

PSCNOTE 1000  
29 March 2006

CANCELLED:  
28 March 2007

**PERSONNEL SERVICE CENTER NOTICE 1000**

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

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

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

**3. Directives Affected** None.

**4. Summary of Changes** A side bar in the margin marks the significant changes. Significant changes are summarized as follows.  
Section 2-A; Updated references and links on PCS Checklists. Added procedure for requesting advance PCS travel funds via FAX.  
Section 2-B; Replaced references to *Unit Travel System (UTS)* with *Travel Preparation and Examination System (T-PAX)*. Updated audit procedures and added sample statements to use when original orders or receipts are lost or missing.  
Section 2-E; Added section on Selected Reserve Assignments and Transfers.  
Page 3-B-18; Added a link to Preseparation Counseling Checklist (DD-2648-1) for Reserve members demobilizing or separating from active duty of 140 or more days.

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

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\*NON-STANDARD DISTRIBUTION:

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

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**5. Procedure** Remove and insert the following pages.

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N/A (New page added)	Page 2-A-11 (reverse blank)
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**6. Forms and Reports**

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

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

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**7. Printed Copies**

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

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

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**8. Comments and Recommendations**

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

  
V. M. WEBER

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	<b>Enclosure (2) -</b>	Standard Abbreviations for Transfer of Personnel
	<b>Enclosure (3) -</b>	Special Instructions for Block 12 of the CG-4251 (TDY Travel Order)
	<b>Enclosure (4) -</b>	Standard Separation Letters
	<b>Enclosure (5) -</b>	Vacant
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## Chapter Overview

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

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**In this chapter**

<b>Section</b>	<b>Description</b>	<b>See Page</b>
A	Permanent Change of Station - PCS	2-A-1
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D	Active Duty Other than Training - ADOT	2-D-1
E	Selected Reserve Assignments and Transfer	2-E-1

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## Section Overview

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

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**Section A**  
**PERMANENT CHANGE OF STATION**

## The PCS Transfer Process

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

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

Stage	Who Does It	What Happens
1	Member	Prepares E-Resume in Direct Access.
2	CG PERSCOM	Issues transfer order in Direct Access (Airport Terminal).
3	SPO	Notifies unit when order is received.
4	Member/Unit	Completes forms and worksheets for PCS departure, request for advance of travel funds, obligated service, passports, etc.
5	SPO	Approves and prints Direct Access orders.
6	PAO/PSC (TVL)	If requested, will process travel advances.
7	TO (TOPS site)	Counsels member and arranges shipment of HHG.
8	Unit	Endorses order upon departure.
9	SPO	Approves and transmits PCS Departing Transactions.
10	Member	Reports to new unit, prepares forms and worksheets for PCS reporting, travel claim(s), housing allowances, etc. <ul style="list-style-type: none"> <li>• Updates information (e.g. email address, home and mailing addresses, Emergency Contacts, etc.) in Direct Access.</li> <li>• Updates information (e.g. email address, home and unit addresses, default AO, etc.) in T-PAX.</li> </ul> Note: Do not submit final travel claim until all member/dependent travel is completed, when and advance of funds of taken.
11	New Unit	<ul style="list-style-type: none"> <li>• Endorses order with date and time reported and messing status (e.g. ENL BAS, ENL BAS MINUS DISC MEAL RATE).</li> <li>• Forwards the reviewed and signed approved travel claim(s) with original order/s to PSC (TVL).</li> <li>• Forwards worksheets to SPO w/ copy of the endorsed order.</li> </ul>
12	SPO	Completes PCS Reporting Transactions.
13	PSC (TVL)	Processes travel claim(s).



**Section A**  
**PERMANENT CHANGE OF STATION**

## PCS Departing Checklist

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

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

Step	Action	Reference	Date
1	Ensure member is eligible for transfer.	<a href="#">PERSMAN, 4-B</a>	
	Ensure member meets weight standards	<a href="#">Weight and Physical Fitness Standards, COMDTINST 1020.8(series)</a>	
	Ensure member meets obligated service requirements for transfer. Complete <a href="#">CG PSC-2045</a> , Career Intentions Worksheet and forward to SPO if member needs to extend enlistment	<a href="#">PERSMAN, 4-B-6</a>	
	Counsel member on SRB entitlement if additional obligated service is required.	<a href="#">PERSMAN, 3-C</a>	
2	Complete member screening for assignment to semi-isolated units (if applicable) and administrative assignments.	<a href="#">PERSMAN, 4-E</a>	
3	Complete PERSMAN, <b>Exhibit 4.A.15., “Coast Guard Sponsor Notification,”</b> and send it to the member’s destination unit to arrange for sponsor services.	<a href="#">PERSMAN, 4-A-15.b.7</a>	
4	Counsel member on PCS travel entitlements, and complete PCS Entitlements Worksheet ( <a href="#">CG PSC-2003</a> ). <b>Note:</b> Per ALCOAST 514/05 ferry tickets for transfers to and from Alaska and airline tickets for travel to or from OUTCONUS <u>shall be charged against a GTA account</u> and <b>not</b> the member’s individually billed government travel charge card. All other airline tickets for PCS travel may be charged against a GTA account or the member’s individually billed account.	<a href="#">CGS-JFTR, Chapter 5</a>	
5	Verify member’s entitlement to FSH and/or FSA-R and BAH allowances. <ul style="list-style-type: none"> <li>Complete <a href="#">Basic Allowance for Housing Rate Protection Worksheet (CG PSC-2025A)</a> if member is eligible for, and desires to apply for, BAH Rate Protection. Forward completed worksheet to COMDT (CG-1222 for approval).</li> </ul>	<a href="#">PAYMAN, 3-F</a>	
6	Complete PCS Departing Worksheet ( <a href="#">CG PSC-2000</a> ), and, if applicable, a PCS/TEMDUINS to “A” school worksheet ( <a href="#">CG PSC-2001</a> ). Forward to SPO for data entry.		

*Continued on next page*

**Section A**  
**PERMANENT CHANGE OF STATION**

**PCS Departing Checklist, Continued**

**Checklist (continued)**

<b>Step</b>	<b>Action</b>	<b>Reference</b>	<b>Date</b>
7	Ensure ID cards for member and dependents are valid	<a href="#">ID CARD INST</a>	
	Verify that member's dependents are enrolled in DEERS and instruct member on procedure for reporting change of address to DEERS.	<a href="#">PPPM, 5-B-17</a>	
8	Ensure member has an appointment scheduled with transportation office (TOPS site) to arrange shipment of HHG	<a href="#">CG Personnel Property Transportation Manual</a>	
9	If member is being assigned to a unit that deploys overseas (WHEC/WAGB/WMEC/NSC, TACLET, TRATEAM, etc.) ensure member completes application for Official Passport.	<a href="#">PASSPORT INST</a> (Procedures for obtaining Official (no-fee) Passports can be found at the G-CI web site at <a href="http://www.uscg.mil/international/">www.uscg.mil/international/</a> )	
10	If member and/or dependents will be required to travel outside of the U.S. in order to reach new duty station (e. g. PDS is in Alaska and travel via Canada), ensure member and dependents obtain passports.		
11	Complete <a href="#">SF-1038</a> for travel advances.	<a href="#">CGS-JFTR 2300</a>	
	Fax copy of original order and SF-1038 to PSC (TVL) for travel advances.	<a href="#">PPPM 2-A-11</a>	
12	Prepare PCS Departing Transactions (SPO)	<a href="#">Direct Access Guide, PCS</a>	
13	Transfer Government Travel Charge Card account to coordinator at the new PDS	<a href="#">Charge Card Instruction</a>	
14	Complete an Enlisted Employee Review (EER). <u>E7 and above</u> - if on the date of detachment 184 or more days have elapsed since the last EER was completed.	<a href="#">PERSMAN, 10-B-5</a>	
	<u>All Others</u> - if on the date of detachment 92 or more days have elapsed since the last EER was completed.	<a href="#">Direct Access Guide, EER</a>	
15	Ensure security debriefing is conducted	<a href="#">PERSEC</a>	
16	Review PDR	<a href="#">PDR Manual</a>	
	Forward SPO PDR and Unit PDR to receiving SPO		
17	Ensure medical record custodian forwards Medical PDR directly to the receiving medical facility via certified mail.	<a href="#">MEDMAN, Chapter 4</a>	

**Section A**  
**PERMANENT CHANGE OF STATION**

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## PCS Reporting Checklist

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

**Reporting checklist** Action upon member reporting.

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

**Section A**  
**PERMANENT CHANGE OF STATION**

## Overseas/OUTCONUS Transfer Checklist

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

<b>Step</b>	<b>Action</b>	<b>Reference</b>	<b>Date</b>
1	Ensure that message concerning overseas transfer with list of screening questions is received from the overseas command to which the member is ordered.	<a href="#">PERSMAN, 4-H-2</a>	
2	Determine member and/or dependents for suitability within 10 days of receipt of transfer order. Use the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN, "Overseas Screening for Active Duty Dependents", Exhibit 4-H-2.b of the PERSMAN, and the list of screening questions sent by the overseas command to complete the interview.	<a href="#">PERSMAN, 4-H-2</a>	
3	Ensure the servicing SPO supervisor has verified for completeness and signed the "Command Checklist for Overseas Screening", Exhibit 4-H-2 of the PERSMAN.	<a href="#">PERSMAN 4-H-2</a>	
4	Ensure the member <u>and dependents</u> are medically qualified for overseas transfer. The member must have an approved overseas physical including immunizations and any essential dental treatment completed within the last 6 months. <b>Note:</b> Per ALCOAST 098/06 commands may submit screening packages with the medical screenings and physicals portion still pending, but must indicate the exact dates the physicals and screenings are scheduled. In addition, the requirement to complete blocks 9.B. and 9.C. of Part Two, of PERSMAN Exhibit 4.H.2.B is waived by ALCOAST 098/06 and ALCOAST 235/05.	<a href="#">PERSMAN, 4-H-3</a> <a href="#">MEDMAN, 3-A-7</a>	
5	Ensure member and dependents <ul style="list-style-type: none"> <li>• have valid ID cards</li> <li>• have International Certificates of Vaccination PHS-731 (if required)</li> <li>• are provided with detailed information concerning tour length and have elected an appropriate tour</li> <li>• are counseled regarding overseas station allowances when member is assigned to a restricted area and dependents reside in an area outside the U.S.</li> </ul>	<a href="#">PERSMAN, 4-H-7</a>	
6	Ensure the member has made arrangements for a Passport and Passports for dependents. If PDS is outside the U.S. or if the member and/or the member's dependents will be required to travel outside of the U.S. in order to reach new duty station (e. g. PDS is in Alaska and travel via Canada), passports are required.	<a href="#">Passport Instruction</a>	
7	Ensure member, if in pay grade E-2 thru E-6, has a valid driver's license.	<a href="#">PERSMAN, 4-H-7.d</a>	
8	Send entry approval request message to overseas command. <b>Note:</b> Ensure that the overseas command has received a copy of the Command Checklist for Overseas Screening prior to requesting approval. <b>Exceptions:</b> 1) Per ALCOAST 020/06 TRACEN Cape May can grant entry approval for recruit graduates without dependents who do not intend to acquire dependents enroute to new PDS. 2) Per ALCOAST 078/06 CG Academy can grant entry approval for Academy, OCS and DCO graduates without dependents who do not intend to acquire dependents enroute to new PDS	<a href="#">PERSMAN, 4-H</a>	

## FAX of PCS Advance Requests

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**PCS Advance Requests:** Fax the following documents for PCS Advance:

- A fax cover sheet that identifies the originator, the member's full name and SSN, authorizing official's name, and unit name with phone number.
- A completed original PCS Travel Order signed by the authorizing official. Ensure PCS travel advance entitlements are authorized on orders.
- A completed original [SF-1038 "Advance of Funds Application and Account"](#) with the authorizing official's signature (Original signature in ink, not stamped). Blocks 1 through 10 on the SF-1038 must be completed. PSC (TVL) will mail the completed travel voucher summary to the traveler's address in block 9d of SF-1038. A traveler who submits a command approved PCS Departing Worksheet requesting an advance does not need to sign the SF-1038. Their signature is on the PCS Departing Worksheet; type "Signature on File" in the signature block of the SF-1038.

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**Where to Fax:**

**Fax #:** (785) 339-3775

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**Section B**  
**Temporary Duty**

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## Section Overview

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

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**In this section**

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## **The Temporary Duty (TDY) Order**

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

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

---

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

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

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

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*Continued on next page*



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## Travel Preparation and Examination System (T-PAX) Process

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

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

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

---

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

---

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

---

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

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**Section B**  
**Temporary Duty**

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

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

Stage	Who	When	What Happens	
1	Traveler	For TDY Order: Prior to departure on TDY. For TDY Settlement: Within 3 days of completion of TDY.	Complete Request For TDY Authorization and "Send to AO" for approval. Complete Request For TDY Settlement and "Send to AO" for approval. <ul style="list-style-type: none"> <li>Forward original travel order and receipts to AO.</li> </ul>	
2	AO	Within 2 days of receipt from member.	Reviews TDY Authorization and TDY Settlement in T-PAX for accuracy and completeness. <ul style="list-style-type: none"> <li>If error, return to Traveler w/remarks to correct.</li> <li>If accurate and complete, release in T-PAX, as approved, to PSC.</li> </ul>	
3	PSC (TVL)	Daily.  <b>In WINIATS:</b>	<ul style="list-style-type: none"> <li>Conduct export routine to create batch of T-PAX transactions.</li> <li>Conduct import routine to download T-PAX batch to WINIATS for computation and release to FINCEN.</li> </ul>	
			<b>If travel voucher is:</b>	<b>Then:</b>
			Complete and accurate	Release claim blocks to FINCEN for payment.
			Incorrect or incomplete	<ul style="list-style-type: none"> <li>Utilize workaround if one exists for the particular problem.</li> <li>Return claim for subsequent submission by traveler if workaround doesn't exist.</li> </ul>
4	PSC (TVL) PAO	PAO requests original travel claim for member on a random basis	Conduct audit to verify as complete, accurate and in accordance with Federal Travel Rules and Regulations. <ul style="list-style-type: none"> <li>If underpayment due to traveler and/or AO oversight, the responsibility is on the traveler to submit a supplemental claim to receive entitlement.</li> <li>If underpayment due to system error, supplemental will be processed by PSC (TVL).</li> <li>If overpayment due to system error or due to traveler and/or AO oversight, PSC (TVL) will submit supplemental to establish collection of debt.</li> </ul> <b>Note:</b> A traveler, whose total entitlement is less than an applicable government travel advance, will be sent a letter of indebtedness for collection of overpayment.	
5	Member	If audited	Mails <i>copies</i> of original orders, claim, and receipts within 2 days of notification. <i>See the page 2-B-17 for audit procedures and mailing address.</i>	

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

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**Critical  
Elements**

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

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

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

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

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

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

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

---

**User  
Categories**

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

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

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*Continued on next page*

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

**User Categories/  
Privileges**

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



Figure 1: T-PAX Log in as menu.

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

## The Traveler

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

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

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

Non-T-PAX Travelers are:

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

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

---

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

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

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

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## **The Proxy**

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

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**Who Can Be a Proxy**      Any traveler can act as a Proxy for another member of the same unit.

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**Limits**              Travel documents prepared by a Proxy can only be forwarded to the traveler.

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## The Signature Proxy

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

---

**Who Can Be a Signature Proxy** Any person in the same unit can be designated a Signature Proxy by a traveler.

---

**Designation Procedure** The traveler designates the Signature Proxy in their personal profile.

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

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## The Approving Official (AO)

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

---

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

---

**AO  
Duties**

AO's must:

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

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

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*Continued on next page*



## **The Approving Official (AO), Continued**

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

---

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

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

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

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

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**Section B**  
**Temporary Duty**

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**PSC**

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

---

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

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

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## The CG Finance Center (FINCEN)

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

---

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

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

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## Records Maintenance

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

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

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

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

Receipts are required for:

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

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

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## Audits (Reviews)

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

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

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**Travel  
Claim  
Package**

The Audit Travel Claim package will consist of:

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

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

---

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

<b>Who</b>	<b>Responsibility</b>
PSC (TVL)	<ul style="list-style-type: none"><li>• Initiate audit requests for specific claims by e-mail to the traveler. Further instructions will be provided at the time of the audit request.</li><li>• Audit claims by comparing T-PAX travel claim information with submitted audit package.</li><li>• If an incorrect payment is found during the audit, a credit or pay adjustment authorization (PAA) will be issued to resolve the travel discrepancy.</li></ul>

*Continued on next page*

**Section B  
Temporary Duty**

**Audits (Reviews),** Continued

<b>Who</b>	<b>Responsibility</b>
PSC (TVL)	<ul style="list-style-type: none"> <li>• Notify traveler of first audit request via e-mail. If a requested audit is not received within one month, a second request is sent. If a requested audit is not received within two months, a third and final request is sent via email to the traveler and traveler's command. If a requested audit is not received within three months after the initial audit request, the traveler will be placed in an overpayment status and collection action will be taken. All of these e-mail notifications are sent first using the travelers T-PAX email address and secondly using their Direct Access e-mail address. <b>It is imperative that members ensure their e-mail address in both T-PAX and Direct-Access are current.</b></li> <li>• Claims received from units will NOT be returned.</li> <li>• Claims that do not result in an overpayment of travel entitlements and have original orders and/or receipts will be returned to traveler using their most current address in Direct Access.</li> <li>• Notifies traveler via e-mail that audit package has been received at PSC.</li> <li>• Initiate and mail Pending Audit Reports to units providing notification of audit requests.</li> <li>• Return incomplete audit packages to travelers for corrective actions.</li> </ul>
Traveler	<ul style="list-style-type: none"> <li>• Mail travel claims package for T-PAX audits to:            Commanding Officer (TVL- T-PAX Audits)            U. S. Coast Guard            Personnel Service Center            PO Box 3551            Topeka, KS 66601-3551</li> <li>• For travel claim packages being sent via DHL or other express service, mail to the following address as these companies do NOT deliver to a PO Box:             Commanding Officer (TVL- T-PAX Audits)            U. S. Coast Guard            Personnel Service Center            444 SE Quincy Street            Topeka, KS 66683-3591</li> </ul>

*Continued on next page*

**Section B  
Temporary Duty**

**Audits (Reviews),** Continued

<b>Who</b>	<b>Responsibility</b>
Traveler (cont)	<ul style="list-style-type: none"> <li>• Do NOT mail original orders, amendments, and receipts with your travel claims package, <b>send copies</b>. You are required to keep the original documents for six years and three months following completion of travel.</li> <li>• Notify T-PAX AO immediately of any known discrepancies or changes to audited original travel claims.</li> <li>• Travelers can request a suspension of an audit due to operational commitments. Requests need to be submitted to PSC Customer Care. Requests must include the claim number and the estimated ending date of suspension. Submit requests via the PSC web site: <a href="http://www.uscg.mil/hq/psc/customerservice.shtm">http://www.uscg.mil/hq/psc/customerservice.shtm</a>.</li> <li>• Is responsible for repayment of monies received due to erroneous information provided on original claim submission. Do NOT send any cash, checks, or money orders to PSC (TVL). Please make your check or money order payable to "U.S. Coast Guard", and write your SSN and TONO on your payment. Include a copy of your official notice of travel overpayment letter and send your payment to:   ART/OTHERS  U. S. Coast Guard ART/OTHERS  PO Box 403391  Atlanta, GA 30384-3391</li> <li>• If an audit results in an overpayment, travelers are not authorized to submit subsequent claims in T-PAX to cancel the debt. If a supplemental travel claim is necessary to offset the debt the supplemental claim package must be mailed to PSC (TVL-T-PAX Audits).</li> <li>• Take corrective action on returned claims and resubmit for audit within 10 days.</li> <li>• Maintain original orders, amendments, travel claim, and receipts for a period of 6 years and 3 months.</li> </ul>

**Audits (Reviews), Continued**

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**Audit  
Request  
Information  
Packages**

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

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

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

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

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

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

---

**When Amendments Are NOT Authorized**

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

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

---

**Amendments Cannot Be Used to Deny an Entitlement**

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

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

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

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## **Blanket Travel Orders**

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**Definition** A Blanket Travel Order is a TDY Order that covers repeated travel over an extended period of time.

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**Reference** JFTR, U2140-B and U2015

---

**Requirements** Blanket Travel Orders must meet the following requirements.

- Be an order for an individual.
  - Define the time period covered by inclusive dates.
  - Inclusive dates to not cross fiscal years (30 Sep/01 Oct).
  - Define the geographic area in which travel can be performed.
- 

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

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**Quarterly Order** In a situation of almost constant travel (e.g., the sum of the TDY travel is expected to be 1 out of 3 months), a quarterly travel order may be appropriate.

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**Order For a Period in Excess of a Quarter** Only under the most continuous travel circumstances (e.g., the sum of the traveler's TDY period is expected to equal or exceed 6 months) should a Blanket Travel order for a period in excess of a quarter be issued.

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

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## **Group Travel Orders**

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

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

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

---

**Identifying the Travelers**    The name of the senior traveler of the group will appear on the order with other travelers listed on an attachment that is a part of the order.  
Example: TO: LTJG/O2 SAFE T. HATCH 000-00-0000, USCGR and group (see attached)  
• This procedure generally enables changing only the attached list when the membership of the group changes before travel begins.  
• If the senior member changes, the basic order must be redone.

---

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

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

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

The last entry must be “AND NO OTHERS”.

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## Leave and Liberty Combined With TDY Travel

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

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

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

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

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

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**Example 1:  
Member  
Departs Early** Situation: Travel that should commence on January 8 but actually commences on January 6.

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

---

**Example 2:  
Member to  
Return Late** Situation: Travel that should commence on January 8, and should end back at the permanent duty station on January 13 but will actually end on January 15.

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

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*Continued on next page*

## Leave and Liberty Combined with TDY Travel, Continued

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**Example 3:  
Member to  
Depart Early  
and Return  
Late**

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

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

---

**Section B  
Temporary Duty**

## Pay Entitlements Affected by TDY

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

**Reference**      PAYMAN

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

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

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

**Section B**  
**Temporary Duty**

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

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

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

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

*Continued on next page*

**Section B**  
**Temporary Duty**

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

**Procedure,**  
continued

<b>Block</b>	<b>Entry</b>	<b>Ref.</b>
9.a Cmd, Dist., Firm or Org.	The name(s) of the TDY activity(ies)  Example: TRACEN PETALUMA CGDSEVEN	
9.b Location	The geographic location(s) including county(ies) if in CONUS  Example: Sonoma County, CA Miami (Dade County) FL	
9.c Date/ Time	Used if desired by the order issuing command to specify the reporting date and time. Time is expressed using the 24-hour clock and the date is expressed in the DDMMYYYY format.  Example: 2400 22OCT1998	
9.d Revisit	<ul style="list-style-type: none"> <li>• YES if traveler is authorized to revisit the TDY location(s)</li> <li>• NO if traveler is not authorized to revisit the TDY location(s)</li> </ul>	
10.a Registration Fee	<ul style="list-style-type: none"> <li>• Registration fees reimbursement is authorized/approved when such fees are a condition for attendance.</li> <li>• Indicate in remarks (block 12) if the registration fee includes the cost of any meals and/or lodging.</li> </ul>	JFTR U4535
10.b Excess Baggage	<ul style="list-style-type: none"> <li>• Any accompanied / excess baggage to be carried at government expense in connection with the TDY travel.</li> </ul>	JFTR U3015
10.c Local Travel	<ul style="list-style-type: none"> <li>• Check the box if reimbursement for travel in the area of the temporary duty station is authorized.</li> </ul>	JFTR U3300 JFTR U3510
10.d 1st class jet	<ul style="list-style-type: none"> <li>• Leave blank, unless approval for use of first-class air accommodations has been received from the Commandant or Vice Commandant.</li> <li>• See DOT Travel Guiding Principles and submit Exhibit B – Request for Approval of Premium – Class Accommodations to COMDT (G-WPM-2)</li> </ul>	JFTR U3125, DOT Travel
10.e U-Drive GSA Veh.	<ul style="list-style-type: none"> <li>• <u>Leave blank</u>, rental car authorization (if any) will be entered in block 12 (remarks)</li> </ul>	
10.f Days Leave	<ul style="list-style-type: none"> <li>• The number of days leave authorized (if any). The leave must also be authorized on a CG-2519 (Leave Authorization)</li> </ul>	PPPM 5-D-2
11 Mode of Travel	<ul style="list-style-type: none"> <li>• <u>Leave blank</u>, use block 12 (remarks) to authorize or direct the mode of travel.</li> </ul>	PPPM Enclosure (3)



**Section B**  
**Temporary Duty**

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## Preparation of TDY Order (CG-4251) Block 12

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- Introduction**      Block 12 of the CG-4251 is used to
- document WHY the travel is being performed
  - document WHAT is intended to be accomplished
  - show HOW the travel is to be performed
  - indicate expenses authorized
  - indicate travel advances authorized
  - enter any special provisions for the travel
  - document the availability/non-availability of government quarters
  - indicate TYPE of messing available
- 

- Reference**            (a) JFTR, U2015  
                              (b) PPPM, Encl. 3
- 

- Instruction**        Follow these instructions to complete block 12 of the CG-4251.
- Example entries can be found in enclosure (3) to this manual.

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

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**Section B**  
**Temporary Duty**

---

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

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

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**Section B**  
**Temporary Duty**

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

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

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**Procedure**      Use these instructions to complete blocks 13-19.

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

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Section B  
Temporary Duty

Letter Travel Orders

U.S. Department of  
Homeland Security

United States  
Coast Guard



COMMANDING OFFICER  
USCG PERSONNEL  
SUPPORT CENTER

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

XXXX  
3 Jan 2004

MEMORANDUM

From: JOE BOSN, CGC NEVERSAIL

Reply to: TONO  
Attn of: XX/XX/XXXXXXXXXX000

To: BM1 C. Sick XXX XX XXXX, USCG

Subj: ORDERS; TEMPORARY DUTY; TRAVEL ORDERS

1. You are authorized to proceed from time to time during Fiscal Year \_\_\_\_\_ to such places within and beyond the continental limits of the United States as may be necessary on official business of the Coast Guard. Upon completion thereof, you will return to your permanent duty station for resumption of regular duty.
2. **Your TONO is XX/XX/XXXXXXXXXX000.** Travel necessary to the execution hereof is required by the public interests and is authorized chargeable against Coast Guard Accounting Data X/X/XXX/XXX/XX/X/XX, cost center XXXXX. Travel within CONUS is chargeable against object code XXXX.
3. Travel via government transportation is directed beyond the continental limits of the United States wherever available. Travel via commercial carrier is authorized when government contract carrier is authorized in order to satisfy travel schedule requirements. For MAC, Class Two priority is certified.
4. Travel via privately owned conveyance is authorized providing it has been administratively determined, for each travel segment, that this mode of travel is clearly more advantageous to the government. Local travel via streetcar, bus, subway, street railway, train, etc., is authorized. The use of taxicabs at your temporary duty station is authorized subject to the restrictions outlined in paragraph JFTR U3510. Hire of special conveyance (GSA vehicle or rental vehicle) is authorized as set forth in paragraph JFTR U3415. Excess baggage is authorized.
5. Registration fees for conferences, seminars, etc., are authorized.
6. The provisions of chapter 4 of the Joint Federal Travel Regulation, governing per diem rate and reimbursable expenses shall apply under these orders. Authorizations for Actual Expenses Allowance must be authorized on a trip by trip basis made by a separate endorsement. The endorsement must indicate the location and of Actual Expense.
7. Possession of valid TOP SECRET clearance is certified. Prior to departure, you will, as required, avail yourself of Defensive Security Briefing procedures as set forth in Coast Guard Security Manual, M5500.11A.
8. No proceed time is allowed under these orders.
9. The authority contained herein will expire 30 September, 2004, or upon relief of your duties as Director of Resources.

#

## **Authenticated Original Message Order**

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

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- Types**
- That official telecommunication message traffic may be used as a travel order. Messages that fund and direct official travel can be modified in a travel order authenticating process and used instead of TDY travel order forms CG-4251 or CG-5131. The message would contain the same travel data as the form. Simple – Print it, Endorse it, Sign it, and mark as “Original”.
- Message Traffic**
- Like message traffic, electronic mail (e-mail) can also be used as a travel order. Such e-mail must comply with COMDTINST 5270.1d (Management of Electronic Mail).
- E-mail**
- TDY training orders issued by Training Quota Management Center (TQC) via the Direct-Access Airport Terminal are on form CG5131. Simple – Print it, Endorse it, Sign it, and mark as “Original”.
- TQC**
- 

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

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

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

*Continued on next page*

Section B  
Temporary Duty

---

## Authenticated Original Message Order, Continued

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**Message  
Endorsement**

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

QUOTE

(Type in the current date)

FROM: CO (OINC), LONG TITLE NAME OF UNIT

TO: RANK/RATE TRAVELER'S FULL NAME, SSN

1. YOU ARE DIRECTED TO TRAVEL TDY AS DESCRIBED HEREIN AND RETURN AND RESUME REGULAR DUTIES THEREAFTER. FOLLOW GUIDELINES ESTABLISHED IAW THIS MESSAGE TRAVEL ORDER CONSISTING OF (#) PAGES. UNLESS OTHERWISE DIRECTED, THE ACCEPTED MODE OF TRANSPORTATION IS: (AS APPROPRIATE).

2. YOU ARE (ARE NOT) A GOVERNMENT TRAVEL CHARGE CARD HOLDER. A TRAVEL ADVANCE IN THE AMOUNT OF (\$000.00) IS AUTHORIZED AND SHOULD BE OBTAINED VIA (ATM OR TRAVELERS CHECKS). IF TRAVEL ADVANCE IS CHARGED TO THE USCG, ATTACH SF-1038 ADVANCE APPROVAL.

3. YOUR PERMANENT DUTY SUBSISTENCE ALLOWANCE IS:

(INDICATE EITHER: PARTIAL BAS, SEPRATS, OR ENL REG BAS OR OFF BAS)

4. (PLACE ADMIN MATTERS HERE, IE, AUTH LEAVE, MAW COMPLIANCE, ETC) SUBMIT YOUR TRAVEL CLAIM WITHIN 3 DAYS AFTER RETURNING FROM TDY FOR REVIEW AND APPROVAL BY YOUR SUPERVISOR.

//S//

AUTHORIZING OFFICIAL SIGNS MSG/E-MAIL

INSERT AO PHONE NUMBER AND DATE.

UNQUOTE

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

---

*Continued on next page*

**Section B  
Temporary Duty**

## Temporary Duty (TDY) Checklists

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

**TDY Departing checklist** Use this checklist when a member requires a TDY order.

Step	Action	Reference	Date
1	Counsel member on travel and pay entitlements	JFTR, Chap. 4 PPPM, 2-B-29	
2	Set up travel arrangements. If member is going TDY to "A" School, and an airline ticket is issued, ensure it is a round trip ticket.	Local policy	
3	Get Commandant (CG-1222) approval if TDY will be over 180 days	CGS-JFTR, 2145	
4	Complete travel order	PPPM, 2-B-25	
5	Ensure member has sufficient funds; arrange for advances if needed	CGS-JFTR, 2300	
6	Ensure member has sufficient obligated service	PERSMAN	
7	Ensure member has proper security clearance	PERSEC	
8	Ensure member meets weight standards (if applicable)	Weight Instruction	
9	Complete PCS/TEM DUINS to "A" School worksheet (CG PSC-2001) if member is going TDY to "A" School.	Local Policy	
10	If the TDY period is expected to be over 30 days, send a copy of the order, endorsed with the date and time the member departed, to the SPO so that pay entitlements affected by TDY can be stopped/started	PPPM, 2-B-24 Direct Access Guide	
11	<b>If</b> the member has dependents	<b>And</b> the TDY period is expected to be over 30 days	<b>Then</b> provide the member with an FSA Worksheet
	Instruct the member to complete and submit the FSA Worksheet to the SPO, with a copy of the TDY order on the 31st day away from the permanent duty station		
12	Forward SPO PDR to TDY unit's SPO if TDY is over 60 days.	PDR Instruction	

*Continued on next page*

**Section B**  
**Temporary Duty**

## Temporary Duty (TDY) Checklists, Continued

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

Step	Action	Reference	Date
1	Receive copy of TDY order		
2	Verify member reports for TDY. If member fails to report, notify the permanent unit.	PPPM, 10-B-4	

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

Step	Action	Reference	Date
1	Ensure member traveled in accordance with the order. If member was required to deviate from the order as issued, ensure any necessary amendments and/or endorsements have been affixed to the original order	JFTR, 4400	
2	Ensure member submits travel claim to supervisor within 3 working days of return	PPPM, 2-B-4	
3	Ensure supervisor reviews the travel claim and signs and dates block 16 within 2 working days	PPPM, 2-B-4	
4	Provide the SPO with a copy of the order, endorsed with the date and time that the member returned to the unit and a copy of the member's travel voucher, so that the pay entitlements affected by TDY can be stopped/started	PPPM, 2-B-23	
5	Ensure the travel claim, original order, and receipts are forwarded to PSC (TVL)	PPPM, 2-B-4	
6	Forward Career Development Worksheet (PSC-2030), to SPO to report school completion or addition of enlisted qualification codes.		
7	Review and complete PCS/TEM DUINS to "A" School (CG PSC-2001) if member is returning from TDY to "A" School.		
8	Submit Direct Access transaction to change BAS (unless the member is not required to eat at a government messing facility at <u>both</u> the permanent unit <u>and</u> the TDY unit).	Direct Access Guide, BAS	



## Reimbursement Methods

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**Introduction** This section covers various reimbursement methods used during TDY.

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

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**Per Diem Definition** Per Diem is a daily fixed allowance based on geographic locality used to reimburse travelers for lodging, meal and incidental expenses incurred while performing official travel. This allowance is separate from transportation and other miscellaneous expenses.

*Note: Current locality per diem rates are available at  
<https://secureapp2.hqda.pentagon.mil/perdiem/rateinfo.html>*

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**Per Diem Types** Normal Lodging Plus Rate (LDP):

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

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

*Continued on next page*

## **Reimbursement Methods, Continued**

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**Per Diem  
Types,  
continued**

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

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

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

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

Training (TNG):

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

Field Duty:

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

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*Continued on next page*

## Reimbursement Methods, Continued

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Per Diem  
Types,  
continued

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

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

Special or Reduced Per Diem (SPR):

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

Inpatient:

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

- Assigned to Rehab Center (REH)  
There is no per diem entitlement for travelers while assigned TDY to a rehabilitation center where both government quarters and mess are available. See JFTR, U7125.
- No Per Diem (NP)  
There are some other circumstances where per diem is not authorized for travel. Some examples are:
  - Travel or TDY Within PDS Limits - Except as for JFTR, U4105.H per diem is not payable for travel or TDY within the limits of the PDS.
  - Round Trips Within 12 Hours - Per diem is not payable for any period of TDY that is performed entirely within 12 hours.

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

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*Continued on next page*

## **Reimbursement Methods, Continued**

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### **Travel Settlement Defaults**

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

- **Government Messing**

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

- **Quarters**

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

- **Transportation**

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

- **Other Expenses**

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

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

Receipts are required for:

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

## Manual Submission of Travel Claims

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

---

**The Travel  
Claim  
Package**

The following items are required for each travel claim:

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

**Lost or Missing Original Orders**

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

Member Name: \_\_\_\_\_ Date: \_\_\_\_\_

Travel Order Number: \_\_\_\_\_

Accounting Data: \_\_\_\_\_

Dates Of Order: \_\_\_\_\_ to \_\_\_\_\_

Place Ordered From and To: \_\_\_\_\_

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

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

Signature: \_\_\_\_\_  
Printed Full Name, Signature & Emplid

Signature: \_\_\_\_\_  
Printed Full Name, Signature & Emplid  
Authorized Certifying Official

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*Continued on next page*

**Section B  
Temporary Duty**

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## Manual Submission of Travel Claims, Continued

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**The Travel  
Claim Package  
(Cont'd)**

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

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

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

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

Signature \_\_\_\_\_  
Printed Full Name, Signature & Emplid

Signature \_\_\_\_\_  
Printed Full Name, Signature & Emplid  
Authorized Certifying Official

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

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

**Travel  
Voucher  
Submission**

Review the travel claim package to ensure it is complete, correct; and that all entitlements are claimed. Review with the "Traveler's Checklist".

Prior to submitting the travel claim package to your supervisor for admin review, make a complete copy for your records. It is important to keep a copy in case you need to submit a supplemental claim or the claim is lost in the mail. You must retain copies of your travel claims for six years and three months from the date of settlement of the claim. PSC (TVL) will not return the original travel claim package.

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

*Continued on next page*

**Section B**  
**Temporary Duty**

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## **Submission of Manual Travel Claims, Continued**

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**Payment**

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

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

---

**Non-receipt of Payment**

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

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

<http://cgweb.uscg.mil/g-w/psc/customerservice.shtm>  
or call: (785) 339-2000 or 1-888-872-8724

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

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*Continued on next page*

**Section B**  
**Temporary Duty**

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**Submission of Manual Travel Claims**, Continued

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**Mailing  
Procedures**

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

Address
COMMANDING OFFICER (TVL) COAST GUARD PERSONEL SERVICE CENTER TOPEKA KS 66683-3591

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

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## Rules for Claiming Official Phone Calls

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

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

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

---

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

For calls made within the Continental United States:

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

Outside the Continental United States

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

## Accounting Data

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

---

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

---

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

<b>Type of order</b>	<b>Example</b>
TAD	<u>1106234PBZA73000</u>
PCS, Retirement, Discharge	<u>1206234P23704000</u>
Blanket or Repeat	<u>1306234ZM1233000</u>

Note: Industrial site TONOs differ from this restriction.

---

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

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

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*Continued on next page*

**Section B**  
**Temporary Duty**

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**Accounting Data, Continued**

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**Reimbursable  
Agreement  
Numbers  
(RAN)**

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

Produce Travel orders and assign a routine TONO & Accounting String

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

An example of a RAN accounting string and TONO follows:

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

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

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

---

**Document Type  
33 and DITY  
Moves**

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

Send Document Type 33 and DITY move claims to:

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

ATTN: MISC. REIMB.

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**Section D**  
**ACTIVE DUTY OTHER THAN TRAINING**

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**Accounting Line Data for ADSW-AC Orders, Continued**

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<b>Field</b>	<b>Function</b>
0 - Allotment Level Indicator Code (ALIC)	<ul style="list-style-type: none"><li>• This field will always be 0.</li></ul>
16 - Program Element (PE)	<ul style="list-style-type: none"><li>• This is the “source of funds” for procurement. Up to six positions may be used for projects in other appropriations. Some large units have multiple Program Elements. For most units, this field will be constant.</li></ul>
12345 - Cost Center	<ul style="list-style-type: none"><li>• Normally the benefiting units OPFAC.</li></ul>
117K - DOT Standard Object Class	<ul style="list-style-type: none"><li>• 117J - Commissioned &amp; Warrant Officers Pay &amp; Allowances</li><li>• 117K - Enlisted members Pay &amp; Allowances</li><li>• 1220 - FICA Tax - Officers</li><li>• 122R - FICA Tax - Enlisted</li><li>• 2100 - General Operational Travel. The travel object class may vary. See FINCEN SOP, Appendix F (<a href="http://www.fincen.uscg.mil/sop/appendix/appenf.pdf">http://www.fincen.uscg.mil/sop/appendix/appenf.pdf</a>), 2100 series for a complete listing of travel related object class codes.</li></ul>

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## How to Process an ADSW-AC Order

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**Introduction**      The below stages shall be followed in the ADSW-AC Order Process

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**References**

- (a) Direct Access Guide, Reserve Orders Guide  
(<http://cgweb.psc.uscg.mil/da/reserveorders.pdf> or  
<http://www.uscg.mil/hq/psc/da/reserveorders.pdf>)
- (b) RPM, Art. 3-D-12
- (c) Medical Manual, COMDTINST M6000.1B, Art 3.A.7.j.(1)

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**ADSW-AC Order Processing**      This table describes the stages of ADSW-AC order process where Direct Access cannot be utilized.

Stage	Who Does It	When	What Happens
1	Member & Supervisor	At least 45 working days prior to the date of ADSW-AC	<ul style="list-style-type: none"><li>• Discuss desired consecutive/non-consecutive duty dates.</li><li>• Coordinates duty days with unit.</li></ul>
2	Member or Designated Unit Reserve Orders Manager		<ul style="list-style-type: none"><li>• Complete the Request for ADSW-AC Orders through Direct Access (Reserve Orders module)</li><li>• Route to the Unit Reserve Orders Manager.</li></ul>

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*Continued on next page*

## Selected Reserve Assignments and Transfers

### Section Overview

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**Introduction** This section will guide you through the Permanent Change of Station (PCS) assignment process and transfer process for Selected Reserve (SELRES) members.

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**Reference** (a) Reserve Policy Manual, COMDTINST M1001.28 (series)  
(b) Personnel Manual, COMDTINST M1000.6 (series), Chapter 10

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**In this section**

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

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## Junior Reserve Officer and Senior Reserve Enlisted Assignments

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**Introduction** This section outlines the process for PCS assignment of Selected Reserve (SELRES) junior commissioned officers (O-1 through O-4) and senior enlisted members (E-7 through E-9).

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**Process** Annual ISC Assignment Panels: E-7 through E-9 and O-1 through O-4. ISCs will release message traffic during the course of the year with the current timeline and deadlines. The sample below reflects AY/06.

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
1	ISC (pf)	Advertises shopping list and list of personnel required to compete for new assignments NLT <u>28 April</u> of each assignment year. Positions slated to be filled during the summer by SRDC selectees shall be marked as “filled” in the Direct Access shopping list and shall not be advertised.
2	Unit	Notifies ISC (pf) of any discrepancies to the shopping list or list of personnel required to compete for new assignments.
3	ISC (pf)	Publishes shopping list updates NLT <u>30 SEP</u> for junior officers and 30 June for senior enlisted members. Maintains Direct Access shopping list to ensure accuracy, updating as soon as changes occur.
4	Member	If affected, submits e-Resume in Direct Access to request new assignment NLT <u>04 Nov</u> . A minimum of three positions and a minimum of two commands must be listed on the e-Resume.
5	Unit	Endorses requests for extensions or early rotations (mandatory). For early rotation endorsements, expeditionary units must include statement concerning whether or not on-site relief is required.
6	ISC (pf)	Compiles lists of applicants for positions at each major unit and shares each unit’s list with that unit’s executive officer, NLT <u>26 Aug</u> . Executive officers should treat these lists as FOUO and shall not distribute them further. Note: major units are defined as units overseeing subordinate units, such as Sectors.

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**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

## Junior Reserve Officer and Senior Reserve Enlisted Assignments, Continued

Process (continued)

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
7	Unit	Submits any command concerns to ISC (pf) NLT 2 Sep. Major units shall coordinate command concerns for all subordinate units.
8	ISC (pf)	Convenes assignment panel NLT Dec-Feb consisting of four officers and one senior enlisted member (E9).
9	Assignment Panel	Determines new assignments based on criteria in the Reserve Policy Manual, COMDTINST M1001.28 (series), to be effective on or about 7 Nov-10 March.
10	ISC (pf)	Once panel results are approved by supported district's Chief of Staff, releases results via message. Authorizes new assignments in Direct Access (posts on Airport Terminal) NLT 10 Mar. Rotation date entered in Direct Access for new assignments should be five years from assignment date. Rotation date entered in Direct Access for extensions or overbilletts should be one year from assignment date.
11	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations. Orders must be executed even for members transferring to new positions within the same command.
12	Departing SPO	Approves and prints Direct Access Orders; mails original to member, copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.

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## Junior Reserve Officer and Senior Reserve Enlisted Assignments, Continued

Process (continued)

Stage	Who Does It	What Happens
13	Departing Unit	Informs affected personnel of new assignments once message is released. Completes a departure OER if more than 6 months have elapsed since last OER was completed or completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
14	Departing Unit	Forwards unit PDR to receiving unit, if applicable. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
15	Receiving Unit	Designates sponsors to contact new members to confirm initial reporting dates and drill schedules.
16	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.
17	Member	If out of season assignment is required, submits endorsed e-Resume for temporary assignment (RELADs included).
18	ISC (pf)	Considers temporarily assigned members for permanent assignment during the next scheduled assignment panel.

## RELAD Assignments: E-2 through E-6

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**Introduction** This section outlines the process for PCS assignment junior enlisted RELAD members (E-2 through E-6) to Selected Reserve (SELRES) assignments.

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**Process** SELRES RELAD Assignments: E-2 through E-6

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
1	ISC (pf)	Maintains Direct Access shopping list to ensure accuracy, updating as soon as changes occur. Positions slated to be filled by new recruits who have not yet been accessed shall be marked as “filled” in the Direct Access shopping list and shall not be advertised.
2	SPO/Unit Personnel Admin / ISTT	Initiates counseling concerning CG Reserve opportunities for every active duty member who will be Released from Active Duty (RELAD) or discharged.
3	Member Leaving Active Duty	Completes e-Resume to state reserve affiliation intentions. Requests assignment consideration for SELRES positions on shopping list or requests transfer to IRR (or discharge for members with no remaining military service obligation).
4	Unit	Endorses e-Resume with brief statement concerning suitability for SELRES assignment at least 60 days prior to active duty termination date.
5	ISC (pf)	Assigns member requesting SELRES assignment to position meeting business rules outlined in Reserve Policy Manual, COMDTINST M1001.28 (series).
6	ISC (pf)	As soon as assignment decision is made, authorizes new assignment in Direct Access (posts on Airport Terminal). As a result, the position should then show as “filled” on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date.

*Continued on next page*

**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

**RELAD Assignments: E-2 through E-6, Continued**

Process (continued)

<b>Stage</b>	<b>Who Does IT</b>	<b>What Happens</b>
7	ISTT / Departing Unit	Informs member of new assignment
8	Departing Unit	Completes evaluation for departing member in accordance with reference Chap. 10 of the Coast Guard Personnel Manual, COMDTINST M100.6 (series).
9	Departing Unit	Forwards unit PDR to receiving unit. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
10	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations. Orders must be executed even for members RELADing to new positions within the same command.
11	Departing SPO	Approves and prints Direct Access Orders; delivers original to member (via mail if member has already departed on terminal leave), copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.
12	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.
13	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.

## Junior Enlisted Reserve Assignments (Other)

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**Introduction** This section outlines the process for PCS assignment of Selected Reserve (SELRES) junior enlisted members (E-2 through E-6).

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**Process** SELRES Assignments: E-2 through E-6

Stage	Who Does It	What Happens
1	ISC (pf)	Maintains Direct Access shopping list to ensure accuracy, updating as soon as changes occur. Positions slated to be filled by new recruits who have not yet been accessed shall be marked as “filled” in the Direct Access shopping list and shall not be advertised.
2	Member	Completes e-Resume at least 90 days prior to requested assignment date, including reason for request in comments block (e.g., civilian job transfer, desire for another unit in area, desire for better advancement opportunity, etc.) Note: members who received enlistment bonuses for assignment to PSUs or NCW units must fulfill the bonus obligation before requesting transfer (normally six years).
3	Unit	Endorses e-Resume at least 60 days prior to requested assignment date. Requests for transfer from a member who has been assigned for less than five years shall be treated by the unit as an early transfer request for endorsement purposes.
4	ISC (pf)	Assigns member to vacant position meeting business rules outlined in the Reserve Policy Manual, COMDTINST M1001.28 (series). <i>Note: ISC must check to see if PSU/NCW members have remaining obligation tied to enlistment bonus before authorizing transfers.</i>

*Continued on next page*

**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

**Junior Enlisted Reserve Assignments (Other), Continued**

Process (continued)

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
5	ISC (pf)	As soon as assignment decision is made, authorizes new assignment in Direct Access (posts on Airport Terminal). As a result, the position should then show as “filled” on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date.
6	Departing Unit	Informs member of new assignment. Completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
7	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations.
8	Departing SPO	Approves and prints Direct Access Orders; mails original to member, copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.
9	Departing Unit	Forwards unit PDR to receiving unit. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
10	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.
11	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.

## Reserve Junior Enlisted Assignments Waiting Lists

**Introduction** This section outlines the process for Selected Reserve (SELRES) junior enlisted members (E-2 through E-6) to be placed on unit waiting lists.

**Process** SELRES Assignment Waiting Lists: E-2 through E-6

Stage	Who Does It	What Happens
1	Member	May request to be placed on a waiting list for an assignment meeting the criteria of the Reserve Policy Manual, COMDTINST M1001.28 (series), if unit assignment is not available due to no vacant positions. (Comments block of e-Resume should be used to request placement on a waiting list.) A member may not be assigned to more than three units' waiting lists at any given time.
2	ISC (pf)	Maintains unit waiting lists for E-6 and below members. A unit waiting list for a particular rating must be cleared before an assignment to that unit can be offered to a new potential transfer (i.e., there must be no BMs on the unit waiting list before a vacant BM position can be offered to a new potential transfer. Priority for placement of members on waiting lists: <ol style="list-style-type: none"> <li>1. Member at a PSU or NCW unit, assigned for more than five years.</li> <li>2. Member at any other unit, more than five years.</li> <li>3. Member at any unit, assigned for less than five years.</li> </ol>

*Continued on next page*

**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

**Reserve Junior Enlisted Assignments Waiting Lists, Continued**

Process (continued)

Stage	Who Does It	What Happens
2		<b>Example:</b> There are three BMs on a unit's waiting list; the first BM on the list has been at a PSU for more than five years, the second BM has been at a boat station for more than five years, and the third has been at a PSU for less than five years. If a new request for assignment to the waiting list is submitted from a BM who has been at a PSU for more than five years, then that member is placed in the second position on the list and other two members drop down one position.
3	ISC (pf)	At least once per month, revisits E-6 and below assignments at each unit and assigns reservists to new positions within the same command to ensure best internal paygrade match (e.g., to accommodate advancements, open up positions for members on unit waiting lists, and to push vacancies down to lowest paygrades).
4	ISC (pf)	Makes two contact attempts within five business days to first member on unit waiting list once a vacancy opens up. After second failed attempt, mails inquiry to member, then waits three weeks before crossing member off list and going to next member on list or new member.
5	Member	If still interested in unit assignment, submits e-Resume within two weeks of notification, and follows up with e-mail to ISC (pf) that e-Resume has been submitted.
6	Unit	Endorses e-Resume within three weeks of receipt.
7	ISC (pf)	Follows up with unit if endorsement has not been submitted within three weeks of notification by member that e-Resume was submitted.

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**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

**Reserve Junior Enlisted Assignments Waiting Lists, Continued**

Process (continued)

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
8	ISC (pf)	If agreement is reached, authorizes new assignment in Direct Access (posts on Airport Terminal). As a result, the position should then show as “filled” on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date.
9	Departing Unit	Informs member of new assignment. Completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
10	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) based on Airport Terminal authorizations.
11	Departing SPO	Approves and prints Direct Access Orders; mails original to member, copies to departing/receiving units and ISC (pf). Forwards SPO PDR to receiving SPO, if applicable.
12	Departing Unit	Forwards unit PDR to receiving unit. If servicing clinic changes, ensure that medical record is forwarded to new servicing clinic.
13	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.
14	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.

## Voluntary Transfer from SELRES to IRR/ISL/ASL

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**Introduction** This section outlines the process for voluntary transfers of reserve members from the Selected Reserve (SELRES) into Inactive Ready Reserve (IRR), or Standby Reserve, Active Status List (ASL) or Inactive Status List (ISL).

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**Process** Voluntary transfers from the SELRES

Stage	Who Does It	What Happens
1	Member	Submits e-Resume requesting position 00062025 at DeptID 002817 (unbudgeted reserve position at Coast Guard Personnel Command, Reserve Personnel Management Division). Indicates IRR, ASL or ISL and describes reason for the request for change of status in the comments block. Transfer requests must meet the criteria of section 5.B of the Reserve Policy Manual, COMDTINST M1001.28 (series).
2	Unit	Conducts records review in coordination with servicing SPO to ensure that member has met all contractual obligations and is eligible for transfer from the SELRES. Endorses e-Resume within three weeks of receipt; must discuss the member's value as a future potential mobilization asset at that unit.
3	ISC (pf)	Confirms that member's request meets criteria for transfer to the IRR or Standby Reserve (ASL or ISL) and verifies that member has completed his or her initial SELRES obligation. If request does not meet the requirements of transfer from the SELRES per Section 5.B of Reserve Policy Manual, COMDTINST M1001.28 (series), informs unit of the reason why and advises the unit on remaining time that the member must remain in the SELRES.
4	ISC (pf)	Confirms that the member is not under any bonus contract that may require recoupment, and confirms that the member is not in receipt of educational benefits including the Montgomery GI Bill or Tuition Assistance benefits that may require suspension or recoupment.

*Continued on next page*

**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

**Voluntary Transfer from SELRES to IRR/ISL/ASL, Continued**

Process (continued)

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
5	ISC (pf)	Notifies CGPC-rpm that member meets all requirement for transfer and specifies whether transfer is to IRR, ASL or ISL.
6	CGPC-rpm-2	Verifies that member meets all requirements for transfer and issues orders (on airport terminal) assigning member to IRR/ASL/ISL as appropriate.
7	Departing Unit	Informs member of transfer authorization. Completes a transfer OER if more than 6 months have elapsed since last OER was completed or completes a departure Enlisted Employee Review (EER) if more than 19 IDT drills have been performed since last EER was completed, in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10.
8	Departing Unit	Ensures that member has appropriate ID card and cancels Government Travel Charge Card account (if applicable).
9	Departing SPO	Executes no-cost PCS orders (departing and reporting transactions) and transfer to IRR, ASL, or ISL based on Airport Terminal authorizations.
10	Departing SPO	Prints Direct Access Orders; mail to member. Ensures that unit and SPO PDRs and medical record are mailed to CGPC-rpm via certified mail.
11	CGPC-rpm	Monitors transfers to IRR, ASL and ISL from field units and if above process was not followed, transfers of member will not be completed and member will remain in the SELRES status at unit for correct processing.

## Transfer from IRR/ISL/ALS to SELRES

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**Introduction** This section outlines the process for transfers of reserve members from the Inactive Ready Reserve (IRR), or Standby Reserve, Active Status List (ASL) or Inactive Status List (ISL), to an assignment at a unit in the Selected Reserve (SELRES).

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**Process** Transfers from the IRR/ASL/ISL to a unit assignment in the SELRES

Stage	Who Does It	What Happens
1	Member	Submits written request (e-mail is acceptable) to CGPC-rpm requesting SELRES assignment.
2	CGPC-rpm	Conducts PDR review to determine if member is suitable for transfer to SELRES. Negative page 7s, NJP, etc., can result in denial of request for transfer. Conducts a review of medical record to determine currency of last physical and dental exam. Ensures that member has current ASQ, meets weight standards, has current background check, and has current contact information in Direct Access.
3	CGPC-rpm	Forwards relevant PDR information to ISC (pf). If member is determined suitable for transfer to SELRES, checks shopping list and communicates with appropriate (pf) then conveys assignment options to member.
4	Member	Rank orders unit assignment desires and provides to CGPC-rpm.
5	CGPC-rpm	Passes members assignment desires to the appropriate (pf).
6	ISC (pf)	Works with member to schedule exam and contact CGPC-rpm with appointment information.

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**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

**Transfer from IRR/ISL/ALS to SELRES, Continued**

Process (continued)

<b>Stage</b>	<b>Who Does IT</b>	<b>What Happens</b>
7	CGPC-rpm	Issues RMP orders for medical appointment if last physical and dental exam are more than one year old, or if medical record is missing and member cannot provide documentation of physical and dental exam less than one year old.
8	ISC (pf)	Authorizes SELRES assignment in Direct Access (posts on Airport Terminal) within three weeks of receipt of member's assignment desires. As a result, the position should then show as "filled" on the Direct Access shopping list. Note: rotation date entered in Direct Access should be end-of-enlistment date. If decision is not to offer assignment, provides substantive documentation of reason for denial to CGPC via e-mail.
9	CGPC-rpm	Informs member of transfer authorization.
10	ISC (pf)	Ensures appropriate SPO executes no-cost PCS orders (departing, reporting and R910 transactions). SPO prints Direct Access Orders; mails original to member, copies to receiving unit and ISC (pf). Ensures that unit and SPO PDRs and medical record are mailed to reporting SPO via certified mail.
11	Reporting SPO	Ensures that unit PDR and medical record are delivered to unit admin and servicing clinic.
12	Receiving Unit	Designates sponsor to contact new member to confirm initial reporting dates and drill schedules.
13	ISC (pf)	Monitors Direct Access to ensure assignment transactions are properly executed; ensures that correct position assignments and assignment/rotation dates are reflected. Coordinates with SPOs to make any updates/corrections.

## Involuntary Transfer or Recall of SELRES for Unsatisfactory Participation

**Introduction** This section outlines the process for involuntary transfers of reserve members from the Selected Reserve (SELRES) to the IRR or discharge, or recall to active duty, due to unsatisfactory participation.

**Process** Involuntary transfer or recall to active duty due to unsatisfactory participation

Stage	Who Does It	What Happens
1	Unit	Documents counseling and disciplinary action in accordance with Reserve Policy Manual, COMDTINST M1001.28 (series). Conducts records review in coordination with servicing SPO to determine whether or not member has met all contractual obligations. If member has no remaining SELRES obligation but still has value as a future potential mobilization asset, pursues transfer to IRR. If member has remaining SELRES obligation, pursues discharge or recall to active duty.
2	Unit	Submits request for transfer to the IRR, discharge, or recall to active duty to ISC (pf), attaching copy of previous evaluation and documentation of counseling and disciplinary action. For requests for transfer to IRR, provides substantive statement concerning member's value as a future potential mobilization asset.
3	ISC (pf)	Confirms that unit's request meets criteria for transfer to the IRR, discharge, or recall to active duty. Verifies whether or not member has completed his or her initial SELRES obligation. Informs unit if request is missing any required documentation. Informs unit if request does not meet requirements of Reserve Policy Manual, COMDTINST M1001.28 (series), providing suggestions of other options to pursue.

*Continued on next page*

**Section E**  
**SELECTED RESERVE ASSIGNMENTS AND TRANSFERS**

## Involuntary Transfer or Recall of SELRES for Unsatisfactory Participation, Continued

Process (continued)

Stage	Who Does It	What Happens
4	ISC (pf)	Confirms that the member is not under any bonus contract that may require recoupment, and confirms that the member is not in receipt of Montgomery GI Bill benefits that may require suspension or recoupment.
5	ISC (pf)	Authorizes PCS order (posts on Airport Terminal) in Direct Access for requests for transfer to IRR. Endorses request for discharge and forwards to CGPC-rpm for processing. Processes request for recall to active duty and forwards authorization and TONO to servicing SPO.
6	CGPC-rpm	Monitors transfers to IRR from field units and if above process was not followed, transfers member back to SELRES status at unit for correct processing. Processes requests for discharge.
7	Unit	Informs member of IRR transfer authorization, discharge action, or recall to active duty. Completes evaluation for departing member in accordance with the Personnel Manual, COMDTINST M1000.6 (series), Chapter 10. Ensures that member has appropriate ID card and cancels Government Travel Charge Card account (if applicable).
8	SPO	For transfer to IRR, executes no-cost PCS orders (departing and reporting transactions) and transfer to IRR based on Airport Terminal authorizations. For transfer to IRR or recall to active duty, prints Direct Access Orders, ensures personal delivery to member or mails to member via certified mail return receipt.
9	SPO	For transfer to IRR or discharge, ensures that unit and SPO PDRs and medical record are mailed to CGPC-rpm via certified mail.





**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).

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



**Section B  
SEPARATIONS**

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## **Routine Separation Processing, Continued**

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**Procedures  
(continued)**

<b>When</b>	<b>Who does it</b>	<b>What happens</b>
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.
Last Day	SPO	On the effective date of separation or date of departure on terminal leave, transmits the separation transaction.

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## Cancellation of Document Numbers and Accounting Data

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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**

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## **Disability Retirement Separations, Continued**

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

<b>Day</b>	<b>Who Does It</b>	<b>What Happens</b>
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 final pay, the DD-214, the standard separation letter to the member.
	SPO	On the effective date of terminal leave or retirement, transmits the Retirement (Endorsement on Orders) transaction.

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# 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"> <li>Complete predischarge interview 6 months prior to separation date</li> <li>Transition Assistance Program counseling</li> </ul> <p>Forward the following to the SPO:</p> <ul style="list-style-type: none"> <li>Preseparation Counseling Checklist for <b>Active</b> Component Service Members (DD-2648).</li> <li style="text-align: center;">OR</li> <li>Preseparation Counseling Checklist for <b>Reserve</b> Component Service Members Released From Active Duty (DD-2648-1)</li> </ul> <p><b>Note:</b> 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"> <li>CG-3307 with SEP-4 entry completed.</li> </ul>	PERSMAN, 12-B-4, ALCOAST 049/00,	
		COMDTINST 1900.2 (series)	
		(Forms available from PSC's web site <a href="http://www.uscg.mil/hq/psc/forms">http://www.uscg.mil/hq/psc/forms</a> )	
		PPPM, Encl. (6)	
2	Ensure member is physically qualified for separation.	PERSMAN, 12-B-6	
3	<p>Complete an E-Resume at least six months prior to date of separation indicating member's intention to separate. For all members eligible for reenlistment:</p> <ul style="list-style-type: none"> <li>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.</li> </ul>	<p>PPPM, 5-D-13</p> <p>Direct Access Guide, E-Resume</p>	

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**Section B  
SEPARATIONS**

## Checklist for Separations, Continued

**Separation checklist** (continued)

<b>Step</b>	<b>Action</b>	<b>Reference</b>	<b>Date</b>
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 PCS Departing/Separation Worksheet, PCS Entitlements Worksheet, and Career Intentions Worksheet, and forward to SPO with DD-2648/2648-1 at least 60 days prior to the separation date.	<p>(Forms available from PSC's web site <a href="http://www.uscg.mil/hq/psc/forms">http://www.uscg.mil/hq/psc/forms</a>)</p> <ul style="list-style-type: none"> <li>• CG PSC-2000</li> <li>• CG PSC-2003</li> <li>• CG PSC-2045</li> </ul>	
6	SPO forward DD-214 SW (worksheet).	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.		

*Continued on next page*

## Checklist for Separations, Continued

### Separation checklist (continued)

Step	Action	Reference	Date
8	Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods.	CGTRANSMAN, 1-H-1	
9	Conduct Final Termination Briefing IAW Personnel Security Manual.	PERSEC	
10	Counsel member on separation, <ul style="list-style-type: none"> <li>Complete CG-3307 entries; see Pg-7 Instruction (Encl. (6) of this manual) for sample entries.</li> <li>Ensures member receives copy of the Thrift Savings Plan (TSP) Withdrawal Package if they have a TSP account.</li> </ul>	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.	Direct Access Guides: Separations Discharges Retirements RELADs DD-214 Statement of Intent	
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"> <li>Provide member with travel claim form(s) and instructions for completion.</li> </ul>	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.	PDR Instruction	



**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.	<a href="#">PERSMAN, 1-G</a>	
2	Advise member: <ul style="list-style-type: none"> <li>• 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.</li> <li>• If entering into an indefinite reenlistment, there will be no further opportunities to sell leave until separation or retirement.</li> </ul>	<a href="#">PERSMAN, 3-C</a> <a href="#">ALCOAST 317/04</a>	
3	Counsel member on SRB program.	<a href="#">PERSMAN, 3-C</a>	
4	Ensure CG-3307 entry is completed for citizens of the Republic of the Philippines (see Pg-7 Instruction for sample entry).	<a href="#">PERSMAN, 12-B-47</a> <a href="#">PPPM, Encl (6)</a>	
5	Ensure member completes a <a href="#">CG PSC-2045 Career Intentions Worksheet</a> and forwards to SPO.	<a href="#">PPPM, Encl (6)</a>	
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 <a href="#">CG PSC-2040 (Allotment Worksheet)</a> (if allotments stop).	<a href="#">PPPM, Encl (6)</a>	
9	Explain Article 137, UCMJ and code of Conduct, Complete Page 7 (CG-3307) entry.	<a href="#">PERSMAN, 8-A-1</a> <a href="#">ALCOAST 049/00</a>	
10	Verify U.S. citizenship.	<a href="#">PERSMAN, 1-G-5</a>	

*Continued on next page*

## Checklist for Reenlistment or Extension, Continued

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**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.

---

## Section Overview, Continued

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### Change in language competency

This is the process for reporting a change in language competency.

Stage	Who Does It	What Happens
1	Member	Completes Defense Language Proficiency Test (DLPT)
2	ESO	Enters DLPT results in Direct-Access Develop Workforce > Manage Competencies (GBL) > Use > <b>Foreign Language Test Results</b>

---

### Off duty educational accomplishments

This is the process for reporting completion of an off duty course of study such as completing a GED or earning a college degree.

Stage	Who Does It	What Happens
1	Member	Provides documentation to ESO
2	Unit/ESO	Forwards copy of documentation to the SPO
3	SPO/Unit	Records accomplishment in Direct-Access. <u>Home &gt; Develop Workforce &gt; Manage Competencies (GBL) &gt; Use &gt; Education</u>

---

### Record Of Professional Development

In addition to the methods listed above for entering training and education data in Direct-Access, form CG-4082, Record Of Professional Development (RPD) may be used to report accomplishments. This form offers active duty, and reserve personnel the opportunity to record their professional development accomplishment to CGPC-ADM-3 where it will become a part of their official record. The procedure is voluntary and does not affect Direct-Access entry.

---

## Individual's Record of Small Arms Training

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**Introduction** The Individual's Record of Small Arms Training (CG-3029A) provides a chronological summary of an individual's small arms qualifications and awards. Prepare this form when the member participates in small arms training.

---

**Reference** (a) Ordnance Manual, COMDTINST M8000.2C

---

**Preparation** The instructions for completion of the CG-3029A are on the reverse side of the form. Upon completion, file the original in the unit PDR, (if maintained) otherwise in the training record, and forward a copy to the SPO.

---

**Types of awards** Members who qualify with a pistol or rifle will receive a Marksman (M), Sharpshooter (S), or Expert (E) award according to the qualifying score.

---

**Award breakdown** See enclosure (9) (for pistol) or enclosure (12) (for rifle) of reference (a) for the qualification and breakdown of scores when completing CG-3029A.

---

**Competency Code Updates** The Competency Codes for a member who qualifies with a pistol, rifle or shotgun must be updated in Direct-Access.

Code	Weapon
MAREP	Pistol Qualification
MARER	Rifle Qualification
MARES	Shotgun Qualification

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## **Section Overview**

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**Introduction**      This section will guide you through the process of electing, increasing, reducing, declining, or canceling SGLI coverage and reporting casualties.

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**In this section**

<b>Topic</b>	<b>See Page</b>
Designation of Beneficiaries and Emergency Data	5-A-2
Servicemembers' Group Life Insurance (SGLI)	5-A-4
SGLI Family Coverage	5-A-11
Casualty Reporting	5-A-14

---

## Designation of Beneficiaries and Emergency Contacts

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**Introduction** To designate beneficiaries, complete a Designation of Beneficiaries form (CG PSC-2020D, from <http://www.uscg.mil/hq/psc/forms/psc2020d.pdf>) and submit to the SPO. The CG PSC-2020D is not used to designate Servicemembers' Group Life Insurance (SGLI) beneficiaries. Changes to a member's Emergency Contact Information should be made by the member in Direct Access.

---

**Reference** (a) PAYMAN, Chap 3-F and 10-K  
(b) Direct Access, Dependency/Emergency Data Activity Guide

---

**Purpose** The Designation of Beneficiaries form and the computer generated Emergency Contact Report are official documents required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
- Name of person(s) receiving death gratuities
- Person(s) who receive allotment of pay if missing or unable to transmit funds
- Person(s) who receive unpaid pay and allowances
- Person(s) to notify in case of emergency or death
- Person(s) who receive unpaid pay and allowances

---

**Annual Verification** Annually, during the month of November, members must verify their Designation of Beneficiaries form (CG PSC-2020D) and computer generated Emergency Contact Information. Refer to Section 5-C of this manual for procedures on the annual verification.

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*Continued on next page*

## Designation of Beneficiaries and Emergency Contact, Continued

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**When to submit the CG PSC-2020D** The Designation of Beneficiaries (CG PSC-2020D) will be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
  - Reenlistment after a break in service
  - Change in status from enlisted to officer or officer to enlisted
  - Recall to active duty of retired members
  - Reporting to a new Permanent Duty Station
  - Changes to the form occurring in any item
- 

**When to submit or update the Emergency Contact Information** The Emergency Contact Information will be submitted and/or updated by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
  - Reenlistment after a break in service
  - Change in status from enlisted to officer or officer to enlisted
  - Recall to active duty of retired members
  - Reporting to a new Permanent Duty Station
  - Changes to the information occurring in any item
-

## Servicemembers' Group Life Insurance (SGLI)

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**Introduction**      Servicemembers' Group Life Insurance was established for the purpose of making life insurance protection available to members of the Uniformed Services at a reasonable cost.

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**Reference**

- (a) [Servicemembers' and Veterans' Group Life Insurance Handbook](http://www.insurance.va.gov/SgliSite/handbook/handbook.htm)  
(<http://www.insurance.va.gov/SgliSite/handbook/handbook.htm>)
- (b) <http://www.insurance.va.gov/sgliSite/SGLI/SGLI.htm> (CG SGLI Homepage)
- (c) <http://www.uscg.mil/hq/g-w/g-wp/g-wpm-2/SGLI.htm> (CG Military Personnel's SGLI homepage)
- (d) [Direct Access Guide, SGLI](http://cgweb.psc.uscg.mil/Direct-Access/persru/elections_and_beneficiaries.htm)  
([http://cgweb.psc.uscg.mil/Direct-Access/persru/elections\\_and\\_beneficiaries.htm](http://cgweb.psc.uscg.mil/Direct-Access/persru/elections_and_beneficiaries.htm))

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**Automatic coverage**      SGLI automatically insures all newly accessed members for \$400,000 and then allows them to either:

- Decline SGLI coverage, or
- Elect a reduced level of SGLI coverage, in multiples of \$50,000.

---

**Traumatic Injury Protection**      Traumatic injury protection under the SGLI program provides payments to service members who are severely injured due to a traumatic event. All members with SGLI coverage are automatically covered by Traumatic SGLI (TSGLI) and will be charged an additional monthly premium of one dollar. Members cannot decline TSGLI coverage unless they also decline all SGLI coverage. TSGLI will provide a payment of \$25,000 to \$100,000 to members who sustain specific traumatic injuries. Example of covered injuries include, permanent loss of a foot, hand, eyesight, hearing, or speech. The policy also covers severe burns, extensive paralysis or long-term coma.

---

**Combat SGLI Allowance**      Members, who are covered by SGLI, and serving in certain areas (as designated by SECDEF/SECDEF), will receive an allowance in an amount equal to the amount of the deduction made for the first \$150,000 of SGLI coverage held by the member plus the amount for TSGLI coverage. If the member is insured for less than \$150,000, the allowance will equal the entire monthly SGLI/TSGLI premium.

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*Continued on next page*



## Servicemembers' Group Life Insurance (SGLI)

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### Payment of SGLI Premium

Active duty members and reservists eligible to receive drill pay will make SGLI payments through automatic payroll deductions which will be reflected on the member's LES.

**Note:** Reservists enrolled in SGLI who do not drill temporarily, but remain in a good pay status, will accrue a negative SGLI premium. Upon resumption of a drilling status, the system will deduct the negative premium balance from the member's pay. If the member does not drill for pay within five months and no SGLI payments is made SGLI coverage will be administratively terminated. To avoid cancellation of SGLI Coverage, reservists with a negative balance may pay off that balance with a check or money order or credit card (Visa or Master Card).

For payment by credit card (Visa or Master Card) or call PSC (MAS/DC) at (785) 339-3610.

Check or money order payments should:

- Be made payable to "U.S. Coast Guard,"
- Be clearly marked "SGLI PAYMENT,"
- Include member's name and EMPLID

Sent Check/MO Payments to: COMMANDING OFFICER (MAS)  
USCG PERSONNEL SERVICE CENTER  
ATTN: SGLI  
444 SE QUINCY STREET  
TOPEKA KS 66683-3591

---

### Procedures for electing coverage or increased coverage previously declined or decreased

Use Request for Insurance, form SGLV-8285, in accordance with instructions contained on the back of the form.

Visit <http://www.insurance.va.gov/sgliSite/forms/forms.htm> for SGLV forms.

Use the table on the following page to determine if approval by the Office of Servicemembers' Group Life Insurance (OSGLI) is required before coverage can be increased or restored:

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*Continued on next page*

**Section A  
DECEDENT AFFAIRS**

## Servicemembers' Group Life Insurance (SGLI), continued

<b>If</b>	<b>Then</b>
Member answers "NO" to item 11, and all parts of items 12 and 13	Member meets the "proof of good health" requirement. SGLI is increased or restored effective the date the USCG receives the form. The original and photocopies of the completed form are distributed as follows: Original - SPO Photocopy 1 - CGPC (adm-3) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)
Member answers "YES" to item 11 or any part of item 12 or 13	The original SGLV-8285 is filed in the member's personnel file and a copy of the completed form is sent to the OSGLI for review and approval. SGLI may not be increased or restored until approval has been received from OSGLI.
Approval has been obtained by OSGLI on the member	The copy returned from OSGLI is filed with the original SGLV-8286 at the SPO. Photocopies of the "Approval" are distributed as follows: Photocopy 1 - CGPC (adm-3) to be scanned as an E1 document Photocopy 2 - Member Photocopy 3 - Unit PDR (optional)

**Procedures for reducing or declining coverage**

Members may elect to reduce or decline coverage by completing form SGLV-8286, Servicemembers' Group Live Insurance Election and Certificate (SGLV-8286). The procedures for completing the form are described below.

**Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286)**

Members with SGLI coverage must complete the Servicemembers' Group Life Insurance Election and Certificate (SGLV-8286) whenever they make a beneficiary designation or changes to a previous designation. The Service members' and Veterans' Group Life Insurance Handbook (VA Handbook 29-98-1) should be available for the member to read when completing this form. The SGLV-8286 should be available at most admin offices and/or may be downloaded from the web at the following site:  
<http://www.insurance.va.gov/sgliSite/forms/8286.pdf>.

*Continued on next page*

## Servicemembers' Group Life Insurance (SGLI), continued

---

**Instructions for completing the SGLV-8286**

Instructions for completing the SGLV-8286 are on page 3 of the form.

---

**Designating the Beneficiary(ies) Member's absolute authority to designate or change a beneficiary**

- Under federal law, the member has the absolute right to name whomever they want as their beneficiary and to change their beneficiary at any time without the knowledge or consent of the prior beneficiary.
  - When a member does not designate a surviving dependent or parent as their beneficiary, a responsible representative should counsel the member to the fact that the Servicemembers' Group Life Insurance Act was specifically designed to provide some form of security for dependents or parents. The member should be encouraged to designate such dependents or parents as beneficiaries. When dependents or parents are disregarded as beneficiaries, it is desirable that the member files a written statement in their PDS along with their SGLV-8286 stating they voluntarily selected their beneficiary (ies).
- 

**Designations of beneficiaries who are minors**

See Ref (a), 6.04.

---

**If member does not designate a Beneficiary (ies)**

See Ref. (a), 6.06.

---

*Continued on next page*

## Servicemembers' Group Life Insurance (SGLI), Continued

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**Changing a beneficiary and accepting the SGLV-8286 from the member.**

When a member asks to change a beneficiary, have the member immediately put the new beneficiary's name on an SGLV-8286 and sign and date it, even if the rest of the form is incomplete. Then immediately sign and date the form as the USCG representative. This legally changes the beneficiary and makes it effective immediately.

The minimum information needed to change a beneficiary and have an effective form is:

Member's Name  
Beneficiary Name  
Member's Signature and date  
USCG Representative Signature and date

Have the member then get the additional information and complete a new SGLV-8286 when they return. However, never send the member away for more information without first getting a signed and dated partially completed SGLV-8286.

---

**A witness must be present when the SGLV-8286 is completed by the member**

An authorized representative of the U. S. Coast Guard (i.e., CO, XO, OINC, XPO, Yeoman, etc.) must witness the member's signature at the time of preparation in the appropriate blocks. The date the form is received and witnessed should be accurately recorded as it determines the exact time and date when the insurance becomes effective or is reduced or cancelled and is the basis for establishing or changing payroll deductions.

---

**Common errors on the SGLV-8286**

Common errors that are made to the SGLV-8286 Form:

- The member does not sign the form.
  - When the form is completed by the member, there is no witness or witness signature.
  - The form is not filed in the member's unit PDR and SPO PDR.
  - The sum total of either the primary or contingent beneficiaries does not equal 100%.
- 

*Continued on next page*

**Section A  
DECEDENT AFFAIRS**

## Servicemembers' Group Life Insurance (SGLI), Continued

**Process and Distribution of SGLV-8286**      The following table describes the responsibilities associated with the SGLV-8286 and the distribution of the form:

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
1	Member	Completes Form SGLV-8286 per instructions on the form
2	Witness	Signs the witness block at same time member signs the form.
3	Unit	<p>Photocopies are made of the original form and distributed as follows:</p> <p>Original - SPO            Photocopy 1 - CGPC (adm-3) to be scanned as an E1 document            Photocopy 2 - Member            Photocopy 3 - Unit PDR (optional)</p> <p><b>Note:</b> The distribution printed on the SGLV-8286 itself should be disregarded.</p>
4	SPO	<p>Enters SGLI information in Direct-Access</p> <p>Direct Access path:  <u>Home</u> &gt; <u>Compensate Employees</u> &gt; <u>Administer Base Benefits</u> &gt; Life and AD/D</p> <p><b>Note:</b> If SGLI was administratively terminated due to the arrears of premiums, the SPO shall not restart SGLI until delinquent premiums have been paid and Form SGLV-8286 has been completed per page 5-A-6 of this section.</p>

**Spousal Notification**      Units must notify the member's spouse, by letter, when the member elects no or reduced coverage or names someone other than the spouse, or child of the member, as the beneficiary. An example of the spousal notification letter is on the following page.

*Continued on next page*

Section A  
DECEDENT AFFAIRS

**Servicemembers' Group Life Insurance (SGLI), Continued**

U.S. Department of  
Homeland Security

United States  
Coast Guard



Commanding Officer  
U. S. Coast Guard  
Any Unit

123 Any Street.  
Any City, ST 12345-1234  
Staff Symbol: (xx)  
Phone: 785-555-1234  
Fax: 785-555-4321  
Email: i.am.sender@uscg.mil

1741  
DD Month Year

<SpouseFirstName> <SpouseLastName>  
<Address1>  
<Address2>  
<City>, <ST> <Zip>

Dear <Mr. or Ms.> <SpouseLastName>: *(Salutation may be omitted)*

Your spouse, <MemberFirstName>, recently made changes to the amount of coverage or beneficiary designations for a life insurance policy. The change may affect you. In accordance Public Law 109-63 we are required to notify a servicemember's spouse whenever a member declines coverage, reduces the amount of insurance coverage or names a principal beneficiary other than the member's spouse or child.

The insurance coverage is provided under Servicemembers' Group Life Insurance (SGLI). It is a low-cost group life insurance program for active duty and ready reserve members of all military services. Coverage is available in \$50,000 increments up to the maximum of \$400,000. The monthly premium rate is \$3.25 per \$50,000. For the maximum coverage the premium is \$26 per month. <MemberFirstName> has \$<coverage> in effect.

*(This section may be omitted member named spouse or child as beneficiary)* The revised beneficiary designations are listed below. The change was effective as soon as it was signed, on <DateChanged>.

<Beneficiary1> <Benefit1> *(Label clearly as dollars or percent)*  
<Beneficiary2> <Benefit2>

There is no requirement for you to reply to this letter. We are merely required to keep you informed of changes.

Sincerely,

F. M. LAST  
Rank/Rate  
U.S. Coast Guard  
Commanding Officer or By direction

Copy: Member

## SGLI Family Member Coverage

---

**Introduction** The Veterans' Survival Benefits Improvement Act of 2001 extends life insurance coverage to spouses and children of members insured under the Servicemembers' Group Life Insurance (SGLI) program. The section offers background information and procedural guidance for implementing SGLI Family Member Coverage.

---

**Reference:**

- (a) Servicemembers' and Veterans' Group Life Insurance Handbook Chap 10
- (b) <http://www.insurance.va.gov/sgliSite/SGLI/SGLI.htm> (CG SGLI Homepage)
- (c) <http://www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/SGLI.htm> (CG Military Personnel's SGLI homepage)
- (d) ALCOAST 282/03

---

**Eligibility** The spouses and children of Active duty service members and members of the Ready Reserve of a uniformed service are eligible for SGLI coverage only if their sponsors also have SGLI coverage.

Each dependent child (under age 18), of every sponsor covered by SGLI, is automatically covered by SGLI under family insurance regardless of the child's health. In addition, children between the ages of 18 and 23 who are full-time students, as well as any child who, before the age of 18, has been declared legally incompetent, are covered.

Ready Reserve members, who have had their SGLI coverage terminated due to non-payment, must have their accounts up-to-date before SGLI can be restarted or Family Member SGLI can be started. See page 5-A-5 of this manual for payment procedures and termination policy.

Family coverage is available only in the SGLI program, not in the Veterans' Group Insurance (VGLI) program.

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*Continued on next page*

**Section A  
DECEDENT AFFAIRS**

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**SGLI Family Member Coverage, Continued**

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**Coverage Amounts**                    See Ref. (a), 10.01

---

**Cost of Coverage**                    See Ref. (a), 10.04

---

**Deduction of Premiums**            Premiums for spouse coverage will automatically be deducted from the member's pay beginning with the pay period following the date a family election is recorded in Direct Access.

---

**Form for Reducing or Declining Coverage**            If the member does not want insurance coverage for his/her spouse or wants a reduced amount of coverage, he/she must complete form [SGLV-8286A, Family Coverage Election](#) (from <http://www.insurance.va.gov/SgliSite/forms/8286a.pdf>), and submit the completed form to the SPO.

Members may also reduce or decline coverage for their spouse at any later date. When a member cancels spousal coverage, the coverage remains in effect at the original level, at no cost to the member, for 120 days after the cancellation date.

---

**Reinstating/Increasing Family Coverage**            See Ref. (a), 10.07

---

**Spousal Notification**                    Units must notify the member's spouse, by letter, when the member declines SGLI or Family Member SGLI coverage. This is to inform the spouse that they have 120-days from the date the coverage is terminated to convert Family Member SGLI to commercial coverage. A recommended format for the spousal notification letter follows. A copy of the letter, the unit has sent to the spouse, should accompany any SGLV-8286/8286A forms sent to the SPO from members declining coverage.

An example of the spousal notification letter is on the following page.

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*Continued on next page*



**Section A**  
**DECEDENT AFFAIRS**

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**U.S. Department of  
Homeland Security**

**United States  
Coast Guard**



Commanding Officer  
United States Coast Guard  
Any Unit

123 Any Street.  
Any City, ST 12345-1234  
Staff Symbol: (xx)  
Phone: 785-555-1234  
Fax: 785-555-4321  
Email: i.am.sender@uscg.mil

1741  
DD Month Year

First Name Last Name  
Street Address  
City, ST Zip

Dear (Mr. Mrs.) (Salutation may be omitted)

We are writing to inform you of Servicemembers' Group Life Insurance (SGLI) or Family SGLI (spouse) coverage changes made by your active duty or reserve member spouse. The purpose of this letter is to notify you of the cancellation of [or impending termination of] your coverage so you may exercise the 120-day conversion benefit. When a member cancels spousal coverage, the coverage remains in effect, at no cost to the member, for 120 days after the cancellation date

You have 120-days from (*enter date of member's election*) to exercise this conversion benefit.

During this 120-day period you can convert this coverage to a policy with a commercial insurance company. Upon request, the Office of Servicemembers' Group of Life Insurance (OSGLI) will provide you with conversion information and a list of participating companies. You can get more information at the VA insurance website at [www.insurance.va.gov](http://www.insurance.va.gov), or by calling OSGLI at (800) 419-1473. You may also request this information by e-mail to OSGLI.OSGLI@PRUDENTIAL.COM, or writing to:

**Office of Servicemembers' Group Life Insurance**  
**290 West Mt. Pleasant Avenue**  
**Livingston, New Jersey 07039**

The block checked below indicates what action your spouse has taken in declining coverage. Your spouse elected to:

Decline his/her SGLI life insurance. When a member declines SGLI for self or family coverage, coverage for the spouse is terminated.

Decline his/her SGLI Family (spouse) Coverage

Sincerely,

F. M. LAST  
Rank/Rate  
U. S. Coast Guard  
Commanding Officer/By direction

## **Casualty Reporting**

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**Introduction**      This information is provided to direct you through the process of casualty reporting.

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**Reference**      (a) PERSMAN, Chap 11-A, Casualties  
                      (b) PPPM, Encl. (7)

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**Reporting procedures**      Casualty reporting procedures and disposition of personal effects are described in Ref: (a).

Examples of the following are contained in Ref: (b) of this manual.

- Personnel casualty report message
  - Next of kin notification
  - Commanding Officer's letter to the next of kin
  - Letter request for death determination
- 

**Inventory and Disposition of Personal Effects**      In cases where a member dies or is missing, complete a CG-3853 (Personal Effects Inventory and Disposition) in accordance with Ref: (a). Distribute the form as follows:

Original and two copies: To the officer designated by the Commanding Officer to assume custody of the effects.

- Officer retains original
- One copy is to be packed with personal effects.
- Second copy is sent to next of kin (If personal effects are shipped to next of kin. Otherwise, second copy goes to Supply Center, Baltimore. IAW PERSMAN, Art. 11-A-11.b (3)

Copy: Unit PDR

Copy: COMDT (G-1222) (if deceased, captured, missing or incapacitated)  
          PERSCOM ((epm), for enlisted/(opm) for officers) if absent at time  
          of sailing, AWOL, AOL, or deserter.

Copy: Unit File

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*Continued on next page*

## **Casualty Reporting, Continued**

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**Disposition of  
Military  
Personnel Data  
Records (PDRs)**

The unit shall forward Unit and Medical PDRs to the SPO within two days of:

- Declaring member a deserter
- Member's death

The SPO shall forward Unit, Medical, and SPO PDRs to Commander (adm-3), Coast Guard Personnel Command within 5 days of the date of death or date member was declared a deserter.

**Note:** Complete instructions for PDR maintenance and disposition can be found in the Military Personnel Data Records (PDR) System, which is reprinted as Appendix (D) to this manual.

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## Defense Enrollment Eligibility Reporting System (DEERS), Continued

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**Updating  
residential  
address**

Member's can update their residential address one of the following ways:

- At any Real time Automated Personnel Identification System (RAPIDS).
  - By calling the DEERS Support office (DSO) listed below.
  - In writing to: DSO, 400 Gigling RD, Seaside, CA 93955-6771.
  - By faxing address change to DSO at: (831) 655-8317.
  - By E-mail to DSO at: [addrinfo@osd.pentagon.mil](mailto:addrinfo@osd.pentagon.mil).
  - At any Military Treatment Facility (MTF).
- 

**DEERS  
inquiries**

Beneficiaries with questions or problems with DEERS enrollment may call the DEERS beneficiary telephone center to verify the information contained in the database.

**Note:** The beneficiary center can only update residence address information in DEERS over the phone. If information other than the residence address is incorrect, the caller will be instructed to contact their servicing personnel office to have the database updated.

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**Phone numbers  
for DEERS  
beneficiary  
telephone  
center**

If calling from	Then dial
California	800-334-4162
Alaska or Hawaii	800-527-5602
All other states	800-538-9552

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**Reports from the  
DEERS database**

Information in the DEERS database can be used to produce enrollment listings, pantograph listings, demographic reports and other type of reports.

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**Obtaining DEERS  
database reports**

Units may request DEERS database reports from the USCG Liaison at the Defense Manpower Data Center (DMDC).

The phone number for USCG Liaison at DMDC is:  
(831)-583-2400 Ext 4361.

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**Section C**  
**MAINTENANCE OF PERSONNEL INFORMATION**

---

## **Section Overview**

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**Introduction** This section provides you with the necessary procedures for annual verification of entitlements, statement of creditable service, security clearances, and information regarding the PDIF and PDE.

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**In this section** The following topics are covered in this section.

<b>Topic</b>	<b>See Page</b>
Annual Verification of BAH, Dependency, Beneficiaries, SGLI, and Emergency Data	5-C-2
Requesting Statements of Creditable Service	5-C-4
Personnel Data Information File (PDIF)	5-C-8
Personnel Data Extract (PDE)	5-C-9
Security Clearances	5-C-10
Transcript of Sea Service (TOSS)	5-C-11

---

## Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts

**Introduction**      Annually beginning in October, members must verify their BAH, dependency, beneficiaries, SGLI and emergency data.

**Reference**            (a) PAYMAN  
                               (b) PERSMAN  
                               (c) Direct Access Guides

- Annual BAH/Dependency Validation
- Emergency Data
- SGLI Election

**Verification Procedures**      Here is how verification of the BAH, Dependency, SGLI, Beneficiaries and Emergency Contacts works:

Stage	Who Does It/ When	What Happens
1	SPO/1st Week of October	<p>Forwards the following forms and worksheets to units:</p> <ul style="list-style-type: none"> <li>• Direct Access BAH/Dependency Data Forms</li> <li>• Direct Access Emergency Contact Information Report</li> <li>• Copies of member’s SGLI Elections forms (SGLV-8286 &amp; SGLV-8286A)</li> <li>• Copy of member’s Designation of Beneficiaries (CG PSC-2020D) form</li> </ul> <p><b>Note:</b> If the unit has sufficient administrative capability and maintains Unit PDR copies of SGLI forms and Designation of Beneficiaries forms, this step is unnecessary as the unit can generate the BAH/Dependency Forms and Emergency Contact Information Reports from Direct Access using Command Self-Service access.</p>
2	Unit/ Upon Receipt	Forwards all forms and Emergency Contact Reports to the member for verification. Also provides members with blank, or with instructions to access, Designation of Beneficiaries Form (CG PSC-2020D).

*Continued on next page*



Section C  
 MAINTENANCE OF PERSONNEL INFORMATION

## Annual Verification of BAH, Dependency, Beneficiaries, SGLI and Emergency Contacts, Continued

Verification Procedures, Continued

Stage	Who Does it/ When	What Happens
3	Member NLT 30 Nov	<ol style="list-style-type: none"> <li>1. Completes Designation of Beneficiaries Form (CG PSC-2020D). Forwards original to SPO, retains copy for Unit PDR if one is maintained.</li> <li>2. Reviews BAH/Dependency Data for accuracy:               <ul style="list-style-type: none"> <li>• Annotates any necessary changes or corrections.</li> <li>• Signs and dates in the “Members Certification” area.</li> <li>• Returns to SPO, includes Dependency Worksheet (CG PSC-2020), and supporting documentation if adding/removing BAH eligible dependents.</li> </ul> </li> <li>3. Reviews Emergency Contact Report for Accuracy:               <ul style="list-style-type: none"> <li>• Enters any changes or corrections to Emergency Contact info in Direct Access using self-service. Or, if unable to access the system, annotates changes on report and returns to SPO/SPO data entry.</li> </ul> </li> </ol>
4	SPO	<p>Enter, into Direct Access, any changes or corrections the member noted using the appropriate process:</p> <ul style="list-style-type: none"> <li>• Dependent/Beneficiary to add or change information about dependents (Note: Appropriate Direct Access entries must be completed if dependency change impacts entitlements). Generates a new BAH/Dependency form and forwards to member for signature.</li> <li>• Emergency Contact to add or change emergency contact information.</li> <li>• Life and AD/D Benefits to make SGLI election changes (Note: Data entry is only required when member is changing a SGLI/Family SGLI election, i.e. increasing, decreasing or declining coverage. <b>No data entry is required if the member is only updating beneficiary designation.</b>)</li> <li>• Files SGLI forms, BAH/Dependency forms and CG PSC-2020D forms in section 4 of SPO PDR.</li> </ul>

## Requesting Statements of Creditable Service

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**Introduction** This will assist you in requesting a Statement of Creditable Service (SOCS) and/or a Statement of Creditable Sea Service (SOCSS).

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**When to Request** Always request a SOCS/SOCSS for members who meet any of these criteria:

- Newly assigned (PCS) USCG/USCGR member with prior service that has not been verified;
- Any reserve member entering Extended Active Duty for more than 139 days must have request for a SOCS submitted for ADBD verification regardless of the fact that a SOCS may have been previously completed.
- Any disputed service.

**Note:** Do not ignore suspected sea time errors simply because a member is not currently assigned to a sea pay eligible vessel. Take immediate action.

---

**Procedure for requesting Statements of Creditable Service** This is the procedure for requesting statements of creditable service/sea service.

Stage	Who Does It	What Happens
1	Unit/Member	<p>Reviews the member's PDR and any supporting documents the member has, notes the specific period of service/sea service the member is disputing and forwards to the SPO.</p> <ul style="list-style-type: none"> <li>• Members can help the process by providing any documents they have that substantiate prior service, such as a DD Form 214, any reserve point statements, orders, or a Navy Statement of Service.</li> <li>• If a member requests career sea service validation for the purpose of Merchant Marine licensing, be aware that the document required by the Merchant Marines is a Transcript of Sea Service (TOSS) (PSC 1075). Do not confuse this with a SOCSS, because the TOSS will include periods of service aboard vessels not eligible for sea pay/time (see 5-C-9 of this section for requirements on requesting TOSS).</li> </ul>
2	Unit	<p>Forwards SOCS request (memo) to SPO. Include:</p> <ul style="list-style-type: none"> <li>• Member's full name, Employee ID Number, service branch, and period of service</li> </ul>

*Continued on next page*

## Requesting Statements of Creditable Service Continued

### Procedure for requesting Statements of Creditable Service, Continued

Stage	Who Does It	What Happens
2	Unit (Cont'd)	<ul style="list-style-type: none"> <li>• Supporting documentation (DD-214s, AD orders, etc.)</li> <li>• A Privacy Act Release Statement if the member is claiming credit for service in any branch other than the Coast Guard or Coast Guard Reserve (other service personnel centers and the National Archives require a Privacy Act Release Form, signed by the member, before they will release documentation to the Coast Guard). A sample Privacy Act Release Statement is shown as Exhibit 5-C-1 on page 7 of this section</li> </ul>
3	SPO	<p>Reviews the Direct Access database to verify whether or not a SOCS has already been completed.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;"><b>Direct Access path:</b></p> <p style="text-align: center;">Home &gt; Administer Workforce &gt; Administer Workforce (GBL) &gt; Use &gt; Statement of Creditable Service</p> </div> <ul style="list-style-type: none"> <li>• If a SOCS has not been completed, and it can be verified that the member is not receiving credit for a specific period of <i>prior</i> service/sea service, endorse the memo request from the unit accordingly and forward it to PSC (SES)</li> </ul> <p>VERY IMPORTANT: If there is a DD-214 or other documents supporting creditable service and/or sea service, and the member's pay base date, active duty base date or sea pay longevity is incorrect, the member can request an immediate adjustment.</p> <p><u><i>The request must be sent to PSC (SES) and must indicate:</i></u>  <u><i>"The member has been counseled and understands that if the pay base date, active duty base date or total sea time, based on the DD-214, is not supported by the prior service records, the member may be in an overpaid status".</i></u></p> <p><b>Note:</b> Please ensure that periods of Coast Guard sea service or ADT that are in dispute are processed by the SPO in Direct-Access. There is no need to request a SOCS/SOCSS in these instances because the transmitted documents will result in the member's JUMPS account being adjusted correctly.</p>

*Continued on next page*

**Section C**  
**MAINTENANCE OF PERSONNEL INFORMATION**

## Requesting Statements of Creditable Service, Continued

### Procedure for requesting Statements of Creditable Service, Continued

Stage	Who Does It	What Happens
4	PSC	<p>Verifies and validates all periods of prior service (all branches) and sea service to adjust a member's Pay Base Date (PBD), Active Duty Base Date (ADBD) or cumulative sea service time.</p> <ul style="list-style-type: none"> <li>• With supporting documentation provided by the member, makes interim adjustment to member's service dates and/or sea service time. The member must provide a statement indicating that the interim adjustment may put him/her in an overpaid status (as discussed in stage 3 on previous page).</li> <li>• Request records from Headquarters or from the appropriate record center (if applicable).</li> <li>• Verifies dates.</li> <li>• Issues member a SOCS (PSC Form 1071) and/or a SOCSS (PSC Form 1072).</li> <li>• Makes necessary adjustments to member's pay account.</li> </ul> <p><b>Note:</b> Completing the process can take from 3 to 6 months, depending on how quick the other Service responds to the request. The most difficult part of this process is retrieving the necessary information needed from the other Services. Please allow 90 days for processing of SOCS/SOCSS requests by PSC before submitting any follow-up or tracer requests.</p>
5	SPO	<p>Once the SOCS/SOCSS has been forwarded to the SPO, ensure a copy is retained in the SPO PDR, and forward a copy to the unit requesting verification.</p> <p><b>Note:</b> If the original SOCS/SOCSS is found to be in error, because of an incorrect date or missing period of service/sea service, please forward the original SOCS/SOCSS with all documentation to PSC (SES) by memo, with the periods in dispute clearly addressed.</p>
6	UNIT	<p>After PSC completes the SOCS/SOCSS and the SPO forwards the package to the unit, the member should be made aware of the impact the SOCS/SOCSS will have on his/her PBD, ADBD, or cumulative sea service. Member should also be aware that a credit or debit to his pay will probably occur due to the change in his/her PBD, ADBD, or cumulative sea service.</p> <p><b>Note:</b> Unit should ensure member understands and agrees with SOCS/SOCSS and then notify SPO by deadline date contained in the letter.</p>

## U. S. Coast Guard Privacy Act Release Statement

NAME : \_\_\_\_\_  
(please print)

SSN# : \_\_\_\_\_

ADDRESS : \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PHONE NO. : \_\_\_\_\_

In accordance with the Privacy Act of 1974 (U.S.C. 552a(e)(3)), I authorize release of the requested military service information/documents to the address below for official use only.

I authorize the release of the following information: ENLISTMENT CONTRACTS, DISCHARGE DOCUMENTS, DD-214s, HISTORY OF ASSIGNMENTS, RESERVE RETIREMENT POINTS STATEMENT, TRANSCRIPT OF SEA SERVICE, NGB22/23, DD-215.

### Send all documents to:

Commanding Officer (SES-S4)  
U. S. Coast Guard  
Personnel Service Center  
444 SE Quincy Street  
Topeka, Kansas 66683  
(785) 339-3554

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

**Exhibit 5-C-1**

## Personnel Data Information File (PDIF)

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**Introduction**      The Personnel Data Information File (PDIF) is a Direct Access generated summary of personnel data.

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**Reference**            (a) Direct Access Guide, Personnel Data Information File Report

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**When will units receive a PDIF**      Units can expect a PDIF to be provided by the SPO at the following times:

- Within 5 working days after a member reports in PCS
- Upon the request of the unit

**Note:** If you are not receiving the PDIFs for all of the members assigned to your unit, contact the SPO and ask them why you are not receiving them.

---

**SPO to Unit Transmission**      The SPO has the ability to send PDIFs to the unit via E-mail or by printed copy via regular mail. Units should inform their SPO which method is preferred.

---

**Direct Access Path**      [Home](#) > [Develop Workforce](#) > [Manage Competencies \(GBL\)](#) > [Report](#) > PDIF

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**Section D  
MISCELLANEOUS**

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## Leave Authorization (CG-2519), Continued

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**Preparation of  
the CG-2519**

The CG-2519 can be typed, prepared using **Adobe Forms**, or handwritten.

Items 1-7 are completed prior to departing.

The space below item 8 is used to indicate if the member used more than one type of absence. Only units outside CONUS need to list regular leave outside CONUS (AO) and regular leave inside CONUS (AI). List types and inclusive date in chronological order.

Follow these procedures for completing the CG-2519.

<b>Item</b>	<b>Description</b>
1	Enter the member's last name, first and middle initials.
2	Enter rate/rank of the member.
3	Enter member's SSN.
4	Enter the unit where the member is assigned.
5	Enter the complete address and phone number.
6	Enter the number of days of authorized absence.
7	DEPARTURE: Enter the time and date absence begins. <b>Note:</b> This entry would normally be the time and date normal liberty begins (a day of duty) and the day before the actual first day of leave/absence.
	RETURN: Enter the time and date the absence expires. <b>Note:</b> This entry would normally be the time and date the member is expected to be back at the work site/unit (a day of duty) and is the first day after the last day of leave/absence.
	AUTHORIZED OFFICIAL: Sign and date.
8	CHANGE ENDORSEMENT Pen and ink changes to item 7 are NOT allowed. Enter leave date and times if different from those authorized.

**Disposition**

Forward parts 1 and 2 to the SPO upon member's return from leave. If part 2 was given to the member (e.g., for AMC flight) forward only part 1.

---

## Leave Carried over in Excess of 60 Days

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### Introduction

Members may be authorized to carry more than sixty (60) days leave into a new fiscal year, if the provisions of Article 7.A.15 of the PERSMAN (as may be modified by temporary program expansion or enhancements) are met.

---

### Reference

- (a) PERSMAN, Article 7.A.15
  - (b) [ALCOAST 387/04](#)
  - (c) [ALCOAST 188/06](#)
- 

### Procedures for carrying over leave of more than 60 days for a member

If a member believes that he/she is **qualified** to carry over more than 60 days of leave into a fiscal year, then the following steps must occur:

*Note: The procedure for submitting requests for multiple members at the same unit is on the following page.*

Step	Who Does It	Action Taken
1	MEMBER	Must submit a letter via the chain of command to PSC (MAS) and the letter must contain: <ul style="list-style-type: none"><li>• a description of the reason the member was prevented from using leave.</li><li>• an estimate of the total number of days to be carried into the new fiscal year.</li></ul>
2	UNIT	Endorse the letter and send to PSC (MAS) NLT 1 November.
3	PSC (MAS)	Will accumulate all requests and will process them immediately following the <b>March</b> end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made. The member's <b>April</b> LES will reflect restoration of any leave credited.

A new request must be submitted by the member if he/she becomes qualified again for additional days to be carried over.

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*Continued on next page*



## Leave Carried over in Excess of 60 Days, Continued

**Procedures for carrying over of more than 60 days for multiple members at a unit**

If multiple members of a unit are qualified to carry over more than 60 days of leave into a fiscal year, then the unit must:

Step	Who Does It	Action Taken
1	UNIT	Must submit a letter to PSC (MAS) and the letter must contain: <ul style="list-style-type: none"> <li>• A listing of each entitled member of the unit.</li> <li>• An estimate of the total number of days to be carried into the new fiscal year for each member.</li> <li>• And the qualifying circumstances (deployed for Operation XXX, back to back ALPATS, etc..).</li> </ul>
2	PSC (MAS)	Will accumulate all requests and will process them immediately following the <b>March</b> end-of-month compute. Note: This timing ensures that any outstanding leave is posted prior to manual adjustments being made. The member's <b>April</b> LES will reflect restoration of any leave credited.

A new request must be submitted by the unit if a multiple number of members assigned to the unit become qualified again for additional days to be carried over.

**Members have 3 years to use carried over leave**

Members have 3 years to use any excess leave carried forward. Any such leave will automatically be carried forward until used, or until the three year "window" has closed. The carry-over balance will not be reduced until all of the regular leave accrued for the year has been used. For example:

A member is authorized to carry forward 65.0 days on 1 October 1996 (5 days out of the 65 days is excess leave carried forward). During fiscal year 1997 this member uses 32 days leave and accrues 30 days leave. This reduces the member's excess leave carry forward balance from the prior year to 3.0 days (the 2.0 days over 30.0 coming off the carry over). On 1 October 1997, Direct Access/JUMPS will automatically carry 63.0 days forward (30 days accrued for fiscal year 1997 plus 33 days carried over from the prior year equals 63 days), since the 3 year window is still open.

## Preparation of the DD Form 2 CG and DD Form 2

---

**Introduction** Armed Forces Identification Card DD Form 2 CG and DD Form 2 are used as a means of identifying members on active duty, in the reserve, or in a military retired status. The card will be prepared using data contained on the DD Form 1172.

---

**Reference** (a) PERSMAN, Chap. 18-C, Identification Cards and Tags.

---

**Use of “RAPIDS” facilities is mandatory for ID Card issuance** On 1 November 1996 the issuance of ID Cards through the Real-Time Automated Personnel identification Card System (RAPIDS) became mandatory. Manual preparation of ID cards is prohibited except in the following circumstances:

- Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available.
- Transition Assistance Management Program (TAMP) beneficiaries and foreign students may be issued DD Form 1173.
- PSC (RAS) may issue DD Form 1173-1.

---

**Availability of RAPIDS facilities** The seven uniformed services have signed a cross-servicing agreement to provide ID card support to all eligible beneficiaries, regardless of their parent service. Once an ID card issuing facility is designated a RAPIDS site, service will be available to any eligible beneficiary.

RAPIDS sites have been established within reasonable distances of most units. Most Coast Guard District, ISC, and Group Offices are designated RAPIDS sites. Most large Department of Defense commands, active and reserve, are designated RAPIDS sites.

The following web site gives the three closest Military ID issuing facilities to a person’s zip code, city or state. <http://www.dmdc.osd.mil/rsl>.

Coast Guard units unable to determine their supporting RAPIDS site should contact COMDT (CG-1222) for assistance.

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*Continued on next page*

## **E-Resume**

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**Introduction**      The E-Resume is necessary to provide up-to-date information to personnel assignment officers regarding an active duty member's personal status and assignment preferences.

Reservists may request reassignment by completing an E-Resume. Forward the completed transaction to the appropriate ISC (fot) via the Commanding Officer.

---

**References**

- (a) PERSMAN, 4-C.2.a thru 4-C-2.f
- (b) Commissioned and Warrant Officer Billet Manual
  - Section A, Officer Billet Code System
  - Section B, Occupational Field Codes
  - Section C, Organizational Level Codes
  - Section D, Job Position Locator Codes
- (c) Enlisted Billet Manual, Chapter 4, Tables of General OPFAC Codes & Geographic Areas.
- (d) Direct Access Guide, E-Resume

---

**Submission of the E-Resume**      The E-Resume must be submitted by active duty personnel as follows:

- To request a specific duty assignment.
- To request a tour extension at current PDS.
- To request mutual or unilateral transfer.
- 6 to 9 months prior to a member's discharge or RELAD date.
- During the "Engage" phase of the S.P.E.A.R. assignment process, for members who will be tour complete in the upcoming fiscal year.

The E-Resume must be submitted by reserve personnel as follows:

- To request transfer to a new unit. The E-Resume shall be submitted to ISC (PF) via the reservist's unit..
-

## Assignment/Termination of Government Quarters

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**Introduction** When a member moves into or out of government quarters, it normally results in a change in BAH entitlements. This job aid will assist you in notifying the SPO to avoid over/under payments.

---

**References** (a) CG Housing Manual,  
Section 6-E, Assignment to Public Quarters and Rental Housing  
Section 6-F, Termination of Assignment: Public Quarters and Rental  
Housing

---

**The need for prompt SPO notification** Timely input of pay transactions is critical. This is especially true when a pay transaction has a large dollar impact on the member, such as a transaction connected with government quarters occupancy or termination.

- Providing timely notification (within 24 hours) of a change to a member's housing status will enable the SPO to input the required Direct Access/JUMPS transactions and ensure the member receives the correct amount of pay.

---

**Advance notification will avoid incorrect payments** Members anticipating assignment to government quarters may submit a special request to the SPO to have the BAH stopped ahead of time to avoid being overpaid.

A member desiring to live on the economy must request permission from their commanding officer to be eligible for BAH entitlements.

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*Continued on next page*

## Assignment/Termination of Government Quarters, Continued

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**Notifying the SPO**

SPOs, housing offices and unit administrative staffs must work together to develop local procedures for SPO notification.

Follow these procedures upon notification that a member has been assigned or terminated quarters:

Step	Action
1	The Housing Office, on the date of assignment, (and not later than 24 hours after date of assignment), notifies the servicing SPO of the assignment via E-mail. <ul style="list-style-type: none"><li>• Provide copy of notification to Area Housing Officer.</li></ul>
2	Ensure notification includes: <ul style="list-style-type: none"><li>• Member's name</li><li>• Rate/Rank</li><li>• Name &amp; SSN</li><li>• Date of assignment/termination</li><li>• Exact BAH code description (e.g. With Dep - member assigned CG Leased Quarters)</li><li>• Indicate if spouse is in service</li><li>• Indicate type of quarters</li><li>• If inadequate quarters indicate the rental fee</li></ul>
3	Upon receipt of the notification, the SPO will acknowledge receipt of the assignment via return e-mail to the housing office within 24 hours and submit the appropriate Direct Access transactions.
4	The Housing Office will run the BAH Verification Report contained in the Housing Management Information System (HMIS) every two weeks.
5	The Housing Office will review all discrepancies and correct HMIS data entry errors within 3-5 days of running the BAH Verification Report. Upon completion, the housing office will notify the SPO via e-mail of any remaining discrepancies involving incorrect BAH codes.

## Permissive Travel Authorization

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**Introduction** A Permissive travel authorization must be prepared in Basic Coast Guard Letter format. Use of the CG-2519, CG-4251, CG-5131, or authenticated message is not authorized.

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**Reference** (a) PERSMAN, Chap. 7-A-10

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**Preparing a Permissive Travel Authorization** A Permissive travel authorization must contain the following:

- Reason for the travel authorization
- Location and inclusive date the member will be absent
- This non-cost statement from the PERSMAN

“This authorization is issued with the understanding that you will not be entitled to reimbursement for mileage or expense in connection therewith. In case you do not desire to bear this expense, consider this authorization cancelled.”

- The member’s signature acknowledging understanding of the non-cost statement
- 

**Distribution** The unit must give the original travel authorization to the member. Upon return, the member must endorse the travel authorization with the time/date of departure and return. After return and endorsement by member, the original travel authorization must be forwarded to the SPO to complete personnel transactions to credit/debit subsistence entitlements.

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**Note** Members performing permissive travel for house hunting in the vicinity of their new permanent duty station should consider taking several certified copies of their latest LES.

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**Section B**  
**TYPES OF PAYMENT**

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## Section Overview

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**Introduction** This section explains the types of payments available to Coast Guard members and the procedures to request special payments, advances and death gratuity.

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**In this section**

<b>Topic</b>	<b>See Page</b>
<u>Regular Payments</u>	6-B-2
<u>Special Payments</u>	6-B-3
<u>Offline Payment template</u>	6-B-5
<u>Advance Payments</u>	6-B-6
<u>Death Gratuity Payments</u>	6-B-8
<u>Retired Pay Projection Request</u>	6-B-9

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**Section B**  
**TYPES OF PAYMENT**

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## **Regular Payments**

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**Introduction**      A regular payment is a payment made by JUMPS based on the member's pay account. It is delivered based on the member's payment option election.

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**Pay periods**      Each month is divided into two pay periods. Approximately 10 days before the end of each pay period, PSC computes the payroll based on Direct Access transactions.

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**Description**      A regular payment covers the amount of pay and allowances accruing to an account during a semimonthly pay period. This payment also includes routine adjustments to previous pay periods.

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## Special Payments

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<b>Background</b>	<p>In addition to making regular semimonthly payments, PSC has the authority and ability to make certain special payments through the Department of Treasury. Special payments can be authorized in two instances:</p> <p><u>Nonreceipt of pay</u>                      Member did not receive his/her regular semimonthly payment, or received it but it was lost or stolen.</p> <p><u>Significant pay shortage</u>              Member's regular semi-monthly payment was significantly less than it should have been, and the member will experience a hardship if he/she must wait until the next scheduled payday to receive the pay due.</p>
<b>Reference</b>	<p>(a) <u>PAYMAN</u>, Section 9-C</p>
<b>Criteria for special payments due to nonreceipt of pay</b>	<p>A member may be authorized a special payment once the ACH (Automated Clearing House) department at the member's financial institution verifies that no payment has been received. Special payments may only be requested by personnel E-7 and above using the Offline Payment template (see page 6-B-5) and sent via email to PSC-MAS.</p>
<b>Criteria for special payments due to regular semimonthly payment being significantly less than it should have been</b>	<p>A member may be authorized a special payment if he or she meets <u>all</u> of the following 5 criteria:</p> <ol style="list-style-type: none"><li>(1) The member is underpaid \$100.00 or more in his/her regular semimonthly payment; <u>and</u></li><li>(2) The pay shortage amounts to 10% or more of the member's total pay entitlements; <u>and</u></li><li>(3) The member is not scheduled to receive the reimbursement of the pay shortage in the next scheduled payday; <u>and</u></li><li>(4) The pay shortage is causing the member to experience a financial hardship; <u>and</u></li><li>(5) The SPO has submitted documentation certifying the member's entitlement to the additional pay due.</li></ol>

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*Continued on next page*

**Section B**  
**TYPES OF PAYMENT**

## Special Payments, Continued

**How special payments are liquidated & posted on the LES**

Special payments are posted as a debit/deduction from the next scheduled pay date. For example, a special payment made to a member on 2 September 2004 will be deducted from the member's 15 September 2004 pay. Special payments made in a mid-month compute cycle will post as a debit/deduction from the mid-month pay. Special payments made in an end-month compute cycle will post as a debit/deduction from the end-month pay.

**Nonreceipt of pay procedures**

Follow these procedures for claiming nonreceipt of pay.

When member's pay delivery is	Then the ...	Does this...
Direct Deposit	Member	Notifies unit admin office, provides the following: <ul style="list-style-type: none"> <li>• name and address of financial institution.</li> <li>• name and phone number of person to contact at the financial institution.</li> </ul>
	Unit	Notifies SPO.
	SPO	Verifies information and notifies PSC (MAS) using the <u>Offline Payment template</u> .
	PSC (MAS)	Makes special payment via EFT if needed within 3 working days.

**Significant pay shortage procedures**

Follow these procedures for requesting a special payment in pay shortage cases:  
**Note:** Special payments for IDT pay discrepancies are generally not authorized but may be considered on a case-by-case basis.

When member's pay delivery is	Then the ...	Does this...
significantly less than it should have been	Member	<ul style="list-style-type: none"> <li>• Notifies unit admin office that a special payment is needed to avoid a financial hardship.</li> </ul>
	Unit	<ul style="list-style-type: none"> <li>• Notifies SPO.</li> </ul>
	SPO	<ul style="list-style-type: none"> <li>• Verifies that all pay entitlement transactions have been input into Direct Access.</li> <li>• Relays special payment request to PSC (MAS) using the <u>Offline Payment template</u>.</li> </ul>
	PSC (MAS)	<ul style="list-style-type: none"> <li>• Makes or authorizes special payment if needed within 3 working days.</li> </ul>

**Section B**  
**TYPES OF PAYMENT**

---

**Offline  
Payment  
template**

A. PERSONNEL AND PAY PROCEDURES MANUAL, PSCINST M1000.2A,  
CHAPTER 6

1. RATE/RANK NAME, EMPLID, USCG

2. *(REASON FOR REQUEST)* REQUEST FOR SPECIAL DIRECT DEPOSIT  
PAYMENT OF PAY AND ALLOWANCES FOR THE PERIOD 15JUL2005 TO  
01AUG2005. REQUEST DUE TO NON-RECEIPT OF PAY FOR 01AUG2005. AN  
EMAIL STATEMENT OF INTENT WAS SUBMITTED ON 08JUL2005 REFLECTING  
MEMBERS INTENTIONS TO REENLIST CURRENT CONTRACT BUT WAS NOT  
SUBMITTED IN TIME TO MAKE THE 15JUL005 PAY CUT.

COMPUTATION OF PAYMENT ARE AS FOLLOWS:

<u>CREDIT</u>	<u>PERIOD</u>	<u>MONTHLY/DAILY AMOUNT</u>
BASIC PAY	2005JUL15 - 2004AUG01	\$60.91 X 15 DAYS = \$913.64
SDAP STRIKE TM	2005JUL15 - 2004AUG01	\$4.67 X 15 DAYS = \$70.05
ENL BAS	2005JUL15 - 2004AUG01	\$8.31 X 15 DAYS = \$124.68
BAH WITH DEP	2005JUL15 - 2004AUG01	\$37.74 X 15 DAYS = \$566.06

<u>DEBIT</u>	<u>PERIOD</u>	<u>MONTHLY/DAILY AMOUNT</u>
TAXES	2005JUL15 - 2004AUG01	\$9.13 X 15 DAYS = \$137.02

TOTAL PAYMENT **\$1,526.79**

3. REQUEST MEETS THE CRITERIA OF REFERENCE (A).

4. CORRECTIVE ACTIONS TAKEN BY THE SPO RECTIFY THE NON PAY  
ISSUE...FOR INSTANCE, WHAT DOCUMENTS SUBMITTED AND WHEN.

5. PERSRU POINT OF CONTACT: YNC I. WANNABAGOD/ 800-000-0000

6. SIGNED BY DESIGNATED PAYMENT APPROVING OFFICIAL (PAO): YNCS I.  
AMAGOD

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**Section B**  
**TYPES OF PAYMENT**

---

## Advance Payments

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**Introduction** This information has been provided to aid in determining what type of advances are allowed, when they may be utilized, and how they will be liquidated.

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**Reference** (a) PAYMAN, Section 9-D, Advance Payments.

---

**Rules** Payment of advances must be made through Direct Access/JUMPS unless a bona fide emergency exists. Advance Pay may not be paid in cash.

---

**Types and amounts of advances** See Ref. (a), Paragraphs 9-D-3 and 9-D-4 to determine which advance should be taken and the amounts payable.

---

---

**Process** This is the process for payment of advances:

<b>Step</b>	<b>Who Does It</b>	<b>Action Taken</b>
1	Member	Submits appropriate worksheet to unit <ul style="list-style-type: none"><li>• Submits <u>Advances Worksheet</u>, or</li><li>• Submits <u>PCS Departing Worksheet</u>, if applicable.</li></ul>
2	Unit	Authorizes advance and forwards to SPO.
3	SPO	Completes Advance transactions.

---

**Liquidation** Refer to Ref. (a), Paragraph 9-D-5 for specific liquidation schedules. The Advances Worksheet (CG PSC-2010) provides a general description of the liquidation process.

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*Continued on next page*

**Section B**  
**TYPES OF PAYMENT**

**Advance Payments, Continued**

**Changes to liquidation schedules**

See Ref (a), Paragraph 9-D-5. Use this table to determine action needed to change liquidation schedule.

<b>When Member</b>	<b>Then</b>
requests increase in payment amount,	monthly amount is increased.
member requests a payment decrease and the liquidation period for advance pay will not exceed 24 months.  Note: Applicable to liquidation of advance pay only. The liquidation period for advance BAH, OHA, and Interim Housing Allowance is limited to 12 months.	decrease may be authorized by unit commanding officer.
member requests a payment decrease for liquidation of advance OHA or Interim Housing Allowance, and BAH in conjunction with Overseas Assignment	decrease may be authorized by unit commanding officer.
member is separated during liquidation schedule,	ensure a lump sum payment is effected.
member did not use advance for its intended purpose,	ensure a lump sum payment is effected.

Changes in the monthly installment amount being deducted are made by the servicing SPO.

## Death Gratuity Payments

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**Introduction** Death gratuity is payable to eligible survivors of Coast Guard members who die while on active duty, Active Duty for Training (ADT) or Inactive Duty for Training (IDT), or while traveling to/from IDT/ADT. The survivors of a member or former member, who dies within 120 days of their separation date, are also authorized a death gratuity, if the Administrator of Veterans Affairs determines the death was service connected.

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**References**

- (a) PERSMAN, Article 18-A-4, Death Gratuity
- (b) PAYMAN, Section 10-K, Death Gratuity
- (c) ALCOAST 569/04

---

**Rules**

- PSC (SES) normally pays the Death Gratuity via an EFT, but the beneficiary may request payment by check.
- PSC (SES) records Death Gratuity payment in JUMPS.

---

**Procedures** This procedure describes the steps for payment of the Death Gratuity:

Step	Who Does It	Action Taken
1	ISC Decedent Affairs Officer (DAO) or Casualty Assistance Calls Officer (CACO)	<ol style="list-style-type: none"><li>1. Prepares <u>DD Form 397</u>.<ul style="list-style-type: none"><li>• Places the following information in Block 5:<ul style="list-style-type: none"><li>o Beneficiary SSN</li><li>o Indicate whether beneficiary has requested payment by check or EFT. If by EFT, indicate if the EFT will be sent to the member's account as listed in Direct Access/JUMPS or to another account designated by the beneficiary. If not using the same account as listed in Direct Access/JUMPS please provide the bank information via a deposit slip or voided check.</li></ul></li></ul></li><li>2. Takes DD Form 397 to beneficiary for signature.</li><li>3. Faxes signed DD Form 397 to PSC (SES) for payment.</li></ol>
3	PSC (SES)	Issues payment.

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## Retired Pay Projection Request

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**Introduction**      The Retired Pay Projection (CG PSC-1900) form may be used to obtain an estimated projection of your future retired pay. It is a financial planning service offered by PSC (RAS) to members with over 15 years service who are considering retirement.

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**Completing the CG PSC-1900**      The member should complete the CG PSC-1900 in original only. Instructions for completion of the form are on the reverse side of the form. The bottom of the form is for PSC (RAS) use.

Mail the completed form to:

COMMANDING OFFICER (RAS)  
USCG PERSONNEL SERVICE CENTER  
444 SE QUINCY STREET  
TOPEKA KS 66683-3591

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Section D  
PAYMENT OF INACTIVE DUTY RESERVISTS

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**Annual Reserve Retirement Point Statement, Continued**

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**CG-4175A not  
received by the  
member**

If the member does not receive the CG-4175A or the member is requesting a copy of the CG-4175A, then the member should request a copy from his/her servicing SPO. All SPOs have the capability of viewing and printing the CG-4175A by using the JUMPS database.

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**Section D**  
**PAYMENT OF INACTIVE DUTY RESERVISTS**

## Disability Processing

**Introduction**      Disability processing applies to reservists who incur or aggravate an injury, illness, or disease in the line of duty while performing, or traveling to, active duty for 30 days or less or inactive duty training (IDT).

**References**      (a) RPM, Chapter 6A  
                          (b) PAYMAN, Chapter 12, Reserve Pay and Allowances  
                          (c) Administrative Investigations Manual, COMDTINST M5830.1

**Process**            Below are the stages of disability processing.

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
1	Member	Becomes disabled
2	Member/ CO	Ensures a medical exam by proper authorities is completed
3	CO	Issues line-of-duty determination
4	CO	Obtains medical documentation
5	CO	<p>Notifies ISC (pf) via letter of the member's injury. Letter shall include the following information:</p> <ul style="list-style-type: none"> <li>• Member's full name, rate and SSN;</li> <li>• Duty status (AD, IDT, traveling to or from duty site) at the time injury occurred, and the time and dates of the duty period;</li> <li>• Date, time, place and circumstances of the injury;</li> <li>• Nature of the injury, estimated period of impairment, and anticipated disposition;</li> <li>• If hospitalized, estimated period of impairment, and anticipated disposition; date, time, place, and estimated period of hospitalization along with address of hospital, name of attending physician, and admission diagnosis;</li> <li>• If not hospitalized, name and address of clinic or physician's office where member was treated and when treatment occurred; name of attending physician, diagnosis, physician's prescribed treatment, including follow-up treatment;</li> <li>• Opinion as to whether the injury was incurred in the line of duty;</li> <li>• Complete home and work address and phone number of the member; and</li> <li>• Name and phone number of the member's civilian employment supervisor.</li> </ul>

*Continued on next page*

## Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID) Continued

**Procedure for payment of HF/ID Pay**

This is the procedure utilized when a member qualifies for or loses an entitlement to HF/ID pay:

Step	Action						
1	<p>The unit commanding officer sends a letter or message to the SPO authorizing HF/ID. In addition to the name, rank, SSN and designated HF/ID area, include one of these entitlements in the letter:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%; text-align: center;">Entitlement</th> <th style="text-align: center;">Description</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Continuing</td> <td> <p>If starting, include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., reporting date)</li> <li>• Statement indicating the member is entitled on an ongoing basis.</li> </ul> <p>If stopping, include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., departing date)</li> <li>• Statement indicating the exact nature for termination.</li> </ul> </td> </tr> <tr> <td style="vertical-align: top;">One time</td> <td> <p>Include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., date member entered a designated HF/ID area)</li> <li>• Statement indicating the member is entitled on a one-time basis.</li> </ul> </td> </tr> </tbody> </table>	Entitlement	Description	Continuing	<p>If starting, include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., reporting date)</li> <li>• Statement indicating the member is entitled on an ongoing basis.</li> </ul> <p>If stopping, include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., departing date)</li> <li>• Statement indicating the exact nature for termination.</li> </ul>	One time	<p>Include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., date member entered a designated HF/ID area)</li> <li>• Statement indicating the member is entitled on a one-time basis.</li> </ul>
Entitlement	Description						
Continuing	<p>If starting, include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., reporting date)</li> <li>• Statement indicating the member is entitled on an ongoing basis.</li> </ul> <p>If stopping, include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., departing date)</li> <li>• Statement indicating the exact nature for termination.</li> </ul>						
One time	<p>Include:</p> <ul style="list-style-type: none"> <li>• Date the event occurred (e.g., date member entered a designated HF/ID area)</li> <li>• Statement indicating the member is entitled on a one-time basis.</li> </ul>						
2	<p>The SPO Submits a Direct Access Start Pay transaction for imminent danger pay. There are two options available:</p> <p>Option 1: HF/ID pay for a single month only</p> <p>Option 2: Continuous HF/ID pay until submission of a subsequent stop transaction.</p>						

## Funeral Honors Duty Allowance for Reservists

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**Introduction** The fiscal year 2000 Legislative Pay Change created an entitlement for Reservists performing funeral honors duty. The entitlement grants the member one retirement point and a daily allowance of \$50. This section provides procedures for processing the funeral duty pay and points.

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**Reference** (a) [PAYMAN](#), Section 12  
(b) RPM, Chapter 2  
(c) Direct Access Guide, Schedule/Approve Drills

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**Procedures** All members of the Ready Reserve may volunteer to perform funeral honors duty. If the member performs at least two hours of funeral duty, including any associated training and travel time, the drill is recorded in Direct-Access as described in Section 6-D of this Manual. Reimbursement for travel expenses require separate TDY orders to be issued and claims filed in accordance with Section 2-B of this manual.

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**Amount of Funeral Duty Pay for Reservists** See [PAYMAN](#), Section 12-O, Funeral Honors Duty Allowance for the current rate.

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**Section B  
TAXES**

**State Tax Listing, Continued**

State and contact phone number	Authorized to Have SITW Withheld From Military Members	Tax Withholding Form State Requires	State Tax Office Address
Pennsylvania 888-728-2937	Yes	Federal Form W-4 *	Bureau of Individual Taxes Taxpayer Inquiry Unit 5 <sup>th</sup> Floor, Strawberry Square Harrisburg, PA 17128
Conditions for exemption from state tax: See rules for Connecticut.			
Puerto Rico	Yes (If stationed outside the U.S.)	Form 499R-4.1	Director, Income Tax Division Treasury Department PO Box S-4515 San Juan, PR 00901
<b>Note:</b> Filing of a tax return and payment of personal income tax may be required. It is the member's responsibility to contact the state tax authority to determine tax liability.			
Rhode Island (401) 222-3911	Yes	Federal Form W-4 *	Rhode Island Division of Taxation 1 Capitol Hill Providence, RI 02908
South Carolina (803) 898-5709	Yes	Federal Form W-4 *	South Carolina Department of Revenue PO Box 125 Columbia, SC 29214
South Dakota 800-829-9188	NO STATE INCOME TAX		
Tennessee 800-342-1003 (In state) (615) 741-3506	No (exempts all active duty military pay)		Department of Revenue Jackson State Office Building 500 Deaderick St Nashville, TN 37242
Texas 800-662-4335	NO STATE INCOME TAX		
Utah 800-662-4335	Yes	Federal Form W-4 *	Utah State Tax Commission 210 N 1950 W Salt Lake City, UT 84134
Vermont (802) 828-2865	Yes	Federal Form W-4 *	Vermont Department of Taxes Taxpayer Services Division 109 State Street Montpelier, VT 05609
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Virginia (804) 367-8031	Yes	State Form VA-4	Customer Services Section PO Box 1115 Richmond, VA 23218-1115
Washington 800-647-7706	NO STATE INCOME TAX		
West Virginia 800-942-8297 (304) 558-3333	No		Department of Tax & Revenue Taxpayer Services Division PO Box 3784 Charleston, WV 25337-3784
<b>Note:</b> Filing of a tax return and payment of personal income tax may be required. It is the member's responsibility to contact the state tax authority to determine tax liability.			
Wisconsin (608) 266-2772	Yes	Federal Form W-4 *	Wisconsin Department of Revenue PO Box 8903 Madison, WI 53708
Wyoming (307) 777-5200	NO STATE INCOME TAX		

\* These states use Federal W-4 annotated "For SITW Purposes Only".

## Income Tax Exclusion for Duty in Combat Zone

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**Introduction** Certain income earned by members of the Armed Forces while in a combat zone designated by the President is not subject to withholding of federal or state income tax.

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**Qualified Areas for Combat Tax Exclusion** Section 8-G-2 of the PAYMAN designates combat zones, which qualify for federal income tax exclusion. The listing of qualified areas may be modified from time to time via ALCOAST messages.

---

**Rules for Combat Tax Exclusion** The following rules apply when determining income tax exclusion for duty in a combat zone.

- A member who is present on official duty in a combat zone, no matter how brief, qualifies for combat tax exclusion for that month.
  - When the airspace over a combat zone is specifically included as part of the zone, members who pass over or through the combat zone during the course of a trip between two points, both of which lie outside the zone, are entitled to an exclusion.
  - If the airspace over a combat zone is not specifically included as a part of the zone this exclusion is valid only if the members are assigned to the airspace of the combat zone on official temporary duty, or if the members otherwise qualify for hostile fire/imminent danger pay as a result of the flight.
  - Members performing military duties in areas outside a designated combat zone in support of military operations in a combat zone, who qualify for imminent danger pay, also qualify for combat tax exclusion.
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*Continued on next page*

## **Section Overview**

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**Introduction**      This section provides the guidelines and procedures for the Thrift Savings Plan (TSP).

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**In this section**

<b>Topic</b>	<b>See Page</b>
Thrift Savings Plan (TSP) Overview	8-C-2
TSP Enrollment	8-C-5
Account Maintenance/Contribution Changes	8-C-7
TSP Catch-Up Program	8-C-9

---

## **TSP Overview**

---

**Introduction** This section provides an overview of the TSP. Information that is more detailed can be found in the references listed below.

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**References** The following provide detailed information on the policy and procedures for the TSP.

- <http://www.tsp.gov/> TSP website
  - [Coast Guard Pay Manual](#) Chapter 6, section G, Policy Governing TSP
- 

**TSP Description** Thrift Savings Plan (TSP) is a Federal Government-sponsored retirement savings and investment plan for federal employees and members of the uniformed services. It is similar to private 401(k) by offering a member the same type of savings and tax benefits that many private corporations offer their employees.

Participation in the TSP is voluntary. Contributions are deducted from a member's pay before taxes are computed. In addition, TSP earnings are tax-deferred.

---

**Employer Matching Contributions** At the present time, the Coast Guard does NOT make matching contributions to military TSP accounts.

---

**Pay that can be contributed to TSP** Members may contribute up to 100% of their basic pay into the Thrift Savings Plan (TSP). Members who elect to contribute from basic pay may also elect to contribute up to 100% of incentive pay, special pay, and bonuses.

Base pay for active duty is defined in 37 U.S.C. section 204; pay for Ready Reserves (e.g., inactive duty for training (IDT) pay) is defined in 37 U.S.C. section 206.

Contributions to TSP remain subject to Internal Revenue Code elective deferral limits. For 2006, the maximum IRS limit for members less than age 50 is \$15,000.

Members age 50 and over, or who will reach age 50 on or prior to 31 December, are eligible to invest an additional \$5,000 into TSP under the TSP catch-up program. (See TSP Catch Up Program on page 9 of this section).

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*Continued on next page*



## TSP Overview, Continued

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### Withdrawals

The TSP is a long-term retirement savings plan that provides special tax advantages. Limitations on in-service withdrawals help ensure that retirement savings will be used for their intended purpose. Therefore, TSP participants who are still members of the uniformed services, are limited to the following two types of in-service withdrawals:

- Age-based in-service withdrawals for participants who are 59½ or older.
- Financial hardship in-service withdrawals for participants who can certify that they have a financial hardship.

When a member makes an in-service withdrawal, they cannot return or repay the money.

The member may use the Account Access section of the TSP Web site (<http://www.tsp.gov>) or complete Form TSP-U-75, Age-Based In-Service Withdrawal Request, or Form TSP-U-76, Financial Hardship In-Service Withdrawal Request, depending on the type of withdrawal requested. Both forms are available from the TSP Web site.

Before making an in-service withdrawal a member should evaluate options to see if a TSP loan would be more beneficial. (See TSP Loan Program below).

---

### TSP Loan Program

The TSP loan program gives members access to the money they have contributed to their TSP account and the earnings on that money. The member must be in pay status to obtain a loan, because regular monthly loan payments are made through payroll deductions.

The **minimum** loan amount is \$1,000. Therefore, the member must have at least \$1,000 of their own contributions and attributable earnings on those contributions in their TSP account to apply for a loan. The **maximum** loan amount is \$50,000, depending on the amount the member has contributed, any outstanding TSP loans, and limits set by the Internal Revenue Code.

The member may use the Account Access section of the TSP Web site (<http://www.tsp.gov>) or complete ([Form TSP-U-20](#)) Loan Application.

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*Continued on next page*

## TSP Overview, Continued

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**TSP  
Contribution  
Limits and  
Rules**

The IRS imposes a limit on the total amount of all contributions a participant can contribute for a year.

For 2006, the total amount a participant can contribute is \$42,000 or 100% of compensation, whichever is the lesser amount.

**Note: ELIGIBLE** participants who expect to contribute larger amounts of special, incentive, or bonus pay need to pay particular attention to this limit.

- Members age 50 and over, or who will reach age 50 on or prior to 31 December of the current tax year, are eligible to invest an additional \$5,000 into TSP under the TSP catch-up program.
  - Members serving in a combat zone are subject to a special elective deferral limit of \$42,000, or 100% of compensation, whichever is less.
-

## TSP Enrollment

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**Introduction** This section provides the procedure for enrolling in TSP.

---

**Reference** (a) [Coast Guard Pay Manual](#) Chapter 6, section G, Policy Governing TSP

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**Before You Begin** Members may enroll within 60 days if one of the following applies:

- Joining the Coast Guard
- Reservist recalled to active duty
- Member changing components (i.e. reserve to regular)

Enrollments and un-enrollments cannot be entered in DA using self-service. Coast Guard Academy cadets and non-prior service CG Naval Academy Preparatory School (NAPS) cadets are not eligible to participate in TSP until they are commissioned or reverted to enlisted status.

---

**Process** This is the process for enrolling in TSP.

Step	Who Does It	Action
1	Member	<p>Completes a <a href="#">TSP-U-1 form</a>. This form can be obtained from the tsp website <a href="http://www.tsp.gov/">http://www.tsp.gov/</a>. under <a href="#">Forms and Publications from the Uniformed Services section</a></p> <p><b>Note:</b> Members should not fill out the <i>TSP-1 election form</i>. This is the civilian TSP election form and is not to be used by military members.</p> <p>Fax the completed form to PSC (MAS-TSP) at (785) 339-3760 or mail it to:</p> <p style="text-align: center;">Commanding Officer (MAS-TSP) Coast Guard Personnel Service Center 444 SE Quincy Street Topeka, KS 66683-3591</p>

*Continued on next page*

**Section C**  
**THRIFT SAVINGS PLAN**

**TSP Enrollment, Continued**

Step	Who Does It	Action
2	Member	<p>Completes a <a href="#">TSP-U-3 Designation of Beneficiary Form</a>. This form can be obtained from the tsp website <a href="http://www.tsp.gov/">http://www.tsp.gov/</a> under <a href="#">Forms and Publications from the Uniformed Services section</a>. The TSP-U-3 must be mailed to the TSP Service office:</p> <p>Thrift Savings Plan Service Office P.O. Box 385021 Birmingham, AL 35238</p>
3	PSC (MAS-TSP)	<p>Upon receipt of Form TSP-U-1, will enter the form in Direct Access so that it can be processed in member's pay account in JUMPS.</p> <p>Once this processes in JUMPS, the member will receive a LES Remark reading: "Your TSP Election of ___% Base Pay, ___% Special Pay, ___% Incentive Pay and ___% Bonus begins _____."</p> <p><b>Note:</b> If a member sees a TSP error on his/her LES, or on IRS Form W-2, the member should contact PSC Customer Care at (785)-339-2200 or by submitting an online trouble –ticket at <a href="http://www.uscg.mil/hq/psc/customerservice.shtm">http://www.uscg.mil/hq/psc/customerservice.shtm</a>.</p>
4	NFC	<p>Opens the member's TSP account and sends a Personal Identification Number (PIN) to the member via mail. See Ref. (a), Article 6-G-10-b for additional details.</p>
5	Member	<p>After receipt of the PIN, the member specifies how he/she wants their TSP contributions to be invested among the TSP funds. See Ref. (a), Article 6-G-10-c for additional details.</p> <p><b>Note:</b> It will take approximately 30-35 days after initial enrollment before the Pin# is mailed out to the member. Please make sure the address (mailing address in Direct-Access) is current.</p>

## Account Maintenance/Contribution Changes

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**Introduction** This section provides the procedures for maintenance of a member's TSP account data.

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**TSP Address Changes** For Active Duty and Reserve members: TSP will automatically receive new address information from the U. S. Coast Guard on the first of the month following the month in which the member's address is changed in Direct-Access.

Separated and former members: Please follow the procedures in [TSP Fact Sheet "Your TSP Account Address"](#) (<http://www.tsp.gov/cgi-bin/byteserver.cgi/forms/oc96-4.pdf>).

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**Contribution Changes** Open seasons were eliminated effective 1 July 2005. This means that participants may file contribution elections at any time.

A member may change the way money already invested in a TSP account is invested by requesting an inter-fund transfer, by one of the following means:

- Using the TSP web site <http://www.tsp.gov/>.
- Calling the Thriftline's automated telephone service at (504) 255-8777.
- Submitting [Form TSP-U-50](#) to the TSP Service Office, National Finance Center, P.O. Box 61500, New Orleans, LA 70161-1500.

Members currently enrolled in TSP who desire to change their contribution percentage can do so through the [Direct Access Self-Service application](http://www.uscg.mil/hq/psc/ps/self_service/members/thrift_savings_plan.htm) ([http://www.uscg.mil/hq/psc/ps/self\\_service/members/thrift\\_savings\\_plan.htm](http://www.uscg.mil/hq/psc/ps/self_service/members/thrift_savings_plan.htm)) or by completing [Form TSP-U-1](#) (<http://tsp.gov/uniserv/forms/tsp-u-1.pdf>) and mailing or faxing it to:

Commanding Officer (MAS-TSP)  
Coast Guard Personnel Service Center  
444 SE Quincy Street  
Topeka, KS 66683-3591  
Fax: (785) 339-3760

**Note:** Members can only make one change a month using Direct-Access self-service. If the need arises to make another change during the current month, complete Form TSP-U-1 and forward it PSC (MAS-TSP) as described above.

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*Continued on next page*

## Account Maintenance/Contribution Changes, Continued

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### **TSP Separation Notification**

If a member was participating in the TSP and is separating from the Coast Guard (Discharge, RELAD or Retirement), the Personnel Service Center (PSC) needs to notify the TSP Service Office. The member will not be able to withdraw funds from their account until the TSP Service Office has been notified, by the Coast Guard, of the separation.

The member must complete a [TSP Separation Notification form](http://www.uscg.mil/hq/psc/forms/tspsepform.pdf) (<http://www.uscg.mil/hq/psc/forms/tspsepform.pdf>), and forward it to PSC (MAS-TSP). The *TSP Separation Notification form* is attached to the Career Intentions Worksheet (CG PSC-2045) file.

Fax the completed form to PSC (MAS-TSP) at (785) 339-3760 or mail it to:

Commanding Officer (MAS-TSP)  
Coast Guard Personnel Service Center  
444 SE Quincy Street  
Topeka, KS 66683-3591

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### **TSP Questions:**

For questions on enrollment, un-enrollment, deductions or form completion, contact PSC Customer Service via phone (785-339-2200) or via the web form at <http://www.uscg.mil/hq/psc/customerservice.shtm>.

Question on TSP investments, loans, and PINS, contact TSP Thrift Line via phone (1-877-968-3778).

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## TSP Catch-Up Program

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**Introduction** This section provides procedures for members desiring to participate in the TSP Catch-Up program.

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**Catch-Up Program Rules** The TSP Catch-Up program applies to members over age 50 or turning age 50 prior to the end of the calendar year. The member must be contributing the maximum amount of regular TSP contributions before any contribution can be made to the Catch-Up program. The TSP Catch-up limits are:

<u>YEAR</u>	<u>LIMIT</u>
2006	\$5,000
2007 and after	5,000 + Inflation

- Catch-up contributions are separate from regular contributions, but are combined with regular contributions on the W-2.
  - Catch-up contributions are in whole dollar amounts (versus a percentage) and are a deduction from basic pay.
  - Elections for catch-up contributions expire on 31 December of each year.
  - If a member stops regular contributions, catch-up contributions are also stopped.
  - Catch-up contributions are on a pre-tax basis like other TSP contributions.
- 

**Enrollment/ Contribution Changes** Enrollments and changes to catch up contributions must be submitted to PSC (MAS/TSP).

Catch-up elections are made on [Form TSP-U-1-C](http://tsp.gov/uniserv/forms/tsp-u-1-c.pdf) (<http://tsp.gov/uniserv/forms/tsp-u-1-c.pdf>). Fax the completed form to PSC (MAS-TSP) at (785) 339-3760 or mail it to:

Commanding Officer (MAS-TSP)  
Coast Guard Personnel Service Center  
444 SE Quincy Street  
Topeka, KS 66683-3591

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## **Section Overview**

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**Introduction**      This section will guide you through the procedures for requesting a remission or waiver.

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**In this section**

<b>Topic</b>	<b>See Page</b>
Remissions	9-B-2
Waivers	9-B-3

---

**Section B**  
**REMISSIONS AND WAIVERS**

## Remissions

**Introduction** To cancel an uncollected amount of indebtedness to the U.S. Government, a member must request a remission of that debt. This will assist you with requesting a remission. Remission Application (CG-5489-1) forms are located on PSC's web site at <http://www.uscg.mil/hq/psc/forms>

**References** (a) PAYMAN, Section 11-G, Remission of Indebtedness for Enlisted Members

**Who can apply** Any enlisted member on active duty, including a temporary officer holding a permanent enlisted status, can request a remission.

**Note to deploying or deployed units** If on a cutter 210' or larger, preparing to deploy or deployed when a member receives a notice of overpayment the unit may request suspension of collection action by notifying PSC (MAS) and your SPO, indicating date application is to be forwarded (must be submitted within 60 days).

**Applying for a remission** Use this table when completing an application for a remission.

Stage	Who Does It	What Happens	Action to be Taken
1	Member	<ul style="list-style-type: none"> <li>• <b>Completes CG-5489-1</b></li> <li>• Completes CG-5489B, (if a financial hardship exists)</li> </ul>	<ul style="list-style-type: none"> <li>• Within 15 days of receipt of notice of overpayment</li> </ul>
2	CO of Unit	<ul style="list-style-type: none"> <li>• <b>Completes, Unit Information and Command Endorsement, CG-5489-1</b></li> <li>• Completes Part II, CG-5489B</li> </ul>	<ul style="list-style-type: none"> <li>• Within 5 working days of receipt of CG-5489C from member</li> </ul>
3	SPO	<ul style="list-style-type: none"> <li>• <b>Completes SPO Endorsement Form, CG-5489A</b></li> </ul>	<ul style="list-style-type: none"> <li>• Within 5 working days of receipt of CG-5489-1 from Unit</li> </ul>
4	PSC (MAS)	<ul style="list-style-type: none"> <li>• Suspends collection of indebtedness</li> <li>• Forwards application and endorsements to COMDT (CG-1222)</li> <li>• Notifies member of action taken</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Within 3 working days of receipt of CG-5489-1 and CG-5489A from SPO</b></li> </ul>

**Section B**  
**REMISSIONS AND WAIVERS**

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## Waivers

**Introduction** An erroneous payment to a member is subject to collection when detected. A member may request cancellation of this debt by submitting a request for waiver. This will assist you with requesting a waiver. Waiver Application (CG-5489-2) are located on PSC's web site at <http://www.uscg.mil/hq/psc/forms>

**References** (a) PAYMAN, Section 11-F, Waiver of Claims for Erroneous Payment

**Who can apply** Any present or former member of the U.S. Coast Guard and recipients of pay and/or allowances on behalf of members or former members may apply for a waiver of a debt.

**Applying for a waiver** Members on active duty or serving in the selected reserve must use this procedure when submitting an application for a waiver.

Step	Who Does It	What Happens	Action to be Taken
1	Member	<ul style="list-style-type: none"> <li>Completes member section of, CG-5489-2</li> </ul>	<ul style="list-style-type: none"> <li>Within 15 days of receipt of notice of overpayment</li> </ul>
2	CO of Unit	<ul style="list-style-type: none"> <li>Completes Unit Information and Command Endorsement of CG-5489-2</li> </ul>	<ul style="list-style-type: none"> <li>Within 5 working days of receipt of CG-5489-2 from member</li> </ul>
3	SPO	<ul style="list-style-type: none"> <li>Completes SPO Endorsement, CG-5489A</li> </ul>	<ul style="list-style-type: none"> <li>Within 5 working days of receipt of CG-5489-2 from Unit</li> </ul>
4	PSC (MAS/PPS)	<ul style="list-style-type: none"> <li>Forwards application and endorsements to COMDT (CG-1222)</li> <li>Notifies member of action taken</li> </ul>	<ul style="list-style-type: none"> <li>Within 3 working days of receipt of CG-5489-2 and CG-5489A from SPO</li> </ul>

**Note:** Former members of the U.S. Coast Guard, and recipients of pay and/or allowances on behalf of a member or a former member should contact PSC (MAS/DC) for information on waiver requests.

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## Reporting Medals and Awards

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**Introduction** All medals and awards that have been presented to the member must be reported to the SPO for entry into Direct Access.

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**References** Direct Access Guide, Honors and Awards

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**Reporting Awards** When a member receives a medal or award, forward a copy of the certificate or other documentation to the Direct Access input office (SPO or Unit). A listing of all Award Codes can be found in an Excel spreadsheet on the [PSC Website: http://www.uscg.mil/hq/psc/3pm.htm](http://www.uscg.mil/hq/psc/3pm.htm).

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**Direct Access Path** Home > Develop Workforce > Manage Competencies (GBL) > Use > Honors and Awards

---

**Processing Good Conduct Awards** Process table for active duty and reserve Good Conduct Awards.

Stage	Who Does It	What Happens
1	SPO	Forwards a list to the unit of members who are eligible for awards between the 15th of the current month to the 14th of the next month
2	Unit/SPO (See note)	Prepares Good Conduct Award Certificate for the unit commanding officer's signature
3	Unit	Completes Direct Access transaction or forwards a copy of the signed award certificate or documentation to SPO for Direct Access input
4	SPO	Completes Direct Access transaction if unit is unable to enter the data

**Note:** If unit has no administrative support attached, the SPO will complete the Good Conduct Award Certificate and forward to the unit.

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## How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access

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**Purpose** The objective of this section is to provide a concise, user-friendly job aid for completing Enlisted Employee Review Worksheet (EERW). Refer to Chapter 10-B of the PERSMAN, for information about the Enlisted Employee Review System.

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**Discussion** The EERW should only be used for personnel assigned to commands without access to Direct Access. Some examples of affected commands are:

- CG Recruiting Offices
- CG personnel assigned at MEPS
- Underway vessels (to be input upon return to homeport)
- Detached duty.

Direct Access does not allow input of Employee Reviews older than one year. In that case the unit must submit the completed EERW and forward to PSC (adv) for processing.

---

**Process** This is the process used for submission of Enlisted Employee Review Worksheets.

Stage	Who Does It	What Happens
1	Unit	<ul style="list-style-type: none"><li>• Determines members that need to be evaluated.</li><li>• Obtains the EERW from parent command (forms are available on the PSC website at the following location <a href="http://www.uscg.mil/hq/psc/forms">http://www.uscg.mil/hq/psc/forms</a>). Vessels anticipating underway periods during a period ending date should have sufficient copies prior to sailing.</li><li>• Ensures member signs EERW within 21 days of period ending date.</li><li>• Mails completed EERW to parent command for data entry into EERS.</li></ul>
2	SPO	<ul style="list-style-type: none"><li>• Enters information from EERW into Direct Access.</li><li>• Prints Enlisted Employee Review Summary (EERS) from Direct Access.</li><li>• Returns counseling sheet to Unit.</li></ul>
3	Unit	<ul style="list-style-type: none"><li>• Verifies EERS for accuracy, counsels member, gets signature, and files summary sheet in member's record.</li></ul>

## How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

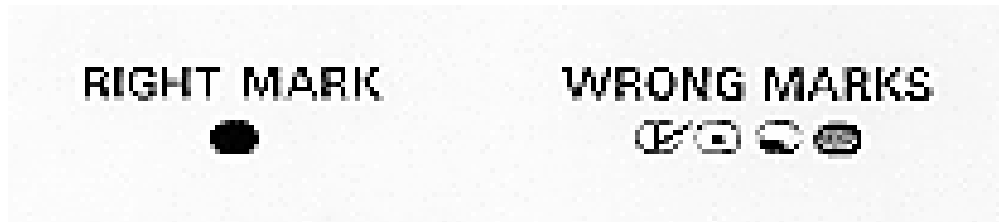
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**Before you  
begin**

EERW's must be used for all Enlisted Employee Reviews (EER) submitted with a period end date later than 1AUG02 when applicable or if connectivity issues prevent entry into Direct Access. All EER's must be submitted online.

A properly completed EERW is required for entry by parent command. Incorrect forms will be sent back to the unit for corrections.

- Keep these important rules in mind while completing EERW's.
  - Use a pen or pencil
  - Darken the ovals completely, as in this example:



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*Continued on next page*

**Section A  
PERFORMANCE**

## How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

**Completing the EERW** Follow these steps and examples to complete the EERW.

**Note:** If you have any questions after reading these directions, please contact PSC (ADV) at 785-339-3400 for assistance, before attempting to complete the form.

Step	Action																																																																						
1	Determine the reason for evaluation.																																																																						
2	<p>Please darken the correct ovals in blocks 1-5.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th style="width: 15%;">Block</th> <th>Enter</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>Print member's full name/rate and unit</td> </tr> <tr> <td style="text-align: center;">2</td> <td>Enter member's Employee Id</td> </tr> <tr> <td style="text-align: center;">3</td> <td>Darken the oval for the appropriate pay grade</td> </tr> <tr> <td style="text-align: center;">4</td> <td>Enter the correct reason code for the evaluation</td> </tr> <tr> <td style="text-align: center;">5</td> <td>Enter the correct period ending date</td> </tr> </tbody> </table> <div style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: center;">1</td> <td style="width: 60%;">RATE, FIRST NAME, LAST NAME:</td> <td style="width: 35%;">UNIT NAME:</td> </tr> <tr> <td style="text-align: center;">2</td> <td>EMPLOYEE ID #</td> <td>4 REASON</td> </tr> <tr> <td colspan="2" style="border: 1px solid black; 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**Section A  
PERFORMANCE**

## How to Complete the Enlisted Employee Review Worksheet for Units without Access to Direct Access, Continued

**Completing the  
EERW (cont'd)**

Step	Action						
3	Darken the ovals that properly evaluate the member. <ul style="list-style-type: none"> <li>• Use only one mark per field.</li> <li>• The supervisor and marking official should use a pencil and enter a mark in the oval, which can be erased if necessary.</li> <li>• The approving official agrees/disagrees and darkens the appropriate oval.</li> </ul>						
4	All marks of: <ul style="list-style-type: none"> <li>• 1;</li> <li>• 2;</li> <li>• 7;</li> <li>• Not Recommended; or</li> <li>• Unsatisfactory in Conduct</li> </ul> Must have supporting documentation attached to the EERW.						
5	<b>LEADERSHIP POTENTIAL</b>  Provide written documentation for all personnel E-6 and above describing in detail their potential for future leadership responsibilities.						
6	Darken the correct Conduct oval.  <div style="border: 1px solid black; padding: 5px;"> <p><b>CONDUCT</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">COMPETENCY</th> <th style="text-align: center; padding: 2px;">UNSATISFACTORY <input type="checkbox"/></th> <th style="text-align: center; padding: 2px;">SATISFACTORY <input type="checkbox"/></th> </tr> </thead> <tbody> <tr> <td style="font-size: small; padding: 2px;"> <b>CONDUCT</b>                The degree to which this member, through personal behavior, conformed to the rules, regulations, and military standards, on and off duty.             </td> <td style="font-size: small; padding: 2px;">               Failed to meet minimum standards as evidenced by NJP, CM, or civil conviction; or brought discredit to the Coast Guard as evidenced by adverse CG-3307 entries including financial irresponsibility, non-support of dependents, or alcohol incidents; or failed to conform to civilian and military rules, regulations, and standards.             </td> <td style="font-size: small; padding: 2px;">               No NJP, CM, or civil conviction; and promoted and supported respect for rules, regulations, and civilian and military standards as evidenced by no adverse CG-3307 entries.             </td> </tr> </tbody> </table> </div> <p>A mark of unsatisfactory requires adverse supporting documentation.</p>	COMPETENCY	UNSATISFACTORY <input type="checkbox"/>	SATISFACTORY <input type="checkbox"/>	<b>CONDUCT</b> The degree to which this member, through personal behavior, conformed to the rules, regulations, and military standards, on and off duty.	Failed to meet minimum standards as evidenced by NJP, CM, or civil conviction; or brought discredit to the Coast Guard as evidenced by adverse CG-3307 entries including financial irresponsibility, non-support of dependents, or alcohol incidents; or failed to conform to civilian and military rules, regulations, and standards.	No NJP, CM, or civil conviction; and promoted and supported respect for rules, regulations, and civilian and military standards as evidenced by no adverse CG-3307 entries.
COMPETENCY	UNSATISFACTORY <input type="checkbox"/>	SATISFACTORY <input type="checkbox"/>					
<b>CONDUCT</b> The degree to which this member, through personal behavior, conformed to the rules, regulations, and military standards, on and off duty.	Failed to meet minimum standards as evidenced by NJP, CM, or civil conviction; or brought discredit to the Coast Guard as evidenced by adverse CG-3307 entries including financial irresponsibility, non-support of dependents, or alcohol incidents; or failed to conform to civilian and military rules, regulations, and standards.	No NJP, CM, or civil conviction; and promoted and supported respect for rules, regulations, and civilian and military standards as evidenced by no adverse CG-3307 entries.					

*Continued on next page*



## Administrative Review of the Enlisted Employee Review Worksheet

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### Introduction

Everyone involved in the enlisted evaluation process has a responsibility to ensure the form is properly completed. An audit of the worksheet will ensure it is processed properly the first time.

Remember the critical nature of the EERW demands that members, commands, parent commands, and processing points adhere strictly to these guidelines to provide the best service to the member being evaluated.

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### Reasons the EERW rejects

Listed below are several reasons the EERW will be rejected by your parent command. Pay special attention to these areas during your review of each worksheet.

1. Wrong period ending date/wrong evaluation reason.
2. Too many marks in field -- Occurs when the rating chain properly changes a factor mark but fails to erase the original mark completely.
3. No marks in field -- One oval per factor must be darkened.
4. Need supporting documentation.
5. Pay grade does not match -- The unit marks the member for semi-annual evaluation when in fact the member advanced at an earlier date.
6. No signature -- The supervisor, marking official, approving official, and the member must sign the worksheet.

**Note:** If for some reason the member will be unavailable at the end of the marking period, ensure enough lead-time in EERW preparation to obtain the signature by mail if necessary. This guidance applies to the evaluation of Reserve personnel in particular.

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### Unit Responsibility

Any worksheet that is improperly completed will be returned to the unit for correction.

**Note:** If the member has transferred; it is the unit's responsibility to forward the EERW to the new command.

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### For more information or assistance

Any questions concerning the Enlisted Employee Review Worksheet should be referred to PSC (ADV) at 785-339-3400. You can also e-mail Advancements at: PSC-DG-ADV@.uscg.mil.

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**Section B  
DISCIPLINE**

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## Unauthorized Absence, Continued

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**UA at time of sailing**

Follow these procedures when a member is UA at time of sailing.

<b>Step</b>	<b>Action</b>
1	Complete the following CG-3307 entry ( <a href="#">P&amp;D-5</a> ) Missed sailing of this vessel from (place of sailing) on (date) on route to (destination). Member had knowledge of the time movement was scheduled. <b>Note:</b> Make a notation on the sailing list.
2	If the vessel deploys for 10 or more days: <ul style="list-style-type: none"><li>• Administratively transfer the absentee TDY to the nearest HRS/SPO ashore</li><li>• Complete a CG-3307 (P&amp;D-5) showing unit transferred to and disposition of records and personal effects</li><li>• Forward original CG-3307 immediately to CGPC (adm-3), copy to HRS/SPO and unit file</li></ul>
3	Inventory absentee's personal effects and coordinate with the Transportation Officer for shipment of absentee's personal effects <b>Note:</b> Shipment will be charged against the member's pay.
4	If member is absent while the vessel is in a foreign port, report absence to the nearest US consulate. Include instructions for disposition of the absentee if apprehended.
5	Notify and direct the Unit Travel Charge Card Coordinator to immediately suspend the account pending investigation.

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## Desertion

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**Introduction** This has been provided to assist you through the procedures for declaring a member to be a deserter.

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**Reference** (a) PERSMAN,  
Article 8-A-2b, Deserter  
Article 8-A-7, Disposition of Personnel Effects of Absentees or Deserters

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**Procedure for declaring a member a deserter** Use this procedure when declaring a member to be a deserter.

<b>Step</b>	<b>Action</b>
1	<p>Issue <a href="#">DD Form 553</a> normally the 31st day of absence.</p> <ul style="list-style-type: none"><li>You may declare the member a deserter before the 31st day when the member's intentions are known.</li></ul> <p><b>Note:</b> In cases where a member was declared a deserter early, issue DD Form 553 on the day member was declared a deserter.</p>
2	<p>Send original DD Form 553 to CGPC (adm-3) Distribute signed copies of DD Form 553 to:</p> <ul style="list-style-type: none"><li>Member's HRS/SPO</li><li>District Commander (o) of the district that the member is absent from</li><li>District Commander (o) of the district of the absentee's home of record</li><li>CG Personnel Command (epm/opm)</li><li>Recruiting office nearest to the home of record</li><li>Next of kin via certified mail, return receipt requested, deliver to addressee only</li><li>Mayor (or chief of police) of the home of record and of any town to which the absentee may have proceeded</li></ul>

*Continued on next page*

## **Types of Mobilization**

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**Introduction**      Members of the Reserve Component may be mobilized under several different legislative authorities. The legislative authority used has implications on the members' pay and travel entitlements.

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**Legislative Authority**      The legislative authorities under which a member may be mobilized are listed below.

<b>Citation</b>	<b>Enabling Authority</b>	<b>In Response to:</b>	<b>Type &amp; Limitations</b>
14 U.S.C. 712	Secretary of Homeland Defense	Serious natural or manmade disasters, accidents or catastrophes	Involuntary. Not more than 30 days per four-month period or 60 per two year period
10 U.S.C. 12301(a)	Congress	War or National emergency declared by Congress	Involuntary. Duration of war or national emergency plus six months.
10 U.S.C. 12301(d)	Designated Authority	Any Event or request for EAD, ADSW, Retired recall, etc.t	Voluntary. Retain only with member consent
10 U.S.C. 12302	President	National Emergency declared by the President	Involuntary. Not more than 24 consecutive months.
10 U.S.C. 12304	President	SELRES Augmentation for any mission deemed necessary by President	Involuntary. Not more than 270 days.

**Note:** Mobilizations connected with 9/11/2001 have been under the authority of 10 U.S.C. 12302

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## Pay Entitlements When Mobilized, Continued

### Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Enlisted Uniform Issue	If recalled from the IRR or Retired Reserve, an enlisted member may be entitled to an issuance of uniforms depending on time elapsed since retirement or transfer to IRR. Rules vary consult with G-WTR for guidance.	No entitlement	<a href="#">ALCOAST 418/01</a>
Enlisted Clothing Maintenance Allowance	BMA if receiving RBMA prior to mobilization. SMA if receiving RSMA prior to mobilization.	Continues to receive RBMA or RSMA while on active duty.	PAYMAN Figure 3-26
Civilian Clothing Monetary Allowance	STADDCMA-CIV	STADDCMA-CIV (period is 30 days in duration)	PAYMAN Figure 3-23 Rules 10 & 11
Officer Uniform Allowance	Additional Officer Uniform Allowance is payable if the active duty period is more than 90 days duration, and the officer has not served on another period of active duty of more than 90 days within the past 2 years.	Not payable (since active duty orders are for less than 91 days).	PAYMAN Section 3.K.3
Hardship Duty Pay for Location (HDP-L)	If mobilized to a designated Hardship Duty Location for over 30 consecutive days.	No entitlement.	PAYMAN Figure 4-3
Career Sea Pay (CSEAPAY)	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level I rate or the Level-3 rate if operating in-theater.	If assigned to a sea pay eligible vessel (or qualifying mobile unit), eligible for CSEAPAY at the Level I rate or the Level-3 rate if operating in-theater.	PAYMAN Figure 4-6  ALSPO D/03
Diving Duty Pay	When assigned by orders to diving duty.	When assigned by orders to diving duty.	PAYMAN Figure 4-7
Imminent Danger Pay	When on official duty in a designated imminent danger pay area.	When on official duty in a designated imminent danger pay area.	PAYMAN Figure 4-9
Board Certified Pay for Physician Assistants	Officers designated as physician assistants.	Officers designated as physician assistants.	PAYMAN Section 4-J

*Continued on next page*

## Pay Entitlements When Mobilized, Continued

### Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders		Reference
Combat Tax Exclusion	If in an active duty status in a designated combat zone.	If in an active duty status in a designated combat zone.		PAYMAN Section 8-G
Special Duty Assignment Pay (SDAP) Enlisted	If ordered to duties which qualify for SDAP.	If ordered to duties which qualify for SDAP.		PAYMAN Section 4-I  COMDTINST 1430.10 (series)
Hazardous Duty Incentive Pay (HDIP)	When under flight orders as a crew member, non-crew member, or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is <u>not</u> payable.)	When under flight orders as a crew member, non-crew member, or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is <u>not</u> payable.)		PAYMAN Section 5-B
Flight Deck Hazardous Duty Incentive Pay (FDHDIP)	When assigned to duty involving participation in flight operations on the flight deck of a ship and if appropriate orders are issued and minimum evolution requirements are met.	When assigned to duty involving participation in flight operations on the flight deck of a ship and if appropriate orders are issued and minimum evolution requirements are met.		PAYMAN Section 5-C
Leave	When on active duty for 30 or more consecutive days, members accrue 2.5 days of leave per month.	If member	Then	PERSMAN Article 7.A.11 ALCOAST 449/05
		Is RELAD before completing 30 days AD	No leave is accrued.	
		Is RELAD on the 30 <sup>th</sup> day of AD	2.5 days leave is accrued.	
Lump Sum Leave Payment Exempt from limit 60-Day Career Maximum	Upon demobilization, remaining leave balances may be sold, even if the member previously sold 60 days of annual leave during his/her career.	Lump sum payment IS subject to the 60-day career maximum		PAYMAN (10-A-1.a.(2) for members on Title 10). (10-A-1.a.(2)

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## Other Entitlements When Mobilized

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**Introduction** Mobilized members have other entitlements and benefits in addition to pay and travel.

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- References**
- (a) JFTR
  - (b) DOD Instruction 1000.13, Identification (ID) Cards for Members of the Uniformed Services, Their Dependents, and Other Eligible Individuals available online at:  
[http://www.dtic.mil/whs/directives/corres/pdf/i100013\\_120597/i100013p.pdf](http://www.dtic.mil/whs/directives/corres/pdf/i100013_120597/i100013p.pdf)
  - (c) Coast Guard Medical Manual, COMDTINST M6000.1B (series)
  - (d) PAYMAN
  - (e) RPM
  - (f) ALCOAST 307/02
  - (g) ALCOAST 153/03
- 

**Summary** The table below summarizes other entitlements:

Entitlement	Summary	Reference
Transportation	Members recalled under 10 U.S.C. 12302 are entitled special temporary household goods storage, including privately owned vehicles (POVs). Authority must be requested from Commandant (G-WPM-2).  Members without dependents that are authorized special storage of household goods (but no POV) lose entitlement to BAH-I.	Ref. (a), U4470-B and U5466-A.2
Identification Card (ID Card)	Members recalled to active duty for more than 30 days are entitled to an active duty ID card. Members and their eligible dependents are afforded full commissary, exchange, and MWR privileges.	Ref. (b)
Civilian Reemployment	Detailed in the following web sites: <ul style="list-style-type: none"> <li>•<a href="http://www.uscg.mil/hq/reserve/recall/recall.htm">http://www.uscg.mil/hq/reserve/recall/recall.htm</a></li> <li>•<a href="http://www.esgr.org/">http://www.esgr.org/</a></li> </ul>	
Educational Assistance	On or after September 11, 2001, a member of a reserve component is entitled to educational assistance under this chapter if the member served on active duty in support of a contingency operation for 90 consecutive days or more.	10 USC 1607

*Continued on next page*

## Other Entitlements When Mobilized, Continued

### Summary (cont'd)

Entitlement	Summary	Reference
Legal Readiness	<p>Members who are a substantial distance from home might consider executing a Power of Attorney to give another individual the right to act on the member's behalf. A Special Deployment Power of Attorney is recommended over a General Power of Attorney.</p> <p>Members should ensure they have an up to date will for distribution of assets and care of dependents in the event of death.</p> <p>Members may want to set up a Living Will or Advanced Health Care Directive to advise the medical profession on the level of life support to be provided in the event the member is terminally ill. These documents can also identify individuals who may make health care decisions for a member, and provide direction to medical professionals about a member's willingness to donate organs.</p>	<p>Consult local Legal Assistance Office, or see the HQ Reserve Web site @ <a href="http://www.uscg.mil/hq/reserve/Recall/Recall.htm">http://www.uscg.mil/hq/reserve/Recall/Recall.htm</a></p>
Medical / Dental	<p>Members recalled for more than 30 days to support a contingency operation are authorized medical and dental benefits while on active duty.</p> <p>Dependents of members on active duty for 31-179 days are entitled to:</p> <ul style="list-style-type: none"> <li>(a) TRICARE Standard;</li> <li>(b) TRICARE Extra;</li> <li>(c) Space-available treatment in military medical treatment and</li> <li>(d) Are eligible to apply for enrollment in TRICARE Prime as well.</li> </ul> <p>Demobilized members are entitled to transitional health-care benefits based on their total active military service:</p> <ul style="list-style-type: none"> <li>• Members with less than six years of service (and dependents) are eligible for 60 days of medical coverage under the TRICARE Transitional Health Care Demonstration Project.</li> <li>• Members with more than six years active duty are entitled to 120 days of coverage for themselves and their dependents.</li> </ul> <p>Visit this web site for more TRICARE information specific to reserve mobilization: <a href="http://www.tricare.osd.mil/reserve/">http://www.tricare.osd.mil/reserve/</a></p> <p>Members who incur a disability while on active duty shall follow procedures outlined in reference (e).</p> <p><b>See page 11-53, <a href="#">TRICARE Benefits</a> section for additional entitlements to mobilized reservists.</b></p>	<p>Ref (c), 12-Q</p> <p>Ref (d)</p> <p>Ref (g), 7-E</p> <p>Ref (e)</p> <p>Ref (f)</p> <p>TRICARE Website, <a href="http://www.tricare.osd.mil/">http://www.tricare.osd.mil/</a></p> <p>DOD News Release, <a href="#">No. 1084-04</a></p> <p>PPPM, <a href="#">Chap 11, TRICARE Benefits</a></p>

## Mobilization Checklist

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**Introduction** This checklist provides a listing of tasks to be completed by the member's unit or units (both the regularly assigned unit and the unit the member is reporting to) required when a reservist is mobilized on active duty.

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### Unit Checklist

Step	Action	Date
1	Send letter to member's employer concerning mobilization status (see sample on page 11-26).	
2	Counsel member to ensure legal documents are up to date (will, power of attorney, and legal support documents). See previous page.	
3	Ensure member has enough obligated service.	
4	Ensure member's dependents have a telephone number for reaching the member during mobilization, as well as the process for contacting the Red Cross in an emergency situation.	
5	Ensure member and his/her dependent/s are issued active duty ID card/s. If the member's mailing address is changing, update address in DEERS through local DEERS site or by calling the DEERS support office (Phone: 1-800-538-9552 except in CA, HI, and AK; for CA 1-800-334-4162; for HI and AK 1-800-527-5602).	
6	Advise member to update mailing/e-mail address and direct deposit information in <a href="#">Direct Access</a> if they are changing. If member does not have access to the CG intranet, supply address and direct deposit information to SPO for data entry into Direct Access.	
7	Advise member that changes in marital or dependency status while in a mobilization status need to be immediately reported to the SPO to avoid potential overpayments/underpayments.	
8	Upon reporting to the mobilization site, ensure member's orders are endorsed to show date member reported, the mobilization unit's subsistence status, the quarters the member will occupy during mobilization, and the member's current dependent status. Ensure endorsed orders are forwarded to SPO.	
9	If the member is assigned outside his/her state of legal residence, and that state does not tax military pay while assigned outside the state (i.e., applies to residents of AZ, CA, CT, ID, MN, MO, MT, NJ, NY, OR, PA, VT, PR), advise the member that he/she may submit a state tax withholding form to claim exemption from state tax withholding.	
10	Ensure member completes travel claim. Administratively review & approve the travel claim and forward to PSC (TVL).	

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## Mobilization Checklist, Continued

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### Unit Checklist (cont'd)

Step	Action	Date
11	Conduct appropriate security briefing. (i.e. Vehicle/Access Passes and Information/Clearances)	
12	Ensure member has physical exam if he/she has not had a physical within the past 5 years (within past 12 months if over age 50).	
13	Ensure member verifies dependency information on the Direct Access generated BAH/Dependency Data form. Members can update this information by submitting a <a href="#">Dependency Worksheet (CG PSC-2020)</a> to their SPO.	
14	Ensure member verifies beneficiaries on the <a href="#">Designation of Beneficiaries form (CG PSC-2020D)</a> . Submit a new form to the SPO if updates are needed.	
15	Ensure member verifies their Emergency Data in Direct Access. SPOs and/or the member can make changes to the emergency data as needed via Direct Access.	
16	Counsel member concerning SGLI benefits during mobilization (as detailed on page 11-14). If member has spouse, have member complete Form <a href="#">SGLV-8286A</a> (Spouse SGLI Election). Ensure member reviews Form <a href="#">SGLV-8286</a> (Member SGLI Election) to verify that beneficiaries are correct; have member complete new <a href="#">SGLV-8286</a> if maximum Member SGLI coverage is not desired. Forward updated/new Forms <a href="#">SGLV-8286</a> and <a href="#">SGLV-8286A</a> to SPO.	
17	Counsel member concerning available Work Life Resources (Employee Assistance Program, Relocation Assistance Program, Transition Assistance Program, Special Needs Program).	
18	Counsel member concerning financial responsibilities. Advise member that if he/she has child support garnishments being deducted from his/her civilian pay, the member needs to make arrangements for payment of such obligations while in a mobilization status; delinquent child support payments will be subject to involuntary collection from the member's military pay under the Treasury Offset Program.	
19	Member affirms that he/she is not in receipt of a claim for disability compensation, pension or retired pay from the DVA. If so, the member is responsible for waiving the amount of compensation he/she has received on days in which they received military pay.	
20	Counsel member on availability of the Tricare Reserve Select Program ( <a href="#">ALCOAST 189/05</a> )	
21	Counsel member on Educational Assistance (if served on active duty in support of a contingency operation for 90 consecutive days or more).	

*Continued on next page*

## Unit Demobilization Checklist

**Introduction** This checklist provides a job aid to assist the unit in completing the necessary tasks required for separating a mobilized reservist from active duty. It should be used along with the Checklist for Separations and the Checklist for RELAD in section 3-B of this manual.

**Checklist** Action when releasing a reservist from active duty:

Step	Action	Date
1	Ensure member is physically qualified for release from active duty. A physical examination is required if one has not been done within the past 12 months. If one has been done within 12 months, a Health Screening Assessment ( <a href="#">DD Form 2697</a> ) is required. Ensure all medical problems are documented in the member's health record, and that a line of duty determination is made if there is a medical problem. Ensure compliance with the Post-Deployment Health Assessment Program IAW <a href="#">ALCOAST 245/03</a>	
2	Ensure member has notified SPO of desires concerning disposition of accrued leave via completion of a <a href="#">Career Intentions Worksheet (CG PSC-2045)</a> <b>at least 45 days prior to separation or departure on terminal leave (whichever occurs first).</b>	
3	Verify that member (and dependents) have the appropriate (reserve versus active duty) military ID card.	
4	Counsel member concerning transitional health-care benefits – see page 11-21 of this chapter. Ensure transitional health-care benefits are recorded in the DEERS database.	
5	Counsel member concerning civilian reemployment rights – see page 11-20 of this chapter.	
6	Counsel member that, if SGLI and/or Family SGLI coverage were automatically increased to the maximum upon mobilization, and the member does not desire continued maximum coverage after demobilization, the member must submit a new <a href="#">SGLV-8286 / 8286A</a> to elect reduced Member / Spouse SGLI coverage. Forward completed SGLV form(s) to SPO for Direct Access data entry.	
7	Ensure that any medals/awards, competencies and school completions earned by the member are recorded in Direct Access.	
8	Complete a special "MEMO" evaluation prior to departure if member is a mobilized reservist TDY from parent unit and it has been more than 92 days since member's last review and member has been mobilized for more than 92 days and is returning to permanent command.	
9	If the member's mailing address is changing, update address in DEERS through local DEERS site or by calling the DEERS support office (Phone: 1-800-538-9552 except in CA, HI, and AK; for CA 1-800-334-4162; for HI and AK 1-800-527-5602)	
10	Advise member to update mailing address and direct deposit information in Direct Access if they are changing. If member does not have access to the system, supply address and direct deposit information to SPO for data entry.	
11	Ensure member has instructions for filing final travel claim.	
12	Ensure member does not have pending UCMJ action.	
13	Conduct appropriate security debriefing. (i.e. Vehicle / Access Passes)	
14	Ensure that SPO is notified if member has uncollected CG Mutual Assistance loan(s) that need to be collected from final active duty pay.	
15	Ensure supporting CDA/ESO provide all Reservists being RELAD with copy of CG Education Quick Reference Guide ( <a href="http://www.uscg.mil/d7/d7r/rp/EducationGuide.doc">http://www.uscg.mil/d7/d7r/rp/EducationGuide.doc</a> )	
16	Deliver DD-214 to member.	
17	Counsel member on time-critical requirements of continuance in the Tricare Reserve Select Program ( <a href="#">ALCOAST 189/05</a> ).	

## Medical Readiness

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**Introduction** There are two situations that may arise near the conclusion of a member's mobilization status:  
A member may be physically fit for military duty, but require further medical evaluation or treatment prior to release from active duty.  
A member may be found not physically qualified for separation or retention and not physically qualified for military duty.

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**Reference** (a) [RPM](#)  
(b) [ALCOAST 245/03](#)

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**Post-Deployment Health Assessment** Per reference (b), all reservists called to active duty for 30 days or longer in support of any CG operation will have [Post-Deployment Health Assessment \(PDHA\)](#) accomplished at the time of redeployment/RELAD. Directed requirements contained in the PDHA program include:

- Completion of the four-page, revised [DD form 2796](#) Post-Deployment Questionnaire.
  - A face-to-face health assessment with a trained health care provider.
  - A blood sample from all redeploying personnel.
  - A quality assurance program to ensure compliance.
- 

**Process** A member on active duty orders of 31 days or more who incurs or aggravates an injury, illness or disease in the line of duty shall not be released from active duty without his or her consent. He or she shall be extended on active duty pending resolution of a medical condition or pending completion of the physical evaluation board process.  
Members who consent to be retained on active duty shall be continued under their original Title 10 orders. If the member's Title 10 orders are due to expire, the SPO shall extend such orders by adjusting the Reserve Orders, Order End Date in Direct Access.  
Members who do not consent to be retained on active duty shall be issued a Notice of Eligibility (NOE) for medical benefits upon release from active duty, and if eligible, shall be entitled to incapacitation pay as outlined in the Reserve Policy Manual.

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**ENCLOSURE 1  
FORMS AND WORKSHEETS**

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**Forms and Worksheets**

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**Forms and  
Worksheets**

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

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

Form Number	Form Name
DD Form 1351-2	Travel Voucher
DD Form 1351-3	Statement of Actual Expenses
DD Form 2648	Preseparation Counseling Checklist
DD Form 2494	TRICARE – Active Duty Family Member Dental Plan Election
DD Form 2494-1	Supplemental TRICARE – Active Duty Family Member Dental Plan Election
CG-3788A	Enlisted Employee Review Worksheet Non-Rated
CG-3788B	Enlisted Employee Review Worksheet Petty Officer
CG-3788C	Enlisted Employee Review Worksheet Master, Senior, Chief Petty Officer
CG-4251	Military Temporary Duty (TDY) or Civilian Temporary Duty (TD) Travel Orders
CG-5131	Standard Travel Order for Military Personnel
CG-5489-1	Remission Application
CG-5489-2	Waiver Application
CG-5489A	SPO’s Endorsement Waiver/Remission Application
CG-5489B	Financial Statement
CG PSC-1884	Application for Annuity Under the Survivor Benefit Plan, Reserve Component Survivor Benefit Plan, Retired Serviceman’s Family Protection Plan and/or Final Retired Pay Due
CG PSC-1900	Retired Pay Projection Request
CG PSC-2000	PCS Departing/Separation Worksheet
CG PSC-2001	Departing TDY or PCS/TEM DUINS to “A” School Worksheet

*Continued on Next Page*

**ENCLOSURE 1  
FORMS AND WORKSHEETS**

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**Forms and Worksheets, Continued**

<b>Form Number</b>	<b>Form Name</b>
CG PSC-2002	CG Direct-Access System Assignment Data Worksheet
CG PSC-2003	PCS (JFTR, Chap5) Entitlements Worksheet
CG PSC-2005	PCS Reporting Worksheet
CG PSC-2010	Advances Worksheet
CG PSC-2015	Pay Delivery Worksheet
CG PSC-2020	Dependency Worksheet
CG PSC-2020A	Support Statement
CG PSC-2020B	Full-Time Student Statement
CG PSC-2020C	Former Spouse Statement
CG PSC-2020D	Designation of Beneficiaries
CG PSC-2025	BAH/Housing Worksheet
CG PSC-2025A	BAH Rate Protection Worksheet
CG PSC-2030	Career Development Worksheet
CG PSC-2045	Career Intentions Worksheet
CG PSC-2070	TDY Travel Request Worksheet
CG PSC-2075	Family Subsistence Supplemental Allowance (FSSA) Application
CG PSC-2426	Career Status Bonus (CSB) Election & Instructions
CG PSC-3600	Designation of Beneficiaries for Payment of Unpaid Retired Pay
CG PSC-3799R	Reserve Annual Screening Questionnaire (ASQ)
CG PSC-3867	Claim for Final Retired Pay
CG PSC-5100	Officer Uniform Allowance Claim Worksheet
CG PSC-7221	Retired Allotment Authorization Form
CG PSC-7421	T-PAX Approving Official (AO) Designation
CG-PSC-7421/2	Direct-Access User Access Authorization and Payment Approving Official (PAO) Designation
CG PSC-11221	Reserve Component Survivor Benefit Plan election Certificate
SF-1038	Request/Authorization for Advance of Funds

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**Administrative Remarks**

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**Introduction** This enclosure will guide you through the process of drafting Administrative Remarks (CG-3307).

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**Reference** The Pg-7 Instruction ([COMDTINST 1000.14\(series\)](#)) establishes policy and standards for preparation and submission of Administrative Remarks (CG-3307) entries and applies to all personnel involved in this process.

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Enclosure**

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

## **Preparation and Distribution of CG-3307**

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**Preparation** Complete Administrative Remarks (CG-3307) as follows:

<b>Block</b>	<b>Entry</b>
<b>Text Area</b>	Text of entry per the examples in this enclosure. Include 1. Entry Type: 2. Reference: 3. Responsible Level: 4. Entry: 5. Signature 6. Member's Acknowledgement (if required) (See discussion on the following page for more information)
<b>1</b>	Member's permanent unit.
<b>2</b>	Name of unit preparing form, may be left blank if same as item #1. Note: If a unit other than the member's current permanent duty station is preparing the CG-3307 entry, that unit name <b>MUST</b> also appear beneath the typed signature block (see discussion on the following page for more information).
<b>3</b>	Member's name in Last, First, Middle Initial format.
<b>4</b>	Member's Social Security Number. Note: Use of Employee ID Numbers for this block is not authorized at this time due to electronic filing procedures.
<b>5</b>	Officer's Grade (ENS, LTJG, etc.) or Enlisted member's Rate (SN, BM2, MKC, etc.)
<b>6</b>	Leave blank

**Distribution** The CG-3307 must be prepared in original and one copy as follows:

1. The original is filed in the SPO PDR, and the copy is mailed to Commander (CGPC-adm-3) for electronic imaging into the Headquarters PDR.

Note: If sending photocopies to CGPC, ensure the original document is signed before copying. Alternatively, original signatures may appear on both the original and copy.

2. There are two exceptions to the distribution of CG-3307's:
    - a. For evaluations not completed in Direct Access - An additional copy of the CG-3307 to document counseling related to enlisted evaluations must be placed inside the original Enlisted Performance Evaluation Form (CG-3788 (series)) and forwarded to PSC (ADV).
    - b. Original CG-3307's remaining at time of separation/reenlistment must be attached to either the original Discharge and Reenlistment Contract or DD-214 as directed in PDR Manual.
-

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**CG-3307's for Advancement and Reduction, Continued**

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[Click here for Word CG-3307 \(A&R-4\)](#)

Entry Type: Advancement and Reduction (A&R-4)

Reference: Section 5-C, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): YN2 Jones' three-month observation period to satisfy the requirements of Article 5-C-38, Personnel Manual, COMDTINST M1000.6 (SERIES), completed this date. YN2 Jones has been determined to be incompetent in the rate of YN2. The required special evaluation was completed this date. Effective this date, YN2 Jones is being reduced to YN3.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I have read and understand the action taken to reduce me in rate effective this date.

J. P. JONES

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[Click here for Word CG-3307 \(A&R-5\)](#)

Entry Type: Advancement and Reduction (A&R-5)

Reference: Article 5-C-4e, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Recommendation and nomination for advancement and participation in the (month and year) servicewide competition for (rate) is withdrawn. (explain reason)

A. B. SEA, CAPT, USCG  
Commanding Officer

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

---

## **CG-3307's for Advancement and Reduction, Continued**

[Click here for Word CG-3307 \(A&R-6\)](#)

Entry Type: Advancement and Reduction (A&R-6)

Reference: Article 1-D-10, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): I have read and understand Article 1-D-10c, Personnel Manual, COMDTINST M1000.6 (SERIES). I voluntarily elect to be removed from the eligibility lists for appointment to warrant grade. I understand that I will not be eligible to be a candidate for appointment to warrant grade for (2 or 5 (whichever is applicable)) years from the anniversary date of this election. I understand that I will be eligible to reapply as a candidate for appointment to warrant grade on or about (date).

J. P. JONES

[Click here for Word CG-3307 \(A&R-7\)](#)

Entry Type: Advancement and Reduction (A&R-7)

Reference: Article 1-D-10, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): I have read and understand Article 1-D-10c, Personnel Manual, COMDTINST M1000.6 (SERIES). I voluntarily elect to be removed from the eligibility lists for appointment to warrant grade. I understand that I will not be eligible to be a candidate for appointment to warrant grade until my personal hardship has been resolved.

J. P. JONES

[Click here for Word CG-3307 \(A&R-8\)](#)

Entry Type: Advancement and Reduction (A&R-8)

Reference: Article 5-C-25, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): I have read and understand Article 5-C-25f, Personnel Manual, COMDTINST M1000.6 (SERIES). I voluntarily elect to be removed from the eligibility lists for advancement to \_\_\_\_\_ (state specific rate). I understand that I will not be eligible to participate in the Servicewide Exam for one year from the date of this election.

J. P. JONES

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**CG-3307's for Performance and Discipline**

[Click here for Word CG-3307 \(P&D-1\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-1)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): On this date, you were weighed and you are in compliance with Coast Guard Weight Standards. Your measurements are: Height: \_\_\_\_\_ (inches), Wrist Size: \_\_\_\_\_ (inches), and Weight: \_\_\_\_\_ (pounds). Your age is: \_\_\_\_\_ and your percent body fat is: \_\_\_\_\_. In accordance with Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are assigned a maximum allowable weight for screening purposes of \_\_\_\_\_ (pounds). Should you exceed this maximum allowable weight in the future, you will be required to complete a body fat determination. You are strongly encouraged to complete a personal wellness profile and aggressively pursue your basic fitness plan. By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review COMDTINST M1020.8(series) and fully understand the action required.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

---

## **CG-3307's for Performance and Discipline, Continued**

[Click here for Word CG-3307 \(P&D-2\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-2)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): You have this date been determined to be \_\_\_\_\_ pounds overweight. Your measurements are: Height: \_\_\_\_\_ (inches), Wrist Size: \_\_\_\_\_ (inches), Weight: \_\_\_\_\_ (pounds). Your age is: \_\_\_\_\_ and your percent body fat is: \_\_\_\_\_. In accordance with Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby notified that you are required to lose \_\_\_\_\_ pounds or drop to \_\_\_\_\_% body fat or below by \_\_\_\_\_. In addition, you are to complete both a personal wellness profile and a detailed fitness plan; participate in a mandatory fitness activity at least one hour per day three days per week; and perform a monthly mandatory fitness assessment until you probationary period ends. If you fail to reach compliance by the end of this probationary period, you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).  
By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry, have been afforded the opportunity to review COMDTINST M1020.8(series) and fully understand the action required.

J. P. JONES

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[Click here for Word CG-3307 \(P&D-3\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-3)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): On this date your probationary period has come to an end. You weighed \_\_\_\_\_ (pounds) or achieved \_\_\_\_\_% body fat and have successfully met the requirements of the Coast Guard Weight/Physical Fitness Program.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry and understand I have met the requirement of the Coast Guard Weight Program in accordance with COMDTINST M1020.8(series).

J. P. JONES



**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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## **CG-3307's for Performance and Discipline, Continued**

[Click here for Word CG-3307 \(P&D-4\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-4)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): On this date your probationary period has come to an end. You weighed \_\_\_\_\_ (pounds) and had a calculated \_\_\_\_\_ % body fat. You have not achieved your maximum allowable weight/%body fat. In accordance with Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby notified that you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if reservist), or recommended to return to the Department of Health and Human Services (if Public Health Service).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry and fully understand the administrative action(s) being initiated because I do not meet the requirements of the Coast Guard Weight Program in accordance with COMDTINST M1020.8(series).

J. P. JONES

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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[Click here for Word CG-3307 \(P&D-4A\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-4A)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): You have this date been determined to be \_\_\_\_\_ pounds overweight. However, in accordance with section 4.D. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby granted a one-time, six month exemption from being placed on weight probation. This one-time exemption will be effective for the period of \_\_\_\_\_ (Date successfully stopped smoking or date successfully completed a tobacco cessation program) to \_\_\_\_\_ (Date of completion of six month period). You are strongly encouraged, during this period, to complete a personal wellness profile and aggressively pursue your basic fitness plan. At the end of this one-time, six month exemption, or at any time during this period if it is determined that you are using tobacco, you will be reweighed to determine if you are in compliance with COMDTINST M1020.8(series). If not, you will be placed on weight probation at which point you will be required to complete both a personal wellness profile and a detailed fitness plan; participate in a mandatory fitness activity at least one hour per day three days per week; and perform a monthly mandatory fitness assessment until your probationary period ends. If you fail to reach compliance by the end of your probation period, you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).

By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry and fully understand the administrative action(s) being initiated because I do not meet the requirements of the Coast Guard Weight Program in accordance with COMDTINST M1020.8(series).

J. P. JONES

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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[Click here for Word CG-3307 \(P&D-4B\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-4B)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): On this date you have been determined to be \_\_\_\_\_ pounds overweight. Your measurements are height \_\_\_\_\_ (inches), wrist size \_\_\_\_\_ (inches), weight (pounds). Your age is \_\_\_\_\_ and your percent body fat is \_\_\_\_\_. In accordance with Weight/Physical Fitness Standards For Coast Guard Military Personnel, COMDTINST M1020.8(series), your probationary period would require 36 weeks or more. Therefore you are hereby notified that, instead of probation, you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if a Reservist), or recommended to return to the Department of Health and Human Services (if Public Health Service).

A. B. SEA, CAPT, USCG  
Commanding Officer

I acknowledge the above entry and fully understand the administrative action(s) being initiated because I do not meet the requirements of the Coast Guard Weight/Physical Fitness Program in accordance with COMDTINST M1020.8(series).

J. P. JONES

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**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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[Click here for Word CG-3307 \(P&D-4C\)](#)

Entry Type: Performance and Discipline (P&D-4C)

Reference: COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): You probationary period is held in abeyance this date pending your return to a fit-for-full-duty status. In accordance with paragraph 3.A. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby notified that the day following a determination that you are fit-for-full duty or a decision by medical authority to lift the abeyance, your probationary period shall be restarted with the length of the probationary period based on your current weight when found fit-for-full duty or when the abeyance is lifted. In addition, at that point you are to resume participation in your detailed fitness plan, mandatory fitness activity, and monthly mandatory fitness assessment until your probationary period ends. If you fail to reach compliance by the end of this new probationary period, you will be recommended for separation (if active duty), recommended for transfer to the IRR or ISL (if a Reservist), or recommended to return to the Department of Health and Human Services (if Public Health Service). By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review COMDTINST M1020.8(series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry and fully understand the administrative action(s) being initiated because I do not meet the requirements of the Coast Guard Weight/Physical Fitness Program in accordance with COMDTINST M1020.8(series).

J. P. JONES

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[Click here for Word CG-3307 \(P&D-5\)](#)

Entry Type: Performance and Discipline (P&D-5)

Reference: Section 10-B, Personnel and Pay Procedures Manual, PSCINST M1000.2A

Responsible Level: Unit

Entry:

(DATE): Missed sailing of this vessel from (place of sailing) on (date) en route to (destination). Member had knowledge of the time movement was scheduled.

A. B. SEA, CAPT, USCG  
Commanding Officer

(if vessel deploys for 10 or more days)

(DATE): Member's records and personal effects transferred to (name of unit).

A. B. SEA, CAPT, USCG  
Commanding Officer

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-6\)](#)

Entry Type: Performance and Discipline (P&D-6)

Reference: None

Responsible Level: Unit

Entry: (General - positive)

NOTE: Entry must be member specific and describe who, what, when, where, why and how. Blanket entries describing generalities, which are photocopied for inclusion in many members' PDRs, are not authorized.

(DATE): Seaman Jones is commended for ....

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the-above entry.

J. P. JONES

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[Click here for Word CG-3307 \(P&D-7\)](#)

Entry-Type: Performance and Discipline (P&D-7)

Reference: None

Responsible Level: Unit

Entry: (General - negative)

NOTE: Entry must be member specific and describe who, what, when, where, why and how. Blanket entries describing generalities, which are photocopied for inclusion in many members' PDRs, are not authorized.

(DATE): Petty Officer Jones was counseled for ....

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the-above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-8\)](#)

Entry Type: Performance and Discipline (P&D-8)

Reference: Section 8-A, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Necessary articles of the Uniform Code of Military Justice (UCMJ), and the Code of Conduct explained this date as required by section 8-A, Personnel Manual, COMDTINST M1000.6 (SERIES).

A. B. SEA, CAPT, USCG  
Commanding Officer

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[Click here for Word CG-3307 \(P&D-9\)](#)

Entry Type: Performance and Discipline (P&D-9)

Reference: Section 8-M, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Counseled concerning civil and moral obligations to provide continuous and adequate support of lawful dependents.

A. B. SEA, CAPT, USCG  
Commanding Officer

---

(DATE): I acknowledge the above entry.

J. P. JONES

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[Click here for Word CG-3307 \(P&D-10\)](#)

Entry Type: Performance and Discipline (P&D-10)

Reference: Section 8-L, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Unreliable due to failure to pay debts. (Describe circumstances surrounding entry-such as the dates, debts, and actions taken).

A. B. SEA, CAPT, USCG  
Commanding Officer

---

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

[Click here for Word CG-3307 \(P&D-11\)](#)

Entry Type: Performance and Discipline (P&D-11)

Reference: Section 8-M, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Unreliable due to unsatisfactory conduct of personal affairs and support of dependents.

(State what other actions will be initiated, etc.).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above counseling and understand the actions being initiated.

J. P. JONES

[Click here for Word CG-3307 \(P&D-12\)](#)

Entry Type: Performance and Discipline (P&D-12)

Reference: Article 8-H-6c(2), Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): (document formal counseling pertaining to improper relationships)

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

---

**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-13\)](#)

Entry Type: Performance and Discipline (P&D-13)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(Date): On (date) you received an alcohol incident when your abuse of alcohol was determined to be a significant and/or causative factor, (describe what happened).

List (time, dates, place, pertinent information, arrested by, BAC if done, etc.)

You were counseled on USCG policies concerning alcohol use and abuse as well as the serious nature of this incident. The unit CDAR will arrange an appointment with a provider who will determine the nature of your relationship with alcohol. It is recommended that you abstain from the use of alcohol until your screening and assessment is completed. (Note any action pending, if any.)

This is considered your first documented alcohol incident. (Underage drinking violation only: Your command may request removal of this incident from your permanent record after three years if no further incidents occur.) Any further incidents will result in you being processed for separation as per Chapter 20, Personnel Manual COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*



**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-14\)](#)

Entry Type: Performance and Discipline (P&D-14)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(Date): On (date) you were involved in an alcohol incident. (Describe what happened. List time, dates, place, pertinent information, arrested by, BAC if done, etc.)

You were previously counseled (date) on USCG policies concerning alcohol use and abuse as well as the serious nature of this incident. The unit CDAR will arrange an appointment with a provider who will determine the nature of your relationship with alcohol. It is recommended that you abstain from the use of alcohol until your screening and assessment is completed. (Note any action pending, if any.)

This is considered your (second) documented alcohol incident. You will be processed for separation from the U.S. Coast Guard, as per Chapter 20 of the Personnel Manual COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**CG-3307's for Performance and Discipline, Continued**

[Click here for Word CG-3307 \(P&D-15\)](#)

Entry Type: Performance and Discipline (P&D-15)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Health Promotion Manual, COMDTINST M6200.1 (series)

Responsible Level: Unit

Entry:

(Date): On (date) you were involved in an alcohol-related situation. Alcohol was not considered a significant or causative in (describe the circumstances, violations, or actions pending).

This is not considered an alcohol incident, but it is entered for documentation purposes only.

You have been advised of the contents of Chapter 20, Personnel Manual, COMDTINST M1000.6 (series) concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

---

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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Click on the links below for the respective Word CG-3307

Entry Type: Performance and Discipline (P&D-16)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Health Promotion Manual, COMDTINST M6200.1 (series)

Responsible Level: Unit

Entry:

(Date): Congratulations! On (date) you successfully completed your (3 or 12 month) after care plan as per Chapter 2, Health Promotion Manual, COMDTINST M6200.1

I encourage you to continue to incorporate positive life style changes into your daily routine and remember what you have learned.

(Use this entry for [Alcohol Abusive](#))

If you return to a pattern of alcohol misuse, take the first step and ask for help. Future alcohol misuse or incidents may lead to separation and shall be addressed by your command.

(Use this entry for [Alcohol Dependent](#))

You must abstain from alcohol indefinitely. A relapse or incident may lead to separation or re-instatement of a continued care program.

(Use this entry for [Members who self-refer only](#))

You may now request removal of the screening letter and treatment plan from your Personnel Data Record as per Personnel Manual, COMDTINST M1000.6 (series). A permanent record of the screening and treatment will be kept on your health record in accordance with the Health Promotion Manual, COMDTINST M6200.1 (series).

(Include this entry on all P&D-16 Page 7's)

You have been advised of the contents of Chapter 20, Personnel Manual, COMDTINST M1000.6 (series), concerning conduct expected of Coast Guard personnel.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-17\)](#)

Entry Type: Performance and Discipline (P&D-17)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Health Promotion Manual, COMDTINST M6200.1 (series)

Responsible Level: Unit

Entry:

(Date): On (date) you were screened at (Name of Facility) and determined to be (alcohol abusive or alcohol/drug dependent) as per Diagnostic and Statistical Manual of the American Psychiatric Association (DSM IV) and recommended for (type or treatment or education). You have indicated that you do not want to receive the treatment, which was recommended by medical authority as outlined above. By doing so you waive all right to any future benefits under the Department of Veterans Affairs program for treatment or chemical dependency.

**You will be processed for separation per Chapter 20, of the Personnel Manual COMDTINST M1000.6 (series).**

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-18\)](#)

Entry Type: Performance and Discipline (P&D-18)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Health Promotion Manual, COMDTINST M6200.1 (series)

Responsible Level: Unit

Entry:

(Date): On (date) you successfully completed (type of treatment) program at (name of facility). Congratulations on your accomplishment and your perseverance for personal recovery.

In accordance with chapter 2 of the Health Promotion Manual, COMDTINST M6200.1 (series), your aftercare (continued care) plan shall consist of, but not limited to:

- a. For a period of 90 days, you will abstain from alcohol. This will allow you to incorporate all of the tools you were given to make positive changes in your life.
- b. For a period of 90 days, you will meet weekly with your command CDAR, at a time agreed upon by both of you, for the purpose of monitoring and supporting your recovery.
- c. For a period of 90 days, participation in a twelve-step or group support program at least twice weekly (unit operations permitting).

Failure to comply with this aftercare plan or involvement in any alcohol incident may result in your separation from the Coast Guard in accordance with chapter 20 of the Personnel Manual, COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-19\)](#)

Entry Type: Performance and Discipline (P&D-19)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Health Promotion Manual, COMDTINST M6200.1 (series)

Responsible Level: Unit

Entry:

(Date): On (date) you successfully completed (type of treatment) program at (name of facility). Congratulations on your accomplishment and your perseverance for personal recovery. This is been a major step in taking charge of your life.

The aftercare (continued care) plan is an important and mandatory segment of the treatment and recovery process. The support you will find in your aftercare program will go far in helping to ensure your success. Your aftercare plan shall consist of, but not limited to:

- a. Abstinence from alcohol indefinitely.
- b. Weekly meetings with the unit CDAR to monitor and support your recovery for 12 months.
- c. Attendance at a minimum to (number specified in aftercare plan) twelve-step or other approved support group meetings per week for 12 months (unit operations permitting).

Failure to comply with this aftercare plan or involvement in any alcohol incident may result in your separation from the Coast Guard in accordance with chapter 20 of the Personnel Manual, COMDTINST M1000.6 (series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-20\)](#)

Entry Type: Performance and Discipline (P&D-20)

Reference: Section 20-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Health Promotion Manual, COMDTINST M6200.1 (series)

Responsible Level: Unit

Entry:

(Date): On (Date) you were screened by (Name) at (Name of Facility) for a (self-referral/command referral/alcohol incident) and it was determined that you meet the criteria for a diagnosis of (Alcohol Abusive/ Dependent or Substance Abusive/Dependent, list drug) as per DSM IV and you have been recommended for (type of treatment).

You will receive your treatment at (name of facility), which begins on (date) at (time).

Until you begin treatment, you shall adhere to a pre-treatment plan, which will consist of the following (alcohol dependent is mandatory, alcohol abusive if recommended by screening facility):

- a. Abstaining from consuming alcohol. Any further use of alcohol until you complete treatment and your support plan will lead to further disciplinary action.
- b. You will meet with your CDAR once a week, at a time to be agreed on by both of you, for monitoring and support.
- c. You must attend at least 2 support group meetings (e.g., Alcoholics Anonymous or other MLC approved support group) each week.

You have been advised of the contents of Chapter 20, Personnel Manual, COMDTINST M1000.6 (series) regarding the policy for (self-referral, command referral, alcohol Incident, drug incident), expected conduct of Coast Guard personnel, and the continued care plans available for those who have problems with alcohol abuse or substance dependency.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-21\)](#)

Entry Type: Performance and Discipline (P&D-21)

Reference: Article 12-B-16 and 12-B-18, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): (document formal counseling pertaining to placing a member on probation, prior to recommending discharge, per articles 12-B-16 and 12-B-18 of the Personnel Manual)

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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[Click here for Word CG-3307 \(P&D-22\)](#)

Entry Type: Performance and Discipline (P&D-22)

Reference: Article 12-B-2, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): (summarize the basis for which a general discharge is awarded per section 12-B of the Personnel Manual)

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*



**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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Click on the links below for the respective Word CG-3307

Entry Type: Performance and Discipline (P&D-23)

Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series)

Responsible Level: Unit

Entry:

(DATE): [Passed](#) (or [Failed](#)) the Deck Watch Officer (DWO) Rules of the Road exam on (date) with a score of \_\_\_\_\_%

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry

J. P. JONES

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**Click on the links below for the respective Word CG-3307**

Entry Type: Performance and Discipline (P&D-24)

Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and Personnel Qualification Standard for Officer of the Deck, COMDTINST M3502.5

Responsible Level: Unit

Entry:

(DATE): Completed all prescribed training and oral examinations, and is certified as an [underway \(inport\)](#) Officer of the Deck in accordance with the Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and the OOD PQS, COMDTINST M3502.5

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Performance and Discipline, Continued**

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[Click here for Word CG-3307 \(P&D-25\)](#)

Entry Type: Performance and Discipline (P&D-25)

Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series) and Engineer Officer in Training (EOIT) PQS, COMDTINST M3502.11

Responsible Level: Unit

Entry:

(DATE): Completed all prescribed training and oral examinations, and is certified as an EOIT in accordance with the Cutter Training and Qualification Manual, COMDTINST 3502.4 (series) and the EOIT PQS, COMDTINST 3502.11 (series).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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**Click on the links below for the respective Word CG-3307**

Entry Type: Performance and Discipline (P&D-26)

Reference: Cutter Training and Qualification Manual, COMDTINST M3502.4 (series), Engineer Officer in Training (EOIT) PQS, COMDTINST M3502.11 (series), and Personnel Qualification Standard (PQS) for Officer of the Deck, COMDTINST M3502.5.

Responsible Level: Unit

Entry:

(DATE): [Completed PQS](#) or [qualified/certified](#) as (specify watchstation).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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## **CG-3307's for Separation**

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[Click here for Word CG-3307 \(SEP-1\)](#)

Entry Type: Separation (SEP-1)

Reference: Section 3-B-5, Personnel and Pay Procedures Manual, PPCINST M1000.2 (series)

Responsible Level: Unit

Entry:

(DATE): I agree to allow the withholding of a substantial portion of my final pay on my date of separation. I also understand that I may owe the government money, and the government will initiate collection action for any money due.

J. P. JONES

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[Click here for Word CG-3307 \(SEP-2\)](#)

Entry Type: Separation (SEP-2)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible level: Unit

Entry:

(DATE): I have read and been counseled on the contents of Article 12-B-53 of the Personnel Manual, COMDTINST M1000.6 (SERIES) concerning my rights on separation from the Coast Guard. I understand my rights as described therein and have had all of my questions answered.

I have been advised IAW COMDTINST 7220.1 (series) that since I am opting for separation at this time, should I later elect to reenlist, I must do so within three (3) months of discharge to be eligible for a Selective Reenlistment Bonus (SRB), provided that on the date of reenlistment my rating has a multiple listed in the ALCOAST then in effect.

J. P. JONES

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[Click here for Word CG-3307 \(SEP-3\)](#)

Entry Type: Separation (SEP-3)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): The provisions of Article 12-B-3, Personnel Manual, COMDTINST M1000.6 (SERIES) concerning types of discharge certificates, their basis for issuance, the possible effects of various veterans' benefits and related matters have been explained to me this date.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-4\)](#)

Entry Type: Separation (SEP-4)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES). Member is recommended for reenlistment. Member has stated intentions (not to reenlist) (to reenlist) (undecided). The required E-Resume has been submitted in Direct Access.

A. B. SEA, CAPT, USCG  
Commanding Officer

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[Click here for Word CG-3307 \(SEP-5\)](#)

Entry Type: Separation (SEP-5)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES). In accordance with (reference message traffic) you are recommended for reenlistment. You have stated your intention (to reenlist) (to extend) (not to reenlist). You have been counseled that failure to extend or reenlist for \_\_\_\_ years prior to (date) will result in revocation of the reenlistment authorization and separation upon EOE/EAOS is mandatory. Members who are authorized reenlistment and choose not to do so are required to serve any additional obligated service incurred in addition to their original enlistment. You will be discharged/RELAD on (date).

A. B. SEA, CAPT, USCG  
Commanding Officer

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-6\)](#)

Entry Type: Separation (SEP-6)

Reference: Article 12-B-47, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(complete the following entry when a citizen of the Republic of the Philippines reenlists immediately following separation or executes a voluntary extension of enlistment):

(DATE): I have been properly advised and counseled regarding the loss of entitlement to file for U.S. citizenship unless such reenlistment or extension of enlistment actually takes place in the United States or its stated possessions (American Samoa, Swans Island, Guam, Puerto Rico, and the Virgin Islands).

J. P. JONES

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[Click here for Word CG-3307 \(SEP-7\)](#)

Entry Type: Separation (SEP-7)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: Unit

Entry:

(DATE): Reenlistment interview conducted this date per Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES). Member is not recommended for reenlistment because (give reason(s)). The required E-Resume has been submitted in Direct Access.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I acknowledge that I have been informed that I am not being recommended for reenlistment and given the reason(s) for this action. I understand that I may submit a written appeal via the chain of command to Commander (CGPC-epm). This appeal must be submitted within 15 days of this notification and my command will furnish clerical assistance, if I desire to submit an appeal.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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## **CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-8\)](#)

Entry Type: Separation (SEP-8)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.

Responsible Level: SPO

Entry:

(DATE): Discharged from active duty without immediate reenlistment this date by reason of (expiration of enlistment, misconduct, etc.). Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) Thrift Savings Plan (TSP) withdrawal options and procedures; (3) provisions of COMDTINST 1760.7 (series); and maintaining continuous service status.

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

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[Click here for Word CG-3307 \(SEP-9\)](#)

Entry Type: Separation (SEP-9)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.

Responsible Level: SPO

Entry:

(DATE): Discharged this date by reason of (expiration of enlistment or convenience of the government) and immediately reenlisted. Certificate of Release or Discharge from Active Duty form (DD-214) not issued. The following information on this enlistment/reenlistment applies:

Period of service.

Reenlistment code.

Separation Program Designator (SPD).

Time lost.

(NOTE: the above data is necessary to compute the final DD-214 since it will cover multiple enlistment/reenlistment periods.)

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

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*Continued on next page*

**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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**CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-10\)](#)

Entry Type: Separation (SEP-10)

Reference: Section 12-B & 18-D-4 Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.

Responsible Level: SPO

Entry:

(DATE): Released from active duty due to expiration of enlistment and immediately transferred to the Coast Guard reserve to complete obligation of military service. Member provided Certificate of Release or Discharge from active duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Member counseled regarding (1) reenlistment opportunities including SRB entitlements and Coast Guard reserve opportunities/benefits; (2) Thrift Savings Plan (TSP) withdrawal options and procedures an/or opportunity to contribute to the TSP within 60 days of joining the Ready Reserve; (3) provisions of COMDTINST 1760.7 (series); (4) liability for SGLI premiums unless member declines coverage or joins the Individual Ready Reserve (IRR); and maintaining continuous service status.

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

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[Click here for Word CG-3307 \(SEP-11\)](#)

Entry Type: Separation (SEP-11)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.

Responsible Level: SPO

Entry:

(DATE): Retired from active duty this date and effective (date) placed on the inactive retired rolls. Member provided Certificate of Release or Discharge from Active Duty form (DD-214) and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES) (series). Member counseled regarding retirement rights, benefits, and responsibilities.

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-12\)](#)

Entry Type: Separation (SEP-12)

Reference: Section 12-B, Personnel Manual, COMDTINST M1000.6 (SERIES) and DD 214 Manual.

Responsible Level: SPO

Entry:

(DATE): As outlined in Article 12-B-4, Personnel Manual, COMDTINST M1000.6 (SERIES), I understand that in order to remain in a continuous service status, reenlistment must occur within three months from the date of discharge/separation. However, the rate held at the time of discharge/separation may not be the rate at which reenlisted unless the rate is on the open rate list at the time of reenlistment. I hereby acknowledge receipt of my separation documents.

J. P. JONES

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[Click here for Word CG-3307 \(SEP-13\)](#)

Entry Type: Separation (SEP-13)

Reference: Article 12-B-11f, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: SPO

Entry:

(DATE): I [member's name], desire to be separated from the Coast Guard on my normal expiration of active obligated service date. I understand I will not be eligible for further follow-up studies or treatment at a U.S. Uniformed Services medical facility or for disability benefits under laws the Coast Guard administers, and any further treatment or benefits would be under the Veterans' Administration's jurisdiction.

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Member sign and date

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Officer witness, sign and date

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*Continued on next page*



**ENCLOSURE 6**  
**ADMINISTRATIVE REMARKS**

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## **CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-14\)](#)

Entry Type: Separation (SEP-14)

Reference: Article 12-B-11f, Personnel Manual, COMDTINST M1000.6 (SERIES)

Responsible Level: SPO

Entry:

(DATE): I [member's name], desire to be separated from the Coast Guard despite the fact separation may prejudice any rights or benefits to which I may be entitled as a result of physical evaluation board hearings under 10 U.S.C. 61. I have been duly advised of my rights in this matter and request the Coast Guard to discharge me as soon as possible without further hearing and without disability, retirement, or severance pay and without any compensation whatsoever. I understand I am not required and am under no obligation to give this statement and I hereby certify I give this statement voluntarily.

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\_\_\_\_\_  
Member sign and date

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\_\_\_\_\_  
Officer witness, sign and date

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[Click here for Word CG-3307 \(SEP-15\)](#)

Entry Type: Separation USCGR (Inactive) (SEP-15)

Reference: Section 8-B, Reserve Policy Manual, COMDTINST M1001.28(series) and DD 214 Manual.

Responsible Level: SPO

Entry:

(DATE): Discharged this date from USCGR inactive duty by reason of (fulfillment of service obligation, expiration of enlistment, or convenience of the government) and immediately reenlisted in the (regular or reserve). Member provided USCGR discharge certificate and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Member counseled regarding (1) reenlistment opportunities including SRB entitlements; (2) opportunity to contribute to the Thrift Savings Plan (TSP) within 60 days of joining Active Duty or the Ready Reserve; (3) provisions of COMDTINST 1760.7 (series); and maintaining continuous service status.

(DATE): Reenlisted this date in the (USCG or USCGR).

A. B. SEA, YNCM, USCG  
By direction  
CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entries.

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J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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## **CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-16\)](#)

Entry Type: Separation USCGR (Inactive) (SEP-16)

Reference: Section 8-B, Reserve Policy Manual, COMDTINST M1001.28 (series) and DD 214 Manual.

Responsible Level: RSPO

Entry:

(DATE): Discharged from USCGR inactive duty without immediate reenlistment this date by reason of (fulfillment of service obligation, expiration of enlistment, or convenience of the government).

Member provided USCGR discharge certificate and other separation documents as required by Article 12-B-53, Personnel Manual, COMDTINST M1000.6 (SERIES). Documents mailed this date to: (address)

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

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[Click here for Word CG-3307 \(SEP-17\)](#)

Entry Type: Separation from Selected Reserve (SELRES)(SEP-17)

Reference: COMDTINST 1001.37 (series)

Responsible Level: RSPO

Entry:

(DATE): Member counseled this date upon assignment to the Individual Ready Reserve (IRR), regarding possible entitlement to/ineligibility to Reserve Transition Benefits (RTB). Commandant (G-RSM) will make final determination of RTB entitlement.

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entry.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-18\)](#)

Entry Type: Separation (SEP-18)

Reference: COMDTINST 1040.10 (series)

Responsible Level: Unit

Entry:

(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).

(for E-5 to E-9)

I understand that based on my present pay grade of \_\_\_\_\_, my Professional Growth Point (PGP) is \_\_\_\_\_ (#) \_\_\_\_\_ years of military service. My present PGP is \_\_\_\_\_ (date) \_\_\_\_\_. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).

I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (CGPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

---

SIGNATURE

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WITNESS

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[Click here for Word CG-3307 \(SEP-19\)](#)

Entry Type: Separation (SEP-19)

Reference: COMDTINST 1040.10 (series)

Responsible Level: Unit

Entry:

(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).

(for E-3 to E-4)

I understand that based on my present pay grade of \_\_\_\_\_, my Professional Growth Point (PGP) is 7 years of Coast Guard service or 10 years military service, whichever is greater. My present PGP is \_\_\_\_\_ (date) \_\_\_\_\_. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).

I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (CGPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

---

SIGNATURE

---

WITNESS

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Separation, Continued**

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[Click here for Word CG-3307 \(SEP-20\)](#)

Entry Type: Separation (SEP-20)

Reference: COMDTINST 1040.10 (series)

Responsible Level: Unit

Entry:

(DATE): I hereby acknowledge that I have been counseled on the contents of the Coast Guard's High Year Tenure (HYT) policy contained in COMDTINST 1040.10 (series).

(for E-2)

I understand that based on my present pay grade of E-2, my Professional Growth Point (PGP) is 4 years of military service. My present PGP is \_\_\_\_\_(date)\_\_\_\_\_. I further understand that I will not be permitted to extend my enlistment or reenlist beyond my PGP plus one month unless my PGP is amended in accordance with COMDTINST 1040.10 (series).

I understand that I will be separated from the Coast Guard upon reaching my PGP and, that if otherwise qualified, I must request, IAW current directives, to be retired in lieu of discharge due to High Year Tenure. I also acknowledge that waivers to this policy may only be granted by Commander (CGPC-epm) and that I must submit a letter requesting this waiver not less than six months prior to my PGP or the expiration of any prior waiver period.

---

SIGNATURE

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WITNESS

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[Click here for Word CG-3307 \(SEP-21\)](#)

Entry Type: Separation (SEP-21)

Reference: COMDTINST 1910.1 (series)

Responsible Level: Unit

Entry:

(DATE): As a condition of receiving separation pay under 10 U.S.C. 1174, I hereby agree to enlist or extend in the ready reserve for a period of 3 years following my discharge or release from active duty in addition to any remaining military service obligation. I understand this agreement is made without regard to the reason for my separation or my eligibility for affiliation with the ready reserve. Further, should I be accepted for enlistment or extension in the Coast Guard reserve, I must execute the extension or enlistment contract as a condition of qualifying for separation pay. I understand that if I enlist in the ready reserve I may request to become a member of the selected reserve by applying for affiliation to the chief, readiness and reserve division of the district in which I live. I also agree if accepted that I will keep the district commander (r) in my area informed of any changes in my address, physical status, or dependency status. I understand that if I stay in the reserve and later retire, my retired pay will be reduced by the amount of enlisted separation payments received.

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SIGNATURE

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WITNESS

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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## **CG-3307's for Selective Reenlistment Bonus**

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[Click here for Word CG-3307 \(SRB-1\)](#)

Entry Type: Selective Reenlistment Bonus (SRB-1)

Reference: COMDTINST M1000.6 (SERIES), Art. 3-C

Responsible Level: Unit

Entry:

(DATE): I have been advised that my current Selective Reenlistment Bonus (SRB) multiple is \_\_\_\_\_ and is listed in ALCOAST \_\_\_\_\_, which has been made available to me.

I am eligible to reenlist/extend my enlistment up to a maximum of \_\_\_\_\_ years. My SRB will be computed based on \_\_\_\_\_ months of newly obligated service.

I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C. I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

---

(Signature of Member/Date)

---

(Signature of Counselor)

---

[Click here for Word CG-3307 \(SRB-2\)](#)

Entry Type: Selective Reenlistment Bonus (SRB-2)

Reference: COMDTINST M1000.6 (SERIES), Art. 3-C

Responsible Level: Unit

Entry:

(DATE): I have been advised that my current Selective Reenlistment Bonus (SRB) multiple is \_\_\_\_\_ and is listed in ALCOAST \_\_\_\_\_, which has been made available to me.

I am eligible to reenlist/extend my enlistment up to a maximum of \_\_\_\_\_ years. My SRB will be computed based on \_\_\_\_\_ months of newly obligated service.

I must reenlist on or 3 months prior to (date), which is my (6<sup>th</sup> or 10<sup>th</sup>) active duty anniversary date, in order to receive a zone (A, B, or C) SRB.

I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C. I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

---

(Signature of Member/Date)

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(Signature of Counselor)

---

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Selective Reenlistment Bonus, Continued**

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[Click here for Word CG-3307 \(SRB-3\)](#)

Entry Type: Selective Reenlistment Bonus (SRB-3)

Reference: COMDTINST M1000.6 (SERIES), Art. 3-C

Responsible Level: Unit

Entry:

(DATE): I hereby acknowledge that I have read and fully understand the contents and explanation of COMDTINST M1000.6 (SERIES) 3-C.

I further acknowledge that I have been advised of the effects on my SRB computation/payment if I enter into an agreement to extend my enlistment.

---

(Signature of Member/Date)

---

(Signature of Counselor)

---

[Click here for Word CG-3307 \(SRB-4\)](#)

Entry Type: Selective Reenlistment Bonus (SRB-4)

Reference: COMDTINST M1000.6 (SERIES), Art. 3-C

Responsible Level: Unit

Entry:

(DATE): I have been advised and am aware that I will not be eligible and will not begin receiving my SRB payment for my new rating until the operative date of my extension or reenlistment after attaining my new rating.

---

(Signature of Member/Date)

---

(Signature of Counselor)

---

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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## Selective Reserve (SELRES) Enlisted Bonus Programs

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[Click here for Word CG-3307 \(BON-1\)](#)

Entry Type: Selective Reserve Reenlistment/Extension Bonus (BON-1)

Reference: COMDTINST 7220.1 (series)

Responsible Level: Unit

Entry:

(DATE): I have been advised that I am eligible for a \_\_\_\_ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST \_\_\_\_\_.

\_\_\_\_\_  
(Signature of Member/Date)

\_\_\_\_\_  
(Signature of Counselor)

---

[Click here for Word CG-3307 \(BON-2\)](#)

Entry Type: Selective Reserve Enlistment Bonus (BON-2)

Reference: COMDTINST 7220.1 (series)

Responsible Level: Recruiting Office

Entry:

(DATE): I have been advised that I am eligible for a \_\_\_\_ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST \_\_\_\_\_.

\_\_\_\_\_  
(Signature of Member/Date)

\_\_\_\_\_  
(Signature of Counselor)

---

[Click here for Word CG-3307 \(BON-3\)](#)

Entry Type: Selective Reserve Enlistment Bonus (BON-3)

Reference: COMDTINST 7220.1 (series)

Responsible Level: Unit

Entry:

(DATE): I have been advised that I am eligible for a \_\_\_\_ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST \_\_\_\_\_.

\_\_\_\_\_  
(Signature of Member/Date)

\_\_\_\_\_  
(Signature of Counselor)

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**Selective Reserve (SELRES) Enlisted Bonus Programs,**  
Continued

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[Click here for Word CG-3307 \(BON-4\)](#)

Entry Type: Selective Reserve Affiliation Bonus (BON-4)

Reference: COMDTINST 7220.1 (series)

Responsible Level: Unit

Entry:

(DATE): I have been advised that I am eligible for a \_\_\_\_ dollar SELRES Enlistment or Affiliation Bonus. Receipt of this bonus commits me to SELRES participation through MM/DD/YYYY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST \_\_\_\_\_.

---

(Signature of Member/Date)

---

(Signature of Counselor)

---

[Click here for Word CG-3307 \(BON-5\)](#)

Entry Type: Performance and Discipline (BON-5)

Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1(series)

Responsible Level: Unit

Entry:

(DATE): I have been advised that I will be placed in a period of authorized absence for 12 months due to involuntary recall to active duty under 10 USC 12302. During this 12-month period, I will retain my current SELRES bonus eligibility.

I further acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1(series).

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(Signature of Member/Date)

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(Signature of Counselor)

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[Click here for Word CG-3307 \(BON-6\)](#)

Entry Type: Performance and Discipline (BON-6)

Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1(series)

Responsible Level: Unit

Entry:

(DATE): I have been advised that I will be authorized a period of non-availability and temporarily assigned to the Active Status Pool (ASP) for 12 months due to (temporary medical disability, temporary work conflict, or documented personal hardship).

Upon completion of the 12-month period, I will be required to extend my enlistment in the Ready Reserve to serve my full contract period in the SELRES in order to receive my total bonus entitlement.

Failure to extend for the necessary additional service or continued assignment in the ASP over 12 months will result in my bonus eligibility being adjusted for time spent in the ASP.

I further acknowledge that I have read and fully understand the contents and explanation of COMDTINST 7220.1(series).

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(Signature of Member/Date)

---

(Signature of Counselor)

---

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**Selective Reserve (SELRES) Enlisted Bonus Programs,**  
Continued

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[Click here for Word CG-3307 \(BON-7\)](#)

Entry Type: Performance and Discipline (BON-7)

Reference: Selected Reserve (SELRES) Enlisted Bonus Programs, COMDTINST 7220.1(series)

Responsible Level: Unit

Entry:

(DATE) I have been advised that:

If I fail to complete Class "A" School training, I will immediately be reassigned to an Unbudgeted SELRES position to complete the minimum one year affiliation per 5.B.1 of the Reserve Policy Manual, COMDTINST M1001.28 (series).

I am eligible for an affiliation bonus of \_\_\_\_\_ based on \_\_\_\_\_ months of remaining Initial Military Obligation. The criteria of ALCOAST \_\_\_\_\_ applies. In addition, the bonus payment is contingent upon successful completion of \_\_\_\_\_ "A" School and the request for payment will not be submitted by servicing SPO until I have successfully completed \_\_\_\_\_ "A" School. My eligibility period will commence the day of assignment to the SELRES and commits me to SELRES participation through MM/DD/YY.

I hereby acknowledge that I have read and fully understand the contents of COMDTINST 7220.1 (series) and ALCOAST\_\_\_\_ .

---

(Signature of Member)

---

(Signature of Counselor)

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## Explanation of Complex Areas on the LES, Continued

**Saved Leave Balance (SLB) Statement in Remarks Block**

Members on Active Duty on 31 August 1976 will have a SLB statement in the remarks block of the LES.

Under 37 USC 501, Public Law 94-361, effective 1 September 1976 leave accrued and later sold would be paid based solely on a member's basic pay.

The following table gives related information as it occurs in date order.

Date	Saved Leave Balance Effect
31 August 1976	<p>A member's accrued leave balance as of this date became the Saved Leave Balance (SLB) to which the "Saved Leave" provisions apply.</p> <ul style="list-style-type: none"> <li>• Saved Leave Balance cannot exceed 60 days.</li> <li>• Saved Leave Balance is subject to reduction when leave is taken or sold, and once reduced cannot be restored.</li> <li>• Saved Leave Balance can never be greater than a member's regular leave balance.</li> </ul>
Prior to 1 September 1976	<p>Leave accrued prior to this date could be sold based on Basic Pay, plus standard rates for housing and subsistence. Leave accrued on or after this date can be sold based solely on Basic Pay. SLB is "grandfathered", and can be sold based on the pre-1 September 1976 rules.</p>
After 1 September 1976	<p>Following each period of leave taken, or when leave is sold, SLB must be recalculated. To determine if there has been a change in SLB, the following steps must be taken:</p> <ul style="list-style-type: none"> <li>▪ Determine the regular leave balance at the end of the month <u>prior</u> to the month in which leave was taken or sold.</li> <li>▪ Add the number of days that were earned <u>through the day of return from leave/date leave sold</u>.</li> <li>▪ Subtract the number of days leave taken sold.</li> <li>▪ If the resulting leave balance is equal to or greater than SLB, SLB remains unchanged. If the resulting leave balance is less than SLB, then SLB is reduced to the newly calculated balance.</li> </ul>

*Continued on next page*

## Explanation of Complex Areas on the LES, Continued

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**Special Accrual  
of Leave in  
Excess of 60  
Days**

Members assigned to certain types of duty may carry forward up to 90 days of accrued leave into a new fiscal year provided the duty meets the criteria set forth in Article 7-A-15 of the CG Personnel Manual, COMDTINST M1000.6 (series). All such leave in excess of 60 days must be used by the end of the third year following the fiscal year in which the authorizing duty occurred.

**(Items 11 and  
16 of the LES)**

Unit commanding officers shall notify PSC (mas) at the end of each fiscal year of those members that they believe qualify for accumulation of leave in excess of 60 days. PSC (mas) will verify each member's entitlement, and make appropriate adjustments. These adjustments will not be made until after the **March** end-month compute cycle, and will be reflected on the **April** LES of qualifying members.

Any member identified by the unit commanding officer who does not qualify for leave carry over under the established criteria will be notified by PSC (mas) in writing (either letter, message, or email as appropriate).

---

**Sold leave in  
Items 14 and 17  
of the LES**

Effects of sold leave are as follows:

- Item 14 will show leave sold this pay period.
- Item 17 will show the cumulative amount of leave sold during the member's career.
- The maximum amount of leave sold on or after 9 February 1976 is 60 days.
- SPOs must verify that leave sold is properly recorded in PMIS/JUMPS and reflected in Item 17 of the LES. If the SPO discovers an error in Item 17, they shall notify PSC (MAS).

**Excess Leave  
(Items 11 and  
12 of the LES)**

Specific instructions on computation and checkage of excess leave are contained in Section 2-I, Coast Guard Pay Manual, COMDTINST M7220.29 (series). Items 11, 12 and the Remarks block will indicate when a member enters an excess leave status.

When excess leave situations occur and are not properly reflected on the LES, the SPO shall notify PSC (MAS) via E-Mail.

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*Continued on next page*

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