

Chapter 3 ACCESSIONS, SEPARATIONS, AND REENLISTMENTS

Introduction The objective of this chapter is to provide a concise, user friendly job aid for accessing, separating, or reenlisting a member. This chapter provides checklists, guides, and information required to complete these tasks.

In this chapter

| Section | Description | See Page |
|----------------|----------------------------|-----------------|
| A | Accessions | 3-A-1 |
| B | Separations | 3-B-1 |
| C | Continuance on Active Duty | 3-C-1 |

This page left blank intentionally.

Section Overview

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

In this section

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

Process for Accessions

Introductions The accession process depends on communication between the member, unit, and SPO to ensure a smooth transition into the Coast Guard. This process is broken down into stages based on what needs to be completed and who is responsible.

Note: This process is for prior service members who report directly to their new unit vice attending indoctrination at Cape May.

Reference (a) [Direct Access Guide, Accessions](#)

Process This is the process.

| Stage | Who Does It | What Happens | Date |
|-------|-------------|---|------|
| 1 | Member | The Unit should assist the Member in completing the following: <ul style="list-style-type: none">• DD Form 2058, State of Legal Residence Certificate• IRS W4 Form• Appropriate state tax withholding certificate• Direct Deposit information• CG PSC-2020D (Designation of Beneficiaries)• CG PSC-2020 (Dependency Worksheet) <i>if member has dependents</i>• DD-1172 (Application for Uniformed Service Identification Card)• DD-1173 (Uniformed Service Identification and Privilege Card) <i>if member has dependents</i> | |

Continued on next page

**Section A
ACCESSIONS**

Process for Accessions, Continued

Process
Continued

| Stage | Who Does It | What Happens | Date |
|-------------|-------------|--|------|
| 1 (cont) | Member | <ul style="list-style-type: none"> • Completes SGLV-8286 • Completes SGLV-8286A (if member is married) • TSP-U-1 (if member desires to participate in TSP) • TDP Enrollment Form (if member has dependents & desires to enroll them in the TRICARE Dental Plan) • DD 2366 (Montgomery GI Bill Election Form) <i>if member is eligible to enroll in MGIB</i> • CG PSC-5100 (Officer Uniform Allowance Claim Worksheet) <i>for eligible officers</i> | |
| 2 | Unit | Assist member in completing PCS Reporting Worksheet (PSC 2005) forwards to SPO with other related forms from Stage 1 | |
| 3 | SPO | <ul style="list-style-type: none"> • Creates PDR • Submits Direct Access transactions: <ul style="list-style-type: none"> Applicant Data Contract Data Hire Applicant Employee Tax Data Information Payment Option Election (Non Self-Service) Enter Family Members/Dependents Enter Emergency Contacts Enter SGLI Election Enter Family SGLI Election Employee Entitlements <p>Note: For members who are changing components of the Coast Guard with no break in service, the SPO must ensure that a separation transaction in Direct Access has been completed and approved on the member prior to transmitting accession (rehire) transactions.</p> | |

**Section A
ACCESSIONS**

Types of Accessions

Introduction Accession is the process of establishing personnel and pay records when a member comes on active duty. There are several ways to be accessed and several points where members can be processed.

Types of accessions This table describes types of accessions and identifies processing points.

| Types | Description | Processing Points |
|--|---|--------------------------------------|
| Direct commission | When an officer comes from the civilian sector or other military service and is processed through Direct Commission Officer (DCO) course before departing for their first unit. | Academy |
| | When an officer comes from the civilian sector or other military service and reports directly to their first unit prior to attending the DCO course. | Responsible SPO for designated unit. |
| Cadet Graduates | When a Cadet graduates from the Academy and becomes an officer. | Academy |
| Cadet | When a Cadet reports to the Academy. | Academy |
| Former Cadet with a reserve obligation | Non-Prior service cadets whose appointment is terminated in their junior or senior year are assigned to the Coast Guard Reserve SELRES Transition Pool for 59 days and subsequently assigned to either the IRR or a drilling unit to complete their military obligation. | Academy |
| Prior service (other than DCO) | When an enlisted member comes from another service and attends Basic Training. | Cape May |
| | When a member comes from prior CG or CG Reserve and reports directly to a unit without going through basic training. Note: This includes members who are being discharged from the active duty component of the Coast Guard to be immediately accessed into the reserve component of the Coast Guard and vice versa. The servicing SPO losing the member must submit the discharge transaction in Direct Access and accession transaction within 24 hours. | Responsible SPO for designated unit. |
| | When a member reports directly to the Individual Ready Reserve (IRR). | Servicing ISC SPO |
| | If the member enlists in the reserves and attends Cape May as a REBI student. | Cape May |
| Recruits | When an enlisted member goes to basic training before departing for their first unit. | Cape May |

**Section A
ACCESSIONS**

Recalled Retired Members

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

Payment Method Use this table to determine if the member will be paid by PSC (MAS) or by PSC (RAS).

| If the member is | And the duration of the recall is | Then the member is paid by |
|---|---|---|
| Immediately recalled to active duty upon retirement (no break in service) | For any period immediately following retirement | <ul style="list-style-type: none"> • JUMPS. • The Assignment Officer issues Recall from Retirement Orders via Direct Access. These orders will generate a P193 JUMPS action and continue the member on Active Duty. • No need to retire member. |
| Recalled to active duty after a break in service of more than 24 hours | For any period | <ul style="list-style-type: none"> • JUMPS. • CGPC (opm/epm) creates orders. • SPO creates contract data and PCS endorsements to access (rehire) the member. |
| Recalled from RET-2 status | For any period | <ul style="list-style-type: none"> • The CGPC (opm/epm) Assignment Officer issues orders to the member (copy to PSC (RAS)). • PSC (RAS) changes members Training Pay Category (R910 transaction) to make the member's records available to the SPO in Direct-Access • The SPO records the member's active duty in Direct Access using the Reserve Orders module. |

**Section A
SEPARATIONS**

This page left blank intentionally.

Section B
SEPARATIONS

Section Overview

Introduction This section prescribes procedures for separating members on active duty whose obligated service is for 140 days or more.

In this section

| Topic | See Page |
|---|-----------------|
| The Separation Process | 3-B-2 |
| Immediate Separation Processing | 3-B-5 |
| Priority Separation Processing | 3-B-7 |
| E-mail Format For Immediate and Priority Separations (Exhibit 3-B-1) | 3-B-9 |
| Routine Separation Processing | 3-B-10 |
| Cancellation of Document Numbers and Accounting Data (Exhibit 3-B-2) | 3-B-12 |
| Preparation of Separation Orders (Exhibit 3-B-3) | 3-B-13 |
| Enlisted to Cadet Status Processing | 3-B-14 |
| Regular Retirement Separations | 3-B-15 |
| Disability Retirement Separations | 3-B-16 |
| Checklist for Separations | 3-B-18 |
| Checklist for RELAD | 3-B-21 |
| Checklist for Discharge | 3-B-22 |
| Checklist for Retirement | 3-B-23 |
| Reserve Retirement Separations | 3-B-26 |

The Separation Process

Introduction

The proper execution of the separation process depends on close communication between all participants. Timely processing of all paperwork and Direct Access data entry is essential to provide the member a smooth transition and to ensure separation payments are made consistent with applicable directives. TONOs are automatically generated when the Separation Orders are entered in Direct Access.

Note: Requests to change the termination date of discharge orders already posted on the Airport terminal to an earlier date may be sent to PSC (ses), by e-mail to PSC-PF-SES@uscg.mil. If the date needs to be changed to a later date, the request must be made to CGPC (EPM-1, for enlistd personnel or OPM-1, for officers).

References

- (a) [DD 214 Manual](#)
 - (b) SPD Handbook
 - (c) [PERSMAN](#), Chap 12-A and 12-B
 - (d) [Direct Access Online Manual](#) (SPO Transactions > Separations)
 - (e) [Identification Cards, COMDTINST M5512.1\(series\)](#)
-

Retention on Active Duty

When a member is retained for any reason beyond the established separation date, documentation submitted to JUMPS to process the original separation must be deleted and modified/replaced with new transactions. This may require action by various sources:

| WHO | MAY NEED TO |
|--------------|--|
| CGPC (opm) | extend an officer's date of separation |
| Member's SPO | submit a Personnel Action to indicate a member has been retained beyond normal expiration of enlistment. |
| PSC | reopen the member's pay account and reprocess the separation |

Continued on next page

**Section B
SEPARATIONS**

The Separation Process, Continued

Types of separations

Separations are classified as *Immediate*, *Priority*, or *Routine*. Each type is defined below.

| Type | Description |
|------------------|--|
| Immediate | Separations, which must be processed in less than 15 days. Separations require four working days for processing by PSC. This 4-day clock begins once: <ul style="list-style-type: none">• The SPO notifies PSC of the authorization to separate the member. This may require coordination between the unit, SPO, and PSC (ses) to change the member's separation date. |
| Priority | Separations, which must be processed within a 15 to 30 day period. Note: If rapid administrative action is required commands (CO/XO) may request Immediate separation processing by contacting PSC (ses) at (785) 339-3551. |
| Routine | Separations, which can be processed in 30 days or more. Note: 30 days is the minimum time in which a Routine separation can be processed. In order to avoid delay in the final payment or payment for any leave sold, units/members must submit the Career Intentions Worksheet (CG PSC-2045) to the SPO not later than 60 days prior to the separation date or departure on terminal leave. |

Continued on next page

**Section B
SEPARATIONS**

The Separation Process, Continued

Which type to use This table prescribes separation classifications.

| IF Separation is | THEN use |
|---|-----------------|
| due to misconduct and unit commanding officer desires rapid administrative action | Immediate |
| not due to misconduct, but rapid administrative action is required (Note: The unit CO/XO must request Immediate separation processing by contacting PSC (ses) at (785) 339-3551). | Immediate |
| for reserve members disenrolling from a class "A" school, officer candidate school, or other training program | Immediate |
| due to unsatisfactory performance | Priority |
| due to unsuitability | Priority |
| due to physical disability | Priority |
| directed by CGPC (epm-1) for urgent reasons | Priority |
| under normal circumstances | Routine |

**Section B
SEPARATIONS**

Immediate Separation Processing

Introduction Immediate separations require 4 working days for processing after CGPC (epm-1) posts the orders on the airport terminal. Immediate separations are often due to misconduct. If a separation is not due to misconduct (would normally be processed as a Priority or Routine separation) but rapid administrative action is required, commands (CO/XO) may request Immediate separation processing by contacting PSC (ses) at (785) 339-3551.

References

- (a) [DD 214 Manual](#)
- (b) SPD Handbook
- (c) [PERSMAN](#), Chap 12-A and 12-B
- (d) [Direct Access Online Manual](#) (SPO Transactions > Separations)
- (e) [Identification Cards, COMDTINST M5512.1\(series\)](#)

Procedures Procedures required for an Immediate separation.

| Day | Who Does It | What Happens |
|------------------|--------------|---|
| 1 | CGPC (epm-1) | <ul style="list-style-type: none"> • Approves separation. • Posts separation orders with the Termination Date, TONO and Accounting Data to the airport terminal. The orders will contain detailed information to enable SPOs to prepare all documents required for separation. |
| | UNIT | <ul style="list-style-type: none"> • Ensures member is physically qualified for separation. • Notifies SPO upon receipt of separation authority from CGPC. <p>Note: For immediate separations requiring less than normal processing time, a signed CG-3307 by the member (see Enclosure 6 of this manual, CG-3307's for Separation (SEP-1)) shall be faxed to (785-339-3784) PSC (ses).</p> |
| T H R U | SPO | <ul style="list-style-type: none"> • Sends Urgent E-mail to PSC-PF-SES@uscg.mil on Day One with pertinent information using the format provided in Exhibit 3-B-1. • SPOs must contact PSC (ses) to request approval of immediate separations • SPOs must contact PSC (ses) to request a change to member's termination date set in Direct Access. |
| | | <p>Note: E-mail must be routed through and released by the SPO supervisor (with "By direction" authority).</p> |
| 3 | | |

Continued on next page

Section B
SEPARATIONS

Immediate Separation Processing, Continued

Procedures,
continued

| Day | Who Does It | What Happens |
|---------------------------|-------------|--|
| 1 | PSC (ses) | <p>Upon receipt of the SPO's E-mail.</p> <ul style="list-style-type: none"> • Calculates the final pay due the member. • Sends E-Mail to the SPO with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, the SRB recoupment endorsement on the reverse side of the DD-214 (if applicable) and the amount of payment authorized. |
| T H R U 3 | SPO | <ul style="list-style-type: none"> • Prepares the DD-214 • Prepares the appropriate Direct Access separation transactions. • Prepares appropriate separation letter(s) from Enclosure (4) of this manual. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account. • Verifies/enters final mailing address in Direct Access. <p>Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W2.</p> |
| 4 | UNIT | <p>Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Orders, appropriate travel claim forms, an envelope addressed to PSC (tv1) for liquidation purposes, and the standard separation letter. Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: http://www.dmdc.osd.mil/rsl/owa/home.</p> |
| | SPO | <p>On the effective date of separation, transmits the separation transaction.</p> |

**Section B
SEPARATIONS**

Priority Separation Processing

Introduction Priority separations require 15 working days for processing. Therefore, to allow for weekends and holidays, the effective date of separation will be 21 days after CGPC (epm-1) posts the orders on the airport terminal.

- References**
- (a) [DD 214 Manual](#)
 - (b) SPD Handbook
 - (c) [PERSMAN](#), Chap 12-A and 12-B
 - (d) [Direct Access Online Manual](#) (SPO Transactions > Separations)
 - (e) COMDTINST M5512.1, Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel

Procedures Procedures required for a Priority separation.

| Day | Who Does It | What Happens |
|----------------------------|-----------------|--|
| 1 T H R U 9 | CGPC (epm-1) | <ul style="list-style-type: none"> • Approves separation. • Posts separation orders with the Termination Date, TONO and Accounting Data to the airport terminal. The orders will contain detailed information to enable SPOs to prepare all documents required for separation. |
| | UNIT | <ul style="list-style-type: none"> • Ensures member is physically qualified for separation. • Notifies SPO. <p>Note: For Priority separations requiring less than normal processing time, a signed CG-3307 (use (SEP-1) in Encl 6 of this manual) must be faxed (785-339-3784) to PSC (ses).</p> |
| | SPO | <p>Sends Urgent E-mail to PSC-PF-SES@uscg.mil on Day One with pertinent information using the format provided in Exhibit 3-B-1.</p> <ul style="list-style-type: none"> • SPOs must contact PSC (ses) to request approval of priority separations • SPOs must contact PSC (ses) to request a change to member's termination date set in Direct Access. <p>Note: The E-mail must be routed through and released by the SPO supervisor (with "By direction" authority).</p> |

Continued on next page

Section B
SEPARATIONS

Priority Separation Processing, Continued

Procedures
(continued)

| Day | Who Does It | What Happens |
|---|--------------------|---|
| 1 T H R U 9 (Cont.) | PSC (ses) | <p>Upon receipt of the SPO's E-mail.</p> <ul style="list-style-type: none"> • Calculates the final pay due the member. • Sends E-Mail to the SPO with the required data to complete block 18 (remarks) of the DD-214, (if applicable) relative to payment of disability severance pay, and the amount of payment authorized. • Schedules a special payment through Treasury to ensure member receives final separation pay on his/her separation date. |
| | SPO | <ul style="list-style-type: none"> • Prepares the DD-214 • Prepares the appropriate Direct Access separation transactions. • Prepares appropriate separation letter(s) from Enclosure (4) of this manual. • Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account. • Verifies/enters final mailing address in Direct Access. <p>Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W2</p> |
| LAST DAY | UNIT | <p>On the effective date of separation, delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PSC (tv1) for liquidation purposes, and the standard separation letter(s). Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: http://www.dmdc.osd.mil/rsl/owa/home.</p> |
| | SPO | <p>On the effective date of separation, or date of departure on terminal leave, transmits the separation transaction.</p> |

**Section B
SEPARATIONS**

E-mail Format for Immediate and Priority Separations

(Not Requesting a Document Number and Accounting Data)

| |
|---|
| <p>From: SPO Supervisor To: PSC-PF-SES@uscg.mil Cc: Unit POC Subject: SEPARATION FOR _____ (NAME/EMPLID) _____, USCG(R)</p> <p>Reference (A): CITE CGPC Separation Summary Authorization</p> <p>1. CITE TYPE OF SEPARATION: IMMEDIATE, PRIORITY, OR DISABILITY NOTE: The CO/XO must call SES for all Immediate separations unless the member's SPD code ends with one of the following two characters: FS FU JA JB JC JD JE KA KB KD KF KK KL KM KN KQ NC</p> <p>2. DATE OF SEPARATION</p> <p>3. SPD CODE</p> <p>4. LEAVE INFORMATION (SPO must still input leave transactions)</p> <p>A. DAYS LEAVE SELLING B. NUMBER OF DAYS TERMINAL LEAVE TAKING AND THE DATES OF TERMINAL LEAVE C. NUMBER OF DAYS LEAVE TAKEN AND THE DATES OF LEAVE, NOT POSTED IN RECENTS D. NUMBER OF DAYS EXCESS LEAVE (Only if allowed by CO)</p> <p>NOTE: Include any leave scheduled to be taken prior to separation. The SPO must still input the leave transaction(s). Enter 'NONE' in each block when not applicable.</p> <p>5. LOST TIME NOT POSTED IN RECENTS NOTE: Enter 'NONE' when not applicable.</p> <p>6. PAY ADJUSTMENTS NOT POSTED IN JUMPS:</p> <p>A. REDUCTION: RATE AND DATE B. FORFEITURE: AMOUNT AND DATE C. MUTUAL ASSISTANCE (follow procedures noted on page 9-A-5 of this manual) D. OTHER INDEBTEDNESS (see page 9-A-4 of this manual prior to transmission of this e-mail) E. ENTITLEMENTS NOT POSTED IN RECENTS (SPO must still transmit necessary transactions) F. BONUS PAYMENTS PREVIOUSLY MADE (SRB, SELRES, or Enlistment Bonus)</p> <p>NOTE: Enter 'NONE' when not applicable.</p> <p>7. FINAL MAILING ADDRESS AFTER SEPARATION AS INDICATED IN DIRECT ACCESS ENTERED THIS DATE IS</p> <p>8. SPO POINT OF CONTACT (name and phone number)</p> <p>NOTE: When producing this e-mail, ensure each paragraph is typed out entirely (i.e., paragraph 2 would read "Date of Separation: 07JAN01" vice "07JAN01"), However you do not need to include notes.</p> |
|---|

EXHIBIT 3-B-1

Routine Separation Processing

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

References

- (a) [DD 214 Manual](#)
- (b) SPD Handbook
- (c) [PERSMAN](#), Chap 12-A and 12-B
- (d) [Direct Access Online Manual](#) (SPO Transactions > Separations)
- (e) [Identification Cards, COMDTINST M5512.1\(series\)](#)

Procedures Procedures required for Routine separation.

| When | Who does it | What happens |
|---|--------------------|--|
| At least 180 days prior to Separation | UNIT | Ensures member is physically qualified for separation. |
| At least 45 days prior to Separation or departure on terminal leave | SPO | <p>Prepares and transmits Statement of Intent.</p> <p>Note: Failure to submit this document in a timely manner will normally result in delay in final pay or payment for any leave sold. The SPO must notify PSC (ses) if there is any change to the statement of intent. On routine separations, the amount of final pay will appear on the member's prior month LES.</p> <ul style="list-style-type: none"> • For routine separations the TONO and Accounting Data are automatically generated when the SPO creates and saves the Direct Access separation orders. <p>For the separation orders follow the guidance on page 3-B-13.</p> |
| Prior to separation | SPO | Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214. |

Continued on next page

**Section B
SEPARATIONS**

Routine Separation Processing, Continued

**Procedures
(continued)**

| When | Who does it | What happens |
|--------------------------------------|--------------------|--|
| At least 10 days prior to separation | PSC (ses) | Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and the amount of payment authorized. |
| 7 days prior to separation | SPO | If information required for block 18 of the DD-214 (if applicable) has not been received, contacts PSC (ses). |
| Prior to separation | PSC (ses) | Schedules a special payment through Treasury to ensure member receives final separation pay. |
| Day of separation | UNIT | Delivers the Certificate of Release or Discharge from Active Duty (DD-214), Separation Order, appropriate travel claim forms, an envelope addressed to PSC (tvl) for liquidation purposes, and the standard separation letter. Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: http://www.dmdc.osd.mil/rsl/owa/home . |
| | SPO | SPO approves separation transaction in Direct Access |

Note: SPO's can approve transactions up to 14 days prior to separation.

Cancellation of Document Numbers and Accounting Data

Separation Document Number and Accounting Data issued to a member who wishes to remain in the service must be cancelled. In this event, the responsible SPO must send a Coast Guard message (not an E-mail) within 48 hours of discovering the need for cancellation to COMDT (CG-12A) with PSC (ses), the order issuing authority, and the responsible Transportation Officer as information addressees, requesting cancellation of the Document ID.

The **message** must contain the following information:

- Member's rate/rank, name, EMPLID and unit.
- Document Number and Accounting Data issued; date issued
- Member's scheduled separation date.
- Reason for cancellation request and member's resulting status (e.g. Reenlisted, Extended, Retained). If member is retained provide reason, estimated duration and subsequent status at the end of retention.
- SPO E-mail address.

NOTE: Members electing to remain in the service where actions to expend funds have been made (e. g. Shipment of household goods has occurred) shall be counseled on their liability and the applicable recoupment procedures. Such counseling shall be documented and acknowledged by the member's signature on their separation orders.

Exhibit 3-B-2

**Section B
SEPARATIONS**

Preparation of Separation Orders

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

Special Instructions Separation Orders shall include the following remark:

“You are directed to submit a Travel Claim to PSC (tvl) within 3 days after completion of the travel under these orders. If you decide to cancel these orders, you are personally liable for the repayment of any funds expended in accordance with these orders.”

Statement required should separation be cancelled If a member elects to remain on active duty after funds have been expended during separation processing, the following amendment to members separation orders shall be made:

(Exhibit 3-B-3) “I acknowledge that I have voluntarily elected to remain on Active Duty after previously starting separation processing, and that I have been counseled concerning my liability to repay any funds expended during my separation processing and the applicable recoupment procedures.”

MEMBER’S SIGNATURE

Enlisted to Cadet Status Processing

Introduction The Academy SPO has the primary responsibility for ensuring a member's pay account in JUMPS is converted to cadet status when an enlisted member is being released from active duty to accept an appointment as a Cadet at the Coast Guard Academy.

The member's SPO has the responsibility to ensure that the member's PCS transfer is handled in a timely and accurate manner.

Procedures When transferring an enlisted member to the Academy for appointment as a Cadet, the member's SPO shall:

- Prepare and transmit the Statement of Intent transaction and verify/enter mailing address information in Direct Access at least 45 days prior to the Cadet swearing-in date.
- Approve and endorse the member's PCS orders in Direct Access.
- The Academy SPO will input a [Direct Access Discharge](#) transaction to discharge the member from enlisted status, and submit an Accession transaction to enlist the member as a cadet.

Note: Advance Pay cannot be authorized (the member will be separated upon swearing-in as a cadet and would not be able to liquidate an advance).

**Section B
SEPARATIONS**

Regular Retirement Separations

Introduction Retirements are normally processed as routine separations

Reference

- (a) Direct Access Online Manual; [Retirements, DD-214](#)
- (b) [Personnel Manual, COMDTINST M1000.6 \(series\)](#)
- (c) [Joint Federal Travel Regulations, Volume 1](#)
- (e) [Identification Cards, COMDTINST M5512.1\(series\)](#)

Procedures Procedures required for a retirement.

| When | Who Does It | What Happens |
|--|-------------|--|
| At least 60 days prior to: <ul style="list-style-type: none"> • The date the member goes on terminal leave: or, • The effective date of retirement, whichever is earlier | Member | Submits: Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election (CG PSC-4700) Note: <u>AUTOMATIC FULL COVERAGE</u> in the Survivor Benefit Plan (SBP) is elected in the absence of a properly completed PSC-4700. The SPO and/or unit will assist in counseling the member and completing the PSC-4700, but ultimate responsibility lies with the member. |
| Same as above | SPO | Prepares and transmits Statement of Intent (SOI) . Verifies/enters mailing address information in Direct Access. |
| Note: If an SOI has processed in the system by the end-month compute for the month prior to the month of separation, the regular mid-month payment and the final pay, as well as allotments will be paid by JUMPS and the final pay projection will include any leave being sold. | | |
| Prior to separation | SPO | Verifies the member's leave balance in order to complete block 16 (days accrued leave paid) of the DD-214. |
| Note: The SPO will notify PSC (ses) if there is any change to the information submitted on the Statement of Intent (SOI). On routine separations, the amount of final pay will appear on the member's prior month LES. | | |
| Day of separation | Unit | Delivers the DD-214, the final payment, (unless the member is on direct deposit) and the standard separation letter. |
| | Member | Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facilities go to the following website: http://www.dmdc.osd.mil/rsl/owa/home . |
| | SPO | On the effective date of terminal leave or retirement, transmits the retirement transaction. |

**Section B
SEPARATIONS**

Disability Retirement Separations

Introduction Temporary and permanent disability retirements are retirements that are approved under the physical disability evaluation system. They are processed as priority separations. The retirement date for members in this category will normally be 20 working days after the date CGPC's action. Active duty allotments will be paid by JUMPS for the last month of active duty.

Reference

- (a) [Direct Access Guide, Retirements, DD-214](#)
- (b) [PERSMAN, Chap 17](#)
- (c) [Joint Federal Travel Regulations, Volume 1](#)
- (e) [Identification Cards, COMDTINST M5512.1\(series\)](#)

Procedures Procedures required for Temporary and Permanent Disability Retirements.

| Day | Who Does It | What Happens |
|-----|-------------------|---|
| 0 | CGPC (opm/epm) | Issues message directing temporary or permanent disability retirement. |
| 1 | SPO | <ul style="list-style-type: none"> • Sends urgent E-mail message to PSC (ses) with pertinent information using the format provided in Exhibit 3-B-1 (Email Format for Separations). • Ensures member has an updated Mailing Address in Direct Access or completes an update if member does not have access to Direct Access. <ul style="list-style-type: none"> Note: The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W-2. • Prepares the Orders transaction in Direct Access |
| 2 | PSC (ses) | <p>Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable).</p> <ul style="list-style-type: none"> • Calculates the final pay due the member. • Schedules a special payment through Treasury to ensure the member receives final separation pay on his/her separation date. |

Continued on next page

**Section B
SEPARATIONS**

Disability Retirement Separations, Continued

Procedures, Procedures required for Temporary and Permanent Disability Retirements.
Cont.

| Day | Who Does It | What Happens |
|------------|-----------------------|--|
| 13 | SPO | If the PSC (ses) separation notification is not received at least 7 days prior to the date of separation, contacts PSC (ses). Nonreceipt of this E-mail message is an indication of a problem with the separation processing. |
| | Unit | On the effective date of retirement, delivers the DD-214 and the standard separation letter (from enclosure (4) to this manual) to the member. |
| | Member | Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facilities go to the following website: http://www.dmdc.osd.mil/rsl/owa/home . |
| | SPO (HRSUP Role User) | On the effective date of terminal leave or retirement, approves the retirement separation transaction in Direct Access. |

**Section B
SEPARATIONS**

Checklist for Separations

Introduction This checklist is provided to assist the unit/SPO in completing all necessary tasks required for separating members from active duty. It should be used along with the Checklist for RELAD, Checklist for Discharge, or Checklist for Retirement, as appropriate. This job aid is designed to be reproduced locally.

Separation checklist Action when separating a member.

| Step | Action | Reference | Date |
|------|--|---|------|
| 1 | <ul style="list-style-type: none"> • Complete predischarge interview 6 months prior to separation date • If member is not recommend or not eligible for reenlistment, complete documentation as required • Transition Assistance Program counseling <p>Forward the following to the SPO:</p> <ul style="list-style-type: none"> • Preseparation Counseling Checklist for Active Component Service Members (DD-2648). <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • Preseparation Counseling Checklist for Reserve Component Service Members Released From Active Duty (DD-2648-1) <p>Note: Upon receipt of the DD-2648, the SPO will prepare and transmit a Direct Access Training file update using School Code 500650</p> <ul style="list-style-type: none"> • CG-3307 with SEP-4 entry completed. | PERSMAN , 12-B-4, ALCOAST 049/00 , PERSMAN 12-B-5 | |
| | | COMDTINST 1900.2 (series) | |
| | | (Forms available from PSC's web site http://www.uscg.mil/hq/psc/forms) | |
| | | PPPM, Encl. (6) | |
| 2 | Ensure member is physically qualified for separation. | PERSMAN , 12-B-6 | |
| 3 | Complete an E-Resume at least six months prior to date of separation indicating member's intention to separate. For all members eligible/recommended for reenlistment: <ul style="list-style-type: none"> • Indicate in "career intentions" field of E-Resume, member's preferences in regards to a Selected Reserve Unit or Individual Ready Reserve (IRR). Also, include the member's address and phone number following separation. | PPPM, 5-D-13 Direct Access Guide, E-Resume | |

Continued on next page

**Section B
SEPARATIONS**

Checklist for Separations, Continued

Separation checklist (continued)

| Step | Action | Reference | Date |
|--|---|--|-------------|
| 3 C O N T I N U E D | <p>Upon receipt of the E-Resume, an ISC representative will contact the member to discuss assignment options and answer questions about participation in the reserve.</p> <p>If agreement is reached on an assignment to a billet in the selected reserve, the ISC will provide the member's servicing SPO with the information needed to effect the assignment. The E-Resume with assignment information will be used to complete reserve assignment orders to the new unit.</p> | | |
| 4 | Complete follow-up interview at 3 months prior to separation date. | PERSMAN , 12-B-4 | |
| 5 | Complete Career Intentions Worksheet, PCS Departing/Separation Worksheet, PCS Entitlements Worksheet, and, and forward to SPO at least 60 days prior to the separation date. | <p>(Forms available from PSC's web site http://www.uscg.mil/hq/psc/forms)</p> <ul style="list-style-type: none"> • CG PSC-2000 • CG PSC-2003 • CG PSC-2045 | |
| 6 | SPO forward DD-214 WS (worksheet) to the member, via the unit, for review and approval | DD-214 Instruction | |
| 7 | If the member is being discharged, and desires immediate enlistment in the Coast Guard Reserve the SPO will complete and forward an Enlistment Contract (DD-4/1), effective the day following discharge, to the unit for administration of the oath and signature. | | |
| 8 | Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods. | CGTRANSMAN , 1-H-1 | |

Continued on next page

**Section B
SEPARATIONS**

Checklist for Separations, Continued

Separation checklist (continued)

| Step | Action | Reference | Date |
|------|--|---|------|
| 9 | Conduct Final Termination Briefing | PERSEC | |
| 10 | Counsel member on separation, <ul style="list-style-type: none"> • Complete CG-3307 entries; see enclosure (6) of this manual) for sample entries. • Ensure member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package (http://www.tsp.gov/forms/tspb02.pdf) if they have a TSP account. | PERSMAN , 12-B-53 | |
| 11 | Ensure Government Travel Charge Card is turned into coordinator for cancellation. | Charge Card Instruction | |
| 12 | Complete CG-3307 (SEP-19) entry for all enlisted members receiving Separation Pay and send a copy by fax to PSC (ses) at 785-339-3784. | PPPM, Encl (6) | |
| 13 | SPO completes Direct Access transactions (Statement of Intent, DD-214 and Discharge or Retirement or RELAD) | Direct Access Online Manual: | |
| 14 | Complete appropriate separation letter(s) from enclosure (4) to this manual. | PPPM, 3-B-5, 7 | |
| 15 | Counsel member on separation travel <ul style="list-style-type: none"> • Provide member with travel claim form(s) and instructions for completion. | CGS-JFTR | |
| 16 | Provide member with pre-addressed envelope to mail travel claims and original separation travel order to PSC (tvl). | PPPM, 2-B | |
| 17 | Review SPO/MED PDR's. | PERSMAN, 12-B-49 | |
| 18 | Distribute PDR's and notify Health Record Custodian (by completing encl (9) to the PDRMAN) to forward MED PDR as appropriate. | PDR Manual | |
| 19 | Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. | ID Cards, COMDTINST M5512.1(series) | |

Section B
SEPARATIONS

Checklist for RELAD

Introduction This checklist provides a job aid to be used when a member is released from active duty (RELAD) and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for RELAD Additional items when releasing a member from active duty.

| Step | Action | Reference | Date |
|------|---|-----------------------------------|------|
| 1 | Complete Continued Health Care Coverage Benefit Program application. | CGCBP Instruction | |
| 2 | Complete ID Card(s). | Appendix (B) PPPM | |
| 3 | Counsel member on: <ul style="list-style-type: none">• Assignment to Selected Reserve• Assignment to Individual Ready Reserve• Updating bank account information in Direct Access if the member will be assigned to a drilling status after separation. | | |
| 4 | Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PSC of Date of Service (Separation Date) and that member signed CG-3307 for waiver. | PPPM, Encl (6) | |
| 5 | Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the SPO. | PPPM, 9-A-5 | |
| 6 | Deliver separation paperwork to member. | | |

**Section B
SEPARATIONS**

Checklist for Discharge

Introduction This checklist provides a job aid to be used when a member is discharged, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for discharge Additional items when discharging a member.

| Step | Action | Reference | Date |
|-------------|--|----------------------------------|-------------|
| 1 | Notify PSC (ses) (for Immediate or Priority discharges) | PPPM, 3-B | |
| 2 | Complete a CG-3307 if member is not processed for separation under normal circumstances and does not wish to be retained. Notify PSC of Date of Service (Separation Date) and that member signed CG-3307 for waiver. | PPPM, Encl (6) | |
| 3 | Ensure CG Mutual Assistance debts, which are desired to be collected from member's available pay during separation processing, are reported to the SPO. | PPPM, 9-A-5 | |
| 4 | Complete Continued Health Care Coverage Benefit Program application. | | |
| 5 | Complete appropriate Discharge Certificate. | PERSMAN, 12-B-51 | |
| 6 | Issue Honorable Discharge Button (if applicable). | PERSMAN, 12-B-52 | |
| 7 | Refer to exhibit in PERSMAN for special information concerning discharges. | PERSMAN, 12-B-1 | |
| 8 | If member will be enlisting in the Coast Guard Reserve immediately following discharge, complete an enlistment contract and return to servicing SPO | | |
| 9 | Deliver separation paperwork to member. | | |

**Section B
SEPARATIONS**

Checklist for Retirement

Introduction This checklist provides a job aid to be used when a member retires, and should be used along with the Checklist for Separations. It is designed to be reproduced locally.

Checklist for retirement Additional items when retiring a member.

| Step | Action | Date |
|------|--|------|
| 1 | Endorse retirement order • Forward one copy to the SPO. | |
| 2 | Ensure member contacts PSC (ras) for retirement information. The following web site address provides “Information for Retirees.” – http://www.uscg.mil/hq/PSC/RAS.htm | |
| 3 | Ensure the member completes and returns the following form(s) from Enclosure (1): CG PSC-4700 , (Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election) and if starting new allotments, CG PSC-7221 , (Retired Allotment Authorization Form) The member <u>must</u> include a copy of their latest LES if they are continuing any allotments or direct deposit to same account. • Administratively review the form(s), ensuring they are completed in accordance with instructions. | |

Continued on next page

**Section B
SEPARATIONS**

Checklist for Retirement, Continued

**Checklist for
retirement (cont'd)**

| Step | Action | Date | |
|------|---|---|---|
| 4 | If the member is married, <ul style="list-style-type: none"> • Use this table to determine what actions are necessary to comply with the spousal notification/concurrence requirements of the Survivor Benefit Plan (SBP) when a married member elects not to participate or to participate at less than the maximum level in SBP. | | |
| | If the Member and Spouse | And | |
| | Then | | |
| | are co-located in the area of the member's duty station and are living together as husband and wife | the spouse concurs with the member's SBP election | the spouse and witness will complete and sign part VII of the CG PSC-4700 |
| | | the spouse does not concur with the member's SBP election | the command will send a letter of notification/concurrence to the spouse as shown in Enclosure (4) page E-4-3 of this manual |
| | are not co-located or are not living together as husband and wife | | the command will send a letter of notification/concurrence to the spouse as shown in enclosure (4) page E-4-3 of this manual |
| | are not living together as husband and wife | and the spouse's whereabouts are unknown and cannot be determined | the member will complete and sign the following statement "The whereabouts of my spouse are unknown to me and have been unknown to me for at least 90 days. I understand that if this statement is later found to be untrue that spouse coverage will be established on the full amount of retired pay with costs and interest collected retroactive to my date of retirement unless my spouse consents otherwise. I understand that any false statement or misrepresentation thereto is a violation of law punishable by fine of not more than \$10,000 or imprisonment of not more than 5 years or both (18 U.S.C. 1001)". |

Continued on next page

**Section B
SEPARATIONS**

Checklist for Retirement, Continued

**Checklist for
retirement (cont'd)**

| Step | Action | Date |
|------|--|------|
| 5 | <p>Forward the following to PSC (ras) at least 30 days prior to retirement or start of terminal leave</p> <ul style="list-style-type: none"> • CG PSC-4700 (four pages) • Copy of latest LES, if member is continuing any allotments or direct deposit to same account • CG PSC-7221 if member is starting any new allotments • SBP Spousal notification/concurrence letter, endorsed by spouse, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse does not complete part VII of the CG PSC-4700 • Statement signed by member, attesting that the whereabouts of spouse are unknown, if a married member elects not to participate in SBP or to participate at less than the maximum level and the spouse cannot be located. | |
| 6 | <p>Ensure retirement certificate and spouse's certificates are received from PSC (ras) at least 30 days prior to member's retirement or departure on terminal leave. You may order Retirement Certificates at http://www.uscg.mil/hq/PSC/RAS.htm.</p> | |
| 7 | <p>Contact CG-1221 if the White House Letter of Appreciation for members retiring with more than 30 years of service has not been received.</p> | |
| 8 | <p>Ensure member receives copy of the Thrift Saving Plan (TSP) Withdrawal Package if they have a TSP account. This includes TSP withdrawal forms, the booklet "Withdrawing Your TSP Account After Leaving Federal Service", and the notice "Important Tax Information About Payments From Your TSP Account."</p> | |
| 9 | <p>Complete retired and dependent ID cards.</p> | |

**Section B
SEPARATIONS**

Reserve Retirement Separations

- Introduction** Reserve retirements are processed by PSC (ras). The two retirement categories are:
- Retirement with Pay (RET-1) for reservists who complete 20 years of satisfactory service and have reached age 60.
 - Retirement Awaiting Pay at Age 60 (RET-2) for reservists who have satisfied all requirements for RET-1, except reaching age 60.

Procedures Procedures for Retirement With Pay (RET-1)

| When | Who does it | What happens |
|---|-------------|---|
| Six months prior to reaching age 60 if member has 20 years of satisfactory service | PSC (ras) | Notify member in writing by sending an “Information Concerning Retirement With Pay (RET-1)” letter and information about the Reserve Component Survivor Benefit Plan. |
| After receipt of “Notification of Eligibility Letter” and retirement forms. | Member | Request transfer to RET-1 status by completing forms CG-PSC-2055A (Reserve Retirement Transfer Request) and CG-PSC 4700 (Coast Guard & NOAA Retired Pay Account Worksheet and Survivor Benefit Plan Election from Enclosure (1) to this manual. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time. |
| <p>Note: 1. If the member is in a drilling status the retirement package will be sent to the member’s home address one month prior to age sixty; if the member is not in a drilling status the retirement package will be sent approximately six months prior to the sixtieth birthday.</p> <p>2. If it is determined that member is not eligible for RET-1 status, member will be separated (age waivers to attain eligibility may be requested from and granted by CGPC (rpm).</p> | | |
| 1 month prior to retirement | PSC (ras) | Forward to member: <ul style="list-style-type: none"> • Retirement Letter • Final Point Statement • Retirement Certificates (if applicable) |
| Retirement day | PSC (ras) | Transmit Endorsement on Orders transaction |
| <p>Note: Normally, reservists are voluntarily transferred to RET-2 status upon their request. There is one instance, however, where a reservist may be involuntarily transferred to RET-2 status. If an enlisted reservist has over 20 years satisfactory service, the reservist’s enlistment expires, and the reservist fails to reenlist, the reservist may be involuntarily transferred to RET-2 status per PERSMAN, 1.G.9.G. In such cases, the reservist’s SPO shall notify ISC (pf) that the reservist has failed to reenlist. ISC (pf) shall in turn notify PSC (ras). PSC (ras) shall transmit Endorsement on Orders transactions to transfer the reservist to RET-2 status.</p> | | |

Continued on next page

**Section B
SEPARATIONS**

Reserve Retirement Separations, Continued

Procedures For RET-2 Status Procedures for Retirement Awaiting Pay at Age 60 (RET-2) followed by Retirement With Pay (RET-1) upon reaching age 60.

Note: These steps apply only to those members who choose RET-2 status rather than continuing to drill.

| When | Who Does It | What Happens |
|---|--------------------|--|
| After completing 20 years of satisfactory service | PSC (ras) | Sends “20 Year Letter” notifying member of eligibility for RET-2 Retirement. Include Reserve Component Survivor Benefit Plan election forms. (RCSBP is optional at this time) |
| After receipt of “20 year letter”. | Member | May request transfer to RET-2 status by completing form CG-PSC-2055A from Enclosure (1) to this manual. Written requests are submitted to ISC (pf) via the chain of command. Requests must be for a future date and not sooner than three months from submission date to provide sufficient processing time. |
| Upon receipt of request for RET-2 Retirement | ISC (pf) | Forwards to PSC (ras). |
| Upon receipt of request for RET-2 Retirement | PSC (ras) | Forwards to member Retirement Information Package. Note: Members requesting RET-2 status who are not yet age 60 will receive retirement certificates at this time rather than at age 60 when transferred to RET-1 status. |
| RET-2 Retirement day | PSC (ras) | Transmits Endorsement on Orders transactions to RET-2 status. |
| RET-2 Retirement Day | Member | Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facility go to the following website: http://www.dmdc.osd.mil/rsl/owa/home . |

This page intentionally blank

Section Overview

Introduction This section will guide you through the procedures for reenlisting, extending, or retaining a member.

Continuous Pay Members reenlisting or extending/re-extending an enlistment are not separated from JUMPS on the date of reenlistment or extension/re-extension. JUMPS recognizes this service as continuous and, if all documents are input timely, pay continues uninterrupted.

In this section

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

Reenlistments and Voluntary Extensions/Reextensions

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

Reference (a) [PERSMAN](#), Chap 1
 (b) Direct Access Guide
 [Begin Extension](#)
 [Begin Re-extension](#)
 [Agreement to Extend](#)
 [Agreement to Re-extend](#)
 [Reenlistment](#)
 [Statement of Intent](#)

Process This is the process for Reenlistments and voluntary Extensions or Reextensions.

| When | Who Does It | What Happens |
|--|------------------|--|
| At least 45 days prior to effective date of reenlistment/extension/re-extension | SPO | Prepares and transmits a Statement of Intent (SOI) using Direct Access. |
| Notes: (1) If an Acceptance of Agreement to Extend/Reextend Enlistment transaction has processed in JUMPS then a Statement of Intent transaction is required to be submitted 45 days in advance only if the member is entitled to an SRB or if the member is selling leave. (2) Failure to submit this document in a timely manner may result in full stoppage of all pay, allowances and allotments. | | |
| Effective date of reenlistment/extension/reextension | SPO | Ensures Reenlistment Contract (DD Form 4/1) or Agreement to Extend/Reextend is signed and then transmits the Direct Access transaction in the Contract Data module. |
| If applicable | PSC (MAS) | Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the SRB. |
| If applicable | PSC (MAS) | Payment of the initial SRB installment will be included in the first regular pay period following successful processing of the reenlistment, extension or re-extension transaction. |
| If applicable | PSC (MAS) | Payment of any leave being sold will be included in the first regular end-month payment following successful processing of the reenlistment/extension transaction. |
| Note: The documents input by PSC (MAS) for credit of the SRB will not process in JUMPS until the reenlistment/extension/reextension document input by the SPO successfully processes. | | |

Section C
CONTINUANCE ON ACTIVE DUTY

Checklist for Reenlistment or Extension

Introduction This checklist provides a job aid to be used when a unit/SPO is completing necessary tasks for reenlistments or extensions and should be used along with the Checklist for Separations in section B of this Chapter. It is designed to be reproduced locally.

| Step | Action | Reference | Date |
|------|--|--|------|
| 1 | Ensure member meets eligibility requirements. | PERSMAN, 1-G | |
| 2 | Advise member: <ul style="list-style-type: none"> • Early reenlistment can effect SRB. The saved leave balance and regular leave balance on the effective date of separation. The number of days of leave previously sold during career. • If entering into an indefinite reenlistment, there will be no further opportunities to sell leave until separation or retirement. | PERSMAN, 3-C ALCOAST 317/04 | |
| 3 | Counsel member on SRB program. | PERSMAN, 3-C | |
| 4 | Ensure CG-3307 entry is completed for citizens of the Republic of the Philippines (see Pg-7 Instruction for sample entry). | PERSMAN, 12-B-47 PPPM, Encl (6) | |
| 5 | Ensure member completes a CG PSC-2045 Career Intentions Worksheet and forwards to SPO. | PPPM, Encl (6) | |
| 6 | SPO forwards appropriate documentation to unit for member's signature. | PPPM | |
| 7 | Unit returns signed documentation to SPO for input into Direct Access. | PPPM | |
| 8 | If member intended to discharge and decides to reenlist/extend, ensure member submits new CG PSC-2040 (Allotment Worksheet) (if allotments stop). | PPPM, Encl (6) | |
| 9 | Explain Article 137, UCMJ and code of Conduct, Complete Page 7 (CG-3307) entry. | PERSMAN, 8-A-1 ALCOAST 049/00 | |
| 10 | Verify U.S. citizenship. | PERSMAN, 1-G-5 | |

Continued on next page

Checklist for Reenlistment or Extension, Continued

SRB processing Process table for Selective Reenlistment Bonuses.

| WHEN | THEN |
|--|---|
| retention documents submitted by the SPO have successfully processed in JUMPS, | initial 50% SRB installment will be made within two pay periods. |
| lump sum payment is approved by COMDT (CG-1211) | lump sum SRB payments will be processed by PSC within 30 days after receipt and included in the member's first regular payment following successful processing of the reenlistment/extension transaction. |

Rules for payment of lump sum leave upon reenlistment or first extension of enlistment

See Art. [7-A-20, PERSMAN](#) for rules when selling leave upon reenlistment or entering the first extension an enlistment.

Payment for lump sum leave will be included in the first end month payment following successful processing of the reenlistment/or begin service under first extension transaction.

Procedures for members with more than 90 days remaining on first enlistment

Members who desire to sell leave, but are not within 90 days of their normal expiration of enlistment, should enter into an agreement to extend their enlistment to meet the obligated service requirement.

These members will be eligible to sell leave when their first extension of enlistment becomes effective.

Retention of Members in a Pay Status Other than Military Confinement

Introduction This includes members retained for reasons of Home Awaiting Orders Status (HOAS), cutter at sea, national emergency, failure to pass separation physical, etc., when stoppage of pay, allowances, and allotments should not occur.

Reference

- (a) [PERSMAN, Chap 12-B-11](#)
- (b) [PPPM, Chap 3-C](#)
- (c) [PAYMAN, Chap 2-L](#)
- (d) [Direct Access Online Manual, Contract Data](#)

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

| When | Action |
|--|--|
| Prior to retention | Review PERSMAN to determine length of time the enlistment is to be extended. |
| At least 45 days prior to effective date of retention | Prepare and transmit a Statement of Intent transaction to JUMPS. |
| Notes: (1) In cases of short notice (between 10 and 44 days prior to the retention date) the SPO is required to submit a Statement of Intent (SOI) transaction. (2) In cases less than 10 days prior to retention effective date, the SPO shall notify PSC (SES) in addition to preparing and transmitting an SOI. | |
| Effective date of retention | Prepare and transmit a new Contract in Direct Access to reflect the new EOE. |

Retention of Members in a Non-Pay Status or in Military Confinement

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

Reference

- (a) [PERSMAN, Chap 12-B-11](#)
- (b) [PPPM, Chap 3-C](#)
- (c) [PAYMAN, Chap 2-L](#)
- (d) [Direct Access Online Manual, Contract Data](#)

Procedures Procedures required by the SPO for retention of members in a non-pay status or in Military confinement.

| When | Action |
|--|--|
| Prior to retention | Review reference to determine length of time the enlistment is to be extended. |
| Note: Do not prepare a Statement of Intent transaction. | |
| Effective date of retention | Prepare and transmit new Contract in Direct Access to reflect the new EOE. |

Active Duty Extensions of Reservists and Recall of Retirees

Introduction This includes: Reservists on active duty being paid by JUMPS whose active duty period is extended; regular members retiring and immediately being recalled to active duty, and members currently in a recall from retirement status whose active duty is being extended.

Procedures Follow these procedures for all cases of active duty extensions of Reservists and recall of retirees.

- For reservist active duty extensions, the Reserve Orders will be modified and approved.
- For recalled retiree active duty extensions, the assignment officer will create orders and those orders will automatically generate the appropriate Reserve Orders Direct Access transaction (P192), without any action required by the SPO.

| When | Who Does It | What Happens |
|--|--------------------|---|
| At least 45 days prior to effective date | SPO | Prepares and transmits a Statement of Intent transaction. |
| 30 days prior to effective date | SPO | Modify and approve the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. |
| Notes: (1) In cases of insufficient lead time (less than 10 days), the SPO shall notify PSC (SES) via E-mail and provide all relevant information that would have been provided on the Statement of Intent. (2) If the member's active duty is being extended via an amendment to the member's original orders and the Orders Order End Date has been modified and transmitted in Direct Access to reflect the new active duty termination date 45 days or more prior to the member's expected active duty termination date, then an SOI is not required. | | |

Immediate Enlistment in Coast Guard Reserve upon Discharge from the Regular Coast Guard

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

Reference (a) PERSMAN
[Chap 1-G](#), Enlistment of Regular and Reserve Personnel
[Chap 3-C](#), Selective Reenlistment Bonus Program
(b) Direct Access Guide:
[Discharge to Immediate Enlistment Statement of Intent](#)

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

Procedures The ISC (fot) where the member will reside following separation from the regular Coast Guard must approve the member’s E-Resume before the member may enlist in the Coast Guard Reserve.

Detailed instructions for completing and processing the E-Resume can be found at <http://cgweb.uscg.mil/g-w/psc/Direct-Access/eresume/overview.htm>. The process is summarized on the [Checklist for Separations](#) in Section 3-B of this manual.

If approved for enlistment in the Coast Guard Reserve the member shall be processed for discharge from the regular Coast Guard using the Routine Separation Procedures listed in Section 3-B of this manual, and rehired into the Coast Guard Reserve by the SPO servicing the member at the time of separation.

Enlistment in Coast Guard Reserve after 24 hours Enlistment in the Coast Guard Reserve after 24 hours following discharge from the regular Coast Guard must be processed at a Coast Guard recruiting office.

Immediate Enlistment of Reserve Members on Extended Active Duty in the Regular Coast Guard

Introduction Coast Guard Reserve members serving on extended active duty of 12 months or more may be authorized to enlist in the regular Coast Guard if they meet eligibility requirements.

Reference (b) PERSMAN
[Chap 1-G](#), Enlistment of Regular and Reserve Personnel
[Chap 3-C](#), Selective Reenlistment Bonus Program
 (b) Direct Access Guide:
[Discharge to Immediate Enlistment](#)
[Statement of Intent](#)

Procedures The member shall be processed for discharge from the Coast Guard Reserve and for enlistment in the regular Coast Guard by the regular SPO handling the member's records, using the following procedures:

| When | Who Does It | What Happens |
|--|------------------|--|
| In time to allow approval prior to date of reenlistment | Member | Submits letter request for reenlistment to Commander (CGPC-EPM) via chain of command as prescribed in the reference. |
| At least 45 days prior to effective date of separation or departure on terminal leave. | SPO | Prepares and transmits a Statement of Intent (SOI) transaction to JUMPS. |
| Day of discharge | Unit | Delivers DD form 214 to member. |
| | SPO | Transmits a Discharge Separation transaction. |
| Day following discharge If applicable | SPO PSC (MAS) | Transmits a Rehire transaction. Calculates the full amount of Selective Reenlistment Bonus (SRB) and the amount of the initial SRB installment. Inputs any necessary transactions to record the Selective Reenlistment Bonus. |

Continued on next page

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

Reservist on extended active duty

Coast Guard Reserve members who desire to enlist in the regular Coast Guard, and who are NOT currently on extended active duty of 12 months or more, must be processed at a Coast Guard recruiting office.
