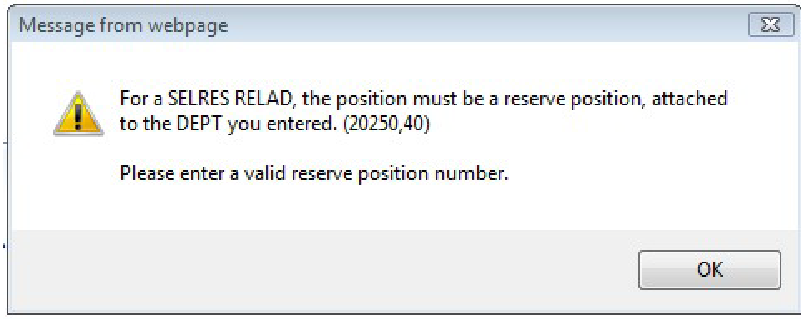
JUMPS' auto stops of pay entitlements will not be visible in DA until data is synchronized. Pay entitlements for a member who is being discharged, released from active duty (RELAD), or retired will automatically be stopped by JUMPS on the effective date of separation. Unlike auto-stops of entitlements in connection with PCS orders, the member's DA entitlements page **will not show the entitlement stop dates** upon saving and approving the separation transaction. The stop dates will be inserted after the separation transaction processes through JUMPS and after the DA/JUMPS Data Resynchronization Process runs (a few days after each JUMPS update cycle). SPOs do not need to manually stop pay entitlements for a member who is separating, unless the entitlement is to stop on a day other than the date of separation or the member will immediately be performing long-term active duty following RELAD or discharge (e. g. A Reserve member who is RELAD from an EAD order and begins duty on another type of long-term orders the next day).

Reservists

RELAD transactions are only required for Reservists completing (or being released from) long-term active duty. Long-term active duty is active duty for more than 139 days ADT or more than 180 days ADOT. Recalls under Title 10 U.S.C are also treated as long-term active duty, regardless of the duration of the recall. Recalls under Title 14 U.S.C. are treated as short-term active duty. Therefore, no RELAD transaction is required for demobilization from a recall under Title 14 U.S.C.

Release From Active Duty and Transfer to the Selected Reserve (SELRES)

When releasing a member from active duty to affiliate with the selected reserve (drilling) you must enter a SELRES position number on the RELAD travel order. Position numbers are provided by the In Service Transition Team at the Coast Guard Recruiting Command.

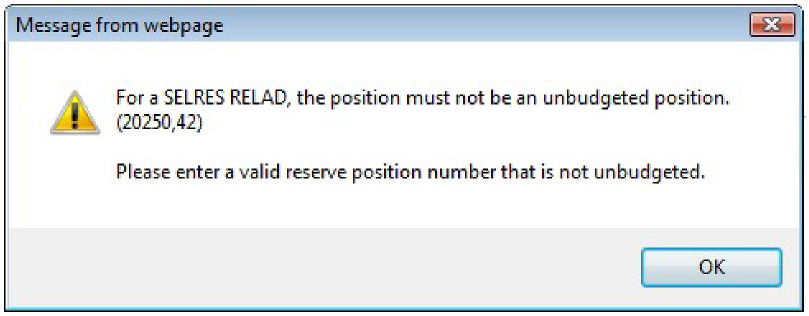


Continued on next page

Guiding Principles, Continued

Release From Active Duty and Transfer to the Selected Reserve (SELRES) (cont'd)

The position must be at the department (unit) the member will be drilling at and cannot be an "Unbudgeted" position.



Release From Active Duty and Transfer to the Individual Ready Reserve (IRR)

Use the Reserve Status tab to change the member's Employee Classification to "IRR" and Reserve Training/Pay Code to "H" when RELADing the member to the IRR. When releasing a member from active duty to the IRR use department ID #002817 and position #00062025. The department ID is entered on the member's RELAD travel order.

Mail records for IRR members to:

COMMANDER (RPM-3)
PERSONNEL SERVICE CENTER
US COAST GUARD STOP 7200
4200 WILSON BLVD STE 1100
ARLINGTON VA 20598-7200

The RELAD process

Introduction

This section provides an ***overview*** of how the **RELAD** process works.

Procedure

This table lists the events that take place in connection with a RELAD. This table is not meant to be all-inclusive; it merely provides an overview of the process to aid in understanding the events that must take place in order for the separation transaction to be input.

Stage	Trigger	Who Does it	What Happens
1	Separation authorized	Member	Submits Career Intentions Worksheet (CIW) (CG-2045)
2	Receipt of CIW	Member's Command	Endorses CIW and forwards to Servicing Personnel Office (SPO).
3	Receipt of CIW	SPO-Data Entry Technician (CGHRS User)	Inputs Career Intentions in Direct Access via the Statement of Intent (SOI) transaction (see Chapter 2 of this part). **Note:** There are additional requirements listed in section 3-B of the 3PM that the SPO must complete in connection with a RELAD. Also, see Reserve Status Transaction on the following page to determine if submitting one will be necessary PRIOR TO entering the RELAD.
4	Receipt of CIW. Updating and saving the separation transaction.	SPO-Data Entry Technician (CGHRS User)	Enters the Reenlistment Eligibility Code*, and SPD Code* for enlisted personnel in the separation transaction and saves. Completes orders, entering delay enroute (terminal leave), dependent data, mode of travel, etc. **Note:** The separation transaction must be accessed and saved before the user can access the orders.
5	Completion and saving of orders data entry	System	Updates departure date on separation transaction to reflect terminal leave. **Note:** This will not be reflected on the screen until the separation transaction is updated and saved.
6	Completion and saving of orders data entry	SPO-Data Entry Technician (CGHRS User)	Finishes the separation transaction, routes to supervisor for approval.

*Note: ALCOAST 125/10 (CGWEB/Intranet link) announced revisions to the SPD and RE codes in the Coast Guard Separation Program Designator Handbook.

Continued on next page

The RELAD process, Continued

Procedure (continued)

Stage	Trigger	Who Does it	What Happens
7	Worklist entry	SPO-Supervisor (CGHRS User)	Reviews and approves separation transaction. Prints and signs orders and DD-214, forwards to member.
8	Approval and save by CGHRSUP	System	Generates JUMPS transaction (L68B).

Reserve Status Transaction

A Reserve Status Transaction (R910) is submitted as part of a RELAD transaction. The Reserve Status Transaction is completed via the Reserve Status tab in the separation component.

If the member has…	Then
NEVER been a Reservist	Complete the Reserve Status Tab prior to creating orders. ***Note:*** Reserve Commission Officers completing EAD contracts require completion of the Reserve Status entry BEFORE starting the RELAD. See the special instructions on page 23 of this guide for more information.
Previously been a Reservist	Complete the Reserve Status Tab Page if the data should change.

Note: For instructions on completing a Reserve Status Transaction that isn't part of a RELAD, see Part VII, Chapter 1 of this manual.

If you should need to…	Then…
Delete a RELAD Transaction in which the Reserve Status Transaction was done in conjunction with the RELAD	Delete the Reserve Status Transaction from the Separation component and save it. Then delete the RELAD Transaction.
Change Reserve Status Transaction done in conjunction with the RELAD.	Correct the Reserve Status Transaction and save. There is no need to modify the RELAD.
Change Both the RELAD data and the Reserve Transaction data.	Complete both changes and save once. Then route for approval and save.

RELAD Procedure

Introduction

This section provides the ***procedure*** for **Releasing a Member from Active Duty (RELAD)**.

Before you begin

Only CG PSC (opm) is authorized to initiate separations for active duty officers and reserve officers on Extended Active Duty (EAD) contracts.

If the separation is not present in the system the SPO should email ARL-PF-CGPSC-opm-1-Separations to let them know.

The status of a RELAD request/authorization can be viewed in Direct Access using the Separation Summary module. The separation transaction can also be accessed from the Airport Terminal once the Separation Transaction has been started and saved. Click the Route/Work button on the row with the member's orders to access the separation.

For all Normal Expiration of Enlistment type separations, the SPO will start the Separation transaction. For officer separations (including officers on EAD), CG PSC (opm) will initiate the separation, therefore the RELAD row should already be present in the Separations component when you access the member's record. If not, contact CG PSC (opm) for assistance. After the **Save**, the **Separation Type, Termination Date** and **Departure Date** will not be editable. If a mistake is made with the **Separation Type** or **Termination Date,** you will have to Delete the Transaction and insert a new row.

Procedure

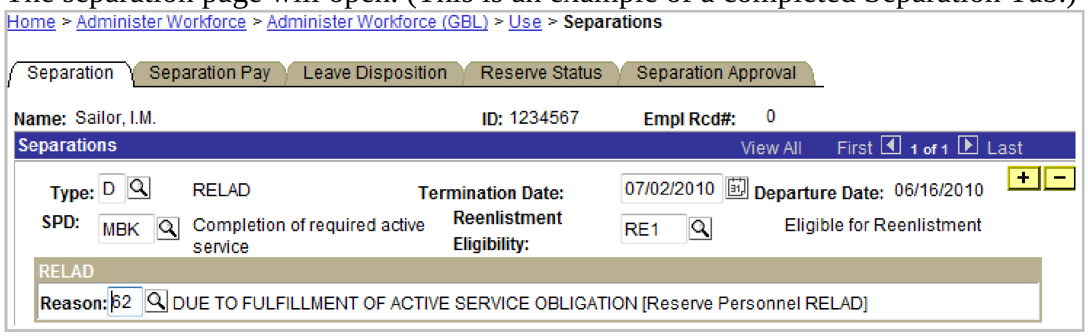
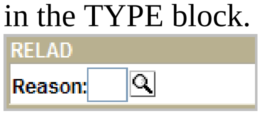
Follow these steps to process a separation transaction. If the Orders Link at the bottom of the Separation Tab Page is available for selection, then the Orders do exist. You should proceed directly to the Orders Page to make your declarations and Save. If the Orders Link is not available for selection, you must complete the Separations Tab Page and the Reserve Status Page and Save.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Separations**
2	Enter **EmplID** with the member's Employee ID number
3	Click the **Search** Button.

Continued on next page

RELAD Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The separation page will open. (This is an example of a completed Separation Tab.)

</td></tr>
<tr><td>5</td><td>For enlisted only, enter the <u>Reenlistment Eligibility</u> code by clicking on the lookup icon and selecting the applicable code. The list of available codes is tied to the SPD code.
Note: ALCOAST 125/10 (CGWEB/Intranet link) announced revisions to the SPD and RE codes in the Coast Guard Separation Program Designator Handbook.</td></tr>
<tr><td>6</td><td>Separation <u>Type</u>, Use “D” for RELAD.</td></tr>
<tr><td>7</td><td>Enter the <u>SPD</u> separation program designator based on the member’s separation reason. Click on the to look up the applicable code. Based on the type and SPD codes entered, additional fields will appear on the page.
Note: ALCOAST 125/10 (CGWEB/Intranet Link) announced revisions to the SPD and RE codes in the Coast Guard Separation Program Designator Handbook.</td></tr>
<tr><td>8</td><td>The <u>Termination Date</u> is the effective RELAD date. Enter the last day of active duty for the member.</td></tr>
<tr><td>9</td><td>The <u>Departure Date</u> (a non-editable field) will take into consideration any terminal leave requested on the member’s orders. However, since the orders must exist before you enter any terminal leave the Departure Date will not be properly set until you forward the Separation for Approval or save the Separation Page after the Terminal Leave has been entered.</td></tr>
<tr><td>10</td><td>The Reenlist Eligibility should be filled with “RE1” if the member is eligible to reenlist.</td></tr>
<tr><td>11</td><td>Complete the RELAD Section which will appear when the “D” RELAD is selected in the TYPE block.


Enter the <u>Reason</u> or click the button to see a listing. This field will not appear for officers.</td></tr>
</table>

Continued on next page

RELAD, Continued

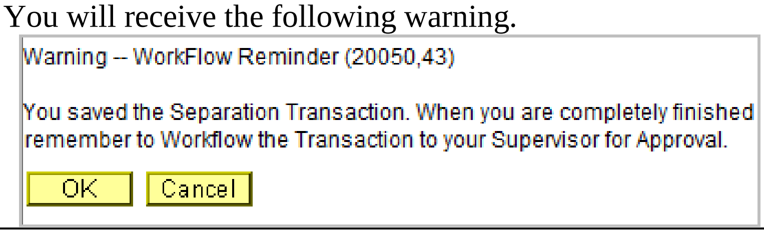
Procedure (cont'd)

Step	Action
12	Once data entry is completed for the Separation page, click the Separation Pay tab.
13	**Earnings Type -** If separation pay is authorized this field will be pre-filled with the earnings type code. **For a RELAD Type "D" separation on a regular active duty member, the following codes are valid:** • S04A Separation Pay Enlisted Full Pay /Satisfactory • S04B Separation Pay Enlisted Half Pay /Substandard **For a RELAD Type "D" separation on a extended active duty reservists, the following codes are valid**: • S04C Separation Pay Reserve Enlisted Half Pay/Substandard • S04D Separation Pay Reserve Enlisted Full Pay/Satisfactory • S04E Separation Pay Reserve Officer Full Pay/Satisfactory • S04F Separation Pay Reserve Officer Half Pay/Substandard • S06A Reserve Lump Sum Readjustment Full Pay/Satisfactory • S06B Reserve Lump Sum Readjustment Half Pay/ Substandard
14	**Highest Pay Grade Held -** If an officer or enlisted member is entitled to Severance Pay Disability (S01A), this field will reflect the highest grade the member satisfactorily held, otherwise it will be blank. Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.
15	**YY/MM of Active Service** - This field will be automatically filled, however the active service time still needs to be verified by the SPO. The data will be used in the computation of Severance Pay Disability, Reserve and Enlisted Separation Pay. Notify the separation authority (PSC (epm)/(opm)) is any discrepancy is noted.
16	**Discharge Gratuity** - If entitled, enter the amount of Discharge Gratuity will be pre-filled.

Continued on next page

RELAD, Continued

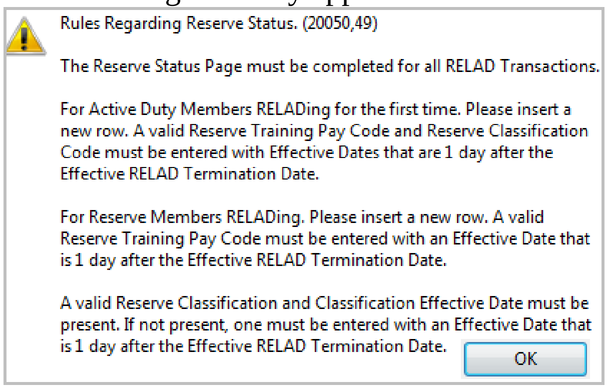
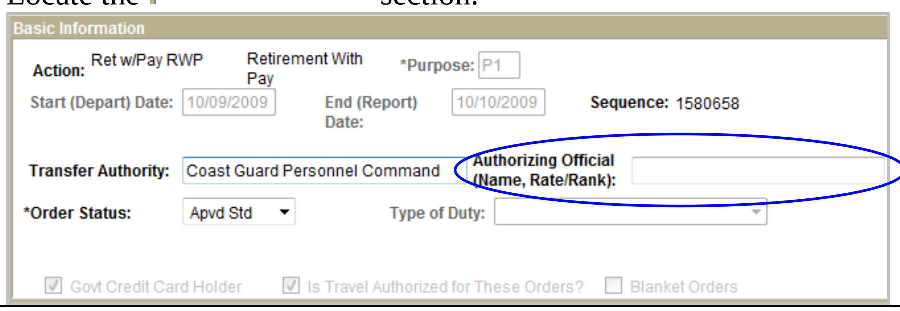
Procedure (cont'd)

Step	Action
17	**You must complete the Reserve Status Tab Page (steps 18 thru 24) prior to creating Orders**. The Employee Classification and Reserve Training/Pay Code must be set to reflect the member's reserve status following RELAD and must be appropriate for the department ID/position number entered on the separation orders (see step 38 below). Example: If assigning the member to DEPTID 002817 and position #00062025 (the IRR), the Classification must be "IRR" and the training/pay code must be "H-No Drill Requirement". See "Reserve Status Transaction" on page 6 of this part for more information. Also see, *Processing Release from Active Duty Separations for Officers with Reserve Commissions* on page 23 if applicable.
18	Click the Reserve Status tab and complete the following.
19	Click the **Add a New Row** button (+) to insert a new row.
20	Select an **Employee Classification** from the drop-down menu listing. For example, if the member is transferring to the Individual Ready Reserve, select "IRR", if the member will be affiliating with the Selected Reserve and drilling, select "SELRES".
21	**Reserve Training/Pay Code** - Enter the Training/Pay Category, or click the button and the Lookup tab for a listing. For example, if the member is transferring to the IRR, select "H-No drill requirement", if the member is affiliating with the SELRES, select "A-Drilling Pay Status".
22	**Reserve Classification** - Enter the appropriate classification from the drop-down list. Most enlisted members completing their initial active duty obligation will be assigned classification "J- Prior Svc CG Enl w/in 8 yr obl", officers will be classified "I=Inact Du Officer w/in 8 yr obl". Section 1-E-1 of the Reserve Policy Manual provides a detailed description of each classification.
23	**TRA-PAY-CAT Effdt** - Should be one day after the RELAD Date.
24	**Classification Effdt** - Should automatically fill to be one day after the RELAD Date unless an older date exists.
25	Click on the **Separation** tab.
26	Click Save.
27	You will receive the following warning. 

Continued on next page

RELAD, Continued

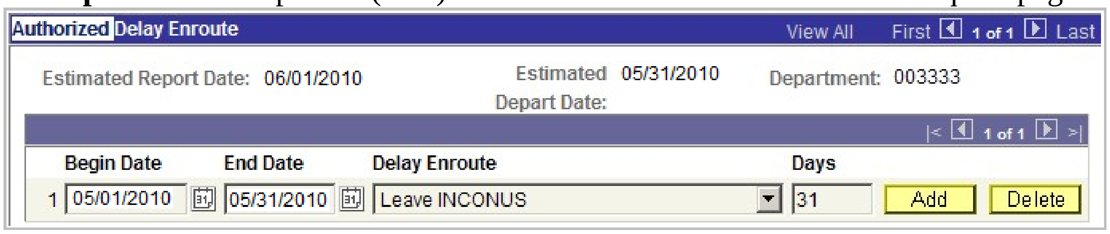
Procedure (cont'd)

Step	Action
28	Click the **OK** button to continue.
29	This Warning will only appear when the "D" RELAD is selected in the TYPE block  You will enter the information (CGHRSUP employee ID) necessary to workflow the transaction later in this process. Click the **OK** button to continue.
30	Click the **Orders** link. Entitlements Orders DD214
31	The member's orders will open in a new window.
32	Locate the Basic Information section. 
33	Enter the **Authorizing Official's Name and Rate/Rank.**
34	Locate the Itinerary section
35	**Report Date** automatically defaults to the last day of duty.
36	**Depart Date** should be left blank.
37	**Department** - If transferring to the IRR use **DEPTID 002817** and position **#00062025**. Otherwise, use the drilling Department ID and position number. Click on the 🔍 to lookup. **Note:** Be sure to enter the employee class and training/pay code on the Reserve Status tab, which corresponds with the member's assignment (see previous page).
38	**Description** will pre-fill when Department is selected.

Continued on next page

RELAD, Continued

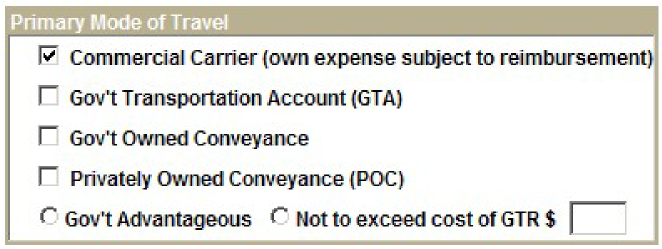
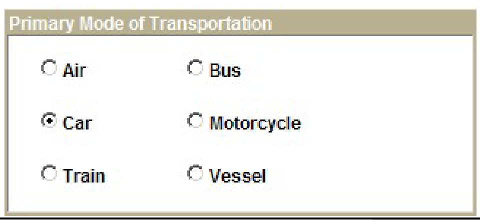
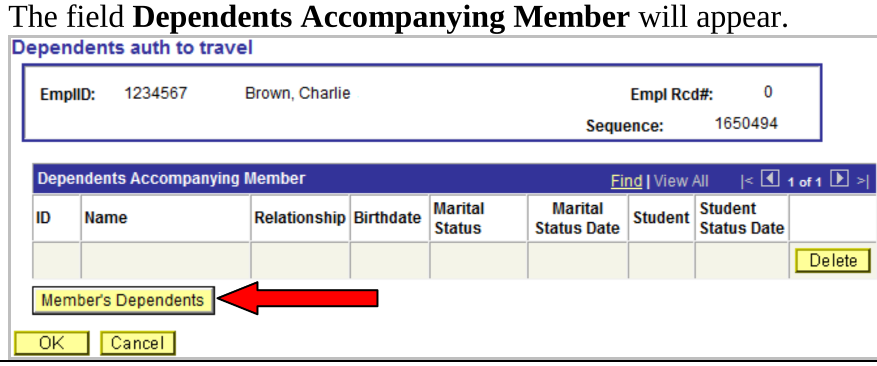
Procedure (cont'd)

Step	Action
39	**<u>City/State/Country</u>** will pre-fill when Department is selected.
40	Locate the Authorized Delay Enroute section. **Note:** Leave taken in conjunction with a RELAD/RETIREMENT must be entered in the **Separations** component (here) and NOT recorded in the Vacation Request page. 
41	Enter the **<u>Begin Date</u>** in MMDDYYYY format or click the calendar icon to select a Begin Date. This is the leave date the member is planning on departing his current unit, normally taken from the CIW.
42	Enter the **<u>End Date</u>** in MMDDYYYY format or click the calendar icon ( ) to select an End Date.
43	Click the **<u>Delay Enroute</u>** drop-down button to view and select from the list. Select the type of delay authorized for the date entered. Enter the Travel Time for Demobilized Reservists as **NON-CHARGEABLE ABSENCE**.
44	Add an additional Delay Period by clicking on the Add button if necessary (e. g. When member is taking terminal leave and one portion is OUTCONUS, and one portion is INCONUS).
45	***Reminder***: The 'End Date" for the last leave period must be one day before the Discharge date (shown above as the "Estimated Report Date"). If you make an error you will receive this message:  Review the leave period(s) you entered and correct the end date before continuing.

Continued on next page

RELAD Procedure, Continued

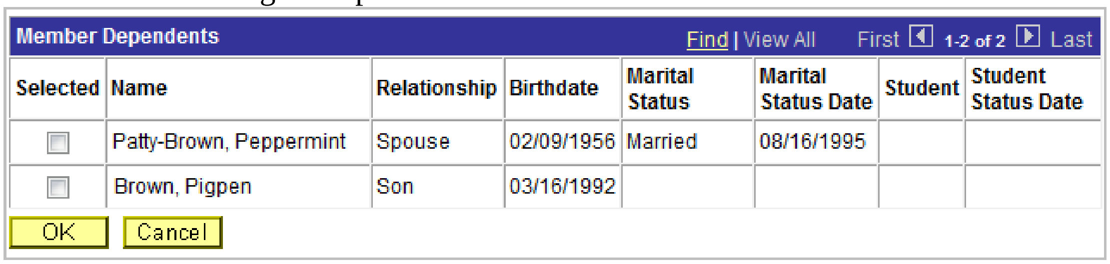
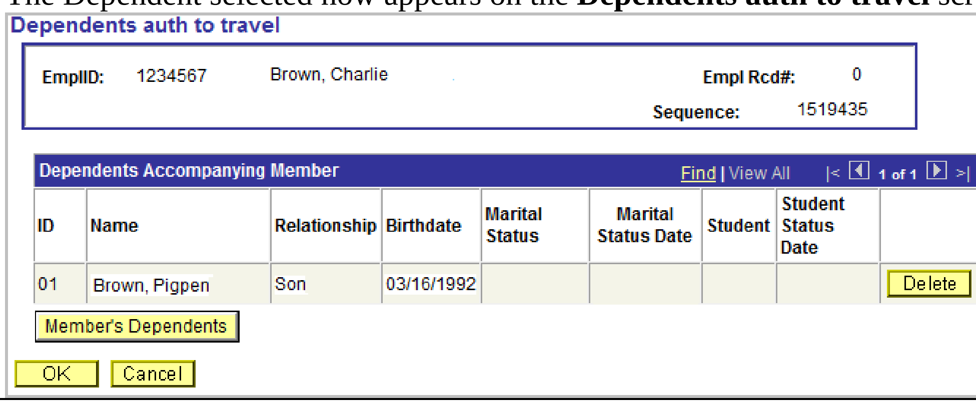
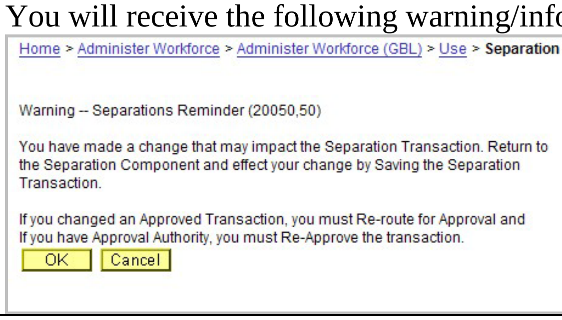
Procedure (continued)

Step	Action
46	In the section labeled Primary Mode of Travel select or de-select an option. 
47	In the section labeled Primary Mode of Transportation select or de-select an option. 
48	Scroll down and click on the Order Notes button.
49	Enter the **Order Note ID** if known, or click the button and the Lookup tab for a listing. Order Notes are entries for the remarks block of the CG-5131.
50	Select the **Sequence Number**. This number determines the print order.
51	**Delete** the text and enter your own text.
52	Click the **OK** button.
53	Click on the Dependents Auth to Travel tab.
54	The field **Dependents Accompanying Member** will appear. 

Continued on next page

RELAD Procedure, Continued

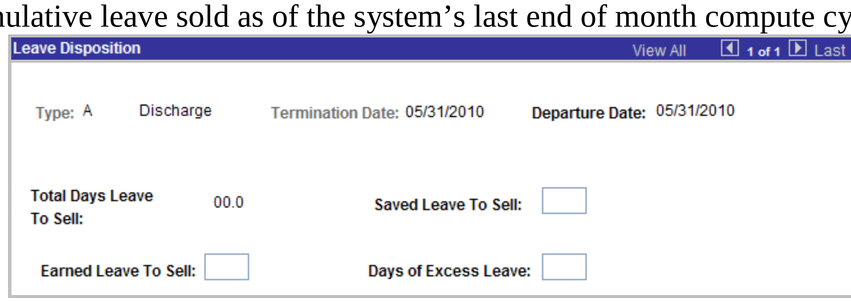
Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>55</td><td>Click the Member's Dependents button.
You will see a listing of Dependents for the member.

Member Dependents — Find | View All — First 1-2 of 2 Last
<table>
<tr><th>Selected</th><th>Name</th><th>Relationship</th><th>Birthdate</th><th>Marital Status</th><th>Marital Status Date</th><th>Student</th><th>Student Status Date</th></tr>
<tr><td>☐</td><td>Patty-Brown, Peppermint</td><td>Spouse</td><td>02/09/1956</td><td>Married</td><td>08/16/1995</td><td></td><td></td></tr>
<tr><td>☐</td><td>Brown, Pigpen</td><td>Son</td><td>03/16/1992</td><td></td><td></td><td></td><td></td></tr>
</table>
OK Cancel
Note: See Chapter 4 (Dependency) of Part III (General Transactions) in this manual for information on adding dependents. </td></tr>
<tr><td>56</td><td>To Select members authorized to travel on the Travel Orders, click the <u>Selected</u> option. Once selected, a check mark ☑ will appear next to the Dependent's Name.</td></tr>
<tr><td>57</td><td>Click the OK button.</td></tr>
<tr><td>58</td><td>The Dependent selected now appears on the Dependents auth to travel screen.

Dependents auth to travel
EmplID: 1234567 Brown, Charlie Empl Rcd#: 0
Sequence: 1519435
Dependents Accompanying Member — Find | View All — 1 of 1
<table>
<tr><th>ID</th><th>Name</th><th>Relationship</th><th>Birthdate</th><th>Marital Status</th><th>Marital Status Date</th><th>Student</th><th>Student Status Date</th><th></th></tr>
<tr><td>01</td><td>Brown, Pigpen</td><td>Son</td><td>03/16/1992</td><td></td><td></td><td></td><td></td><td>Delete</td></tr>
</table>
Member's Dependents
OK Cancel </td></tr>
<tr><td>59</td><td>Click the <u>Ok</u> button.</td></tr>
<tr><td>60</td><td>Click the Save button.
You will receive the following warning/information message:

Home > Administer Workforce > Administer Workforce (GBL) > Use > Separation
Warning -- Separations Reminder (20050,50)
You have made a change that may impact the Separation Transaction. Return to the Separation Component and effect your change by Saving the Separation Transaction.
If you changed an Approved Transaction, you must Re-route for Approval and If you have Approval Authority, you must Re-Approve the transaction.
OK Cancel </td></tr>
</table>

Continued on next page

RELAD Procedure, Continued

Procedure (continued)

Step	Action
61	Click the **Ok** button.
62	To obtain a printable version of the orders, click the Email Printable Order button. The system will send a copy of the orders to your 'Business E-Mail' address.
63	Click on the ☒ to close the orders window. The separation transaction window should still be present on the screen. Use the menus to return to the member's separation page.
64	The **Departure Date** and **Termination Date** will be filled. **Note:** The screen does not yet reflect any terminal leave entered in the orders. This will update after the remaining separation information is entered and saved. Termination Date: 05/31/2010 Departure Date: 05/31/2010
65	At this point, you should complete the DD-214. Click the **DD-214** link at the bottom of the Separations page. See Chapter 6 of this part for instructions.
66	After completing the DD-214, return to the **Separation** tab.
67	Click the Leave Disposition tab.
68	The Leave Disposition page will appear. The page provides balances for regular, saved, and cumulative leave sold as of the system's last end of month compute cycle.  The Leave Disposition page allows the member to sell any unused leave that may remain as of the day of separation. These fields may be left blank if the member is not selling any leave. It also allows the system to debit the member's pay of any excess leave previously taken. ***Note***: It is extremely important to dispose of the member's entire leave balance.
69	Enter the amount of **Earned Leave to Sell** or leave blank.
70	Enter the amount of **Saved Leave to Sell** or leave blank.
71	Enter the **Days of Excess Leave** or leave blank.

Continued on next page

RELAD Procedure, Continued

Procedure (continued)

Step	Action
72	Click the Separation Approval tab.
73	Enter the **Employee ID** number for the CGHRSUP user who will be reviewing and approving this transaction. **Note:** If you are the CGHRS user approving this transaction, see the approval procedures later in this guide for instructions.
74	Click the Save button. **Note:** The Departure Date will automatically update to reflect any terminal leave or other authorized delay entered in the orders. (31 days in this example.) Termination Date: 05/31/2010 Departure Date: 05/01/2010
75	Click the **Ok** button.
76	Follow up with approver to ensure the transaction is approved by the date the member physically departs the unit.

RELAD Approval Procedure

Introduction

This section provides the ***Approval Procedure*** for **Releasing a Member from Active Duty (RELAD)**.

Approval date

Separation transactions cannot be approved more than 14 days prior to the effective date of separation.

Procedure

Access your Worklist and follow these steps to approve the transaction.
Note: You can also access the transaction using the following menu path: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Separations**

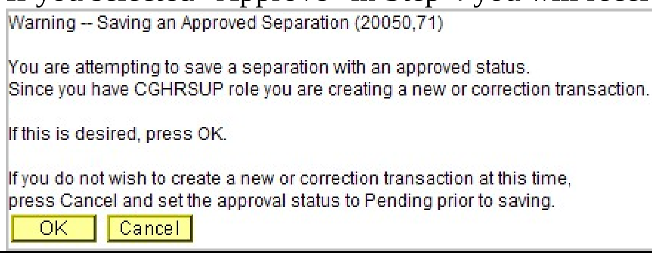
The RELAD must be approved by the date the member physically departs the unit.

Step	Action
1	Locate the **Worklist** item in the link column.
2	Click on the **Employee**.
3	Check member's information for accuracy.
4	Supervisors must decide which action from the Approval Status button to take. The Selections are: • **Approve** – Select to approve. • **Denied** – Select to deny (disapprove) the transaction. If desired, a text box is available to advise why the transaction is denied. • **Pending** - This is used when the transaction needs further information. The user may return and complete the transaction at a later date. **Note:** If the Approver selects Denied or Pending, further information is needed. The transaction can be re-routed to a specific user by entering the Employee ID in the "Route to" block. When an Employee ID is entered in the route to block the transaction will appear on their Worklist.
5	Click the **Ok** button.

Continued on next page

RELAD Approval Procedure, Continued

Procedure (continued)

Step	Action
6	If you selected "Approve" in Step 4 you will receive the following warning: 
7	If you want to transmit the separation, click **OK**. If you did not intend to approve and transmit the separation, click **Cancel**.
8	Remember to go back to the **Worklist** and check the **Marked Worked** button.

RELAD Corrections and Deletions

Introduction

This section provides the procedures for Corrections and Deletions of the Release from Active Duty (RELAD) transaction.

Deletions for Reservists on Active Duty

You cannot delete a RELAD transaction for a reserve member who is currently on another set of Active Duty orders. The current orders must be cancelled before a previous RELAD can be deleted.

Procedure

Only a CGHRSUP role user (SPO Supervisor/Auditor) can make changes to an approved separation.

The Separation Type and Effective Date cannot be corrected once the transaction is saved. When the Separation transaction is in an "Approved" status, the CGHRSUP role user must be in “Correct History” to make a change such as selling leave (etc.). Upon saving, the system will create a correction-type transaction.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > Separations</td></tr>
<tr><td>2</td><td>Enter the EmplID with the members Employee ID.</td></tr>
<tr><td>3</td><td>Make sure you are in the Correct History mode.</td></tr>
<tr><td>4</td><td>Click the Search button.</td></tr>
<tr><td>5</td><td>Select the transaction from the search results.
<table>
<tr><th>If the separation transaction…</th><th>Then…</th></tr>
<tr><td>has NOT been approved</td><td>CGHRS/CGHRSUP user can:
• Change the Field and Save.
• Route for approval (CGHRS)/Approve (CGHRSUP)</td></tr>
<tr><td>is in an "Approved" status</td><td>• CGHRSUP User – Make changes and save.</td></tr>
<tr><td>Normal Expiration of Enlistment type separations</td><td>SPO will start the Separation transaction. After the Save, the Separation Type, Termination Date and Departure Date will not be editable. If a mistake is made with the Separation Type or Termination Date, you will have to Delete the Transaction and insert a new row.</td></tr>
</table></td></tr>
<tr><td>6</td><td>Open the Separation tab.</td></tr>
</table>

Continued on next page

RELAD Corrections and Deletions, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>If the separation <u>Type</u> has not been approved, the CGHRS/CGHRSUP user can simply change the field and save.
If the separation has been approved, only the CGHRSUP role user can change the field and save.</td></tr>
<tr><td>8</td><td><u>SPD (CODE)</u> - Contact PSC (epm-1)/(opm-1) to make the change. When the change is completed the SPO can go into the transaction and finish the Separation.</td></tr>
<tr><td>9</td><td><u>Effective Date/Termination Date</u> –
<table>
<tr><th>If the separation date needs to be amended to...</th><th>Then Contact...</th></tr>
<tr><td>An earlier date</td><td>PPC SES to make the change.</td></tr>
<tr><td>A later date</td><td>CG PSC-epm/opm to make the change.</td></tr>
</table>
When the change is completed the SPO can go into the transaction and finish the Separation. If any correction impacts the Effective Date and the separation was saved, whether approved or not, the SPO must delete the separation and recreate.

If a change in terminal leave impacts the effective date:
• And the separation has not been approved; the SPO may change the terminal leave.
• And the separation has been approved; the SPO must delete the separation and recreate.</td></tr>
<tr><td>10</td><td><u>Reenlistment Eligibility</u> - If the separation has not been approved, the CGHRS/CGHRSUP user can simply change the field and save.
If the separation has been approved, a CGHRSUP user can change the field and save. CGHRS users will need to route the transaction to a CGHRSUP user for approval.</td></tr>
<tr><td>11</td><td><u>Departure Date</u> - If the separation has not been approved, the SPO may change the terminal leave. If the separation was approved, the SPO must delete the separation and recreate. The Departure Date (a non-editable field) will take into consideration any terminal leave requested on the member’s orders. However, since the orders must exist before entering any terminal leave; the Departure Date will not be properly set until forwarded for Approval. Or the user can Save the Separation Page after the Terminal Leave has been entered.</td></tr>
<tr><td>12</td><td>Open the Separation Pay tab.</td></tr>
<tr><td>13</td><td><u>SEP Pay</u> - PSC (epm-1)/(opm-1) must make the change. When the change is completed, the SPO can go into the transaction and finish the Separation</td></tr>
</table>

Continued on next page

RELAD Corrections and Deletions, Continued

Procedure (cont.)

Step	Action
14	**Earning Type** - PSC (epm-1)/(opm-1) must make the change. When the change is completed the SPO can go into the transaction and finish the Separation.
15	In regards to correcting/deleting the Highest Pay Grade Held field: Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.
16	Click on the Leave Disposition tab. ***Note:*** Leave taken in conjunction with a RELAD or Retirement must be entered in the Separations component and NOT recorded in the Vacation Request page.
17	Enter the **Total Days Leave to Sell.**
18	Enter the **Earned Leave to Sell.**
19	Enter the **Saved Leave to Sell.**
20	Enter the **Days of Excess Leave.**
21	Access the Reserve Status tab. **Note:** If submitting this correction to change a member's employee classification, reserve training/pay code or reserve classification due to a change in the member's desired reserve status following RELAD (e. g. Member has elected to affiliate with the SELRES with assignment to a unit instead of transferring to the IRR), be sure to update the separation orders with the department ID and position number for the reserve assignment. See Step 37 in the Procedures section (Page 11).
22	**Employee Classification** - Enter Correct Classification and save.
23	**Reserve Training/Pay Code** - Enter Correct Training/Pay Code and save.
24	Enter Correct **Reserve Classification** and save.
25	**TRA-PAY-CAT Effdt** - Do nothing. This date will show as the Day After RELAD Date.
26	**Classification Effdt** - Do nothing. This date will show as the Day After RELAD Date.

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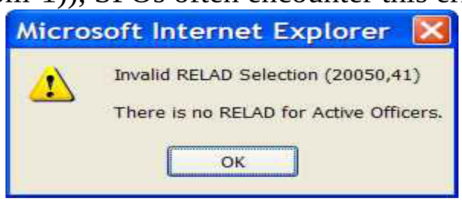
Processing Release from Active Duty Separations for Officers with Reserve Commissions

Introduction

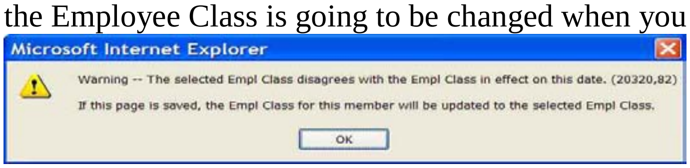
When a Reserve Commissioned Officer completes their initial active duty service obligation/Extended Active Duty (EAD) contract and does not desire to continue on active duty or is not selected for an extension or integration, they are released from active duty and transferred to the Selected Reserve (SELRES) to complete their military service obligation.

Procedure

When processing these separations (after the separation authority has been entered by CGPSC(opm-1)), SPOs often encounter this error message:



This error occurs because DA expects a reserve status row to be present **with a reserve Employee Classification** (SELRES, IRR, etc.), because the Officer you are separating is a Reservist. However, in most of these cases, the Officer has never been a member of the SELRES and no reserve status row exists. If you should receive this error, follow the following steps to correct the error.

Step	Action
1	**Exit the separation component**, go to the **Reserve Member Status** page: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Reserve Member Status**
2	Insert new row. The Reserve Tra/Pay Cat effective date must be one day after the RELAD date.
3	When you enter the **<u>Date</u>**, you will receive this warning message informing you that the Employee Class is going to be changed when you save.  This is exactly what you are trying to accomplish. Changing the Employee Class to a reserve classification will allow you to process the separation.
4	Click **<u>OK</u>** to dismiss the warning message.

Continued on next page

Processing Release from Active Duty Separations for Officers with Reserve Commissions, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>When transferring the Officer to the IRR use:
“<u>IRR</u>” for the Employee Classification,
“<u>H - No Drill Requirement</u>” for the Reserve/Training Pay Code, and
“<u>Inact Du Officer w/in 8 yr obl</u>” (Inactive duty Officer within 8 year initial military obligation) for the Reserve Classification.
Note: For IRR transfers, use department ID #002817 and position #00062025 when you complete the separation travel order.

If the Officer will be participating in the SELRES following RELAD use:
“<u>SELRES</u>” for the Employee Classification,
“<u>A – Drilling Pay Status</u>” for the Reserve/Training Pay Code, and
“<u>Inact Du Officer w/in 8 yr obl</u>” (Inactive duty Officer within 8 year initial military obligation) for the Reserve Classification.</td></tr>
<tr><td>6</td><td>Use the <u>Department ID</u> and <u>Position Number</u> to complete the separation travel order.<table><tr><th>If</th><th>Then</th></tr><tr><td>Long Term/Demobilized Reservist</td><td>RELAD to previous drilling unit.</td></tr><tr><td>All other RELAD</td><td>Use the <u>Department ID</u> and <u>Position Number</u> provided by the assignment officer (CGPSC (rpm)).</td></tr></table>Note: All RELAD travel orders MUST be completed with a Position Number</td></tr>
</table>

Coast Guard Servicing Personnel Office Manual

Part VI, Separations

Chapter 4, Discharge

Overview

Introduction

This section provides the ***procedures*** for **Discharging** a member from the Coast Guard, and to terminate an officer's appointment. Within the Separation Transaction, the user may initiate payment of Separation Pay, Dispose of Leave (Note: Do NOT enter terminal leave in the discharge transaction. This should be done as a separate leave transaction. See Part III of this manual, General Transactions, Chapter 7, Leave and Other Approved Absences, for the procedure used to record leave taken in connection with a discharge from active duty as regular leave.), Change a Members Reserve Status, Declare Location of RELAD on Orders, and Complete a DD214.

**** For instructions on a Discharge to Immediate Enlistment please use the Accessions guidance in Part VIII of this manual. ****

Topics

The following topics are covered in this chapter.

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Guiding Principles

Introduction

This section provides the ***guiding principles*** for **Discharging** a member from the Coast Guard.

Reference

The following references provide additional information about Discharges.

- Military Separations, COMDTINST M1000.4 (series)
- Joint Federal Travel Regulations, Volume 1
- Personnel and Pay Procedures Manual,PCINSTMl000.2(series)
- Reserve Policy Manual, COMDTINST M1001.28 (series)
- CG Separation Program Designator Handbook & ALCOAST 125/10

Authorizing discharges

Commander (epm-1/opm-1), Coast Guard Personnel Service Center (CGPSC), must authorize Discharges for active duty officers, officers on Extended Active Duty (EAD) and enlisted members. Approved discharges and RELADs will be posted to the Airport Terminal for the member's unit. Refer to Chapter 6 of this Part for instructions on completing the DD-214.

Separation Pay

Separation Pay authorizations are entered in the separation request component by CGPSC (epm-1)/(opm-2), the separation pay data is carried over into the separation component. Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.

Continued on next page

Guiding Principles, Continued

Corrections and Deletions

Corrections and Deletions are limited to users with the role of CGHRSUP. If the transaction has been saved but not approved, modifications can be done to all entries EXCEPT the *Termination Date* (PPC-SES), *SPD Code* (CGPSC-epm/opm), *and Separation Type* (CGPSC-epm-1/opm-1). Corrections to these three entries will require contacting PPC-SES or CGPSC-epm-1/opm-1.

A transaction can be **corrected** by going directly to the erroneous entry, entering the correction, and then saving the transaction. This can be done to a transaction that has been saved; saved and forwarded for approval; and approved. Corrected transactions that have been routed for approval or have been previously approved need to be re-routed for approval, unless a CGHRSUP user/auditor is performing the correction.

For CGHRSUP users, if a transaction is in an approved status when it is corrected, saving the transaction will create a corrected transaction. If an approved transaction needs to be deleted, the CGHRSUP user should leave the approval status set to approved and click the delete button. This will create a deleted transaction.

Continued on next page

Guiding Principles, Continued

Process

This table lists the events that take place in connection with a Discharge. This table is not meant to be all-inclusive; it merely provides an overview of the process to aid in understanding the events that must take place in order for the separation transaction to be completed.

Stage	Trigger	Who Does it	What Happens
1	Member's Separation Request is approved	CGPSC (epm-1/opm-1) for **Immediate and Priority Separations**	Enters authorization in Direct Access for Discharges which creates: 1. Discharge orders. 2. E-Mail to member. 3. Separation transaction. ***Note:*** The transaction is 'built' by the system but additional data entry and approval is required before it is complete.
2	Receipt of e-mail orders from Direct Access	Member	Submits Career Intentions Worksheet (CIW) (CG- 2045).
3	Receipt of CIW	Member's Command	Endorses CIW and forwards to Servicing Personnel Office (SPO).
4	Receipt of CIW	SPO-Data Entry Technician (CGHRS User)	Inputs Career Intentions in DA Statement of Intent (SOI) transaction. ***Note:*** There are additional requirements listed on section 3-B of the 3PM that the SPO must complete in connection with a Discharge.
5	Receipt of CIW. Updating and saving the separation transaction.	SPO-Data Entry Technician (CGHRS User)	Enters the Reenlistment Eligibility Code* for enlisted personnel in the separation transaction and saves. Completes Separation orders, dependent data, mode of travel, etc. ***Note:*** The separation transaction must be accessed and saved before the user can access the orders.

*Note: ALCOAST 125/10 (CGWEB/Intranet link) announced revisions to the SPD and RE codes in the Coast Guard Separation Program Designator Handbook.

Continued on next page

Guiding Principles, Continued

Process **(continued)**

Stage	Trigger	Who Does it	What Happens
6	Completion and saving of orders	System	Updates departure date on separation transaction. ***Note:*** This will not be reflected on the screen until the separation transaction is updated and saved.
7	Completion and saving of orders	SPO-Data Entry Technician (CGHRS User)	Finishes the separation transaction and DD-214, routes to supervisor for approval.
8	Worklist entry	SPO-Supervisor (CGHSRUP User)	Reviews and approves separation transaction. Prints and signs orders and DD-214, forwards to member.
9	Approval and save by CGHRSUP	System	Generates JUMPS transaction to close down member's pay account.

Discharge Procedure

Introduction

This section provides the ***procedure*** for completing a **Discharge**. A DD Form 214 must also be completed. See chapter 6 of this part for instructions.

Before you begin

The status of a Discharge request/authorization can be viewed in Direct Access using the Separation Summary module. See "Viewing Separation Orders" in the online help for additional details.

The status of a Discharge request/authorization can be viewed in Direct Access using the Separation Summary module. See "Viewing Separation Orders" in the online help for additional details. The separation transaction can also be accessed from the Airport Terminal. Click the Route/Work button on the row with the member's orders and the separation page will open. See Using the Airport Terminal in the online help for more information.

For all CGPSC (epm/opm) approved separations, a Separation transaction will be started for you and contain pre-filled values for **Separation Type**, **Termination Date**, **Departure Date** and **SPD Code**. If **Separation Pay** was authorized, the **Earnings Type, YY/MM of Active Service** and **Discharge Gratuity** will also be pre-filled on the Separation Pay Page. If the Termination Date needs to be changed, contact PPC (SES). If any of the other fields listed above needs to be changed, <u>contact CGPSC (epm-1/opm-1)</u>.

The SPO submitting the discharge from the reserve or active duty component is also responsible for completing the enlistment transaction for those being immediately accessed into a new component of the Coast Guard. This shall be accomplished prior to forwarding the SPO record. For officers 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 as an officer or vice versa, the servicing SPO losing the member MUST submit this transaction.

Continued on next page

Discharge Procedure, Continued

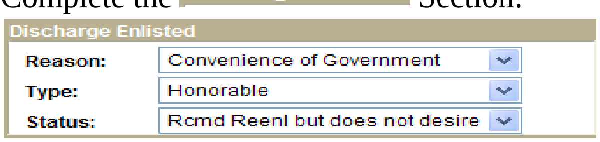
Procedure Follow these steps to process a separation transaction.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Separations**
2	Enter the member's **Employee ID** number.
3	Click the **Search** button ***Note:*** Verify the employee ID before making any changes.
4	A separation page will display, use Code "**A" for DISCHARGE**. Entry will be pre-filled if separation has CGPSC approval. Code "A" will be used in the following situations: • Regular active duty enlisted members who have met their military obligation and want to be discharged from the active component to be put into the reserve components. ***Note:*** If the member has **NOT** met his/her military obligation, then the member should be released from the active duty component and put into the Coast Guard Reserve component. Use the Release from Active Duty (RELAD) event for this. • Reserve members who want to be discharged from the reserve component and be enlisted into the active duty component of the Coast Guard. • Regular or reserve members who have met their military obligation and want to be discharged from the Coast Guard. • Discharging enlisted members for fraudulent enlistment. • Canceling an enlistment on an enlisted member. • Regular active duty officers who will be discharged from the active Coast Guard component to accept an appointment as an officer in the Coast Guard reserve component. ***Note:*** There may be times when a reserve officer who is on extended active duty will need to be released from active duty to be put back into a reserve status. Do not use this transaction for this purpose. Use the Release from Active Duty (RELAD) event for this. • Reserve officers who will be discharged from the reserve component to accept an appointment as an officer in the active duty component of the Coast Guard. • Regular or reserve officer whose appointment as an officer is being terminated. ***Note:*** Do not use this transaction for enlisted members who are appointed to Warrant Officer. Use the Warrant Appointment event for this. This transaction is not required for temporary commissioned officers that are discharged from warrant status to accept permanent LTJG.

Continued on next page

Discharge Procedure, Continued

Procedure (continued)

Step	Action
5	Complete the following in the **Separations** section.  For all CGPSC (epm/opm) approved separations, a Separation transaction will be started for you and contain pre-filled values for **Separation Type**, **Termination Date**, **Departure Date** and **SPD Code**. If **Separation Pay** was authorized, the **Earnings Type** will also be pre-filled on the Separation Pay Page. The above fields will not be editable.
6	Separation **Type**, This field is set by CGPSC. “A” is for Discharge.
7	**SPD** is the Separation Program Designator. The SPD code is set by CGPSC based on the member’s separation reason. **Note:** ALCOAST 125/10 (CGWEB/Intranet link) announced revisions to the SPD and RE codes in the Coast Guard Separation Program Designator Handbook.
8	**Termination Date** - Enter the last day of active duty for the member.
9	The **Departure Date** is a non-editable field and will not reflect any terminal leave requested on the member’s orders. Any requested terminal leave is accounted for on a separate Vacation Request (Leave) transaction. This should be done as a separate leave transaction. See Part III of this manual, General Transactions, Chapter 7, Leave and Other Approved Absences, for the procedure used to record leave taken in connection with a discharge from active duty as regular leave.
10	**For enlisted only**, enter the **Reenlistment Eligibility** code by clicking on the lookup icon and selecting the applicable code. The list of available codes is tied to the SPD code. **This field will not appear for officers.**
11	Complete the **Discharge Enlisted** Section: 
12	Click the dropdown button to view and select a **Reason** from the list.

Continued on next page

Discharge Procedure, Continued

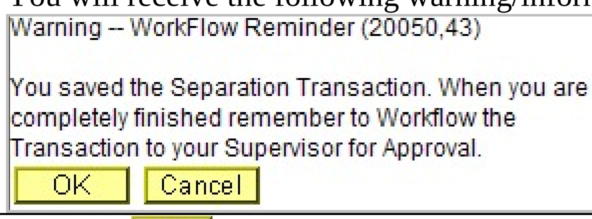
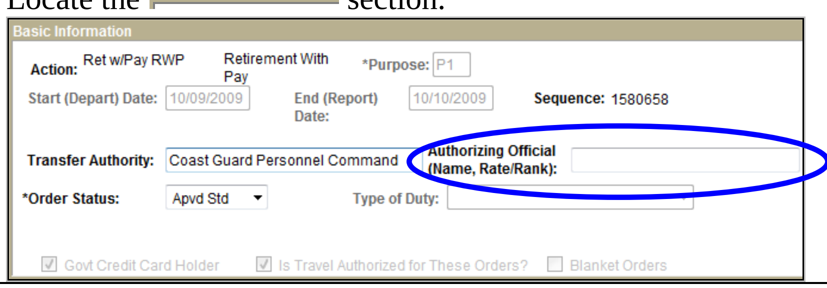
Procedure (continued)

Step	Action
13	Click the dropdown button to view and select the **Type** from the list.
14	Click the dropdown button to view and select a **Status** from the list.
15	Once data entry is completed for the Separation page, click on the Separation Pay tab if the member is entitled to separation pay.
16	**Earnings Type** – This field will be pre-filled if separation pay is authorized. **For a Type “A” discharge separation of an enlisted active duty member, the following codes are valid:** • S01A Severance Pay Disability • S03A Discharge Gratuity – Enlisted (Dishonorable/Bad Conduct ONLY) • S04A Separation Pay Enlisted Full Pay /Satisfactory • S04B Separation Pay Enlisted Half Pay /Substandard **For a Type “A” discharge of an enlisted reservist, these codes are valid:** • S01A Severance Pay Disability • S04C Separation Pay Reserve Enlisted Half Pay/Substandard • S04D Separation Pay Reserve Enlisted Full Pay/Satisfactory • S06A Reserve Lump Sum Readjustment Full Pay/Satisfactory • S06B Reserve Lump Sum Readjustment Half Pay/Substandard **For a Type “A” discharge of a reserve officer, the following codes are valid:** • S01A Severance Pay Disability • S02A Severance Pay Officer • S04E Separation Pay Reserve Officer Full Pay/Satisfactory • S04F Separation Pay Reserve Officer Half Pay/Substandard • S06A Reserve Lump Sum Readjustment Full Pay/Satisfactory • S06B Reserve Lump Sum Readjustment Half Pay/Substandard **For a Type “A” discharge of a regular officer, the following codes are valid:** • S01A Severance Pay Disability • S02A Severance Pay Officer
17	**Highest Pay Grade Held** - If an officer or enlisted member is entitled to Severance Pay Disability (S01A), this field will reflect the highest grade the member satisfactorily held, otherwise it will be blank. Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.

Continued on next page

Discharge Procedure, Continued

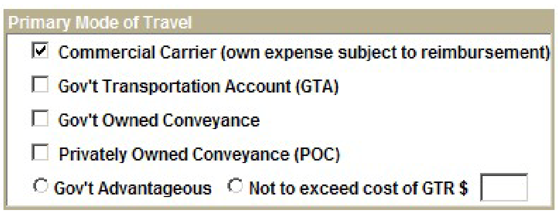
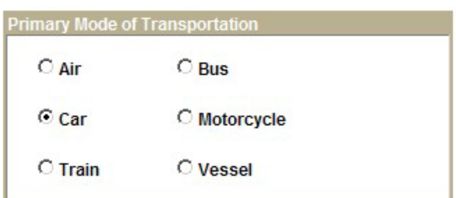
Procedure (continued)

Step	Action
18	<u>**YY/MM of Active Service**</u> - This field will be automatically filled, however SPO's still need to verify the active service time. The data will be used in the computation of Severance Pay Disability, Reserve and Enlisted Separation Pay. Contact CGPSC (epm-1/opm-1) and PPC (SES) if any discrepancy is noted.
19	If entitled, the amount of <u>**Discharge Gratuity**</u> will be pre-filled.
20	Before the transaction can be forwarded to a supervisor for approval, the member's Orders must exist. If the <u>**Orders**</u> link found on the Separation page is highlighted, an Orders document does exist and the transaction can be forwarded and saved. If the Orders Link is NOT highlighted, the Orders do not exist. The separation transaction must now be saved and **Orders must be created before approval is requested.** Once saved, access to the Orders Link is allowed. After completion of the Orders, the separation transaction is ready to be forwarded to the supervisor for approval. To forward the Discharge for approval, complete the Separation Approval page.
21	Click the Save button.
22	You will receive the following warning/information page. 
23	Click the OK button to continue.
24	Click the <u>**Orders**</u> link. Entitlements Orders DD214
25	The member's orders will open in a new window.
26	Locate the Basic Information section. 
27	Enter the Authorizing Official's Name and Rate/Rank.

Continued on next page

Discharge Procedure Procedure, Continued

Procedure (continued)

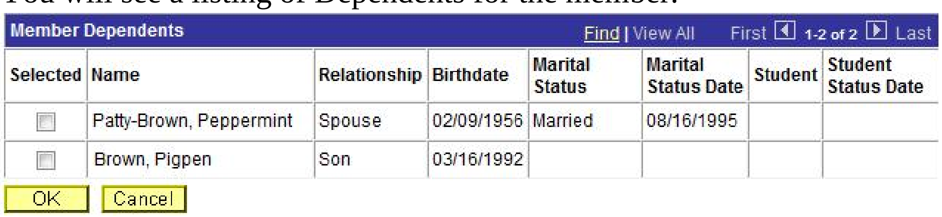
Step	Action
28	Locate the Authorized Delay Enroute section.
29	**Delay Enroute** - Click the drop-down button to view and select from the list. Select the type of delay authorized for the date entered. Enter the Travel Time for Demobilized Reservists as **NON-CHARGEABLE ABSENCE.** ***Note:*** Do NOT enter terminal leave. This should be done as a separate leave transaction. See Part III of this manual, General Transactions, Chapter 7, Leave and Other Approved Absences, for the procedure used to record leave taken in connection with a discharge from active duty as regular leave.
30	Enter **Begin Date** in MMDDYYYY format or click the calendar icon to select a Begin Date.
31	Enter **End Date** MMDDYYYY format, or click the calendar icon ( ) to select an End Date.
32	In the section labeled Primary Mode of Travel select or de-select an option. 
33	In the section labeled Primary Mode of Transportation select or de-select an option. 
34	Scroll down and click on the Order Notes button.
35	Enter the **Order Note ID** if known**,** or click the button and the Lookup button for a listing. Order Notes are entries for the remarks block of the CG-5131.
36	Select the **Sequence Number**. This number determines the print order.
37	**Delete** the text and enter your own text.
38	Click the **OK** button.

Continued on next page

Discharge Procedure Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>39</td><td>Click on the Dependents Auth to Travel tab.</td></tr>
<tr><td>40</td><td>The field Dependents Accompanying Member will appear.

</td></tr>
<tr><td>41</td><td>Click the Member's Dependents button.
You will see a listing of Dependents for the member.


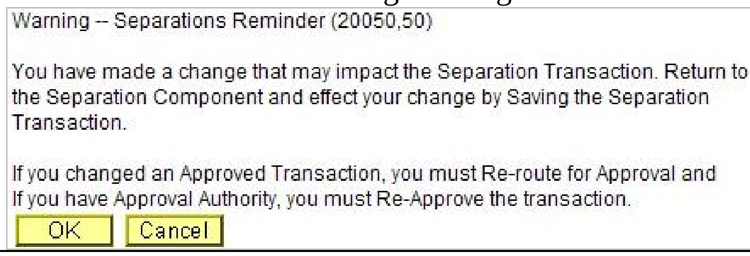
Note: See Chapter 4 of Part III in this manual for information on adding dependents.</td></tr>
<tr><td>42</td><td>To Select members authorized to travel on the Travel Orders, click the <u>Selected</u> option. Once selected, a check mark ☑ will appear next to the Dependents Name.</td></tr>
<tr><td>43</td><td>Click the OK button.</td></tr>
<tr><td>44</td><td>The Dependent selected now appears on the Dependents auth to travel screen.

</td></tr>
<tr><td>45</td><td>Click the <u>Ok</u> button.</td></tr>
<tr><td>46</td><td>Click the Save button.</td></tr>
</table>

Continued on next page

Discharge Procedure Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>47</td><td>You will receive the following warning/information message:

</td></tr>
<tr><td>48</td><td>Click the <u>Ok</u> button.</td></tr>
<tr><td>49</td><td>To obtain a printable version of the orders, click the Email Printable Order button. The system will send a copy of the orders to your ‘Business E-Mail’ address.</td></tr>
<tr><td>50</td><td>Click on the ☒ to close the orders window.
The separation transaction window should still be present on the screen. Use the menus to return to the member’s separation page. The departure date and termination date will be filled.

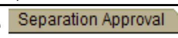

The screen will not reflect any terminal leave entered in accordance with Part III of this manual, General Transactions, Chapter 7, Leave and Other Approved Absences, to record leave taken in connection with a discharge from active duty as regular leave.</td></tr>
<tr><td>51</td><td>At this point, you should complete the <u>DD-214</u>. Click the DD-214 link at the bottom of the Separations page. See the Chapter 6 of this Part for instructions; they are not included with this guide.</td></tr>
<tr><td>52</td><td>After completing the DD-214, return to the <u>Separations</u> page.</td></tr>
<tr><td>53</td><td>Click the Leave Disposition tab.</td></tr>
<tr><td>54</td><td>The page provides balances for regular leave, saved leave, and cumulative leave sold as of the system’s last end of month compute cycle.


The Leave Disposition page allows the member to sell any unused leave that may remain as of the day of separation. These fields may be left blank if the member is not selling any leave. It also allows the system to debit the member’s pay of any excess leave previously taken.
Note: It is extremely important to dispose of the member’s entire leave balance.</td></tr>
<tr><td>55</td><td>Enter the amount of <u>Earned Leave to Sell</u> or leave blank.</td></tr>
</table>

Continued on next page

Discharge Procedure, Continued

Procedure **(continued)**

Step	Action
56	Enter the amount of **Saved Leave to Sell** or leave blank.
57	**Days of Excess Leave** - If member has an excess leave balance on the date of separation, enter the number of excess leave days.
58	Click the  tab.
59	Enter the **Employee ID** number for the CGHRSUP User who will be reviewing and approving this transaction. **Note:** If you are the CGHRS User approving this transaction, see the approval procedures on the last page of this guide for instructions.
60	Click the  button.
61	Click the **OK** button.
62	Follow up with approver to ensure the transaction is approved by the separation date.

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Discharge Approval Procedures

Introduction

This section provides the **Approval Procedure** for discharging a member.

Approval date

Separation transactions cannot be approved more than 14 days prior to the effective date of separation.

Procedure

Access your Worklist and follow these steps to approve the transaction.
Note: See the Worklist topic in the online help for additional information on accessing your Worklist. The Worklist can also be accessed by using the following menu path:
Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Separations**

Step	Action
1	Locate the **Worklist** item in the link column.
2	Click on the **Employee**.
3	Check member's information for accuracy.
4	Once in the Separations screen, Supervisors must decide which action from the Approval Status button to take. The Selections are: • **Approve** – Select to approve. • **Denied** – Select to deny (disapprove) the transaction. If desired, a text box is available to advise why the transaction is denied. • **Pending** - This is used when the transaction needs further information. The user may return and complete the transaction at a later date. ***Note:*** If the Approver selects Denied or Pending, further information is needed. The transaction can be re-routed to a specific user by entering the Employee ID in the "Route to" block. When an Employee ID is entered in the route to block the transaction will appear on their Worklist.
5	Click on OK.
6	If you selected "Approve" in Step 2 you will receive the following warning: 
7	If you want to transmit the separation click **OK**. If you did not intend to approve and transmit the separation click **Cancel**.
8	Remember to go back to the **Worklist** and check the **Marked Worked** button.

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Discharge Corrections and Deletions

Introduction

This section provides the procedures for Corrections and Deletions of the Discharge transaction.

Procedure

Only a CGHRSUP role user (SPO Supervisor/Auditor) can make changes to an approved separation.

The Separation Type and Effective Date cannot be corrected once the transaction is saved. When the Separation transaction is in an "Approved" status, the CGHRSUP role user must be in “Correct History” to make a change such as selling leave (etc.). Upon saving, the system will create a correction-type transaction.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
<u>Enterprise Menu</u> > <u>Administer Workforce</u> > <u>Administer Workforce (GBL)</u> > <u>Use</u> > <u>Separations</u></td></tr>
<tr><td>2</td><td>Enter the <u>EmplID</u> with the members Employee ID.</td></tr>
<tr><td>3</td><td>Make sure you are in the Correct History mode.</td></tr>
<tr><td>4</td><td>Click the <u>Search</u> button.</td></tr>
<tr><td>5</td><td>Select the transaction from the search results.
<table>
<tr><th>If the separation transaction…</th><th>Then ...</th></tr>
<tr><td>has NOT been approved</td><td>CGHRS/CGHRSUP user can:
• Change the <u>Field</u> and <u>Save</u>.
• Route for approval (CGHRS)/Approve (CGHRSUP)</td></tr>
<tr><td>is in an "Approved" status</td><td>• CGHRSUP User – Make changes and save.</td></tr>
<tr><td>Normal Expiration of Enlistment type separations</td><td>SPO will start the Separation transaction. After the Save, the Separation Type, Termination Date and Departure Date will not be editable. If a mistake is made with the Separation Type or Termination Date, you will have to Delete the Transaction and insert a new row.</td></tr>
</table>
</td></tr>
<tr><td>6</td><td>Open the Separation tab.</td></tr>
</table>

Continued on next page

Discharge Corrections and Deletions, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>If the separation <u>Type</u> has not been approved, the CGHRS/CGHRSUP user can simply change the field and save.
If the separation has been approved, only the CGHRSUP role user can make changes.</td></tr>
<tr><td>8</td><td><u>SPD (CODE)</u> - Contact EPM1/OPM1 to make the change. When the change is completed the SPO can go into the transaction and finish the Separation.</td></tr>
<tr><td>9</td><td><u>Effective Date/Termination Date</u> –
<table>
<tr><th>If the separation needs to be amended to ...</th><th>Then contact...</th></tr>
<tr><td>An earlier date</td><td>PPC-SES to make the change.</td></tr>
<tr><td>A later date</td><td>CG PSC-epm/opm to make the change.</td></tr>
</table>
When the change is completed, the SPO can go into the transaction and finish the Separation. If any correction impacts the Effective Date and the separation was saved, whether approved or not, the SPO must delete the separation and recreate.</td></tr>
<tr><td>10</td><td><u>Reenlistment Eligibility</u> - If the separation has not been approved, the CGHRS/CGHRSUP user can simply change the field and save.
If the separation has been approved, a CGHRSUP user can change the field and save. CGHRS users will need to route the transaction to a CGHRSUP user for approval.</td></tr>
<tr><td>11</td><td><u>Departure Date</u> - The SPO must delete the separation and recreate. The Departure Date (a non-editable field) will not take into consideration any terminal leave (Reminder: Leave in connection with a discharge must be entered in the Absence Request component).</td></tr>
<tr><td>12</td><td>Open the Separation Pay tab.</td></tr>
<tr><td>13</td><td><u>SEP Pay</u> - EPM1/OPM1 must make the change. When the change is completed, the SPO can go into the transaction and finish the Separation.</td></tr>
</table>

Continued on next page

Discharge Corrections and Deletions, Continued

Procedure (continued)

Step	Action
14	**Earning Type** - EPM1/OPM1 must make the change. When the change is completed, the SPO can go into the transaction and finish the Separation.
15	In regards to correcting/deleting the Highest Pay Grade Held field: Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.
16	Click on the Leave Disposition tab.
17	Enter the **Total Days Leave to Sell**.
18	Enter the **Earned Leave to Sell**.
19	Enter the **Saved Leave to Sell**.
20	Enter the **Days of Excess Leave**.

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JUMPS Effect

Introduction

This section explains the effect of a separation transaction on a member's pay entitlements in Direct Access and JUMPS.

JUMPS Auto-Stops are Not Reflected on Entitlements Page

Pay entitlements for a member who is being discharged, released from active duty (RELAD), or retired, will automatically be stopped by JUMPS on the effective date of separation. Unlike auto-stops of entitlements in connection with PCS orders, the member's DA entitlements page **will not show the entitlement stop dates** upon saving and approving the separation transaction. The stop dates will be inserted after the separation transaction processes through JUMPS and after the DA/JUMPS Data Resynchronization Process runs (a few days after each JUMPS update cycle). SPOs do not need to manually stop pay entitlements for a member who is separating, unless the entitlement is to stop on a day other than the date of separation or the member will immediately be performing long-term active duty following RELAD or discharge (e. g. A Reserve member who is RELAD from an EAD order and begins duty on another type of long-term orders the next day). In May 2005, more than 2000 Stop Pay Entitlement (P625) transactions were rejected by JUMPS. The transactions were not necessary because the entitlement auto-stop program had already closed the pay segments.

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Coast Guard Servicing Personnel Office Manual

Part VI, Separations

Chapter 5, Retirement

Overview

Introduction

This section provides the ***procedures*** for a **Retirement** separation.

Topics

The following topics are covered in this chapter.

Guiding Principles

Introduction

This section provides the ***guiding principles*** for a **Retirement** separation transactions.

Reference

The following references provide additional information about retirements.
- Military Separations, COMDTINST M1000. (series)
- Joint Federal Travel Regulations, Volume 1
- Personnel and Pay Procedures Manual, PSCINST Ml000.2(series)

Before you begin

Commander (epm/opm), Coast Guard Personnel Service Center (CGPSC), must authorize retirements, including retirements for physical disability, for active duty officers and enlisted members. Approved retirement requests and authorizations for physical disability retirements will be posted to the Airport Terminal for the member's unit.

The status of a retirement request/authorization can be viewed in Direct Access using the Separation Summary module. See "Viewing Separation Orders" in Chapter 1 of this volume for additional details.

Contact CGPSC (epm/opm) if the member's retirement request/authorization cannot be located in Direct Access. The retirement separation cannot be input in Direct Access until CGPSC has entered the authorization.

Requests to change retirement date must be sent to CGPSC for approval and data entry.

Ensure member has sufficient **obligated service** to meet the retirement date. The member will need to extend or reenlist if the expiration of current enlistment is before the effective date of separation (day before retirement date).

Separation Pay

Separation Pay authorizations are entered in the separation request component by CGPSC (epm-1)/(opm-2), the separation pay data is carried over into the separation component. Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.

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The Retirement process

Introduction

This section provides an ***overview*** of how the **Retirement** process works.

Process

This table lists the events that take place in connection with a member's voluntary or involuntary retirement. This table is not meant to be all-inclusive; it merely provides an overview of the process to aid in understanding the events that must take place in order for the retirement separation transaction to be input.

Stage	Trigger	Who Does it	What Happens
1	Member's voluntary retirement request is approved, involuntary retirement is directed, or physical disability retirement is directed.	CGPSC (epm/opm)	Enters authorization in Direct Access, which will create: 1. Retirement orders. 2. Separation transaction. (Note: The transaction is 'built' by the system but additional data entry and approval is required before it is complete.)
2	Receipt of retirement order (unit provides via the Airport Terminal)	Member	Submits Career Intentions Worksheet (CIW) (CG-2045) Submits Retirement Package to PPC-RAS. **Note:** Download the Retirement Package from http://www.uscg.mil/ppc/ras/retpack.pdf
3	Receipt of CIW	Member's Command	Endorses CIW and forwards to Servicing Personnel Office (SPO).
4	Receipt of CIW	SPO-Data Entry Technician (CGHRS)	Inputs Career Intentions in DA Statement of Intent (SOI) transaction (Note: There are additional requirements listed on section 3-B of the Personnel Pay and Procedures Manual that the SPO must complete in connection with a disability retirement).
5	Receipt of CIW	SPO-Data Entry Technician (CGHRS)	Enters the Reenlistment Eligibility Code for enlisted personnel; and Retirement Authorization Code for officers and enlisted personnel in the retirement transaction and saves. (Note: The retirement transaction must be accessed and saved before the user can access the retirement orders.)
6	Updating and saving the separation transaction.	SPO-Data Entry Technician (CGHRS)	Completes retirement orders, entering delay enroute (terminal leave), dependent data, mode of travel, etc.

Continued on next page

The Retirement process, Continued

Procedure (cont'd)

Stage	Trigger	Who Does it	What Happens
7	Completion and saving of orders data entry	System	Updates departure date on separation transaction to reflect terminal leave. **Note:** This will not be reflected in DA until the separation transaction is updated and saved.
8	Completion and saving of orders data entry	SPO-Data Entry Technician (CGHRS)	Finishes the separation transaction and DD-214, routes to supervisor for approval.
9	Worklist entry	SPO-Supervisor (CGHSRUP)	Reviews and approves separation transaction (Note: Transaction should be approved not later than the date the member departs unit). Prints and signs orders and DD-214, forwards to member.
10	Approval and save of separation transaction by CGHRSUP	System	Generates JUMPS transaction (L68B) to close down member's pay account and transmit record to the Retired Global Pay system for establishment of the retired pay account.

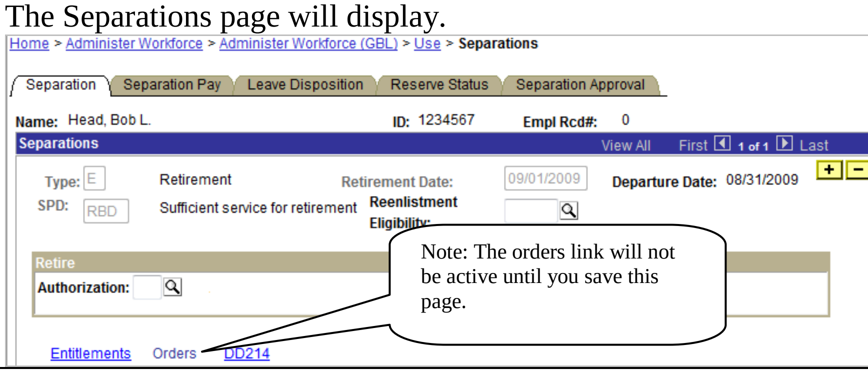
Retirement Procedure

Introduction

This section provides the ***procedure*** for completing a **Retirement** separation and retirement orders in Direct Access. A DD Form 214 must also be completed. See Chapter 6 of this part for instructions.

Procedure

Follow these steps to process a retirement separation transaction.

Step	Action
1	Select menu items in the following order: Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Separations**
2	Enter **EmplID** with the member's Employee ID number.
3	Click the **Search** Button. ***Note:*** When choosing a member from the search results, please be sure it is the person that actually needs a data change. Verify the employee 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 to select the correct Employee Classification.
4	The separation transaction can also be accessed from the Airport Terminal. Click the Route/Work button on the row with the member's orders and the separation page will open. See Using the Airport Terminal in Part IV, Chapter 1 of this manual for more information.
5	The Separations page will display. 
6	**For enlisted retirements only**, enter the **Reenlistment Eligibility** code by clicking on the lookup icon and selecting the applicable code. The list of available codes is tied to the SPD code.
7	Enter the Retirement **Authorization** code by clicking on the lookup icon and selecting the applicable code.

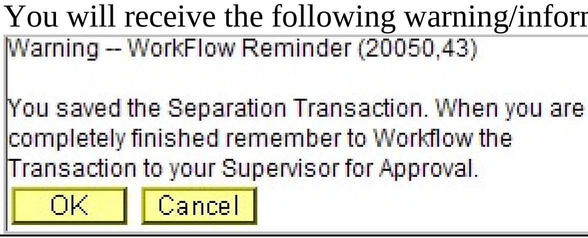
Continued on next page

Retirement Procedure, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>The Reenlistment Eligibility code is not used on Officer Retirements:

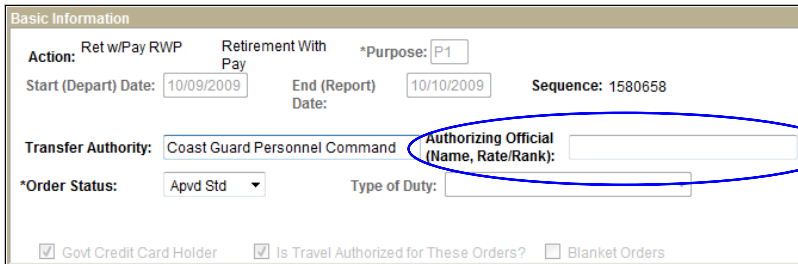
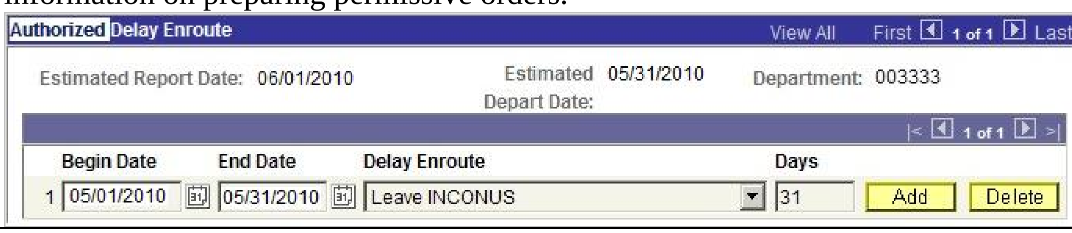
Example officer disability retirement:

</td></tr>
<tr><td>9</td><td>Separation <u>Type</u> This field is set by CGPSC. "E" is for Retirement.</td></tr>
<tr><td>10</td><td><u>SPD</u> is the Separation Program Designator. The SPD code is set by CGPSC based on the member's retirement reason. Contact CGPSC if incorrect.
Note: <u>ALCOAST 125/10</u> (CGWEB/Intranet link) announced revisions to the SPD and RE codes in the Coast Guard Separation Program Designator Handbook.</td></tr>
<tr><td>11</td><td>The <u>Retirement Date</u> is set by CGPSC based on the member's request and needs of the service. Requests to change the retirement date must be sent to CGPSC.</td></tr>
<tr><td>12</td><td><u>Departure Date</u> is pre-filled by the system. Initially this is the day before the retirement date. The system will change the departure date to reflect any authorized delay (e. g. Terminal leave) entered in the orders portion of the transaction after the orders are saved and the user returns to this page.</td></tr>
<tr><td>13</td><td>Click the Save button.
You will receive the following warning/information page:

</td></tr>
<tr><td>14</td><td>Click the <u>OK</u> button to continue.
You will enter the information (CGHRSUP employee ID) necessary to workflow the transaction later in this process.</td></tr>
</table>

Continued on next page

Retirement Procedure, Continued

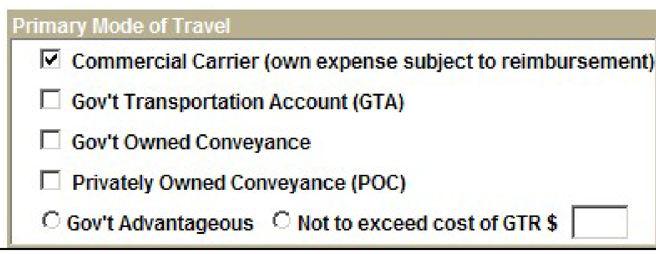
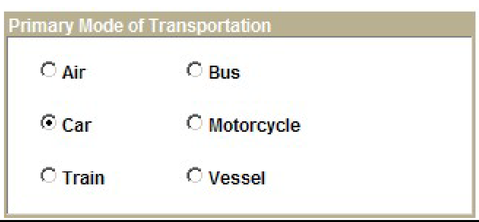
Procedure (cont'd)

Step	Action
15	Click the **Orders** link. The member's retirement orders will open in a new window.
16	Locate the Basic Information section. Enter the Authorizing Official's Name and Rate/Rank. 
17	Locate the Authorized Delay Enroute section. ***Note:*** Permissive orders are not part of the retirement transaction. See section 5-B of the Personnel and Pay Procedures Manual (PPCINST M1000.2(series)) for information on preparing permissive orders. 
18	Enter **Begin Date** in MMDDYYYY format or click the calendar icon to select a Begin Date. This is the leave date the member is planning on departing his current unit, normally taken from the CIW.
19	Enter **End Date** MMDDYYYY format, or click the calendar icon ( ) to select an End Date.
20	Click the **Delay Enroute** dropdown button to view and select from the list. Select the type of delay authorized for the date entered.

Continued on next page

Retirement Procedure, Continued

Procedure (cont'd)

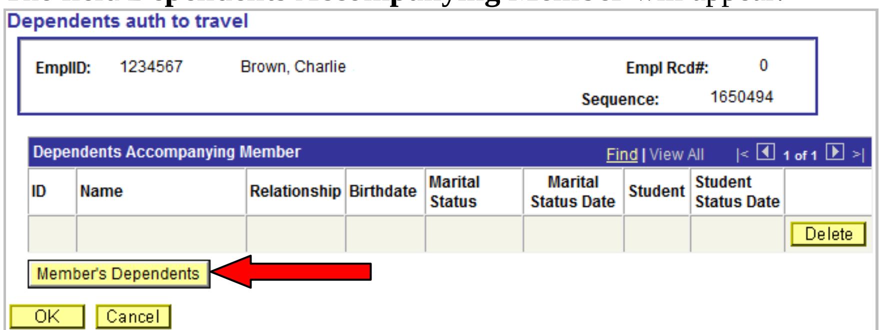
Step	Action
21	Add an additional Delay Period by clicking on the Add button if necessary (e. g. When member is taking terminal leave, and one portion is OUTCONUS, and one portion is INCONUS). ***Note:*** The **End Date** for the last leave period must be one day before the retirement date (shown above as the "Estimated Report Date"). If you make an error you will receive this message:  Review the leave period(s) you entered and correct the end date before continuing.
22	In the sections labeled Primary Mode of Travel select or de-select an option. 
23	In the sections labeled Primary Mode of Transportation select or de-select an option. 
24	Scroll down and click on the Order Notes button.
25	Enter the **Order Note ID** if known, or click the button and the Lookup tab for a listing. Order Notes are entries for the remarks block of the CG-5131.
26	Select the **Sequence Number**. This number determines the print order.
27	**Delete** the text and enter your own text. Click the **OK** button.
28	Click on the Dependents Auth to Travel tab.

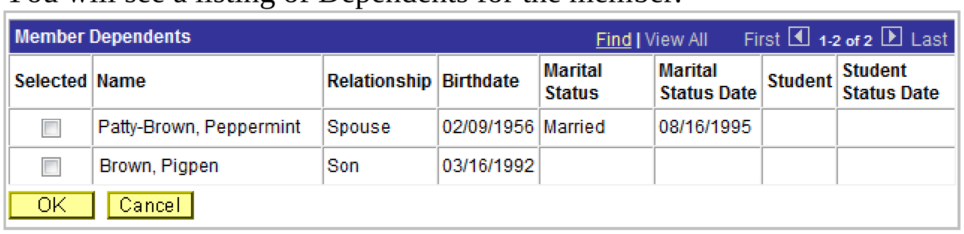
Continued on next page

Retirement Procedure, Continued

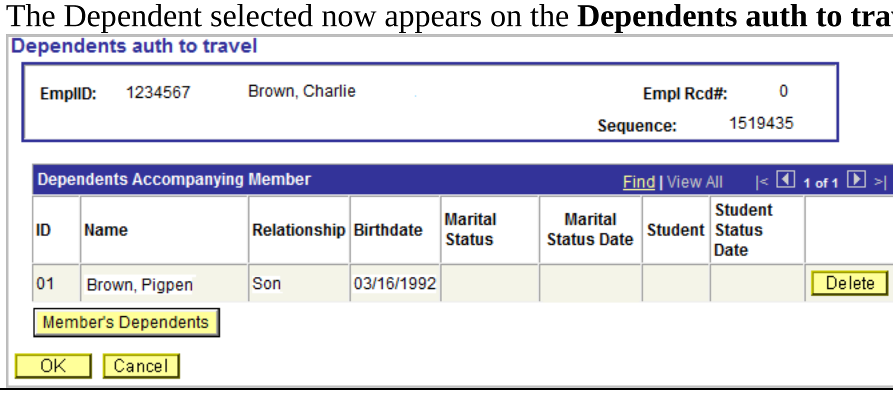
Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>29</td><td>The field Dependents Accompanying Member will appear.


</td></tr>
<tr><td>30</td><td>Click the  button.
You will see a listing of Dependents for the member.



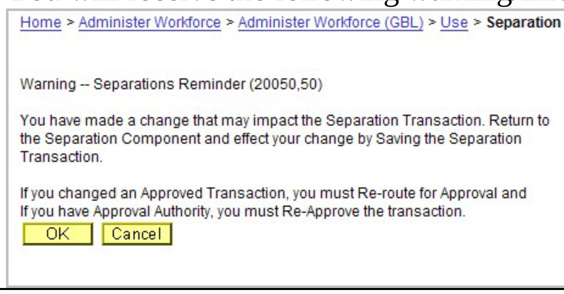
Note: See Chapter 4 (Dependency) of Part III (General Transactions) in this manual for information on adding dependents.</td></tr>
<tr><td>31</td><td>To Select members authorized to travel on the Travel Orders, click the <u>Selected</u> option. Once selected, a check mark ☑ will appear next to the Dependent's Name.</td></tr>
<tr><td>32</td><td>Click the  button.</td></tr>
<tr><td>33</td><td>The Dependent selected now appears on the Dependents auth to travel screen


</td></tr>
<tr><td>34</td><td>Click the <u>Ok</u> button.</td></tr>
</table>

Continued on next page

Retirement Procedure, Continued

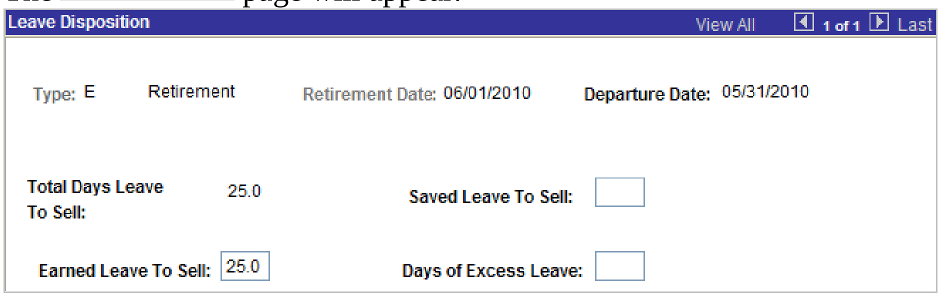
Procedure (cont'd)

Step	Action
35	Click the Save button. You will receive the following warning/information message: 
36	Click the **Ok** button.
37	To obtain a printable version of the orders, click the Email Printable Order button. The system will send a copy of the orders to your 'Business E-Mail' address.
38	Click on the ☒ to close the orders window. The separation transaction window should still be present on the screen. Use the menus to return to the member's separation page. The departure date will still be listed as one day before the retirement date.
39	The **Retirement Date** and **Departure Date** will be filled. **Note:** The screen does not yet reflect any terminal leave entered in the orders. This will update after the remaining separation information is entered and saved. Retirement Date: 06/01/2010 Departure Date: 05/31/2010
40	At this point, you should complete the DD-214. Click the **DD-214** link at the bottom of the Separations page. See Chapter 6 of this part for instructions.
41	After completing the DD-214, return to the **Separation** tab.
42	Click the Leave Disposition tab.

Continued on next page

Retirement Procedure, Continued

Procedure (cont'd)

Step	Action
43	The Leave Disposition page will appear.  The Leave Disposition page allows the member to sell any unused leave that may remain as of the day of separation. These fields may be left blank if the member is not selling any leave. It also allows the system to debit the member's pay of any excess leave previously taken. ***Note***: It is extremely important to dispose of the member's entire leave balance.
44	Enter the amount of **Earned Leave to Sell** or leave blank.
45	Enter the amount of **Saved Leave to Sell** or leave blank.
46	Enter the **Days of Excess Leave** or leave blank.
47	Click the Separation Approval tab.
48	Enter the **Employee ID** number for the CGHRSUP user who will be reviewing and approving this transaction. ***Note:*** If you are the CGHRS user approving this transaction, see the approval procedures on the last page of this guide for instructions.
49	Click the Save button. The Departure Date will automatically update to reflect any terminal leave or other authorized delay you entered in the orders. **Example:** **Before saving** – Departure date is one day before retirement date: Retirement Date: 06/01/2010 Departure Date: 05/31/2010 **After saving** – Departure date has changed to reflect the terminal leave (25 days in this example). Retirement Date: 06/01/2010 Departure Date: 05/06/2010
50	Follow up with approver to ensure the transaction is approved by the date the member physically departs the unit.

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Retirement Approval Procedure

Introduction

This section provides the ***Approval Procedure*** for a **Retirement**.

Approval date

Separation transactions cannot be approved more than 14 days prior to the effective date of separation.

Procedure

Access your Worklist and follow these steps to approve the transaction.
Note: See the Worklist topic in the online help for additional information on accessing your Worklist. You can also access the transaction using the following menu path:
Enterprise Menu > Administer Workforce > Administer Workforce (GBL) > Use > **Separations**

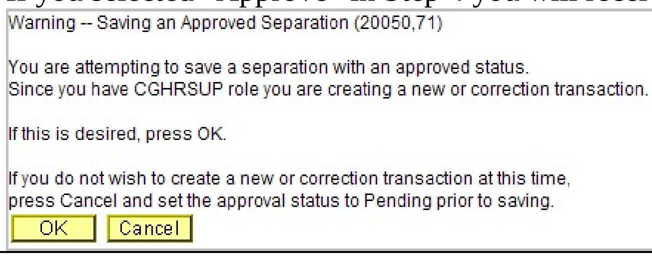
The Retirement transaction must be approved by the date the member physically departs the unit.

Step	Action
1	Locate the **Worklist** item in the link column.
2	Click on the **Employee**.
3	Check member's information for accuracy.
4	Supervisors must decide which action from the Approval Status button to take. The Selections are: • **Approve** – Select to approve. • **Denied** – Select to deny (disapprove) the transaction. If desired, a text box is available to advise why the transaction is denied. • **Pending** - This is used when the transaction needs further information. The user may return and complete the transaction at a later date. **Note:** If the Approver selects Denied or Pending, further information is needed. The transaction can be re-routed to a specific user by entering the Employee ID in the "Route to" block. When an Employee ID is entered in the route to block the transaction will appear on their Worklist.
5	Click the **Ok** button.

Continued on next page

Retirement Approval Procedure, Continued

Procedure (continued)

Step	Action
6	If you selected "Approve" in Step 4 you will receive the following warning: 
7	If you want to transmit the separation, click **OK**. If you did not intend to approve and transmit the separation, click **Cancel**.
8	Remember to go back to the **Worklist** and check the **Marked Worked** button.

Retirement Corrections and Deletions

Introduction

This section provides the procedures for Corrections and Deletions of the Retirement transaction.

Procedure

Only a CGHRSUP role user (SPO Supervisor/Auditor) can make changes to an approved separation.

The Separation Type and Effective Date cannot be corrected once the transaction is saved. When the Separation transaction is in an "Approved" status, the CGHRSUP role user must be in “Correct History” to make a change such as selling leave (etc.). Upon saving, the system will create a correction-type transaction.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
<u>Enterprise Menu</u> > <u>Administer Workforce</u> > <u>Administer Workforce (GBL)</u> > <u>Use</u> > <u>Separations</u></td></tr>
<tr><td>2</td><td>Enter the <u>EmplID</u> with the members Employee ID.</td></tr>
<tr><td>3</td><td>Make sure you are in the Correct History mode.</td></tr>
<tr><td>4</td><td>Click the <u>Search</u> button.</td></tr>
<tr><td>5</td><td>Select the transaction from the search results.
<table>
<tr><th>If the separation transaction…</th><th>Then…</th></tr>
<tr><td>has NOT been approved</td><td>CGHRS/CGHRSUP user can:
• Change the <u>Field</u> and <u>Save</u>.
• Route for approval (CGHRS)/Approve (CGHRSUP)</td></tr>
<tr><td>is in an "Approved" status</td><td>• CGHRSUP User – Make changes and save.</td></tr>
<tr><td>Normal Expiration of Enlistment type separations</td><td>SPO will start the Separation transaction. After the Save, the Separation Type, Termination Date and Departure Date will not be editable. If a mistake is made with the Separation Type or Termination Date, you will have to Delete the Transaction and insert a new row.</td></tr>
</table></td></tr>
<tr><td>6</td><td>Open the Separation tab.</td></tr>
</table>

Continued on next page

Retirement Corrections and Deletions, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>If the separation <u>Type</u> has not been approved, the CGHRS/CGHRSUP user can simply change the field and save.
If the separation has been approved, only the CGHRSUP user can make any changes.</td></tr>
<tr><td>8</td><td><u>SPD (CODE)</u> Contact EPM1/OPM1 to make the change. When the Change is completed the SPO can go into the transaction and finish the Separation.</td></tr>
<tr><td>9</td><td><u>Effective Date/Termination Date</u> –
<table>
<tr><th>If the separation date needs to be amended to...</th><th>Then Contact...</th></tr>
<tr><td>An earlier date</td><td>PPC SES to make the change.</td></tr>
<tr><td>A later date</td><td>CG PSC-epm/opm to make the change.</td></tr>
</table>
When the change is completed the SPO can go into the transaction and finish the Separation. If any correction impacts the Effective Date and the separation was saved, whether approved or not, the SPO must delete the separation and recreate.

If a change in terminal leave impacts the effective date:
• And the separation has not been approved; the SPO may change the terminal leave.
• And the separation has been approved; the SPO must delete the separation and recreate.</td></tr>
<tr><td>10</td><td><u>Reenlistment Eligibility</u> - If the separation has not been approved, the CGHRS/CGHRSUP user can simply change the field and save.
If the separation has been approved, a CGHRSUP user can change the field and save. CGHRS users will need to route the transaction to a CGHRSUP user for approval.</td></tr>
<tr><td>11</td><td><u>Departure Date</u> - If the separation has not been approved, the SPO may change the terminal leave. If the separation was approved, the SPO must delete the separation and recreate. The Departure Date (a non-editable field) will take into consideration any terminal leave requested on the member’s orders. However, since the orders must exist before entering any terminal leave; the Departure Date will not be properly set until forwarded for Approval. Or the user can Save the Separation Page after the Terminal Leave has been entered.</td></tr>
<tr><td>12</td><td>Open the Separation Pay tab.</td></tr>
<tr><td>13</td><td><u>SEP Pay</u> - EPM1/OPM1 must make the change. When the change is completed, the SPO can go into the transaction and finish the Separation</td></tr>
</table>

Continued on next page

Retirement Corrections and Deletions, Continued

Procedure (cont'd)

Step	Action
14	**Earning Type** - EPM1/OPM1 must make the change. When the change is completed the SPO can go into the transaction and finish the Separation.
15	**Highest Pay Grade Held**: Alert CGPSC (epm-1)/(opm-2) if any corrections to the separation pay authorization are need. SPOs cannot edit the separation pay authorization data.
16	Click on the Leave Disposition tab. ***Note:*** Leave taken in conjunction with a RELAD or Retirement must be entered in the Separations component and NOT recorded in the Vacation Request page.
17	Enter the **Total Days Leave to Sell.**
18	Enter the **Earned Leave to Sell.**
19	Enter the **Saved Leave to Sell.**
20	Enter the **Days of Excess Leave.**

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PPC SPO Manual

Part VI, Separations

Chapter 6, DD-214

Overview

Introduction

This chapter provides the procedure for completing the Certificate of Release or Discharge from Active Duty, DD Form 214 in Direct Access.

Prior to completion of the DD-214, the Separation section must be completed. Data is obtained for completion of the DD-214 from the member's SPO, Unit PDR, JUMPS, and other Official Records. Certain fields of the DD-214 are pre-filled with information currently in Direct-Access. After the DD-214 is created, additional course completion or awards may be manually added.

In this chapter

The following topics are covered in this chapter

Before You Begin

Introduction

Keep the following key points in mind when preparing and distributing DD form 214.

Reference

Complete step by step instructions are located in Certificate of Release or Discharge from Active Duty, DD Form 214, COMDTINST M1900.4(series), the "DD-214 Manual".

Exceptions to DD-214 Instruction (Per ALCOAST 562/08)

- The Character of Service in block 24 will only read:
  – Honorable
  – Under Honorable Conditions
  – Under Other than Honorable Conditions
  – Bad Conduct
  – Dishonorable
  – Uncharacterized

- Block 28 must only state the Narrative Reason found in the separation Program Designator (SPD) Code Handbook.

- Narrative Reasons like Unsuitability and Convenience of the Government are not found in the Services' SPD Code Handbooks and, therefore, are not recognized as a reason for separation.

- Mailing Addresses for State Directors of Veterans Affairs Changes
  – There have been numerous changes to State Directors of Veterans' Affairs Mailing Addresses since the DD-214 instruction was released.
  – Visit http://www.va.gov/statedva.htm for a listing mailing addresses for State Directors of Veterans Affairs.

Address Change for Department of Labor (Copy #5)

Personnel Released from Active Duty, Discharged, or Retired. Forward copy number 5 immediately to

U.S. Department of Labor
Federal Claims Control Center
P.O. BOX 785070
Orlando, FL 32878-5070

DD-214 Worksheet

Procedure

Follow these steps to complete the DD-214 Worksheet.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the DD Form 214 section from the path the Enterprise Menu:
Home > Administer Workforce > Administer Workforce (GBL) > Use > DD Form 214</td></tr>
<tr><td>2</td><td>Enter the employee ID in the Emplid field or the member's SSN in the SSN field and press the Search button.

When choosing a member from the search results, please be sure it is the person that actually needs a data change. Verify the employee 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 to select the correct Employee Classification.</td></tr>
<tr><td>3</td><td>Locate the DD214 Worksheet Data Section and complete the blocks as described below:
<table>
<tr><th>Block</th><th>Field</th><th>Description</th></tr>
<tr><td>1</td><td>NAME (Last) (First) (Middle, Suffix)</td><td>Pre-filled. If member has no middle name Enter 'NMN'. For members with a middle initial and no middle name, enter the initial in quotation marks. Include suffix when applicable. To lookup click the button.</td></tr>
<tr><td>2</td><td>DEPT, COMP & BRANCH</td><td>Pre-filled.</td></tr>
<tr><td>3</td><td>SSN</td><td>Pre-filled this Block will not show on Printed Version.</td></tr>
<tr><td>4.a.</td><td>GRADE, RATE or RANK</td><td>Pre-filled.</td></tr>
<tr><td>4.b.</td><td>PAY GRADE</td><td>Pre-filled. To lookup click the button.</td></tr>
<tr><td>5.</td><td>DATE OF BIRTH</td><td>Pre-filled.</td></tr>
<tr><td>6</td><td>RES OBL TRM</td><td>Pre-filled.</td></tr>
<tr><td>7.a.</td><td>PLACE of ENTRY (city/st)</td><td>Pre-filled. If not pre-filled enter city, state.
Enlisted: Initial place where member was sworn in.
Officer: Place of acceptance of commission.
Cadet: Enter the place where the "Letter of Appointment to the USCG Academy" was addressed.</td></tr>
<tr><td>7.b.</td><td>HOME of RECORD</td><td>Enter the place MBR originally entered AD w/o a break in service. City and State fields are required. Enter street address, if known.</td></tr>
<tr><td>8.a.</td><td>LAST DUTY ASGN</td><td>Enter the member's last Permanent Duty assignment.</td></tr>
</table></td></tr>
</table>

Continued on next page

DD-214 Worksheet, Continued

Procedure (continued)

Step	Action		
	Block	**Field**	**Description**
3 (cont.)	**8.b.**	STATION WHERE SEP	Enter the place of release, transfer retirement, or discharge. i.e., Pay & Personnel Center Topeka, KS
	9	COMMAND TRANSFERRED	For RELAD or Transferred personnel, enter the District Office where member will reside as appropriate. For Discharge or Retired, enter "NA".
	10	SGLI COVERAGE	Enter the exact amount of SGLI coverage **member** has. Enter "Decline" if the member declined coverage.
4	**Block 11. Primary Specialty Number, Title and Years and Months in Specialty.** For enlisted personnel, enter "N/A" in the Description field and leave the Competency, Year Acquired and Last Used fields blank (Ref: COMDTINST M1900.4(series), Para 1-E). For Officers, the instructions in COMDTINST M1900.4(series), Para 1-E**,** are no longer valid because the Officer Experience Indicators were removed from the Register of Officers (COMDTINST M1427.1(series)) and are no longer available. The Coast Guard is transitioning to a new Officer Specialty Management System (OSMS) (See http://www.uscg.mil/psc/opm/Opm3/opm-3OSMS.asp for more information and status updates). During this transition officers may not have any assigned primary specialties in Direct Access, **or if the specialties were assigned they may not have been updated since the transition to the new OSMS began in 2006**. However, the old Officer Experience Indicator code can be reconstructed based on the officer's assignment (Officer Billet Code – OBC) and education/degree history. During the transition to Officer Specialty Management System **the information for completing block 11 will have to be provided by the officer** and validated by reviewing educational accomplishments and assignment history.		

Continued on next page

DD-214 Worksheet, Continued

Procedure (continued)

Step	Action
4 (cont'd)	**How Officer Experience Indicators Were Assigned**: The primary specialty was based on the officer's completion of resident training (normally graduate school) and when that officer was required to fill a billet using that resident training. Officers not having completed resident training or completing a general degree program such as an MBA were assigned a primary specialty of ADM01 (General Command and Staff), PER10 (Personnel General), MGT20 (Management General), COM30 (Comptrollership), MSF40 (Marine Safety General), ENG50 (Engineering General), AVI60 (Aviation General), OPS70 (Operations General), BSF80 (Boating Safety) or HSV90 (Health Services General) as appropriate. Warrant to lieutenants may have been assigned a more specific primary occupational field. Prior to the transition to OSMS, officers were assigned Officer Billet Codes (OBCs). These can be viewed in the officer's competencies listing (Develop Workforce > Manage Competencies (GBL) > Use > Competencies) or the PDIF or the Employee Summary Sheet in CGBI. Note: The Officer Specialty Code (OSC) and Officer Billet Code (OBC) functions of DA are in the process of being updated with the new OSCs. **PSC(OPM) is not authorizing any updates to historical OBC data or the new OSC system at this time**. Once PSC(OPM) has completed coding officers with the new OSC data, PSC(OPM) will disseminate an ALCOAST informing personnel of any actions to be taking to ensure their electronic records are correct. Until then, PSC(OPM) has informed personnel to refrain from updating OBC/OSC data **in DA. Do not enter any OSC or OBC code in Develop Workforce > Manage Competencies (GBL) > Use > Competencies.** When completing Block 11 of the DD-214 you are not assigning or updating codes in member competencies. You are just selecting information to appear on the DD-214.

Continued on next page

DD-214 Worksheet, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(Cont’d)</td><td>To begin gathering information for Block 11, view the officer’s competencies (Open a new window and go to: Develop Workforce > Manage Competencies (GBL) > Use > Competencies). Make note of any entries that include “(OBC)”. Note any OBCs with at least one between the year acquired and year last used fields.</td></tr>
</table>

Home > Develop Workforce > Manage Competencies (GBL) > Use > Competencies

Competency Evaluation | Competency Assignment | Competency Rating | Competency Verification

Employee ID:

Competency Verification — View All First

Evaluation ID/Type: 01 Approved

Assigned Competencies — View All First

Description	Effective Date	Verified By	Year Acquired	Year Last Used	Years of Experience
Operations General (OBC)	11/08/1991	On the Job Training	1991	1992	
Ice Operations (OBC)	07/01/1992	On the Job Training	1992	1994	
Vessel Traffic Services (OBC)	06/06/1994	On the Job Training	1994	1997	
Aids to Navigation (OBC)	08/09/1997	On the Job Training	1997	1999	
Comptrollership (OBC)	06/06/1999	On the Job Training	1999	2009	

Reminder: Do not enter any OBCs in Member Competencies.

Return to the DD-214 window. Locate the **11. Primary Specialty** section.

Click the lookup button- in the Competency column. The Lookup Competency page will open. Enter the description (title) of the OBC that you noted in the officer’s competencies with the most time in the Description field and click the Lookup button.

Lookup Competency

Competency:

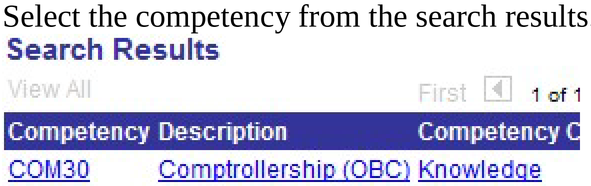
Description: Comptrollership (OBC)

Short Description:

Competency Category: Knowledge

Lookup | Clear | Cancel | Basic Lookup

Select the competency from the search results.



Search Results

View All First 1 of 1

Competency	Description	Competency C
COM30	Comptrollership (OBC)	Knowledge

Continued on next page

DD-214 Worksheet, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
You will be returned to the DD-214, block 11.
<table>
<tr><th colspan="6">11. Primary Specialty — View 1 — First 1 of 1 Last</th></tr>
<tr><th></th><th>Competency</th><th>Year Acquired</th><th>Last Used</th><th>Description</th><th></th></tr>
<tr><td>1</td><td>COM30</td><td></td><td></td><td>Comptrollership (OBC)</td><td>+ −</td></tr>
</table>
Complete the “Year Acquired” the “Last Used” with the years from the member competencies page or the worksheet on the following pages. If the officer had more than one OBC listed on the competency page or worksheet, click the insert row button - + and repeat the lookup, selection and year acquired/last used fields for every OBC that was used for one or more years.
<table>
<tr><th colspan="6">11. Primary Specialty — View 1 — First 1-5 of 5 Last</th></tr>
<tr><th></th><th>Competency</th><th>Year Acquired</th><th>Last Used</th><th>Description</th><th></th></tr>
<tr><td>1</td><td>COM30</td><td>1999</td><td>2012</td><td>Comptrollership (OBC)</td><td>+ −</td></tr>
<tr><td>2</td><td>OPS75</td><td>1997</td><td>1999</td><td>Aids to Navigation (OBC)</td><td>+ −</td></tr>
<tr><td>3</td><td>MSF44</td><td>1994</td><td>1997</td><td>Vessel Traffic Services (OBC)</td><td>+ −</td></tr>
<tr><td>4</td><td>OPS78</td><td>1992</td><td>1994</td><td>Ice Operations (OBC)</td><td>+ −</td></tr>
<tr><td>5</td><td>OPS70</td><td>1991</td><td>1992</td><td>Operations General (OBC)</td><td>+ −</td></tr>
</table>
The Officer will most likely request changes to block 11 after you provide the worksheet for their review. Keep in mind that OBCs have not been maintained in Direct Access for several years and information will be out of date. The following pages list all the available OBCs with spaces for the officer to include the dates for year acquired and last used. Provide the officer with OBC listing and ask them to provide you with the OBCs they have earned.
</td></tr>
</table>

Continued on next page

DD-214 Worksheet, Continued

Officer OBCs/EICs

Select any codes that describe the officer's specialties involving periods of one or more for one or more years.

X	Competency	Description	Date Acquired (YYYY/MM)	Date Last Used (YYYY/MM)
	ADM01	General Command & Staff (OBC)		
	ADM02	Civil Rights (OBC)		
	ADM03	Public & Int'l Affairs (OBC)		
	ADM04	Legal (OBC)		
	ADM05	Reserve Programs (OBC)		
	ADM06	Inspection (OBC)		
	ADM07	Chaplain (OBC)		
	ADM08	Spcial Aide/Asst/Liaison (OBC)		
	ADM09	Staff Services/Security (OBC)		
	AVI60	Aviation General (OBC)		
	AVI61	Aviation Eng Admin (OBC)		
	AVI62	Avi Maint & Overhaul (OBC)		
	AVI64	Aviation Electronics (OBC)		
	AVI65	Aviation Administration (OBC)		
	AVI66	Aviation Safety (OBC)		
	AVI67	Air Liaison/Spec'l Staff (OBC)		
	BSF80	Boating Safety (OBC)		
	BSF81	Auxiliary/Education (OBC)		
	BSF82	Boating Affairs (OBC)		
	BSF83	Boating Standards (OBC)		
	BSF84	Boating Investigation (OBC)		
	COM30	Comptrollership (OBC)		
	COM31	Financial Management (OBC)		
	COM32	Fiscal Operations (OBC)		
	COM33	Supply/Inventory Mgmt (OBC)		
	COM34	Supply Operations (OBC)		
	COM35	Contracting (OBC)		
	COM36	Resale Programs (OBC)		
	ENG50	Engineering General (OBC)		
	ENG51	Ocean Engineering (OBC)		
	ENG52	Naval Engineering (OBC)		
	ENG53	Engineering Afloat (OBC)		
	ENG55	Civil Engineering (OBC)		
	ENG56	Industrial Engineering (OBC)		
	ENG58	Electronics Engineering (OBC)		
	ENG59	Engineering Physics (OBC)		
	HSV90	Health Services General (OBC)		
	HSV91	Physician (OBC)		
	HSV92	Physician Psychiatrist (OBC)		
	HSV93	Physician Flight Surgeon (OBC)		
	HSV94	Dentist (OBC)		
	HSV95	Pharmacist (OBC)		
	HSV96	Environ/Occup Hlth (OBC)		
	HSV97	Therapy (OBC)		
	HSV98	Dietetics (OBC)		
	HSV99	Audiology (OBC)		

Continued on next page

DD-214 Worksheet, Continued

Officer OBCs/EICs (Continued)

X	Competency	Description	Date Acquired (YYYY/MM)	Date Last Used (YYYY/MM)
	MGT20	Management General (OBC)		
	MGT21	Program/Budget Mgmt (OBC)		
	MGT22	Data Processing (OBC)		
	MGT23	Research & Development (OBC)		
	MGT25	Planning General (OBC)		
	MGT26	Info Resource Mgmt (OBC)		
	MGT27	Mgmt Contingency/Defense (OBC)		
	MGT28	Acquisition/Project Mgmt (OBC)		
	MSF40	Marine Safety General (OBC)		
	MSF41	Commercial Vessel Safety (OBC)		
	MSF42	Port Safety/Env Protect (OBC)		
	MSF43	Port Contingency Plans (OBC)		
	MSF44	Vessel Traffic Services (OBC)		
	MSF45	Vessel Inspection (OBC)		
	MSF46	Vessel Technical (OBC)		
	MSF47	Marine Investigation (OBC)		
	MSF48	Hazardous Materials (OBC)		
	MSF49	Explosive Loading (OBC)		
	OPS70	Operations General (OBC)		
	OPS71	Search & Rescue (OBC)		
	OPS72	Marine Science (OBC)		
	OPS73	Readiness (OBC)		
	OPS74	Communications (OBC)		
	OPS75	Aids to Navigation (OBC)		
	OPS76	Intelligence (OBC)		
	OPS77	Law Enforcement (OBC)		
	OPS78	Ice Operations (OBC)		
	OPS79	Deck Afloat (OBC)		
	PER10	Personnel General (OBC)		
	PER11	Officer Personnel Admin (OBC)		
	PER12	Enlisted Personnel Admin (OBC)		
	PER14	Recruiting (OBC)		
	PER15	Training (OBC)		
	PER16	Personnel Systems (OBC)		
	PER17	Personnel Services (OBC)		
	PER18	Physician Assistant (OBC)		
	PER19	Medical Administration (OBC)		

How Officer Experience Indicators Were Assigned: The primary specialty was based on the officer's completion of resident training (normally graduate school) and when that officer was required to fill a billet using that resident training. Officers not having completed resident training or completing a general degree program such as an MBA were assigned a primary specialty of 01, 10, 20, 30, 40, 50, 60, 70, 80 or 90 as appropriate. Warrant to lieutenants may be assigned a more specific primary occupational field.

Continued on next page

DD-214 Worksheet, Continued

Procedure
(continued)

Step	Action
5	Locate the 12. Record of Service Section and complete the following:

Block	Field	Description
12.a.	**Date Entered A/D This Period**	Pre-filled.
12.b.	**Separation Date This Period**	Pre-filled. For personnel being retired, enter the last day of active duty in this block and enter the effective date of retirement in Block 18 (Remarks). Reservists entitled to travel time incident to separation, construct the effective date to include travel time and enter that date in this block. Enter the actual date the member was released from active duty and the number of days travel time in Block 18 (Remarks).
12.c.	**Net Active Service This Period**	Enter the net active service completed during the period between the dates entered in 12a and 12b.
12.d.	**Total Prior Active Service**	Enter the years, months, days of service creditable for basic pay for all active service prior to the date entered in Block 12a. **This includes ALL periods of active duty training performed in any branch of the Armed forces.**
12.e.	**Total Prior Inactive Service**	Enter the years, months, days of service creditable for basic pay for all inactive service completed prior to the date entered in Block 12a.

Continued on next page….

DD-214 Worksheet, Continued

Procedure (cont'd)

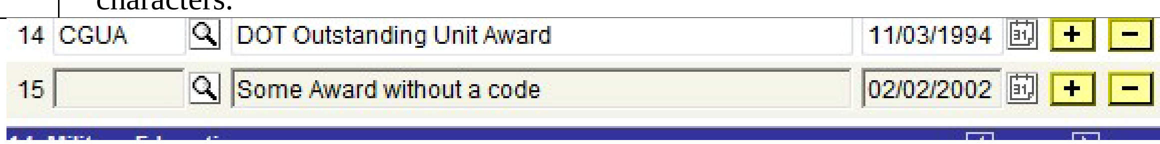
Step	Action
5 (cont)	(see table below)

Block	Field	Description
12.f.	**Foreign Service**	Enter the years, months, and days of foreign service from the date entered in Block 12.a. through the date entered in Block 12.b.
12.g.	**Sea Service**	Enter the years, months, and days of sea service from the date entered in Block 12.a. through the date entered in Block 12.b.
12.h.	**Effective Date of Pay Grade**	Pre-filled.

Step	Action
6	Locate the 13. Decorations, Medals, Badges Section and complete the following;

Block	Field	Description
13	**Type**	Pre-filled. This section will contain all Medals and Awards the member has in Direct Access. To lookup click the button.
	Description	Pre-filled.
	Issue Date	Pre-filled.

- To clarify a description (such as designating first, second, third, etc.) or to reflect a subsequent award (ex. Coast Guard Good Conduct Medal with 2 bronze stars), simply make the change and they will print out on the form.
- It is also easier to edit course and award abbreviations in Direct Access before they get printed on the form. To add or delete a Decoration or Medal, go to the Awards section in DA before starting the DD-214. Click the + button to add a row. To remove a Row, click the − button. If the DD-214 has already been started and an award needs to be added or deleted, use the plus or minus button in the DD-214 section, but also go back and add the change in the Awards section in DA**. You can also add an award even if there isn't a valid code** (as shown below).
- **Award descriptions are sometimes abbreviated due to system limitations.** You should edit the descriptions to match or closely match the award's title as listed in the Medals & Awards Manual. However, the award description field is limited to 50 characters.



Continued on next page

DD-214 Worksheet, Continued

Procedure (cont'd)

Step	Action
7	Locate the 14. Military Education section and complete the following:

Block	Field	Description
14	Course	Pre-filled. To lookup click the button. To add Military Education, click the button.
	Course Title	Pre-filled. (Note you may edit as necessary to reduce the use of abbreviations)
	Sesn	Pre-filled.
	Start Date	Pre-filled.
	End Date	Pre-filled.
15.a.	Contributed to VETERAN'S EDUCATIONAL ASST PRGM	Select either Yes No
15.b.	HIGH SCHOOL GRADUATE or EQUIVALENT	Select either Yes No
16	Days Accrued Leave Paid	If the member receives a lump sum leave payment, enter number of days for which member was paid. If no lump-sum payment is made, enter "None".
17	Member Provided Complete Dental Examination	If the member received dental treatment less than 90 days prior to separation, check the "Yes" block. If not, check "No". Yes No

Step	Action
8	

Block	Field	Description
18	REMARKS	Entries in this block consist of information not shown elsewhere on this form.
19.a.	MAILING ADDRESS AFTER SEPARATION	Pre-filled. Otherwise enter members Mailing Address after Separation. (Address, city, state, zip)
19.b.	NEAREST RELATIVE	Enter Name and complete address of member's nearest relative. This will be used as a supplementary mailing address if necessary.
20	Send Copy 6 to:	If the member desires that copy (6) be forwarded to the *State Director of Veterans' Affairs select the "Yes" block and enter the State Abbreviation. To lookup click the button. If the member does not desire a copy to be forwarded the State Director of Veterans' Affairs select "No".

Continued on next page

DD-214 Worksheet, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8
(cont.)</td><td>
<table>
<tr><th>Block</th><th>Field</th><th>Description</th></tr>
<tr><td>21</td><td>SIGNATURE OF MEMBER</td><td>Member's Name is Pre-filled. Member must sign each copy separately to ensure that they are aware of the differences of the information contained on certain copies of the DD Form 214.</td></tr>
<tr><td>22</td><td>OFFICIAL AUTHORIZED TO SIGN</td><td>Enter the Name, Grade, and Title of Authorizing Official. The Authorizing Official shall sign in ink.</td></tr>
</table>
*Note: There have been numerous changes to State Directors of Veterans' Affairs Mailing Address since the DD-214 Manual was released.
Visit http://www.va.gov/statedva.htm for a listing of mailing addresses for State Directors of Veterans Affairs.
</td></tr>
<tr><td>9</td><td>Locate the Special Additional Information section and complete the following:
<table>
<tr><th>Block</th><th>Field</th><th>Description</th></tr>
<tr><td>23</td><td>TYPE of SEPARATION</td><td>Pre-filled. A type may also be selected from the drop-down menu listing.</td></tr>
<tr><td>24</td><td>CHARACTER of SERVICE</td><td>Select from the drop-down menu listing as appropriate and consistent with the reason and authority for separation, unless otherwise directed by CGPSC.
The Character of Service in block 24 will only read:
• Honorable
• Under Honorable Conditions
• Under Other than Honorable Conditions
• Bad Conduct
• Dishonorable
• Uncharacterized
The type of discharge will not be included.</td></tr>
<tr><td>25</td><td>SEPARATION AUTHORITY</td><td>Pre-filled. Otherwise enter the appropriate separation authority associated with a particular authority and reason for separation.</td></tr>
<tr><td>26/28</td><td>SEPARATION CODE*</td><td>Enter the appropriate Separation Program Designator Code, or enter Code specified by CGPSC. The SPD code description will be used to populate block 28 (see next page).</td></tr>
</table>
</td></tr>
</table>

Continued on next page

DD-214 Worksheet, Continued

Procedure (cont'd)

Step	Block	Field	Description
9 (cont.)	**27**	**REENTRY CODE**	• **Enlisted Personnel -** Enter the appropriate reenlistment code to denote whether or not the member is recommended for reenlistment. Use only the proper reenlistment code associated with a particular SPD Code as shown in the SPD Handbook. Codes not listed may only be used upon specific authority from CGPSC. See Article 1.B.4, Military Separations, COMDTINST M1000.4 (series), for criteria for determining whether or not a member may be recommended for reenlistment. • **Officers and Cadets** - Enter "NA".
	28	**NARRATIVE REASON for SEPARATION**	The system will fill in this field with the SPD Code description from block 26. This field is 'read only' and cannot be changed. Per ALCOAST 562/08, block 28 must only state the Narrative Reason found in the separation Program Designator (SPD) Code Handbook. Narrative Reasons like Unsuitability and Convenience of the Government are not found in the Services' SPD Code Handbooks and, therefore, are not recognized as a reason for separation.
	*Note: If this field is blank, clear and reenter the SPD code in block 26 (see previous page) this will cause the system to fill in block 28 with the Narrative Reason for Separation.		
10	Locate the Dates of Time Lost During This Period section and completed the following:		
	29	**Dates of Time Lost During This Period**	Enter the inclusive dates for all periods of time lost during the time between Blocks 12.a. and 12.b. Includes periods of unauthorized absence (UA), sickness due to misconduct (SKMC), confinement (CONF), and non-performance of duty due to civil arrest (NPDI CIVIL). **If none, leave blank.** To add additional rows click + button. To remove rows click the − button

Continued on next page

DD-214 Worksheet, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10
(cont.)</td><td>
<table>
<tr><th>Block</th><th>Field</th><th>Description</th></tr>
<tr><td>30</td><td>MEMBER REQUEST COPY 4</td><td>If the member requests to receive the special information contained in Blocks 23 – 29, initials are required.</td></tr>
</table>
</td></tr>
<tr><td>11</td><td>• Click the Email DD214 button to receive worksheet only, OR
• Check the Final box, then click the Email DD214 to receive the final DD-214 (8 copies). The e-mail will be sent to your "business e-mail" address.</td></tr>
</table>

Distribution changes

There have been numerous changes to State Directors of Veterans' Affairs Mailing Addresses since the DD-214 instruction was released. Visit http://www.va.gov/statedva.htm for a listing mailing addresses for State Directors of Veterans Affairs.

Address Change for Department of Labor (Copy #5):
Personnel Released from Active Duty, Discharged, or Retired. Forward copy number 5 **immediately** to:

U.S. Department of Labor
Federal Claims Control Center
P.O. BOX 785070
Orlando, FL 32878-5070

Failure to forward copy 5 in a timely fashion will delay the receipt of unemployment compensation for the former member.

Personnel Continuing on Active Duty. When an individual is in service and enlisting or reenlisting in an active duty status or otherwise continuing on active duty in another status, copy number 5 will not be forwarded to the Department of Labor.

Send copies 2 and 8 to Commander, PSC (PSD-MR) within 5 days of separation (along with other documents as listed on the Separation Documents Checklist, enclosure (6) to COMDTINST M1080.10(series)).

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