



PSCNOTE 1000  
14 June 2007

CANCELLED:  
13 June 2008

**PERSONNEL SERVICE CENTER NOTICE 1000**

**Subj: CH-13 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.asp>.

**3. Directives Affected** E-Mail ALSPO Message G/06, PCS Entitlements and SPO Instructions for Personnel Reporting to Patrol Forces Southwest Asia and Cutters Supporting Operation Iraqi Freedom, is cancelled. The contents of the message are now in Chapter 2-F of the Personnel and Pay Procedures Manual.

**4. Summary of Changes** A side bar in the margin marks the significant changes. Significant changes include:

Chapter 1: Added procedures for contacting PSC Customer Care. Refined procedures for authorizing Direct-Access Command, HRS (SPO), and HRSUP (SPO Supervisor/Auditor) role users. Updated list of directives referenced in the PPPM. Added CG PSC worksheets to list of forms referenced in the PPPM. Added "Worksheets" to section title beginning on page 1-20.

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DISTRIBUTION - SDL No. 146 (Note: This notice distributed electronically only, see paragraph 7 for ordering reprints)

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**4. Summary of Changes (cont'd)**

[Chapter 2-A](#): Incorporated policies and procedures for obtaining Official Passports as promulgated in [ALCOAST 113/07](#). Added new step, on PCS Departing Checklist, to notify ESU when member departs, IAW ALCOAST 389/06. Added note on the PCS Reporting Checklist to notify CGPC (OPM-2) when a PHS Officer reports, they are the SPO for PHS Officers. Updated Overseas Departing Checklist with input provided by the Overseas Work Group and per CG Personnel Manual 4-H-2. Corrected list of auto-stops of pay entitlements on page 2-A-8, adding: Diving Duty Pay, Foreign Language Proficiency Pay, Hazardous Duty Incentive Pay for Visit, Board, Search & Seizure, Flight Deck Hazardous Incentive Pay and State Income Tax Withholding exclusion. Added members may check the status of their advance of funds requests and payment summaries in T-PAX on page 2-A-12.

[Chapter 2-B](#): Added a note to the TDY Checklists to show that only a copy of the amended/annotated orders needs to be sent to the SPO. Updated reference in Step 4 of TDY Return checklist. Updated reference in Step 2 of TDY Duty Site checklist.

[Chapter 2-D](#): Changed definition for term for long-term ADSW to reflect 181 days. Updated accounting data examples.

[Chapter 2-E](#): Corrected process block, on page 2-E-2, to show that ISCs, not CGPC will release message traffic with timeline and deadlines.

[Chapter 2-F](#): Incorporates the contents of E-Mail ALSPO Message G/06, PCS Entitlements for Members Ordered to Patrol Forces Southwest Asia

[Chapter 3-A](#): Added, on the Responsibility table for Types of Accessions, page 3-A-4, that the unit's SPO shall input the accession when an officer comes from the civilian sector or other military service and reports directly to their first unit prior to attending the DCO course.

[Chapter 3-B](#): Updated hyperlinks to Direct Access Online Manual and other directives. Updated e-mail address for PSC (ses) ([PSC-PF-SES@uscg.mil](mailto:PSC-PF-SES@uscg.mil)). Removed e-mail address from Exhibit 3-B-2. Cancellation of separation orders are to be reported by message, not e-mail. Removed requirement to complete CG Form 5507 (PMIS/JUMPS Entitlement Validation) from Checklist for Separations (#17). Form is obsolete. Added "*Counsel member on Assignment to the IRR*" to the Checklist for RELAD.

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**4. Summary of  
Changes  
(cont'd)**

[Chapter 5-A](#): Added change to the amount for combat SGLI and changed requirement from witness to sign and date SGLV-8286 to unit representative requirement to sign and date upon receipt.

[Chapter 5-B](#): Added SGLV-8286A, Family Coverage Election (SGLI), to list of forms required to be reviewed or submitted when a member reports a change in dependency. Updated references to forms and worksheets (5-B-3) to include COMDTINST M5512.1 (series) (ID Card Inst.). Introduction rewritten to clarify that documentation is required when there is a need to verify dependency (e. g. When a child turns 21) in addition to the need for documentation when adding a new dependent. Added documentation requirements for applying for an ID card for a child age 21 or 22 who is a full-time student and dependent on the member for over one-half support.

[Chapter 5-C](#): Added requirement for single members with dependents and member married to member with dependents to annually certify availability for worldwide assignment IAW CG Personnel Manual 4.A.6.g, to annual validation procedures. Added information about unit/command access to SWE PDEs in Direct Access to the PDE instructions on page 5-C-9. Updated filing location of forms SF-312 and CG-5588 to the information on Security Clearances on page 5-C-10.

[Chapter 5-D](#): Added section on Common Access Cards (CAC). Preserved instructions for manual preparation of the DD Form 2 CG (Active ID Card) for afloat unit to use when an ID card is needed a no RAPIDS facility is available. Removed section on Personal Clothing and Equipment Record (AF Form 538). [Chapter 3-B](#) of [COMDTINST 10470.10\(series\), Rescue and Survival Systems Manual](#), provides policies and procedures for the use of this form. Added section on Issuance of Official Passports.

[Chapter 6-A](#): Changed PSC point of contact for non-receipt of LESs and request for NPAMs to Customer Care.

[Chapter 6-B](#): Changed PSC point of contact for requests for special payments to Customer Care. Removed page 6-B-9, Retired Pay Projection Request, members may use online calculators to obtain retirement estimates.

[Chapter 6-C](#): Changed PSC point of contact for off-line payment requests to Customer Care.

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**4. Summary of Changes (cont'd)**

[Chapter 6-D](#): Updated discussion section of Annual Reserve Retirement Points Statement (CG-4175A) to reflect that forms are no longer sent to the SPO for filing in the PDR.

[Chapter 7-A](#): Added procedures for Combat-Related Injury Rehabilitation Pay (CIP) and Foreign Language Proficiency Pay (FLPP).

[Chapter 7-B](#): Added procedures for Family Separation Housing and Combat SGLI Allowance.

[Chapter 8-A](#): Changed PSC point of contact for reporting non-receipt of an allotment from PSC (MAS) to PSC (CCB).

[Chapter 8-B](#): Verified and updated hyperlinks in the State Tax Listing to state revenue departments. Added link to Puerto Rico website. Changed form number for California state tax withholding request to Sate Form EDD DE4. Added Ohio as a state the exempts active duty military pay from tax if member is not stationed in the state. Added reference to Combat SGLI Allowance to procedures for Combat Tax Exclusion. Corrected W-2 Block reference for Adoption Assistance Benefits from 13.T to 12.T.

[Chapter 8-C](#): Updated TSP contribution limits with 2007 amounts.

[Chapter 9-A](#): Changed collection rules to reflect 20% of available pay per Public Law 109-364.

[Chapter 9-B](#): Removed “...*temporary officers holding a permanent enlisted status...*” from “Who Can Apply [for Remissions]. Changed PSC point of contact to PSC (CCB). Eliminated SPO Endorsement requirement for both Remissions and Waivers. Form CG-5489A, Waiver/Remissions Application, SPO Endorsement, is hereby cancelled.

[Chapter 10-B](#): Added section on confinement processing. Updated staff symbol for distribution of CG-5588 to COMDT (CG-862).

[Chapter 11](#): Updated duration of Title 14 orders from 30 days per four-month period to 60 days and from 60 days per two year period to 120 days. Replaced “BAH II” with “BAH-RC”. Added OHA as an entitlement for Title 14 orders. Updated BAH-RC entitlement from 31 days to 60 days or less. Added Combat SGLI Allowance as an entitlement. Added PSC form 5150 to section on Civilian Clothing Monetary Allowance. Changed references to UTS to T-PAX. Added TRICARE Early ID Program and Reserve Income Replacement Program.

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**4. Summary of Changes (cont'd)**

[Enclosure 4](#): Updated phone numbers for PSC (CCB) and (RAS) and Coast Guard Personnel Command (RPM). Added additional information on member responsibilities to the Standard Separation Letter for members released from active duty and transferred to the Coast Guard Reserve (IRR).

[Enclosure 6](#): Added new CG-3307 example entries for Performance and Discipline (P&D-1A, P&D-1B and P&D-1C) and removed option for transfer to the IRR on P&D2, per the new weight policy COMDTINST M1020.8F. Removed CG-3307 example entries ACC-9, ACC-12, ACC-13 and ACC-15, which are no longer needed per the new Recruiting Manual, COMDTINST M1100.2E. Removed “Command request for failure to meet SELRES satisfactory participation” from A&T10 (Transfer to the IRR). Per Reserve Policy Manual, COMDTINST M1000.28(series), chapter 5.B.2, members are not authorized to transfer to the IRR for failure to meet SELRES satisfactory participation standards. Added requirements to document counseling members who are released from active duty and transferred to the IRR on their responsibilities while assigned to the IRR to the SEP-10 example entry.

[Appendix C](#): Corrected page numbers on contents page and shortened steps to determine Expiration of Enlistment for computation of service.

[Appendix F](#): Changed process for special leave accrual to show 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.

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

<b>Remove</b>	<b>Insert</b>
Table of Contents i thru viii	Table of Contents i thru viii
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**6. Environmental aspect and impact considerations** Environmental considerations were examined in the development of this notice and have been determined to be not applicable.

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**7. 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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**8. 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.asp>. 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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**9. Comments and Recommendations** The next change to the PPPM is expected to be completed by 1 May 2008. **PSC encourages user recommended revisions and corrections to the Personnel and Pay Procedures Manual.** Comments or recommendations may be submitted by returning the comment form in Enclosure (11) of the manual or by sending an e-mail to PSC (P&D) at [PSC-PF-PD@uscg.mil](mailto:PSC-PF-PD@uscg.mil). Items received by 1 February 2008 will be considered for inclusion in the next change.

/s/

V. M. WEBER

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

---

## Chapter Overview

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**Introduction** This chapter introduces the personnel and pay systems in use by the Coast Guard. Responsibilities, which incorporate data input, communications guidelines, and signature authority, are also provided in this chapter.

Travel systems and procedures are covered in chapter 2 of this manual.

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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## Responsibilities

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**Introduction** Direct Access exists as a part of the overall Coast Guard Personnel System. Six players (entities) within this system have a responsibility to ensure the system functions properly.

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**Entities** These six entities interact to perform the personnel and pay functions for the Coast Guard. Below are their responsibilities such as, but not limited to:

<b>Entity</b>	<b>Responsibility</b>
Member	<ul style="list-style-type: none"> <li>• Report changes in mailing address (for bonds and allotments too).</li> <li>• Understand the LES and report any discrepancies via the chain-of-command.</li> <li>• Understand the Retirement Point Statement and report any discrepancies via the chain-of-command (reservists).</li> <li>• Report changes in family member's status.</li> <li>• Report occasions of moving into or out of government owned or leased quarters.</li> <li>• Report changes in allotments or direct deposit.</li> <li>• Advise CO of reenlistment/extension intentions.</li> <li>• Submit E-Resume.</li> </ul>
Unit CO	<ul style="list-style-type: none"> <li>• Complete Enlisted Employee Reviews and ensure they are completed no later than 30 days after the reporting period.</li> <li>• Authorize and submit Leave Authorizations.</li> <li>• Endorse E-Interviews.</li> <li>• Conduct predischarge interviews.</li> <li>• Grant interim security clearance, request final security clearance from DOT Adjudication Facilities or grant/suspend access to classified information if required and conduct the briefings/debriefings.</li> <li>• Maintain Personnel Data Records (PDRs) as per PDR Manual (COMDTINST M1080 (series)).</li> <li>• Provide data in support of personnel/pay actions for members.</li> <li>• Review orders for attached personnel (Airport Terminal).</li> <li>• Maintain Security for Direct Access by keeping on file the original CG PSC 7421/2 and checking the Department Role Query on a quarterly basis to confirm access levels for unit personnel.</li> </ul>

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Responsibilities, Continued**

**Entities  
(cont'd)**

SPO	<ul style="list-style-type: none"> <li>• Provide information feedback to the unit.</li> <li>• Investigate and resolve personnel and pay problems.</li> <li>• Ensure that required transactions are submitted within 2 working days of an event affecting a member's pay.</li> <li>• Ensure that units assisting input have proper training and clear understanding of job required of them (Memo Of Understanding).</li> </ul>
PSC	<ul style="list-style-type: none"> <li>• Provide feedback to SPOs when transaction errors are correctable.</li> <li>• Take corrective action on errors which cannot be corrected by SPOs.</li> <li>• Provide written notice of due process rights to members who are overpaid.</li> <li>• Provide timely and accurate personnel and pay service to all members of the Coast Guard.</li> <li>• Administer leave and retirement point accounting for active and reserve military personnel.</li> <li>• Arrange for settlement of claims on behalf of deceased or separated members and collect out of service debt.</li> <li>• Process application for allotments and garnishments for certain support obligations as set forth in <a href="#">5 CFR 581</a>, <a href="#">32 CFR 63</a>, and <a href="#">33 CFR 50</a>.</li> <li>• Administer the SWE program and provide enlisted advancement lists to CGPC for official issuance.</li> <li>• Develop written procedures to support all areas of personnel and pay policy.</li> <li>• Process Travel Claims.</li> </ul>
Commander Coast Guard Personnel Command (CGPC)	<ul style="list-style-type: none"> <li>• Issue normal promotion/advancement authorizations and eligibility list.</li> <li>• Approve retirements.</li> <li>• Consider all personnel waivers.</li> <li>• Issue assignment orders.</li> </ul>
CG Institute	<ul style="list-style-type: none"> <li>• Distribute and score Coast Guard correspondence courses.</li> <li>• Distribute educational funding.</li> <li>• Conduct military education credit evaluation.</li> </ul>

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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## Information Flow

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**Information** Information required by Direct Access is generated by an event occurring to a member. After the event occurs there are different steps that need to be taken to ensure proper input into Direct Access.

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**Information flow from the member** This is an example of how information should flow from the member to Direct Access.

Stage	Who Does It	What Happens
1	Member	Event occurs (e.g., marriage) Event is reported to the unit by submitting appropriate forms or worksheets (listed later in this chapter and in applicable sections of this manual) and updating any information in Direct Access.
2	Unit	Insures that member has provided all necessary information in accordance with the instructions from the appropriate section of this manual or from the reverse side of the worksheet and reports the event to the SPO.
3	SPO	Reviews PDR; contacts unit for additional information if needed and inputs appropriate information in the Direct Access system.
4	PSC	Processes the data for the event, updates personnel and pay entitlements, and provides feedback on the LES.

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*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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**Information Flow**, Continued

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**Communication between the member, unit, and the SPO**

There are different ways in which the member, unit and SPO can communicate. It is up to each unit and SPO to establish the most preferred method in which to communicate with their customer.

<b>Type</b>	<b>Method</b>	<b>Uses</b>
1	Mail	Not as fast as types 2-4, but when urgency is not a factor it is an efficient method of getting information to and from the unit (e.g., worksheets).
2	E-Mail	Very effective form of information exchange. It can be traced and other documents can be attached. Depending where sent, it can be received very quickly.  <b>Note:</b> Members or units that do not have access to the Coast Guard Data Network (CGDN) for the use of E-Mail can use the Coast Guard's Internet E-Mail gateway to send and receive E-Mail between themselves and Coast Guard units if they have access to Internet E-Mail. Internet gateway users should be advised that this method does not offer the security of the CGDN and that information of a highly personal nature or information protected by the Privacy Act should not be transmitted through the gateway. Consult COMDTNOTE 5270, Policy and Procedures for the Electronic Mail Gateway to the DOT and Worldwide Internet Network, for more information.
3	Telephone	Fastest form of communication, Limitation: No tracking ability.
4	FAX	A fast method of communication. A good way to track information when source document is required to be cited.

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## Contacting the Personnel Service Center

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**Introduction** There are three methods to contact the Personnel Service Center in Topeka, KS.

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**Methods** These three methods are the primary means for Coast Guard personnel to establish contact with PSC.

Method	Uses
E-Mail	Contact can be established using this email address: <a href="mailto:PSC-CustomerCare@uscg.mil">PSC-CustomerCare@uscg.mil</a> . The Customer Service Team has a three day timeframe in which to respond to email sent to this address.
Telephone	1-(866)-PSC-USCG (772-8724) or 1-(785)339-2200. Phone support hours of operation are weekday 0700 to 1600 Central Time and 0730 to 1600 on scheduled weekends (see Weekend Staffing Schedule in the left column of the PSC Website ( <a href="http://www.uscg.mil/hq/psc/customerservice.shtm">http://www.uscg.mil/hq/psc/customerservice.shtm</a> ) for dates.  <b>Note: Password resets cannot be provided by telephone. Utilize E-Mail or the Online Trouble Ticket to request password resets for Direct Access, JUMPS or T-PAX.</b>
Online Trouble Ticket	This method allows the member or unit/SPO point of contact to provide a more detailed description of the problem, resulting in faster resolution and enables PSC to track and correct recurring problems. <a href="http://www.uscg.mil/hq/psc/customerservice.shtm">http://www.uscg.mil/hq/psc/customerservice.shtm</a>

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

## **Signature of Responsible Officer**

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<b>Discussion</b>	<p>The requirement to sign various forms and worksheets in this manual and to electronically sign T-PAX and Direct Access transactions are necessary to affirm and give legal credence to the information contained on the form or in the transaction. The Commanding Officer (CO) should avoid situations where the responsible officer lacks the knowledge or time to validate the information and may sign as a formality.</p>
<b>Reference</b>	<ul style="list-style-type: none"><li>• <a href="#">COMDTINST M5000.3 (series), CG Regulations</a><ul style="list-style-type: none"><li>• Chapter 7-1-8, Administration of Oaths</li><li>• Chapter 7-1-9, Signing Official Correspondence</li></ul></li><li>• <a href="#">COMDTINST M7210.1 (series), Certifying and Disbursing Manual</a></li></ul>
<b>Authority to sign forms and worksheets</b>	<p>The CO may authorize in writing for officers, Chief Petty Officers, First Class Petty Officers, and Second Class Petty Officers to sign forms and worksheets “by direction”, subject to the following restrictions.</p> <ul style="list-style-type: none"><li>• Only officers, the Master Chief Petty Officer of the Coast Guard (MCPO-CG), Commandant designated Command Enlisted Advisors, and designated recruiting office Chief Petty Officers and Petty Officers may administer enlisted oaths and sign enlistment contracts.</li><li>• Only Officers, the MCPO-CG, Commandant designated Command Enlisted Advisors, and permanently assigned Enlisted Officers-in-Charge may administer reenlistment and extension of enlistments oaths and sign the appropriate reenlistment or extension document.</li><li>• The “by direction” authority granted to Second Class Petty Officers (PO2) shall normally be limited to routine transactions such as leave and personnel transactions. PO2s shall only be given authority to sign specific Direct Access transactions “by direction” in cases where there is a shortage of Officers, Chief Petty Officers, and First Class Petty Officers.</li><li>• Only the CO may sign the PCS Departing Worksheet (<a href="#">CG-PSC-2000</a>) or the Advances Worksheet (<a href="#">CG PSC-2010</a>) when the member is requesting Advance Pay &amp; Allowances or Advance Pay with liquidation period in excess of 12 months.</li></ul>

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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**Signature of Responsible Officer, Continued**

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**Authority to sign Pay and Personnel Transactions**

The Commanding Officer (CO) of a unit with a SPO must nominate at least one Officer, Chief Petty Officer, First Class Petty Officer, Second Class Petty Officer, or Civilian employee in grade GS-7 or above, for designation by PSC (MAS) as a Payment Approving Official (PAO).

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

**Payment Approving Officials' responsibilities and liabilities**

It is Coast Guard Policy that PAOs have the same level of financial liability as an Authorized Certifying Officer (ACO), as described in Chapter 1 of Certifying and Disbursing Manual. Thus, if a PAO incorrectly certifies a document to an ACO that directly results in an erroneous or improper payment, the PAO is responsible for the error. PAOs remain fully accountable to the Coast Guard and may be found to have pecuniary<sup>1</sup> liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/EPEF) impacted by such action by an official in their chain with evaluation approving authority.

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**Designation Procedure for PAO**

COs will request designations, revocations or terminations for PAOs by submitting form \*[CG PSC-7421/2 \(Direct-Access User Access Authorization And Payment Approving Official \(PAO\) Designation\)](#) to PSC (MAS). If the form requests designation of a Second Class Petty Officer as a PAO, the CO shall attach a letter explaining what PAO authority will be granted to the Second Class Petty Officer (e.g., authority to sign leave and personnel transactions only).

- PSC (MAS) is the final approving authority for the designation of PAOs. After receipt and review of the [CG PSC -7421/2](#), PSC (MAS) will certify the PAO designation. The original form will be returned to the unit along with a detailed brochure outlining the duties, responsibilities, and liabilities of the PAO. A copy of the form will be forwarded to PSC (CCB), who will update the member's permissions in DA.

\*Form CG PSC-7421/2 and all other PSC forms and worksheets are available at <http://www.uscg.mil/hq/psc/forms/>

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<sup>1</sup> **pe-cu-ni-ar-y** Requiring payment of money: *a pecuniary offense.*



## **Procedures for Authorizing Direct Access Command Users**

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**Introduction** Access to command functions of Direct Access is limited to authorized personnel -- *Command Users*. This section provides guidelines and procedures for designating Command Users.

---

**The Command User** The Command User role in Direct Access provides the user with the ability to access the Self-Service for Command functions of the system. It is a powerful, multipurpose role, intended for use by trusted, mature and responsible members of the command cadre. Command Users must be designated by the unit Commanding Officer/Officer in Charge or Executive Officer/Executive Petty Officer.

The Direct Access Command User has the ability to:

- Schedule and approve (for payment) reserve IDT drills.
- Initiate and view enlisted evaluations (employee reviews).
- Access the Airport Terminal, which provides a list of personnel in receipt of orders to or from the unit and the ability to view, modify and print travel orders.
- Generate and view member competency reports.
- Print BAH/Dependency and Emergency Contacts reports.
- View command information including roster and personnel allowance list.
- View member service record information (CG Member Info) including assignment history, competencies, training history, contact telephone numbers and address.

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## **Procedures for Authorizing Direct Access Command Users,** Continued

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### **Choosing Command Users**

Each unit must designate at least one Command User. Additional Command Users should be designated based on the need to access the information listed above.

Commanding Officers may designate as many Command Users as necessary to meet the unit's needs and maintain a smooth workflow. However, designations of Command Users in pay grades below E-6 are subject to review and approval by PSC and/or COMDT (CG-102). There are alternative access roles available for personnel who do not need access to all of the Command User functions (see next page).

---

### **Command User Responsibilities**

Direct Access, based on the Operator ID, allows a Command User access to all command functions. Any Command User has the ability to enter comments and approve an employee review, enter IDT drills, or view transfer information. Commanding Officers should clearly define an individual's role when making Command User designations.

When you consider designating Command Users, you should first ask yourself these questions:

Does the individual have your authorization to:

- View enlisted evaluations?
  - Initiate enlisted evaluations?
  - View pending transfer information?
  - Run reports and rosters?
  - Input reserve drill/ADT information?
- 

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Procedures for Authorizing Direct Access Command Users,**  
Continued

**Alternatives to Command User Access**      Granting full command access may not always be necessary or appropriate. Consider granting one or more of these roles in lieu of full command access.

<b>Role</b>	<b>Functions</b>	<b>Suggested users</b>
Airport Terminal Only (CGAIRTRM).	Allows access to the Airport Terminal	Housing Officers/staffs and Relocation Specialists.
Employee Review Only (CGEMPREV)	User can initiate, route or approve enlisted employee reviews	Supervisors (E-6 and above) and Marking Officials. <b>Note:</b> Employee Reviews may be initiated using the worksheets ( <a href="#">CG-3788a</a> , <a href="#">CG-3788b</a> or <a href="#">CG-3788c</a> ). A Command User can handle final data entry in the system. It is not necessary for every person in the chain of command to use Direct Access to complete an employee review.  Use this rule to determine if you should authorize someone at your command Employee Review Access: <i>If the evaluation was being completed using the old paper-process, would that person's name and signature appear on the form as the supervisor, marking official or approving official?</i>  If <b>yes</b> , the person should be authorized access in Direct Access. If <b>no</b> , the person's input on the evaluation may be captured using the Employee Review worksheets.
Reserve Orders Manager (CGRSVMGR)	Create, review, and endorse requests for reserve orders.	Allows supervisor to initiate requests for reserve orders on behalf of members who can't access Self-Service and allows the user to review and endorse requests for orders.
Field Admin (CGFIELDADM)	User can view and modify member competencies, run reports, view dependency data, print BAH/Dependency Data and Emergency Contacts reports, view and print travel orders, and most other non-pay related personnel actions.	Unit administrative staff.  <b>Note:</b> Applications must be approved by the SPO and be accompanied by a Memorandum of Understanding (MOU). This is to ensure the SPO is aware that the unit will be assuming responsibility for entering competency data and prevents duplicate data entry. A template for the MOU is included as exhibit 1 (see page 26 of this chapter) . MOUs are valid for a maximum of two years.
Global Workforce Inquiry Solution (CGGWIS)	Allows <b>view-only</b> access to member and unit data. Includes ability to access the Airport Terminal.	HR Managers (CO/OIC, XO/XPO, Admin Officer, HQ/CGPC Staffs).

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## **Procedures for Authorizing Direct Access Command Users,** Continued

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### **Designation Procedure**

To designate a Command User (or other role types), utilize [CG PSC Form 7421/2](#) (Direct-Access User Access Authorization).

1. Complete the first section (Blocks 1 through 7) of the form.
2. The authorizing official's name, rank, title and phone number must be printed or typed in Block 8 and the block must be signed.  
**Note:** "By direction" is not authorized. Only the CO/OIC, XO/XPO, or HQ/CGPC/AREA/MLC/DIST Branch Chief may authorize Direct Access.  
If the applicant is the CO/OIC, then they may sign their own application.
3. Fax the form to PSC's Customer Care Branch at: (785)-339-2297.
4. PSC Customer Care Branch will enable Command User privileges in Direct Access and notify the user, via email, when completed. Forms are *usually* processed within 3-working days of receipt.

Retain the original CG PSC Form 7421/2 until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

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### **Terminating Privileges**

To terminate Command User designation and privileges, have the member and/or Authorizing Official sign in blocks 15 and 16, respectively, of CG PSC Form 7421/2 and fax to PSC Customer Care Branch at (785) 339-2297.

Access terminates automatically upon transfer or separation. There is no need to notify PSC Customer Care when a member is transferred or is separated:

- Access, to all but self-service applications, will automatically terminate when a military member departs on PCS orders.
  - All access to Direct Access will automatically be revoked when a military member is separated from the service.
-

## **Procedures for Authorizing HRS/HRSUP Users**

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

---

**HRS/HRSUP Access Defined** HRS access permits a Direct Access user to create and transmit transactions, which effect changes in a member's pay entitlements. HRS users can also access and maintain non-payroll data, such as competencies, awards, enlisted employee reviews, etc. HRS access duplicates the Self-Service for Employees and Self-Service for Commands roles to allow users at (SPOs) to service members and commands that do not have access to Direct Access.

HRS Supervisor (HRSUP) role users have the ability to release Direct Access transactions that require approval and to override software edits.

---

**HRS/HRSUP User Responsibility and Liability** It is Coast Guard policy that HRS users have the same level of financial liability as an Authorized Certifying Officer (ACO). ACO liability is described in Chapter 1 of the Certifying and Disbursing Manual. If an HRS user incorrectly certifies a document to an ACO (the ACO for military pay is PSC Topeka) that directly results in an erroneous or improper payment, the HRS user is responsible for the error. HRS users remain fully accountable to the Coast Guard and may be found to have pecuniary liability; and/or may have their personal evaluations (OER/CIV Performance Appraisal/Employee Review) impacted by such action by an official in their chain with evaluation approving authority.

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Procedures for Authorizing HRS/HRSUP Users, Continued**

**Field Unit HRS Access**

Personnel at field units may be granted HRS access, provided the following criteria are met, COMDT (CG-102) has approved the transfer of responsibility, and the unit has entered into a Memorandum of Understanding with the **unit's designated SPO**, for the transfer of data input responsibility (see exhibit 2, on page 28 of this chapter).

- Must be a YN or CWO (PERS).
- If YN2 or YN3, must have access to and be directly supervised by a Subject Matter Expert (someone knowledgeable in pay matters).
  - Senior YN (E-6 and above).
  - CWO (PERS).
  - Full time Personnel/Admin Officer.
- The HRS Supervisor role will not be granted to users at field units. Units will contact their SPO to coordinate input of transactions that require approval or the override of system edits.

**Alternatives to HRS Access for Field Unit Personnel**

Granting HRS access may not always be necessary or appropriate. Consider granting one or more of these roles in lieu of HRS access.

<b>Role</b>	<b>Functions</b>	<b>Suggested users</b>
Airport Terminal Only (CGAIRTRM).	Allows access to the Airport Terminal	Housing Officers/staffs and Relocation Specialists.
Employee Review Only (CGEMPREV)	User can initiate, route or approve enlisted employee reviews	Supervisors (E-6 and above) and Marking Officials. <b>Note:</b> Employee Reviews may be initiated using the worksheets ( <a href="#">CG-3788a</a> , <a href="#">CG-3788b</a> or <a href="#">CG-3788c</a> ) from enclosure (1) to the Personnel and Pay Procedures Manual. A Command User can handle final data entry in CGHRS. It is not necessary for every person in the chain of command to use Direct Access to complete an employee review.
Field Admin (CGFIELDADM)	User can view and modify member competencies, run reports, view dependency data, print BAH/Dependency Data and Emergency Contacts reports, view and print travel orders, and most other non-pay related personnel actions.	Unit administrative staff. <b>Note:</b> Applications must be approved by the unit's designated SPO and be accompanied by a Memorandum of Understanding (MOU). This is to ensure the SPO is aware that the unit will be assuming responsibility for entering competency data and prevents duplicate data entry. A template for the MOU is on page 26 of this chapter. MOUs are valid for a maximum of two years.
Global Workforce Inquiry Solution (CGGWIS)	Allows <b>view-only</b> access to member and unit data. Includes ability to access the Airport Terminal.	HR Managers (CO/OIC, XO/XPO, Admin Officer, HQ/CGPC Staffs).

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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**Procedures for Authorizing HRS/HRSUP Users, Continued**

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**SPO Staffs** Active duty, reserve and civilian employees permanently assigned to a position in one of the existing SPOs may be granted HRS access in Direct Access. Yeomen, temporarily assigned to a SPO, may be granted access.

---

**SPO Supervisors/  
Payment  
Approving  
Officials** Certain Direct Access entitlements transactions require review and approval before they can be released for processing. Approval of these transactions is limited to properly designated Pay Approving Officials (PAOs). PAOs are assigned the HRS Supervisor (HRSUP) role in Direct Access.

Commanding officer of a unit with a SPO must nominate at least one officer, chief petty officer, first class petty officer, or civilian employee in grade GS-7 or above, for designation by PSC (MAS) as a Payment Approving Official (PAO).

In addition to reviewing and approving transactions, HRS Supervisors have the ability to override Direct Access program edits. This allows the user to “force” a transaction to be saved, even if it does not meet the criteria established for an entitlement to be paid. This functionality exists because the system edits are closely tied to the member’s assigned position and department in Direct Access. Therefore, the edits prevent some transactions, which are otherwise appropriate, from being entered into the system. An example of this would be attempting to put in a sea pay change on a member who has departed, PCS, from a sea pay eligible unit to a unit where sea pay is not authorized. Direct Access would normally prevent entry of this type of transaction because the member’s current unit is not authorized sea pay.

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*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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**Procedures for Authorizing HRS/HRSUP Users, Continued**

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**Designation Procedure**

To designate an HRS/HRSUP user, utilize [CG PSC Form 7421/2](#) (Direct-Access User Access Authorization).

1. Complete the first section (Blocks 1 through 7) of the form at the unit level.
2. The authorizing official's name, rank, title and phone number must be printed or typed in Block 8 and the block must be signed.
  - Note that for field unit access "By direction" is not authorized. Only the CO/OIC or XO/XPO may authorize Direct Access. The SPO supervisor may sign applications from users within that SPO.
  - Users at field units should include a copy of the Memorandum of Understanding.
  - HRS Supervisor applicants should include a copy of their PAO designation letter (PSC acknowledges that we have these letters on file. However, by having the applicant include it with their access form, the authorizing official is assured the applicant is a PAO. Including the letter with the application also reduces processing time at PSC).
3. Fax the form to PSC's Customer Care Center at: (785)-339-2297.
4. The PSC Customer Care Center will enable HRS privileges in Direct Access and notify the user, via email, when completed. Forms are *usually* processed within 3-working days of receipt.

Retain the original CG PSC Form 7421/2 until the member/employee departs the unit (transfer, discharge, etc.), or the designation is otherwise terminated or revoked.

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**Terminating Privileges**

To terminate HRS/HRSUP designation and privileges, have the member and/or Authorizing Official sign in blocks 15 and 16, respectively, of CG PSC Form 7421/2 and fax to PSC Customer Care Branch at (785) 339-2297.

Access terminates automatically upon transfer or separation. There is no need to notify PSC Customer Care when a member is transferred or is separated:

- Access, to all but self-service applications, will automatically terminate when a military member departs on PCS orders.
  - All access to Direct Access will automatically be revoked when a military member is separated from the service.
-



**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

## Directives Referenced in this Manual

**Introduction** Several directives are referenced throughout the Personnel and Pay Procedures Manual. These directives usually set policy for the procedure being described. You will need to refer to these directives from time to time.

**Directives referenced** Directives used in this manual and their abbreviation. Current online versions can be found at: <http://cgweb2.comdt.uscg.mil/CGDIRECTIVES/> (intranet) or at: <http://www.uscg.mil/CCS/CIT/CIM/DIRECTIVES/WELCOME.HTM> (internet).

<b>Number</b>	<b>Long Title</b>	<b>Abbreviation</b>
COMDTINST M1000.6 (series)	CG Personnel Manual	PERSMAN
COMDTINST 1000.14	Preparation and Submission of Administrative Remarks (CG-3307)	Pg-7 Instruction
COMDTINST M1001.28 (series)	Reserve Policy Manual	RPM
COMDTINST 1020.8 (series)	Weight/Physical Fitness Standards for Coast Guard Military Personnel	Weight and Physical Fitness Standards
COMDTINST M1080.10 (series)	Military Personnel Data Records (PDR) System Manual	PDR Manual
COMDTINST M1414.8 (series)	Enlisted Performance Qualifications Manual	Quals Manual
COMDTINST M1510.2 (series)	Enlisted Professional Military Education (E-PME) Manual	E-PME
COMDTINST M1500.10 (series)	Coast Guard Training and Education Manual	Training & Ed Man
COMDTINST M1650.25 (series)	Coast Guard Medals and Awards Manual	Medals & Awards Manual
COMDTINST M1900.4 (series)	Certificate of Release or Discharge from Active Duty, DD Form 214	DD 214 Manual
N/A	Separation Program Designators Handbook <i>(Distribution limited to SPOs. Contact COMDT (CG-1221) to obtain a copy)</i>	SPD Handbook

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Directives Referenced in this Manual, Continued**

**Directives  
referenced (cont'd)**

<b>Number</b>	<b>Long Title</b>	<b>Abbreviation</b>
COMDTINST 4600 (series)	Travel Charge Card Program	Charge Card Instruction
COMDTINST M4600.17 (series)	Coast Guard Supplement to the Joint Federal Travel Regulations Volume 1	CGS-JFTR
COMDTINST 5000.5 (series)	Foreign Travel, Passports, and Visas	Passport Inst.
COMDTINST M5000.3 (series)	United States Coast Guard Regulations	CG Regs
COMDTINST M5260.3 (series)	Privacy (Coast Guard) and Freedom of Information Acts Manual	Privacy Act Manual
COMDTINST M5300.2 (series)	U.S. Coast Guard Competency Management System Manual	COMPMAN
COMDTINST 5310 (series)	Measuring the Contribution of Reserve Duty	None
COMDTINST M5510 (series)	Classified Information Management Program	None
COMDTINST M5520.12 (series)	Military Personnel Security Program Manual	PERSEC
COMDTINST M5512.1 (series)	Identification cards for members of the uniformed services, their eligible family members, and other personnel	None
COMDTINST M5810.1 (series)	Military Justice Manual	MJM
COMDTINST M7210.1 (series)	Certifying and Disbursing Manual	Certifying and Disbursing Manual
COMDTINST M7220.29 (series)	U. S. Coast Guard Pay Manual	PAYMAN
COMDTINST 7220.39 (series)	Management and Administration of Aviation Incentive Pays	Flight Pay Instruction

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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**Directives Referenced in this Manual, Continued**

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**Directives referenced**  
(cont'd)

<b>Number</b>	<b>Long Title</b>	<b>Abbreviation</b>
COMDTINST M8000.2 (series)	Ordnance Manual	
COMDTINST M10470.10 (series)	Coast Guard Rescue and Survival Systems Manual	CG Rescue Manual
COMDTINST M11101.13 (series)	Coast Guard Housing Manual	Housing Manual
PSCINST M1000.2 (series)	Personnel and Pay Procedures Manual	PPPM
FINCENINST M7000.1 (series)	CG Finance Center, Standard Operation Procedures <a href="http://www.fincen.uscg.mil/sop.htm">http://www.fincen.uscg.mil/sop.htm</a>	FINCEN SOP
JFTR Vol 1	Joint Federal Travel Regulations DOD Travel Regulations	JFTR

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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## Forms and Worksheets Referenced in this Manual

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### Introduction

Several forms and worksheets are referenced throughout the Personnel and Pay Procedures Manual. The forms and the PSC worksheets referenced in this manual are needed to complete the action described.

CG PSC worksheets are available on the internet at <http://www.uscg.mil/hq/psc/forms/>. CG PSC worksheets are no longer promulgated in enclosure (1) to this manual.

Other forms referenced in this Manual are available in Electronic Forms Application on the Coast Guard Standard Workstation (*USCG Adobe Forms*) or on the intranet at <http://cgweb2.comdt.uscg.mil/CGFORMS/>.

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### Forms & Worksheets Referenced

Forms and worksheets referenced in this manual and corresponding numbers.

Form Number	Form name
AF Form 538	Personal Clothing and Equipment Record
CG-1650	CG Award Recommendation
CG-2519	Leave Authorization
CG-2556	Move-In Housing Allowance Claim Form
CG-3029A	Individual's Record of Small Arms Training
CG-3301B	Agreement to Extend/Re-extend Enlistment
CG-3307	Administrative Remarks
CG-3719D	USCG Certificate of Training
CG-3788A	Employee Review Worksheet (Non-Rated)
CG-3788B	Employee Review Worksheet (Petty Officer)
CG-3788C	Employee Review Worksheet (Master, Senior and Chief Petty Officer)
CG-3788E	Enlisted Performance Evaluation Support Form (Petty Officer)
CG-3788F	Enlisted Performance Evaluation Support Form (Master, Senior, Chief Petty Officer)
CG-3788G	Enlisted Performance Evaluation Support Form (Non-Rated)
CG-3853	Personal Effects Inventory and Disposition
CG-4057	Chronological Record
CG-4178A	Good Conduct Certificate

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Forms and Worksheets Referenced in this Manual, Continued**

**Forms & Worksheets  
Referenced (cont'd)**

Form Number	Form name
CG-4251	Military Temporary Additional Duty (TDY) or Civilian Temporary Duty (TD) Request and Travel Order
CG-4685	Aircrew Certificate
CG-4910	Report of Offense and Disposition
CG-5063	Coxswain Certificate
CG-5063A	Boat Engineer Certificate
CG-5063B	Boat Crewmember Certificate
CG-5063C	Surfman Certificate
CG-5063D	Heavy Weather Coxswain
CG-5064	Cutterman's Certificate
CG-5065	Command At Sea Certificate
CG-5066	Officer-In-Charge Afloat Certificate
CG-5066A	Officer In Charge Ashore Certificate
CG-5067	Boat Force Operations Insignia Certificate (Advanced)
CG-5068	Boat Force Operations Insignia Certificate (Basic)
CG-5073	Privacy Act Log
CG-5131	Standard Travel order for Military Personnel (Computer Generated)
CG-5209	Leave and Earnings Statement (Computer Generated)
CG-5475	Clothing and Small Stores Checkage
CG-5481	Reserve Officer Personal Resume
CG-5489-1	Remission Application
CG-5489-2	Waiver Application
CG-5489A	SPO's Endorsement Waiver/Remission Application
CG-5489B	Financial Statement
CG-5530	Advancement Certificate to SN/FN
CG-5588	Personnel Security Action
CG-5673	Child's Appreciation Letter
CG-5674	Spouse Reenlistment Appreciation Letter
CG-5675	Oath Of Reenlistment Certificate
CG-6058	Coast Guard Sponsor Notification
CG-9556	Acceptance and Oath of Office

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Forms and Worksheets Referenced in this Manual, Continued**

**Forms & Worksheets  
Referenced (cont'd)**

<b>Form Number</b>	<b>Form name</b>
CG PSC-1570	Individual Monthly IDT Tracking Worksheet
CG PSC-1884	Application For Annuity Under The Survivor Benefit Plan (SBP), Reserve Component Survivor Benefit Plan (RCSBP), Retired Serviceman's Family Protection Plan (RSFPP) And/Or Final Retired Pay Due
CG PSC-2000	PCS Departing Worksheet
CG PSC-2001	Departing TAD or PCS/TEMDUINS to "A" School Worksheet
CG PSC-2002	Assignment Data Worksheet
CG PSC-2003	PCS Entitlements Advance Travel 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	Housing Allowance (BAH/OHA) Protection Worksheet
CG PSC-2030	Career Development Worksheet
CG PSC-2035	Family Separation Allowance (FSA) Worksheet
CG PSC-2040	Allotment Worksheet
CG PSC-2045	Career Intentions Worksheet
CG PSC-2050	Nonreceipt Worksheet
CG PSC-2426	Career Status Bonus (CSB) Election
CG PSC-3600	Designation Of Beneficiary For Payment Of Unpaid Retired Pay
CG PSC-3799R	Reserve Annual Screening Questionnaire (ASQ)
CG PSC-3867	Claim for Final Retired Pay

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Forms and Worksheets Referenced in this Manual, Continued**

**Forms & Worksheets  
Referenced (cont'd)**

<b>Form Number</b>	<b>Form name</b>
CG PSC-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election
CG PSC-5100	Officer Uniform Allowance Claim Worksheet
CG PSC-5150	Civilian Clothing Monetary Allowance Worksheet
CG PSC-5200	Ethnicity and Race Self-Reporting Worksheet
CG PSC-7221	Retired Allotment Authorization Form
CG PSC-7270	COLA - Unique Expenses Reimbursement Worksheet
CG PSC-7421	T-PAX Approving Official (AO) Designation
CG PSC-7421/2	DA User Authorization/Revocation
CG PSC-7421/3	JUMPS User Access Authorization
CG PSC-7543	Statement of Financial Status Submitted for Consideration In Connection with Indebtedness to the United States
CG PSC-11221	Reserve Component Survivor Benefit Plan (RCSBP) Option - Election Certificate
DD-216CG	Petty Officer Advancement Certificate
DD-256CG	USCG Honorable Discharge Certificate
DD-257CG	USCG General Discharge Certificate
DD-259CG	USCG Bad Conduct Discharge Certificate (accountable form)
DD-260CG	USCG Dishonorable Discharge Certificate (accountable form)
DD Form 1172	Application For Department of Defense Common Access Card DEERS Enrollment
DD Form 1173	Uniformed Services ID and Privilege Card
DD Form 1173-1	Reserve Family Member Identification Card
DD Form 1299	Application for Shipment and/or Storage of Personal Property
DD Form 1351-2	Travel Voucher
DD-1351-2C	Travel Voucher or Subvoucher (Continuation Sheet)
DD Form 1351-3	Statement of Actual Expenses
DD-1351-4	Voucher Or Claim For Dependent Travel And Dislocation Or Trailer Allowance

*Continued on next page*

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

**Forms and Worksheets Referenced in this Manual, Continued**

**Forms & Worksheets  
Referenced (cont'd)**

Form Number	Form name
DD Form 139	Payment Adjustment Authorization
DD Form 1475	Basic Allowance For Subsistence Certification
DD Form 2058, CG	State of Legal Residence Certificate
DD Form 2842	DOD Public Key Infrastructure Registration Official Certificate of Acceptance and Acknowledge of Responsibilities
DD-2556	Move-In Housing Allowance Claim Form
DD Form 216 CG	Petty Officer Appointment Certificate
DD Form 216 CGR	Reserve Petty Officer Appointment Certificate
DD Form 2278	Application for Do It Yourself/Self-Procured Move and Counseling Checklist
DD Form 2329	Record of Trial by Summary Courts-Martial
DD Form 2366	Montgomery GI BILL Enrollment/Disenrollment, SOI
DD Form 2366-1	Montgomery GI BILL Increased Benefit Contribution Program
DD Form 2367	Individual/Overseas Housing Allowance
DD Form 2648,	Preseparation Counseling Checklist for <b>Active</b> Component Service Members
DD Form 2648-1	Preseparation Counseling Checklist for <b>Reserve</b> Component Service Members Released From Active Duty
DD Form 2656-9	Survivor Benefit Plan (SBP) and Reserve Component Survivor Benefit Plan (RCSBP) Open Enrollment Election
DD Form 2895	Agreement to Serve in the Selected Reserve for TRICARE Reserve Select
DD Form 397	Claims Certificate and Voucher for Death Gratuity Payment
DD Form 4/1	Enlistment/Reenlistment Document Armed Forces of the United States
DD Form 553	Deserter/Absentee Wanted by the Armed Forces
DD Form 616	Return of Absentee
DD Form 803	Certificate of Termination

*Continued on next page*



**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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**Forms and Worksheets Referenced in this Manual, Continued**

---

**Forms & Worksheets  
Referenced (cont'd)**

<b>Form Number</b>	<b>Form name</b>
DD-214	Certificate of Release or Discharge From Active Duty (Computer Generated)
DD-214WS	Certificate of Release or Discharge From Active Duty (Computer Generated)
DD-Form 2 (CG)	Armed Forces Identification Card
IRS Form W-2	Wage and Tax Statement
IRS Form W-4	Employee's Withholding Allowance Certificate
IRS Form W-5	Federal Earned Income Credit
PHS 731	International Certificate of Vaccination
SF-312	Nondisclosure Agreement
SF-1038	Advance of Funds Application and Account
SGLV-8285	Request for Insurance (Servicemembers' Group Life Insurance)
SGLV-8286	Servicemembers' Group Life Insurance Election Certificate
SGLV-8286A	Family Coverage Election (SGLV)
VA Form 4-5281	Refund of Educational Contributions

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**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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Exhibit 1-1: Suggested format for MOU between Unit and SPO for maintenance of member competency data

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

**United States  
Coast Guard**



Commanding Officer  
Unit Name

Address.  
City, ST Zip  
Staff Symbol: ()  
Phone: ( )  
Fax: ( )  
Email:

5230

## MEMORANDUM

From: Unit and Servicing SPO

Reply to  
Attn of: Unit Point of Contact

To: Distribution  
Thru:

Subj: MEMORANDUM OF UNDERSTANDING FOR UNIT TO MAINTAIN MEMBER  
COMPETENCY DATA

Ref:

1. To allow field units to maintain member competency and other non-payroll related personnel data, using the Direct-Access, these parties have entered into an agreement on the following items:

- (a) **SYSTEMS ACCESS:** (Enter Name of Unit) will complete a user access form (CG PSC 7421/2) for each person that will be authorized full access, to Direct-Access applications, in order to provide pay and personnel support for members assigned to the following units:

List Units

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

- (b) **RESOURCES:** No additional YN resources will be provided to Name of Unit during the initial phases of software rollout.
- (c) **RESPONSIBILITIES:** Data input responsibilities will shift from (SPO) to (Unit) . (Unit) will be responsible for entering all member competency information (**Education, Honors and Awards, Qualification Codes and Training, collectively know as "Competencies"**), for those units listed above, on the effective date of this agreement. (Unit) must incorporate internal controls to safeguard data input integrity. The Personnel Service Center (PSC) may require the future designation of at least one Payment Approving Official.

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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- (d) **SUPPORT:** (SPO) will provide training, as requested, on data input requirements and software navigation. They will also be available to provide assistance with various pay entitlement questions.
  
- (e) **EFFECTIVE DATE:** This agreement is entered into effective (date) and will remain in effect for a period not to exceed two years from the effective date or until terminated by both parties, whichever occurs first.
  
- (f) **Agreed to by** (Signatures Below):

---

FIRST LAST NAME RANK, USCG  
Title:  
(CO, XO, or SPO Chief only)

---

FIRST LAST NAME RANK, USCG  
Executive Officer, Unit  
  
#

Enclosures: List of CG-PSC form 7421/2 (Direct-Access Form) For Each Unit Member Who Is To Be Authorized Access

Dist: Original SPO General Files  
Copy Unit General Files  
Copy Fax to PSC (Customer Service) with User Access Forms

Copy: COMDT (CG-102)

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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Exhibit 1-2: Suggested format for MOU between Unit and SPO for the assumption of SPO data entry responsibilities.

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

**United States  
Coast Guard**



Commanding Officer  
Unit Name

Address.  
City, ST Zip  
Staff Symbol: ()  
Phone: ( )  
Fax: ( )  
Email:

5230

## MEMORANDUM

From: Unit and Servicing SPO

Reply to

Attn of: Unit Point of Contact

To: Distribution

Thru: COMDT (CG-102 – YN Force Manager)

Subj: MEMORANDUM OF UNDERSTANDING FOR UNIT TO ASSUME SPO DATA  
INPUT RESPONSIBILITIES

Ref:

1. To begin the process of shifting personnel and pay data input responsibilities using Direct-Access these parties have entered into an agreement on the following items:

- (a) **SYSTEMS ACCESS:** (Enter Name of Unit) will complete a user access form (CG PSC 7421/2) for each person that will be authorized full access, to Direct-Access applications, in order to provide pay and personnel support for members assigned to the following units:

List Units

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

- (b) **RESOURCES:** No additional YN resources will be provided to Name of Unit during the initial phases of software rollout.
- (c) **RESPONSIBILITIES:** Data input responsibilities will shift from (SPO) to (Unit) . (Unit) will be responsible for entering pay and personnel transactions for those units listed above, on the effective date of this agreement. (Unit) must incorporate internal controls to safeguard data input integrity.

**Chapter 1**  
**PERSONNEL AND PAY SYSTEMS OVERVIEW**

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- (d) **SUPPORT:** (SPO) will provide training, as requested, on data input requirements and software navigation. They will also be available to provide assistance with various pay entitlement questions. The SPO will continue to input those transactions, which require approval by a Payment Approving Official (PAO).
  
- (e) **EFFECTIVE DATE:** This agreement is entered into effective (date) and will remain in effect for a period not to exceed two years or until terminated by both parties, whichever occurs first.
  
- (f) **Agreed to by** (Signatures Below):

---

FIRST LAST NAME RANK, USCG Title: (CO, XO, or SPO Chief only)	FIRST LAST NAME RANK, USCG Executive Officer, Unit  #
---	--

Enclosures: List of CG-PSC form 7421/2 (Direct-Access Form) For Each Unit Member Who Is To Be Authorized Access

Dist: Original SPO General Files  
Copy Unit General Files  
Copy Fax to PSC (Customer Service) with User Access Forms

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## Section Overview

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

---

**In this section**

Topic	See Page
<a href="#">The PCS Transfer Process</a>	2-A-2
<a href="#">PCS Departing Checklist</a>	2-A-3
<a href="#">PCS Reporting Checklist</a>	2-A-5
<a href="#">Overseas Transfer Checklist</a>	2-A-6
<a href="#">Automatic Stops of Pay and Allowances</a>	2-A-8
<a href="#">How to Prepare NATO Supplemental Orders</a>	2-A-10
<a href="#">Fax of PCS Advance Requests</a>	2-A-12

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

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## The PCS Transfer Process

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**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.

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**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	Member/Unit	If Official Passport is required, follow instructions in <a href="#">ALCOAST 113/07</a>
6	SPO	Approves and prints Direct Access orders.
7	PAO/PSC (tvl)	If requested, will process travel advances.
8	TO (TOPS site)	Counsels member and arranges shipment of HHG.
9	Unit	Endorses order upon departure. Ensures that member checks-out with ESU/ESD for transfer of CGSWSIII account. Ensures member's, and dependents ID cards are up-to-date.
10	SPO	Approves and transmits PCS Departing Transactions.
11	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.
12	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>
13	SPO	Completes PCS Reporting Transactions.
14	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 Coast Guard Sponsor Notification ( <a href="#">CG-6058</a> ), 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 <a href="#">ALCOAST 514/05</a> 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 Common Access card for member and ID cards for dependents are valid (Note: Ensure member knows his/her PIN number).	<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 where his/her official duties are expected to result in international travel into or out of a country requiring that U.S. service personnel present an official passport to enter or exit that country (see <a href="http://www.fcg.pentagon.mil">www.fcg.pentagon.mil</a> ), ensure member completes application for Official Passport.	<a href="#">ALCOAST 113/07</a> (Procedures for obtaining Official (no-fee) Passports can be found at the CG-00I 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 (tv) for travel advances.	<a href="#">PPPM 2-A-12</a>	
12	Prepare PCS Departing Transactions (SPO). (Note: For PHS Officers, notify CGPC (OPM-2) when Officer departs, they are the SPO for PHS Officers).	<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 unless member is authorized to hand-carry IAW <a href="#">COMDTINST M1080.10(series)</a> .		
17	Notify Health Record Custodian to forward Medical PDR to the receiving medical facility.	Enclosure (9) to the <a href="#">PDR Manual</a> ,	
18	Ensure IT support staff (ESU/ESD/ESDD) is notified of member's PCS so they can initiate an "Employee Transfer". The CGSWSIII/ Windows 2003 environment requires user accounts to be moved from one location to another within active directory by the staff at the CG Enterprise Management Facility (EMF) located at TISCOM. It is imperative that users properly check-out with their computer support staffs prior to PCS departure to ensure that required information is provided to process the account moves.	<a href="#">ALCOAST 389/06</a>	

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

## 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 (Note: For PHS Officers, notify CGPC (OPM-2) when Officer reports, they are the SPO for PHS Officers).	<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 stops taxing when a member is no longer stationed in the state or starts taxing again when stationed back in the state, ensure member submits state tax withholding form.	<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 or Authorizing Official sign block 20c or 21a within 2 working days.	<a href="#">PPPM, 2-B-4</a>	
11	Ensure the travel claim and original order are forwarded to PSC (tv1) 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/FSGLI 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

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

Step	Action	Reference	Date
1	Ensure that message concerning overseas transfer with list of screening questions is received from entry approval point. Member must be in compliance with all Overseas Duty Suitability requirements as well as the requirements listed in the Overseas Transfer Message. An Entry Approval Request Message must then be sent IAW Step 7 below.	<a href="#">PERSMAN, 4-H-2</a>	
2	Screen member and/or dependents to determine for suitability for overseas assignment within 10 days of receipt of transfer order. Use the “Command Checklist for Overseas Screening”, Exhibit 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, Exhibit 4-H-2</a>	
3	Ensure the servicing SPO supervisor has verified for completeness and signed the “Command Checklist for Overseas Screening” and that has been faxed to Entry Approval Point within 15 days of receipt of transfer authority with copies filed in SPO and Unit PDR.	<a href="#">PERSMAN, Exhibit 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 <a href="#">ALCOAST 098/06</a> 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 <a href="#">ALCOAST 098/06</a> and <a href="#">ALCOAST 235/05</a> .	<a href="#">PERSMAN, 4-H-3</a>  <a href="#">MEDMAN, 3-B-3</a>	

*Continued on next page*

Section A  
PERMANENT CHANGE OF STATION

## Overseas/OUTCONUS Transfer Checklist, Continued

Checklist (continued)

Step	Action	Reference	Date
5	<p>Ensure member and dependents</p> <ul style="list-style-type: none"> <li>• have valid CAC and 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> <li>• are counseled regarding requirements for the transportation of pets and/or firearms to new PDS</li> </ul>	<a href="#">PERSMAN, 4-H-7</a>	
6	<p>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 may be required.</p>	<a href="#">ALCOAST 113/07</a>	
7	<p>Send entry approval request message to overseas command.</p> <p><b>Note:</b> Ensure that the overseas command has received a copy of the Command Checklist for Overseas Screening prior to requesting approval.</p> <p><b>Exceptions:</b> 1) Per <a href="#">ALCOAST 020/06</a> TRACEN Cape May can grant entry approval for recruit graduates without dependents who do not intend to acquire dependents enroute to new PDS.</p> <p>2) Per <a href="#">ALCOAST 078/06</a> 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</p>	<a href="#">PERSMAN, 4-H</a>	
8	<p>Ensure entry approval has been granted prior to member receiving ORIGINAL orders or travel advances.</p>	<a href="#">PERSMAN, 4-H-4-a</a>	

## Automatic Stops of Pay and Allowances

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

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- References**
- PAYMAN
    - Chapter 3, Allowances
    - Chapter 4, Special Pay
    - Chapter 5, Incentive Pay
  - [JFTR](#), para. U9100, Housing and Cost-of-Living Allowances
- 

**Auto Stops on PCS** This table shows pay entitlements, which will be automatically stopped when PCS transfer occurs.

**Note:** Automatic stops will not occur on interoffice transfers.

Entitlement Description	When the Entitlement Stops
Basic Allowance for Housing - Child (BAH Diff) (Codes P or Q)	On the day prior to PCS Departure.
Basic Allowance for Housing (BAH)-Without Dependents	On the day prior to reporting.
Basic Allowance for Housing - Partial (BAH Partial)	On the day prior to the effective date of departure.
Enlisted Discount Meal Rate deduction	On the day prior to the effective date of departure.
Enlisted Basic Allowance for Subsistence (ENL BAS)	On the effective date of reporting PCS.
Career sea pay/time and premium	On the effective date of departure.
Combat SGLI Allowance	On the last day of the month of the effective date of departure.
Combat Tax Exclusion	On the last day of the month of the effective date of departure.
CONUS Cost of Living Allowance (COLLA)	On the day prior to the effective date of reporting.

*Note: Effective 1 January 2006, BAH for members without dependents auto-stops effective the date of PCS departure. These members are entitled to BAH W/O while in transit and the system (JUMPS) will credit any BAH due when the reporting endorsement on orders transaction processes.*

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*Continued on next page*

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

**Automatic Stops of Pay and Allowances, Continued**

**Auto Stops on PCS (continued)**

<b>Entitlement Description</b>	<b>When the Entitlement Stops</b>
OUTCONUS-Cost of Living Allowance (OCOLA), with or without dependents and partial	On the day prior to the effective date of departure.
If dependents are delayed	Date last dependents departs within 60 days.
Crew flight pay (enlisted only)	On the effective date of departure
Diving Pay	On the effective date of departure
Family Separation - Housing (FSH)	On the day prior to the effective date of PCS departure.
Family Separation Allowance	On the day prior to reporting, less any leave, proceed time or compensatory absence.
Hardship duty pay-location	On the effective date of departure.
Hostile Fire, Imminent Danger Pay	On the last day of the month of the effective date of departure.
Noncrew flight pay	On the effective date of departure.
Overseas Housing Allowance (OHA), with and without dependents	On the day prior to the effective date of departure.
If dependents are delayed	Date last dependent departs (Delay not to exceed 60 days).
Responsibility Pay	On day prior to departure.
Diving Duty Pay	On the effective date of departure
Special Duty Assignment Pay (SDAP)	On the day prior to the effective date of departure.
Flight Deck Hazardous Duty Incentive Pay	On the day prior to the effective date of departure.
Foreign Language Proficiency Pay	On the day prior to the effective date of departure.
Hazardous Duty Incentive Pay for Visit, Board, Search & Seizure	On the day prior to the effective date of departure.
Exclusion from State Income Tax Withholding (SITW)	Member's exclusion from SITW ends the day prior to PCS reporting if member is assigned to unit in a state that taxes military pay while member is stationed within the state (See Chap. 8-B)

## How to Prepare NATO Supplemental Orders

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**Introduction** A NATO order, along with proper identification, allows an individual to pass without difficulty from one NATO nation to another. This order is only for the movement of military personnel, their personal baggage, individual weapons, and official documents.

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**References** PERSMAN, 4-A-18

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**Format for order** The below table describes how to complete a NATO order.

Step	Action
1	Top of letterhead type: Grading of Form: NATO UNCLASSIFIED
2	Include in the heading: country of origin, SSN, date order prepared.
3	In the first paragraph include: <ul style="list-style-type: none"><li>• Name, rank, grade and ID card number</li><li>• Destination, within NATO country.</li><li>• Date of departure from original country.</li><li>• Number of days member will remain in NATO country, if PCS, so indicate.</li></ul>
4	In the second paragraph include: Authorization for member to possess and carry firearms.
5	In the third paragraph include: The number of official dispatches and that they are official documents.
6	In the fourth paragraph include: A certification that the travel is under the provisions of the NATO Status of Forces Agreement.

**Note:** Officer authorizing the NATO travel will sign the order.

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*Continued on next page*



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

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## How to Prepare NATO Supplemental Orders, Continued

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**Recommended format** Here is the recommended format for NATO travel orders  
**Note:** NATO travel orders will be prepared in English and French. Any instructions printed on the reverse of the orders will appear in English only.

Grading of form: <b>NATO UNCLASSIFIED</b>		
<b><u>NATO TRAVEL ORDER</u></b>		<b><u>ORDRE DE MISSION OTAN</u></b>
Country of Origin: <i>Pays de provenance:</i>	Social Security Number Date order issued	
1. The bearer (and group as shown heron or on attached list) <i>Le porteur (et personnel porte ci-dessus ou sur la list jointe)</i>		
Personal/Identity Card No. (if any) <i>No Mle/de la cazrte d'identite</i>	Name: <i>Nom:</i>	Rank/Grade
<i>(s'il y a lieu)</i>		
will travel to: <i>fera mouvement a:</i> _____		
Date of departure <i>Date du depart, le (ou vers le):</i> _____		
____For a period of approximately _____days ____For permanent change of station, <i>Pour a peu pres _____jors _____ Pour changement permanent de garnison.</i>		
2. Authority (is)(is not) granted to possess and carry arms. <i>Autorisation dep port d'armes (accordee) (non accordee).</i>		
3. The person named in paragraph 1 is authorized to carry _____ sealed dispatches. <i>La personne indequee au paragraphe 1 est autorisee a porter _____ plis scelles.</i>		
a. These dispatches contain only official documents. <i>Ces plis ne contiennent que des documents officiels.</i>		
4. I hereby certify that this individual/group is/are member(s) of a Force as defined in the NATO Status of Forces Agreement, and that this is an authorized mover under the terms of this agreement. <i>Je soussigne certifie que le personnel vise appartient a une armee telle definie dans l'Accord OTAN sur le statu des Forces Armees et que ce deplacement est officiel selon les termes de cet accord.</i>		
Signature of Officer Authorizing Movement		

## FAX of PCS Advance Requests

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**Introduction** This section provides the procedure for requesting advances of PCS travel funds.

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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. 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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**Status of Advance of Funds Requests** Members may check the status of their advance of funds requests and payment summaries in T-PAX.

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**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/cg1/psc/ccb/">http://www.uscg.mil/hq/cg1/psc/ccb/</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 (tv1). Please make your check or money order payable to “U.S. Coast Guard”, and write your TONO on your payment. Include a copy of your official notice of travel overpayment letter and send your payment to:   <div style="margin-left: 40px;">           U. S. COAST GUARD TRAVEL &amp; ART            PO BOX 70969            CHARLOTTE, NC 28272-0969         </div> </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>

*Continued on next page*

## **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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### **Audit Status Reports**

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

The most recent audit request reports can be accessed the first week of each month via the PSC intranet (CGWEB) page at <http://cgweb.PSC.uscg.mil/travel/audits/>. Enter the unit 7 digit OPFAC in the search box to find the link to your unit page, which contains 5 reports: 1st requests; 2nd requests; 3rd requests; suspended requests; and requests being recouped.

Travelers can also view audit request status by going to the FINCEN website [http://cgweb.FINCEN.uscg.mil/tvs\\_aux2/](http://cgweb.FINCEN.uscg.mil/tvs_aux2/). This shows the following information on a requested audit: claim number, TONO, travel dates, dates of requests, date received at PSC, date suspended, suspension end date, date cancelled, date returned to the traveler for further documentation, and date when the audit was completed.

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**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-26	
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-27	
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 <b>or may involve changes to member's BAS and/or Career Sea Pay/Time</b> , send a copy of the orders, annotated with the date and time the member departed, to the SPO so that pay entitlements affected by TDY can be stopped/started. The SPO will forward SPO PDR to TDY unit's SPO if TDY is over 60 days.	PPPM, 2-B-26 <a href="#">Direct Access</a> <a href="#">Online Manual</a> , <a href="#">TDY</a> <a href="#">Entitlements</a>	
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		
		PPPM, 7-B-3	

**Note:** The unit will notify the SPO if the member does not travel on the dates of the original TDY orders (e.g. send copies of the amendments or annotations).

*Continued on next page*

**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-5	

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

Step	Action	Reference	Date
1	Ensure member traveled in accordance with the order. If member was required to deviate from the order as issued, ensure any necessary amendments and/or endorsements have been affixed to the original order	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 orders, annotated with the date and time that the member returned to the unit. The SPO will submit Direct Access transaction to change BAS (unless the member is not required to eat at a government messing facility at <u>both</u> the permanent unit <u>and</u> the TDY unit).	PPPM, 2-B-26 <a href="#">Direct Access Online Manual</a> , <a href="#">TDY Entitlements</a>	
5	Ensure the travel claim is prepared and submitted through T-PAX with documentation retained by the member for a period of 6 years & 3 mos, or travel claim, original orders, and receipts are forwarded to PSC (tv1) if T-PAX is not used	PPPM, 2-B-4	
6	Forward Career Development Worksheet ( <a href="#">PSC-2030</a> ) to SPO to report school completion or addition of enlisted competency codes.		
7	Review and complete PCS/TEM DUINS to "A" School ( <a href="#">CG PSC-2001</a> ) if member is returning from TDY to "A" School.		

## Manual Submission of Travel Claims, Continued

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**Payment**

If all documentation is correct, PSC (tv1) 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.

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**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://www.uscg.mil/hq/psc/customerservice.shtm>  
or call: (785) 339-2200 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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**Manual Submission of 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) U. S. COAST GUARD PERSONNEL 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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## Section Overview

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**Introduction** Active Duty Other Than Training (ADOT) includes:

- Involuntary Active Duty
- Voluntary Active Duty for Emergency Operations
- Active Duty for Special Work (ADSW)

This section will focus on the procedures and processes governing ADSW-AC, (formerly TEMAC). Reservists in the Selected Reserve, Individual Ready Reserve (IRR) or the Standby Reserve (Active Status) may perform this duty.

**Note:** IRR and Standby Reserve include those referred to as Active Status Pool (ASP).

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### References

- (a) [RPM](#)
  - (b) [COMDTINST 1330.1](#) (series) (Temporary Active Duty)
  - (c) [PDR Manual](#)
  - (d) Direct Access Guide, [Reserve Orders Guide](#)
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### In this section

Topic	See Page
<a href="#">Projecting Costs of ADSW-AC Orders</a>	2-D-2
<a href="#">Document ID's (TONO) for ADSW-AC Orders</a>	2-D-3
<a href="#">Accounting Line Data for ADSW-AC Orders</a>	2-D-4
<a href="#">How to Process an ADSW-AC Order</a>	2-D-6

## Projecting Cost of ADSW-AC Orders

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**Introduction** All ADSW-AC costs, including pay and benefits, travel and per diem, and permanent change of station (PCS) entitlements (when applicable) are normally the responsibility of the commands using ADSW-AC. Commands using long-term ADSW-AC should keep in mind those personnel ordered to active duty for 181 or more days are entitled to PCS entitlements.

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**References**

- (a) [PERSMAN](#), 4.G and 7.A.19-20
- (b) [PAYMAN](#), Chapter 12
- (c) [JFTR](#), U7G
- (d) Direct Access Guide, [Reserve Orders Guide](#)

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**Estimating Total Cost** The Benefiting Unit shall determine the cost of Pay and Allowances, FICA and Travel. Units are directed to use the Standard Personnel Cost (SPC) worksheet to determine the costs. The SPC worksheet is located on CG Central and at <http://cgweb.comdt.uscg.mil/cg8/cg83/cg832/sct/sr/index.htm>. If the period of ADSW-AC covers a portion, rather than a full 15 day pay period, (i.e.: 25-30 June vice 16-30 June), compute the pay and allowances for the partial period by dividing a full month's entitlement by 30 days then multiply that daily amount by the number of days. Compute total cost taking the following into account:

Pay and Allowances

- Base Pay (including longevity increases)
- BAH/OHA
- Subsistence (actual days)
- FSA (if period of ADSW-AC is over 30 days refer to page 7-B-3)
- CONUS COLA or COLA
- Leave to be earned and sold
- Any other station allowances

FICA

- Multiply .0765 x one month's base pay. This amount is reduced from the base pay accounting line and added to the FICA accounting line.

Travel Entitlements

- Travel costs to and from the ADSW-AC site
- Per diem for travel days

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

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## Document ID's (TONO) for ADSW-AC Orders

**Introduction**      **Direct Access does not automatically generate Document IDs for ADSW-AC orders.** The Benefiting Unit shall provide three separate Document ID's. The DOC Type 72 is used to pay the member in JUMPS. DOC Type 11 (single claim), 12 (PCS) or 13 (multiple claims) are used to reimburse the member for travel.

**References**      (a) [FINCEN SOP](#), FINCENSTFINST M7000.1, Chapter 5  
(b) Direct Access Guide, [Reserve Orders Guide](#)

**Document Number Examples**

- 11/07/29/7/8/16/001/000 (for TVL)
- 72/07/29/7/8/16/001/000 (for P&A)
- 72/07/29/7/8/16/001/001 (for FICA)

**DOC ID TABLE**      This table gives guidance on each part of the document number.

Field	Function
11 - Document Type	Use DOC type 11 for ADSW Travel Orders with a duration under 181 days where only a single travel claim will be submitted. Use DOC type 13 for ADSW Travel Orders with a duration under 181 days where multiple travel claim will be submitted (e.g. Monthly claims). Use DOC type 12 for PCS Travel Orders (duty of 181 or more days). Use DOC 72 for Pay and Allowances and FICA.
07 - FY Funded	Last two digits of the FY in which the transaction will be funded.
29 - Procurement Site Code	“29” represents ISC New Orelans. A listing is found in Appendix H to the FINCEN SOP. This number should remain constant for each office.
7 - FY Contract Originated	Last digit of the fiscal year of the initial document.
8 - Region	Region/district from <a href="#">Appendix A, FINCEN SOP</a> . “8” stands for Eighth District.
16 - Program Element (PE)	For most units, this field will be constant. Those units that have several program elements or other than normal 2-digit PE's should use a master 2-digit PE assigned by their Budget Office for document numbering purposes. For reserve orders use only the first two characters of the Accounting Line Program Element.
001 - Document Sequence	Assigned by the unit for expenditure of funds.
000 - Suffix	Subdivision within expenditure. For ADSW-AC Orders, use 000 for Travel and Pay & Allowances, and 001 for FICA Entries.

## Accounting Line Data for ADSW-AC Orders

**Introduction**      **Direct Access does not automatically generate Accounting Lines for ADSW-AC orders.**

**References**      (a) [FINCEN SOP](#), FINCENSTFINST M7000.1, Chapter 4  
 (b) Direct Access Guide, [Reserve Orders Guide](#)

**Accounting Line Data:**

- 2/8/701/108/30/0/16xx/12345/2100 (Travel)
- 2/8/701/108/30/0/16xx/12345/117K (P&A)
- 2/8/701/108/30/0/16xx/12345/122R (FICA)

**Accounting Line Table**      This table gives guidance on each part of the document number.

Field	Function
2 - Agency Code	Indicates the Coast Guard. It will always be “2”.
8 - Region/District Code	Normally constant for a particular unit. Example: 8 for Eighth District, F for FINCEN. See <a href="#">Appendix A, FINCEN SOP</a> for additional region codes.
701 - Appropriation Code	Last digit of the fiscal year. (7=2007). Remaining digits are the appropriation account. For ADSW-AC use “01”.
108 - Appropriation Limitation Code (ALC)	First digit is type of funding, direct or indirect. Use “1, 2, 3 or 8” as per Appendix C of reference (a) for Reserve Orders. 1=Direct Funds, 2=Direct Funds (pickup accounts), 3=Direct Funds (HQ Refund Program), and 8=Reimbursable Funds. Second two digits is Administrative Target Unit (ATU): 01 for First Coast Guard District, 07 for Seventh Coast Guard District, 36 for FINCEN, etc.
30 - Allotment Fund Control Code (AFC)	Most units and staff elements will use a constant 30 in this field. Day to day CG operations are generally funded through AFC 30.

*Continued on next page*

**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, and will be two digits</li></ul>
12345 - Cost Center	<ul style="list-style-type: none"><li>• Normally the benefiting units OPFAC.</li></ul>
117K - 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 INCONUS 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 and pay 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://www.uscg.mil/hq/psc/da/reserveorders.pdf>
  - (b) [RPM](#), Art. 3-D-12
  - (c) [MEDMAN](#), Art 3.A.7.j.(1)
- 

**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>

*Continued on next page*

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

**How to Process an ADSW-AC Order**, continued

<b>Step</b>	<b>Who Does It</b>	<b>When</b>	<b>What Happens</b>
3	Unit Reserve Orders Manager	Within 2 days of receipt of request	<ul style="list-style-type: none"> <li>• Creates the Request for Reserve Orders in Direct Access if member is unable.               <ul style="list-style-type: none"> <li>• Enters TONO and Accounting Data provided by unit.</li> <li>• Completes Per Diem Entitlements (if applicable).</li> <li>• Completes Other Authorized Expenses (if applicable).</li> <li>• Completes Partial Entitlements Tab.</li> </ul> </li> <li>• Verifies all readiness requirements (ASQ, medical, dental, security, etc.).</li> <li>• Verifies Personal Information is current.</li> <li>• Verifies no other duty/drills are scheduled during timeframe desired.</li> </ul>
4	Supervisor or Reserve Orders Manager	Within 2 days of receipt of request	<ul style="list-style-type: none"> <li>• Approve request in Direct Access and forward to the servicing ISC (pf) for final approval</li> <li>Or</li> <li>• Disapprove request and forward back to member/unit.</li> </ul>
5	ISC (pf)	Within 5 days of receipt of request	<ul style="list-style-type: none"> <li>• Verifies all previous information.</li> <li>• Reviews TONO.</li> <li>• Approves the orders.</li> <li>• Ensure the member has a security clearance if required.</li> </ul>
6	Member's Unit	Prior to member's arrival at ADT site	If ADSW-AC is over 60 days, forward Medical/Unit PDR to ADSW-AC site.

*Continued on next page*

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

**How to Process an ADSW-AC Order, continued**

<b>Stage</b>	<b>Who Does It</b>	<b>When</b>	<b>What Happens</b>
7	SPO  <i>* Note, Verify that member is not receiving military retired pay or any type of disability compensation from the Department of Veterans Affairs.</i>	Within 2 days of receipt of an approved request	<ul style="list-style-type: none"> <li>• Ensure member has sufficient obligated service to cover the ADSW-AC period.</li> <li>• Verify direct deposit.</li> <li>• Complete Standard Travel Orders using the Reserve Orders transaction in Direct Access.</li> <li>• Complete other Direct Access pay transactions if the member as necessary (e.g. If member is entitled to SDAP or COLA while on ADSW-AC).</li> <li>• Maintain approved request and copy of orders in SPO files and PDR for 1 year.</li> </ul> <p>In cases where the ADSW-AC is for 60 or more days:</p> <ol style="list-style-type: none"> <li>1. Review and mail the SPO PDR to the SPO servicing the ADSW-AC site.</li> <li>2. Set up tracking of completion date of ADSW-AC period.</li> </ol>
8	Member	As directed by orders	<ul style="list-style-type: none"> <li>• Obtain new I.D. card at nearest issuing unit if ADSW-AC is over 30 days.</li> <li>• Report to ADSW-AC site.</li> </ul>
9	ADSW-AC site	Member reports for ADSW-AC	<ul style="list-style-type: none"> <li>• Reports actual reporting date to SPO.</li> <li>• Notify SPO if member deviates from orders by reporting at a different time or fails to report.</li> </ul>
10	SPO	Upon notification	<ul style="list-style-type: none"> <li>• Reserve Orders transaction. <ul style="list-style-type: none"> <li>• Completes actual report/depart dates.</li> <li>• Completes the Travel Report Dates section.</li> <li>• Validated partial entitlements and BAH.</li> <li>• Starts appropriate pay and allowances.</li> </ul> </li> </ul>

*Continued on next page*



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

**How to Process an ADSW-AC Order**, continued

<b>Stage</b>	<b>Who Does It</b>	<b>When</b>	<b>What Happens</b>
11	ADSW-AC site	Member completes ADSW-AC	<p>Reports actual depart date to SPO</p> <ul style="list-style-type: none"> <li>• Endorse Travel Orders to show:               <ul style="list-style-type: none"> <li>(1) date and time member reported and departed, and;</li> <li>(2) availability of Gov't qtrs/mess.</li> </ul> </li> <li>• Fax copy of endorsed Travel Orders to SPO on the same day.</li> <li>• Complete a performance evaluation using Direct Access.</li> </ul> <p><b>(181 days or more)</b> Submit separation paperwork, e.g. SOL.</p>
12	SPO	Within 2 days of receipt of endorsed Orders	<p>Less than 181 days:</p> <ul style="list-style-type: none"> <li>• Enters number of days leave sold upon completion of orders.</li> </ul> <p>181 or more days:</p> <ul style="list-style-type: none"> <li>• (181 days or more) Receives separation information from the member's duty command. Processes member RELAD in the Separations Module.</li> </ul>
13	Member	Within 3 days following completion of travel	Complete DD-1351-2 (Travel Voucher) and forward to unit with original Travel Orders.
14	Unit	Within 2 days of receipt from member	Complete administrative review of travel voucher and forward to PSC (tvl) for processing.

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## 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 Overview

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**Introduction** This section consolidates information on PCS travel, household goods, privately owned vehicle storage and pay entitlements for members ordered to Patrol Forces Southwest Asia (PATFOR SWA), Bahrain or a cutter deployed (for a year or more) in support of Operation Iraqi Freedom.

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**In this section**

Topic	See Page
<a href="#">Mobile Unit Designation</a>	2-F-2
<a href="#">PCS Travel</a>	2-F-3
<a href="#">PCS Orders Remarks</a>	2-F-4
<a href="#">HHG/Unaccompanied Baggage</a>	2-F-5
<a href="#">POV Transportation/Storage</a>	2-F-7
<a href="#">Station Allowances (OHA and COLA)</a>	2-F-8
<a href="#">Allowances for Members With Dependents (FSA, DLA, BAH, OHA and COLA)</a>	2-F-9
<a href="#">Basic Allowance for Subsistence</a>	2-F-11
<a href="#">Hardship Duty Pay, Imminent Danger Pay and Combat Allowances</a>	2-F-12
<a href="#">PDR Handling</a>	2-F-13
<a href="#">Points of Contact</a>	2-F-14
<a href="#">Entitlements Summary (Exhibit 2-F-2)</a>	2-F-15

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## Mobile Unit Designation

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### Mobile Unit Designation for PATFOR SWA Cutters

Per Commandant (CG-1) Memo (No SSIC) of 04 Apr 06 (*see below*) members ordered to serve on PATFOR SWA cutters, on or after 4 April 2006, are considered to be assigned to a "Mobile Unit". They receive the same PCS, Household Goods (HHG), Privately Owned Vehicle (POV) storage, and travel entitlements as those personnel assigned ashore to PATFOR SWA. Members assigned to mobile units (other than those assigned in an administrative capacity) are entitled to continuous career sea pay (and career sea pay premium, if otherwise eligible) on the same basis as members assigned to other Coast Guard vessels.

*Exhibit 2-F-1: CG-1 Memo of 04 Apr 06*

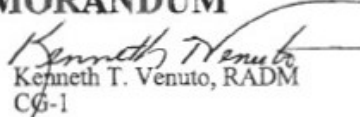


Commandant  
United States Coast Guard

2100 Second Street, S.W.  
Washington, DC 20593-0001  
Staff Symbol: CG-122  
Phone: (202) 267-0914

APR 4 2006

### MEMORANDUM

From:   
Kenneth T. Venuto, RADM  
CG-1

Reply to: CAPT M. C. Cosenza  
Attn of: 202-267-0914

To: CG-8

Subj: PATROL FORCES SOUTHWEST ASIA (PATFORSWA) CUTTERS DESIGNATION AS MOBILE UNITS

1. Commander, Atlantic Area presented several concerns regarding pay and entitlement inequities between the PATFORSWA shore side personnel and those Coast Guard members assigned to PATFORSWA cutters. Designating all of PATFORSWA as a mobile unit was proposed as a potential solution. However, this proposal creates a service-wide inequity by providing sea time to the PATFORSWA shore-side personnel. In coordination with LANTAREA and your staff, I have resolved this issue by designating just the PATFORSWA cutters alone as mobile units. This designation for the cutters will remedy the most significant issues of LANTAREA's concern.

2. The key entitlement differences are a result of the cutters being homeported in CONUS when in reality, they are actually located overseas. The proposed solution establishes new sub-OPFACs for each cutter and the augment crew as a subunit of PATFORSWA, and designates them as mobile units. By then assigning the WPB crews to those sub-OPFACs, they would become eligible for OCONUS entitlements, including COLA, and would gain the ability to have vehicles stored at government expense and receive credit of an overseas tour. Under this arrangement, each member would require TAD orders to a cutter in order to properly credit and track career sea pay. This designation will also provide the same entitlement to BAH for members with dependents assigned to the cutter forces as well as those assigned ashore.

3. In an effort to provide uniform entitlements to members who will be arriving in Bahrain this transfer season and to address the inequities as soon as possible, I request expedited establishment of the sub-OPFACs before the incoming personnel report this summer.

#

## PCS Travel

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**Introduction** This section provides information on PCS travel entitlements for members ordered to PATFOR SWA.

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**PCS Travel** Members will receive PCS Orders from their current duty station to PATFOR SWA. They also receive TAD Orders to LANTAREA for Pre-Deployment training (Note: **The only exception to this rule is for members coming from outside the U.S. (i.e. Guam, Alaska, etc.).** They may request PCS/TEMDU orders from Atlantic Area (Arec-5). The member's SPO must first obtain TEMDU approval from CGPC (OPM-2 or EPM-2)).

Following the Pre-Deployment training, members either go on leave or return to their current Duty Station. When they depart their PDS, their PCS Orders require a layover at LANTAREA, Portsmouth, VA to await transportation. Transportation from LANTAREA to PATFOR SWA is Government Procured Transportation. Members are entitled to 2 additional travel days for the flight from Portsmouth, VA to Bahrain.

**Members without dependents are authorized:**

- PCS travel entitlements from their old PDS via Portsmouth VA for transportation to Bahrain. **Members are not allowed round-trip travel between a TDY station and designated place.**
- Members may elect mode of travel to Portsmouth, VA.

**Members with dependents are authorized:**

- PCS travel entitlements from their old PDS via the designated place per [Joint Federal Travel Regulations, Volume 1](#), par. U5120-g to assist their dependents in relocating before reporting TAD/TDY to Portsmouth for training.

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*Continued on next page*

## PCS Travel, Continued

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### PCS Travel (cont'd)

- Dependents can remain at their current location or travel to a designated place. A designated place is the location where the dependents will establish a permanent residence while the member serves a dependent restricted tour in Bahrain. The designated place can be any location in CONUS or OCONUS locations as indicated in [Joint Federal Travel Regulations, Volume 1](#), par. U5222-d1.
  - Designated places must be authorized by COMDT (CG-1222). Use form CG PSC-2025A, Housing Allowance Protection Worksheet (<http://www.uscg.mil/hq/psc/forms/psc2025a.pdf>) for requesting BAH or OHA at a designated place of dependents, or if eligible, the previous duty station (BAH location only).
-



**Section F**  
**PCS TO PATROL FORCES SOUTHWEST ASIA**

---

## PCS Orders Remarks

### Introduction

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

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### PCS Orders Remarks

A. THESE ORDERS CONSTITUTE A PCS MOVE FM \_\_\_\_\_ FOR FURTHER ASSIGNMENT TO BAHRAIN VIA AUTH DELAY IN PORTSMOUTH, VA.

B. DEPN INFO: WILL BE TRAVELING OOA \_\_\_\_\_ TO DESIGNATED LOCATION OF \_\_\_\_\_. **OR** DEPENDENTS NOT RELOCATING AT THIS TIME.

C. IAW JFTR U5012-B: ENTITLEMENTS DEPEND ON THE MBR & DEPN INDIVIDUAL TRAVEL CIRCUMSTANCES. TRAVEL SETTLEMENTS WILL BE DETERMINED BY PSC(TVL)BASED ON TYPE OF ORDERS/TRAVEL VOUCHER AND ACTUAL TRAVEL PERFORMED.

D. MBR NOT AUTH POV SHIPMENT TO BAHRAIN- COMMAND RESTRICTED, IAW JFTR U5405.

E. MBR AUTH POV STORAGE IN LIEU OF SHIPMENT AT GOVT EXPENSE IAW JFTR U5466. STORAGE OF POV NOT AUTH IF A POV IS SHIPPED TO DESIGNATED PLACE FOR DEPN USE. AUTH POV SHIPMENT TO DESIGNATED PLACE FOR USE BY MEMBER'S DEPENDENTS IAW JFTR, U5410. INCONUS SHIPMENT OF POV IS AT THE INITIAL EXPENSE OF THE MEMBER PENDING TRAVEL CLAIM REIMBURSEMENT NOT TO EXCEED STANDARD MILEAGE ALLOWANCE.

F. AUTH GTR TRANS FROM \_\_\_\_\_ TO BAHRAIN VIA PORTSMOUTH, VA, MOST COST ADVANTAGEOUS TO THE COAST GUARD.

G. OFFICIAL DISTANCE (MILEAGE) \_\_\_\_\_ FM \_\_\_\_\_ TO, IAW JFTR U5222-D.

H. DLA NOT AUTHORIZED FOR SINGLE MEMBERS. MANDATORY GOV'T QUARTERS. **OR** AUTH ADVANCE DLA WITH DEPENDENTS FOR PAYGRADE \_\_\_\_ IN THE AMOUNT OF \$ \_\_\_\_\_, IAW JFTR U5600.

I. MBR WAS COUNSELED ON THE TLE (U5710) ENTITLEMENTS.

J. TVL ADVANCES REQUESTED THE AMOUNT OF \$ \_\_\_\_\_, (EXACT AMOUNT) CHARGED AGAINST THE COAST GUARD. **or** TVL ADV NOT REQUESTED.

PER DIEM:

MBR: \$99.00 X (TVL DAYS) =

DEPN: \$74.25 X

DEPN: \$49.50 X

MALT:

(# OF TRAVELERS): (MILEAGE) X (CENTS) =

K. ADV PAY NOT REQUESTED. **OR** REQUESTED ADV PAY FOR \_\_\_\_ MONTHS **or** SPECIFIC AMOUNT TO BE LIQUIDATED OVER 12 MONTHS.

L. AUTH PARTIAL SHIPMENT OF HHG'S NOT TO EXCEED COMMAND RESTRICTED WEIGHT OF 500 LBS. AUTH SHIPMENT OR NTS OF REMAINING HHG'S FOR PAYGRADE \_\_\_\_ WITH **or** WITHOUT DEPN RATE IAW U5012-C.

M. SPO ADDRESS:  
COMMANDING OFFICER (SPO)  
COAST GUARD INTEGRATED SUPPORT COMMAND  
ATTN: PATFOR SWA  
4000 COAST GUARD BLVD.  
Portsmouth, VA 23703

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

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## Household Goods/Unaccompanied Baggage

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**HHG/  
Unaccompanied  
baggage**

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

- Storage space is limited, so members should only ship those personal effects that can be accommodated in their assigned quarters.
- Members need not bring personal computers; there are Internet cafes at the residence and on base.
- Partial HHG /Unaccompanied baggage shipments to and from Bahrain are limited to 500 pounds.
- Additional information/restrictions on HHG shipments to Bahrain can be found in Chapter 11 of the *The Personal Property Consignment Instruction Guide – Online (PPCIG-OL)* available online at: <https://tops.ppcigweb.sddc.army.mil/ppcig/menu/query/country.do> (Click the “*Country Instructions*” tab and search for Bahrain.)

For members without dependents, the HHG not shipped to Bahrain should be placed in NTS (non-temporary storage) at origin. Members with dependents may ship HHG to a designated place for dependents use or place them in NTS at origin.

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## POV Transportation/Storage

---

**POV  
Transportation/  
storage**

**Transportation:**

- Coast Guard personnel assigned to PATFOR SWA are not authorized shipment of a POV to/from Bahrain. However, a POV may be shipped to a designated place, including OCONUS, for use by the member's dependents in accordance with [Joint Federal Travel Regulations, Volume 1](#), par. U5410-b1. INCONUS shipment of POV is at the initial expense of the member pending travel claim reimbursement not to exceed standard mileage allowance.

**Storage:**

- POV storage is authorized in lieu of a shipment. Since POV shipment to Bahrain is restricted by service regulations, members are entitled to storage of one POV at government expense under the provisions of [Joint Federal Travel Regulations, Volume 1](#), par. U5466. The POV can be stored using the SDDC global POV storage program or self-procured by the member. For travel entitlement to the storage facility when accomplished concurrently with TDY enroute to the OCONUS PDS, see [Joint Federal Travel Regulations, Volume 1](#), par. U5468-e. For information on POV storage see SDDC pamphlet *Storing Your POV* online at: <http://www.sddc.army.mil/sddc/Content/Pub/8810/DBCN8810.pdf>.
  - Members who travel by POV to Portsmouth must arrange to place their POV in storage prior to departing for Bahrain. Storage of a POV is not authorized if a POV is shipped to a designated place for dependents use.
-

## Station Allowances

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**Station Allowances (OHA and COLA).**

OHA is not authorized for members in Bahrain since all members will be assigned government leased quarters or shipboard berthing. While stationed in Bahrain members will be entitled to OUTCONUS COLA at the full without dependents rate. Members with dependents are authorized to receive both full OCONUS COLA at the without dependent rate, and, if payable, CONUS COLA at the with-dependents rate for the designated place of dependents. Station allowances may also be authorized by COMDT (CG-1222) for dependents residing at a designated place OCONUS per [Joint Federal Travel Regulations, Volume 1](#), par. U9301-b. Requests for station allowances must be submitted before the dependents relocation.

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**Entitlements Summary**

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

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## Allowances for Members With Dependents

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**Introduction** This section provides information on allowances and entitlements for members with dependents assigned to PATFOR SWA.

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**Dislocation Allowance (DLA)** Only members with dependents that relocate dependents to a designated place are authorized DLA.

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**BAH, OHA and COLA for Members With Dependents** To request BAH for either the previous duty station location or a designated place of dependents, or OHA for a designated place of dependents, members with dependents will submit a CG PSC-2025A, Housing Allowance Protection Worksheet (<http://www.uscg.mil/hq/psc/forms/psc2025a.pdf>) to COMDT (CG-1222) for processing.

For a member stationed OCONUS (non-BAH location), OHA cannot be requested for a previous duty station location, only for a designated place of dependents.

BAH for a previous duty station location may be authorized if the member has no intention of relocating their dependents from the residence established while receiving the BAH rate for their previous duty station. The dependents residence location must be within a reasonable commuting distance (as determined by COMDT (CG-1222) – see Note 2 below) to the previous duty station for a member to be authorized to receive the BAH for their previous duty station, if more equitable than the dependents location.

Note 1: Members who receive BAH or OHA with dependents based on the payment of child support are not eligible to submit a CG PSC-2025A. Effective upon their PCS reporting date, these members are entitled to receive BAH-DIFF, if otherwise so entitled per Section 3-C-2.c. of the [Coast Guard Pay Manual, COMDTINST M7220.29\(series\)](#). If a member acquires a dependent(s) during their OCONUS assignment which changes their dependency status to a member with-dependents, the member will complete and submit a CG PSC-2025A to request BAH or OHA for the designated place of their dependent(s).

Note 2: A reasonable commuting distance is 50 miles one-way or a 2 hour round-trip, whichever is to the member's advantage.

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*Continued on next page*

## Allowances for Members With Dependents, Continued

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**BAH, OHA,  
and COLA  
(cont'd)**

**COLA Entitlement:**

If BAH is authorized for a previous duty station location, CONUS COLA, by law, cannot be paid for the previous duty station location, only the dependent's location.

If BAH or OHA is authorized for the dependents location, COLA will be based on the dependents location.

Upon processing the worksheet, COMDT (CG-1222), will mail the member a memo authoring the housing allowance for either the designated place of dependents, or if eligible, the previous duty station. A copy is also sent to the ISC Portsmouth SPO and CG PSC (MAS & FAIR).

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**FSA**

Members with dependents, including member-married-to-member (see [Coast Guard Pay Manual, COMDTINST M7220.29\(series\)](#), Section 3-G-13), are entitled to FSA. The current rate for FSA is \$250 per month.

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**Entitlements  
Summary**

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

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## Basic Allowance for Subsistence

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### BAS

Officers	Officer BAS
Enlisted Members Assigned ashore	Enlisted BAS
While deployed to a cutter	Enlisted BAS-ESM (Essential Station Messing) less DMR (Discount Meal Rate) deduction

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### Entitlements Summary

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

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## Hardship Duty Pay, Imminent Danger Pay and Combat Allowances

**Hardship Duty Pay, Imminent Danger Pay and Combat Allowances**

Some members assigned to PATFOR SWA may be eligible for one or more of the following entitlements. Consult the references listed below to determine eligibility:

Entitlement	Reference
Hardship Duty Pay – Location	Sec. 4.A CG Pay Manual
Combat Tax Exclusion	Sec. 8.G CG Pay Manual
Combat SGLI Allowance	ALCOAST 060/06 E-Mail ALSPO B/06
Imminent Danger/Hostile Fire Pay	Sec 4.H. CG Pay Manual
Responsibility Pay (for cutter COs)	Sec 4.D. CG Pay Manual
Savings Deposit Program	Sec 7.C. PPPM (PSCINST M10002.A)

See the Special and Incentive Pays topic in the DA Online Manual for SPO procedures: [http://www.uscg.mil/ps/pay\\_entitlements/special\\_and\\_incentive\\_pays.htm](http://www.uscg.mil/ps/pay_entitlements/special_and_incentive_pays.htm)

**Entitlements Summary**

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



## PDR Handling

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**PDR Handling**    **Note:** Check the online version of this section at <http://www.uscg.mil/hq/psc/pppm/chap02F.pdf> for updates to this page.

Please ship SPO PDRs, via rapid, accountable means (DHL, express mail, etc.) to:

Commanding Officer (SPO)  
ATTN: PATFOR SWA YN  
Coast Guard Integrated Support Command  
4000 Coast Guard Blvd  
Portsmouth, VA 23703

Normally (per COMDTINST M1080.10(series)) the SPO PDR is sent via regular mail. However, these transfers call for special handling to ensure timely input of transactions.

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## Points of Contact

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**Points of  
Contact (as of  
16 May 2007)**

**Note:** Check the online version of this section at <http://www.uscg.mil/hq/psc/pppm/chap02F.pdf> for updates to this page.

**ISC Portsmouth SPO:**

- YNC Tina Sporkin, (757) 686-4115

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

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

**Operations/Mission issues:** LANTAREA: SKCS Sandra Fletcher  
Atlantic Area, (Arec-5)  
PATFOR SWA Coordinator  
Tel: (757) 295-2220, Ext 1  
Cell: (757) 651-2409  
Fax: (757) 295-2217  
[Sandra.J.Fletcher@uscg.mil](mailto:Sandra.J.Fletcher@uscg.mil)

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**Section F**  
**PCS TO PATROL FORCES SOUTHWEST ASIA**

**Exhibit 2-F-2: Patrol Forces SW Asia (PATFOR SWA) Cutter and Augmented Crew Pay Entitlements (Effective 4 April 2006)**

**PAY AND ENTITLEMENTS BASED ON DEPENDENCY STATUS**

<b>Member Status</b>	<b>Basic Allowance for Housing (BAH)</b>	<b>Conus Cost of Living Allowance (COLA)</b>	<b>Outconus COLA w/ out dpn (FULL)</b>	<b>Family Separation Allowance (FSA) (\$250/month) [3]</b>	<b>Reimbursement of (POV Storage) [4]</b>
Married	BAH w/dpn [1]	YES [1]	YES	YES	YES
Married to service member (w/out child dependent)	Partial	NO	YES	YES	YES
Married to service member (w/ child dependent)	NO [2]	NO[2]	YES	YES	YES
Single w/ child support	BAH-diff only	NO	YES	NO	YES
Single w/out dependents	Partial	NO	YES	NO	YES

Notes:

[1] BAH and COLA is based on dependents location unless otherwise designated by CG-1222. Housing Allowance Protection Worksheet (CG-PSC-2025A) must be submitted to CG-1222 for determination and approval. All OCONUS M-2-M w/minors should claim minors to be entitled to BAH-W or for spouse to receive BAH-Death (in case of fatality).

[2] Member may be entitled to BAH w/ dpn and Conus COLA at dependents location if they are claiming child on BAH/Dependency Data form vice spouse claiming. BAH Protection Worksheet required.

[3] FSA - All eligible members receive FSA-R, no one receives FSA-S.

[4] POV Storage - Member may store vehicle via government sponsored SDDC Global POV storage program or self-procure storage and submit claim for reimbursement. Member will be reimbursed up to government cost.

*Continued on next page*

**Section F**  
**PCS TO PATROL FORCES SOUTHWEST ASIA**

**Exhibit 2-F-2: Patrol Forces SW Asia (PATFOR SWA) Cutter and Augmented Crew Pay Entitlements (Effective 4 April 2006), continued**

**PAY AND ENTITLEMENTS REGARDLESS OF DEPENDENCY STATUS**

<u>Member Status</u>	<u>Level-3 Career Sea Pay/ Time (CSEAPAY)</u> <sup>[5]</sup>	<u>(BAS)</u> <sup>[6]</sup>	<u>Per Diem (IE Portion)</u>	<u>Responsibility Pay (\$50/ Month)</u>	<u>HDIP Vessel Boarding Search &amp; Seizure (HDIP-VBSS)</u> <sup>[7]</sup>	<u>Imminent Danger Pay (\$225/mont h)</u> <sup>[8]</sup>	<u>Combat Zone Tax Relief (CZTR)</u> <sup>[9]</sup>	<u>Combat SGLI</u> <sup>[10]</sup>	<u>Savings Deposit Program Participatio n</u> <sup>[11]</sup>	<u>IRA and Thrift Savings Plan (TSP)</u> <sup>[12]</sup>	<u>Rest and Recuperati on (R&amp;R) Leave Transporta tion</u> <sup>[13]</sup>
<b>Cutter Crew</b>	YES	YES	NO	NO	YES	YES	YES	YES	YES	YES	YES
<b>Augmented Crew</b>	YES	YES	NO	NO	YES	YES	YES	YES	YES	YES	YES
<b>CO</b>	YES	YES	NO	YES <sup>[14]</sup>	YES	YES	YES	YES	YES	YES	YES

Notes:

[5] CSEAPAY - Member receives continuous sea pay unless member exceeds 30 days ashore, IAW Section 4-B of USCG Pay Manual. Career Sea time runs continuously with CSP; when CSP suspended, career sea time counter goes into neutral until CSP is re-started. CSP-PREM is payable if current career sea time counter exceeds 36 months.

[6] Enlisted members will have Daily Discount Meal Rate deducted from BAS; PAYGO rules apply to officers.

[7] HDIP-VBSS - designated boarding teams only - Commanding Officers will authorize via written correspondence and verify requirements of ALCOAST 353/04 are met.

[8] IDP – Areas defined by SECDEF.

[9] CZTR areas designated by the President or Congress. Applies to all taxable income (up to the highest enlisted pay grade (E-10) plus imminent danger pay), including any bonuses earned while member is in the area (SRBs & Career Status Bonus (CSB) and the Basic Pay for all leave earned in the CZTR area. Federal & State Income Taxes not withheld, however, FICA tax is withheld. Although most states follow Federal rules concerning CZTR, some do not & will still require payment of state income taxes even though SITW not applied to military pay in CZTR areas. See Section 8-A of USCG Pay Manual for details.

[10] Government sponsors first \$150K of SGLI, plus Traumatic SGLI (TSGLI).

[11] SDP – Members may make an allotment or directly deposit up to \$10K with 10% annual interest guaranteed on average quarterly balance. Cannot exceed unallotted pay earned in theatre. May not use advance pay for SDP deposit. See Section 6-F of USCG Pay Manual.

[12] Members may make contributions to IRA and TSP (including special & incentive pays for TSP only), NTE Internal Revenue Code limits.

[13] One R&R trip at government expense per 12 month tour.

[14] Augment crew CO only receives Resp Pay during periods actually in command afloat. At no time will RSPLTY PAY be paid concurrently to more than one officer assigned to the same vessel. Acting CO for less than 30 days is not entitled to RSPLTY PAY.

**Section A  
ACCESSIONS**

**Process for Accessions, Continued**

**Process**  
Continued

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

**Section A  
ACCESSIONS**

## Types of Accessions

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

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

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

**Section B**  
**SEPARATIONS**

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## Section Overview

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

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**In this section**

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

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## The Separation Process

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### Introduction

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

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

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### References

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

### Retention on Active Duty

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

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

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*Continued on next page*



**Section B  
SEPARATIONS**

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## The Separation Process, Continued

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**Types of separations**

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

<b>Type</b>	<b>Description</b>
<b>Immediate</b>	Separations, which must be processed in less than 15 days. Separations require four working days for processing by PSC. This 4-day clock begins once: <ul style="list-style-type: none"><li>• The SPO notifies PSC of the authorization to separate the member. This may require coordination between the unit, SPO, and PSC (ses) to change the member's separation date.</li></ul>
<b>Priority</b>	Separations, which must be processed within a 15 to 30 day period.  Note: If rapid administrative action is required commands (CO/XO) may request Immediate separation processing by contacting PSC (ses) at (785) 339-3550.
<b>Routine</b>	Separations, which can be processed in 30 days or more.  <b>Note:</b> 30 days is the minimum time in which a Routine separation can be processed. In order to avoid delay in the final payment or payment for any leave sold, units/members must submit the <a href="#">Career Intentions Worksheet (CG PSC-2045)</a> to the SPO not later than 60 days prior to the separation date or departure on terminal leave.

*Continued on next page*

**Section B  
SEPARATIONS**

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## The Separation Process, Continued

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**Which type to use**      This table prescribes separation classifications.

<b>IF Separation is</b>	<b>THEN use</b>
due to misconduct and unit commanding officer desires rapid administrative action	Immediate
not due to misconduct, but rapid administrative action is required (Note: The unit CO/XO must request Immediate separation processing by contacting PSC (ses) at (785) 339-3550).	Immediate
for reserve members disenrolling from a class "A" school, officer candidate school, or other training program	Immediate
due to unsatisfactory performance	Priority
due to unsuitability	Priority
due to physical disability	Priority
directed by CGPC (epm-1) for urgent reasons	Priority
under normal circumstances	Routine

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**Section B  
SEPARATIONS**

## Immediate Separation Processing

**Introduction** Immediate separations require 4 working days for processing after CGPC (epm-1) posts the orders on the airport terminal. Immediate separations are often due to misconduct. If a separation is not due to misconduct (would normally be processed as a Priority or Routine separation) but rapid administrative action is required, commands (CO/XO) may request Immediate separation processing by contacting PSC (ses) at (785) 339-3550.

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

**Procedures** Procedures required for an Immediate separation.

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

*Continued on next page*

**Section B**  
**SEPARATIONS**

## Immediate Separation Processing, Continued

Procedures,  
continued

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

**Section B  
SEPARATIONS**

## Priority Separation Processing

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

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

**Procedures** Procedures required for a Priority separation.

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

*Continued on next page*

**Section B**  
**SEPARATIONS**

## Priority Separation Processing, Continued

**Procedures**  
**(continued)**

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

**Section B  
SEPARATIONS**

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## E-mail Format for Immediate and Priority Separations

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### (Not Requesting a Document Number and Accounting Data)

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

## Routine Separation Processing

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

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

**Procedures**      Procedures required for Routine separation.

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

*Continued on next page*



**Section B  
SEPARATIONS**

**Routine Separation Processing, Continued**

**Procedures  
(continued)**

<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. Collect the member's Common Access Card (CAC) and dependent ID cards; return to the nearest Real-Time Automated Personnel Identification System (RAPIDS) for disposal. The nearest RAPIDS facility can be located at the following website: <a href="http://www.dmdc.osd.mil/rsl/owa/home">http://www.dmdc.osd.mil/rsl/owa/home</a> .
	SPO	SPO approves separation transaction in Direct Access

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

## Cancellation of Document Numbers and Accounting Data

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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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## **Preparation of Separation Orders**

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

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**Special Instructions** Separation Orders shall include the following remark:

“You are directed to submit a Travel Claim to PSC (tv1) within 3 days after completion of the travel under these orders. If you decide to cancel these orders, you are personally liable for the repayment of any funds expended in accordance with these orders.”

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

**(Exhibit 3-B-3)**

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

MEMBER’S SIGNATURE

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## Enlisted to Cadet Status Processing

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

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

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

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

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

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**Section B  
SEPARATIONS**

## Regular Retirement Separations

**Introduction** Retirements are normally processed as routine separations

**Reference**

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

**Procedures** Procedures required for a retirement.

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

**Section B  
SEPARATIONS**

## Disability Retirement Separations

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

**Reference**

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

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

Day	Who Does It	What Happens
0	CGPC (opm/epm)	Issues message directing temporary or permanent disability retirement.
1	SPO	<ul style="list-style-type: none"> <li>• Sends urgent E-mail message to PSC (ses) with pertinent information using the format provided in <a href="#">Exhibit 3-B-1</a> (Email Format for Separations).</li> <li>• Ensures member has an updated <a href="#">Mailing Address</a> in Direct Access or completes an update if member does not have access to Direct Access.  <p style="margin-left: 40px;"><b>Note:</b> The mailing address information must be entered and verified in Direct Access to facilitate mailing of the final pay and the end of year mailing of the member's IRS Form W-2.</p> </li> <li>• Prepares the Orders transaction in Direct Access</li> </ul>
2	PSC (ses)	<p>Notifies the SPO of the required data to complete block 18 (remarks) of the DD-214 (if applicable) relative to the payment of Severance Pay, Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay, and SRB recoupment endorsement on the reverse side of the DD-214 (if applicable).</p> <ul style="list-style-type: none"> <li>• Calculates the final pay due the member.</li> <li>• Schedules a special payment through Treasury to ensure the member receives final separation pay on his/her separation date.</li> </ul>

*Continued on next page*

**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 the DD-214 and the standard separation letter (from enclosure (4) to this manual) to the member.
	Member	Visit the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility for retired ID card. To find the nearest RAPIDS facilities go to the following website: <a href="http://www.dmdc.osd.mil/rsl/owa/home">http://www.dmdc.osd.mil/rsl/owa/home</a> .
	SPO (HRSUP Role User)	On the effective date of terminal leave or retirement, approves the retirement separation transaction in Direct Access.

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**Section B  
SEPARATIONS**

## Checklist for Separations

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

**Separation checklist** Action when separating a member.

Step	Action	Reference	Date
1	<ul style="list-style-type: none"> <li>• Complete predischarge interview 6 months prior to separation date</li> <li>• If member is not recommend or not eligible for reenlistment, complete documentation as required</li> <li>• Transition Assistance Program counseling</li> </ul> <p>Forward the following to the SPO:</p> <ul style="list-style-type: none"> <li>• <a href="#">Preseparation Counseling Checklist for Active Component Service Members (DD-2648)</a>.</li> </ul> <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> <li>• <a href="#">Preseparation Counseling Checklist for Reserve Component Service Members Released From Active Duty (DD-2648-1)</a></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>	<a href="#">PERSMAN</a> , 12-B-4, <a href="#">ALCOAST 049/00</a> , <a href="#">PERSMAN</a> 12-B-5	
		<a href="#">COMDTINST 1900.2 (series)</a>	
		(Forms available from PSC's web site <a href="http://www.uscg.mil/hq/psc/forms">http://www.uscg.mil/hq/psc/forms</a> )	
		<a href="#">PPPM, Encl. (6)</a>	
2	Ensure member is physically qualified for separation.	<a href="#">PERSMAN</a> , 12-B-6	
3	Complete an E-Resume at least six months prior to date of separation indicating member's intention to separate. For all members eligible/recommended for reenlistment: <ul style="list-style-type: none"> <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>	<a href="#">PPPM, 5-D-13</a>  <a href="#">Direct Access Guide, E-Resume</a>	

*Continued on next page*



**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.	<a href="#">PERSMAN</a> , 12-B-4	
5	Complete Career Intentions Worksheet, PCS Departing/Separation Worksheet, PCS Entitlements Worksheet, and, and forward to SPO at least 60 days prior to the separation date.	<p>(Forms available from PSC's web site <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>• <a href="#">CG PSC-2000</a></li> <li>• <a href="#">CG PSC-2003</a></li> <li>• <a href="#">CG PSC-2045</a></li> </ul>	
6	SPO forward DD-214 WS (worksheet) to the member, via the unit, for review and approval	<a href="#">DD-214 Instruction</a>	
7	If the member is being discharged, and desires immediate enlistment in the Coast Guard Reserve the SPO will complete and forward an Enlistment Contract (DD-4/1), effective the day following discharge, to the unit for administration of the oath and signature.		
8	Ensure member schedules appointment with servicing transportation office to arrange shipment of household goods.	<a href="#">CGTRANSMAN</a> , 1-H-1	

*Continued on next page*

**Section B  
SEPARATIONS**

## Checklist for Separations, Continued

Separation checklist (continued)

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

**Section B  
SEPARATIONS**

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## Checklist for RELAD

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

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

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

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**Section B  
SEPARATIONS**

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## Checklist for Discharge

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

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**Checklist for discharge** Additional items when discharging a member.

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

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**Section B  
SEPARATIONS**

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## Checklist for Retirement

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

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**Checklist for retirement**      Additional items when retiring a member.

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

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*Continued on next page*

**Section B  
SEPARATIONS**

## Checklist for Retirement, Continued

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

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

*Continued on next page*

**Section B  
SEPARATIONS**

## Checklist for Retirement, Continued

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

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

**Section B  
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## Reserve Retirement Separations

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

**Procedures** Procedures for Retirement With Pay (RET-1)

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

*Continued on next page*



**Section B  
SEPARATIONS**

## Reserve Retirement Separations, Continued

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

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

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

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## Section Overview

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**Introduction** This section will guide you through the process and procedures to report completion of formal training courses, educational accomplishments, and qualification changes.

---

**In this section**

Topic	See Page
<a href="#">Training and Educational Accomplishments</a>	4-C-2
<a href="#">Individual's Record of Small Arms Training</a>	4-C-4
<a href="#">Lump Sump Payments to VEAP or MGIB-K Programs</a>	4-C-5
<a href="#">Managing Competencies</a>	4-C-7
<a href="#">Insignia</a>	4-C-8

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## Training and Educational Accomplishments

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**Introduction** Completion of Coast Guard formal training courses (Class “A” and “C” schools) must be recorded in the Direct Access system. Other educational accomplishments shall be recorded in the Training Management Tool (TMT) application in accordance with [COMDTINST 5270.2, Mandatory Use of the Training Management Tool](#).

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**References**

- (a) [Training & Ed Man](#), Chap 4
- (b) [RPM](#), 8.C.9
- (c) [Direct Access Online Manual, Member Competencies](#) :

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**Formal Training Courses** This is the process of reporting completion of a formal training course:

Stage	Who Does It	What Happens
1	Member	Completes a Career Development Worksheet ( <a href="#">CG PSC-2030</a> )  <b>Note:</b> If more than one member of the unit attended the same course, at the same time, the unit may submit a list of attendees in lieu of individual worksheets.
2	Unit	Forwards worksheet or list of attendees to SPO or
3	SPO/Unit	Completes appropriate Direct Access transaction. Direct Access path: <a href="#">Develop Workforce</a> > <a href="#">Manage Competencies (GBL)</a> > <a href="#">Use</a> > Training

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**Retest of enlisted battery tests** This is the process for reporting a retest of an enlisted battery test.

Stage	Who Does It	What Happens
1	Unit	<ul style="list-style-type: none"> <li>• Provides a copy to the member</li> <li>• Forwards a letter documenting a retest to SPO or</li> </ul>
2	SPO/Unit	Completes appropriate Direct Access transaction. Direct Access path: <a href="#">Develop Workforce</a> > <a href="#">Recruit Workforce</a> > <a href="#">Use</a> > Test Results

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*Continued on next page*

## Lump Sum Payments for Veteran's Education Assistance Program (VEAP) or Montgomery GI Bill (MGIB) Additional Contributions and Request for VEAP Refunds

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<b>Introduction</b>	This section provides the procedures for making lump sum payments for educational benefit programs and for requesting a refund of contributions made under VEAP
<b>Reference</b>	<ul style="list-style-type: none"><li>(a) <a href="#">Training &amp; Ed Man</a>, 3-D-3</li><li>(b) <a href="#">PAYMAN</a>, 7-D</li><li>(c) GI Bill Website - <a href="http://www.gibill.va.gov/">http://www.gibill.va.gov/</a></li><li>(d) <a href="#">COMDTINST 1760.9(series), Montgomery G.I. Bill (MGIB) - Active Duty Education Assistance Program</a></li><li>(e) The Veterans Benefits And Health Care Improvement Act of 2000 (Public Law 106-419)</li></ul>
<b>VEAP</b>	The Veteran's Education Assistance Program (VEAP) was available to any member who first became a member between 1 January 1977 and 30 June 1985. Participating members, who had an "E" type allotment in the past, may make a lump sum payment to bring their total contribution up to \$2700, in order to convert their VEAP eligibility to MGIB.
<b>MGIB Additional Amount</b>	<p>Effective May 1, 2001, qualified members can increase their monthly MGIB benefits by contributing additional funds up to \$600. Members with sufficient remaining time in service may make the additional contribution via an allotment. Monthly deductions are made in increments of \$20 with a minimum contribution of \$20. The total additional contribution will not exceed \$600. Members separating from the service may elect to make a lump sum contribution.</p> <ul style="list-style-type: none"><li>• Members desiring to make the additional contribution via an allotment should complete an Allotment Worksheet (CG PSC-2040) and forward it to their SPO.</li><li>• Lump sum contributions shall made in accordance with the procedure on the following page.</li></ul>

*Continued on next page*

Section C  
EDUCATION AND QUALIFICATIONS

## Lump Sum Payments for Veteran’s Education Assistance Program (VEAP) or Montgomery GI Bill (MGIB) Additional Contributions and Request for VEAP Refunds, Continued

**Procedure for lump sum VEAP or MGIB payment**      This is the process for making lump sum payments for contributions to VEAP or MGIB-K accounts:

Stage	Who does it?	What Happens
1	Member	Contacts SPO
2	SPO	Determines if amount being deposited is a valid amount (e. g. Member is eligible and has not already made the maximum contribution).
3	Member	Prepares a check or money order payable to U. S. Coast Guard with the following information: <ol style="list-style-type: none"> <li>1. Name</li> <li>2. SSN</li> <li>3. Total amount of lump sum and period covered by the lump sum.</li> </ol> <p style="text-align: right;">Mails payment to: ATTN: COLLECTION CLERK COMMANDING OFFICER (MAS-DC) USCG PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591</p>

**Procedure for VEAP refund**      Use this procedure to request a VEAP refund.

Step	Action
1	Complete application for Refund of Educational Contributions ( <a href="#">VA Form 4-5281</a> ) items 1-10 must be completed.
2	Mail application to: ATTN: VOUCHER SECTION COMMANDING OFFICER (DC) USCG PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA, KS 66683-3591
3	Member should receive refund within 90 days.

## Designation of Beneficiaries and Emergency Contacts, 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/g-wpm-2/SGLI.htm> (CG Military Personnel's SGLI homepage)
- (d) [Direct Access Online Manual, SGLI](http://www.uscg.mil/hq/psc/ps/persru/elections_and_beneficiaries.htm) ([http://www.uscg.mil/hq/psc/ps/persru/elections\\_and\\_beneficiaries.htm](http://www.uscg.mil/hq/psc/ps/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.

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

---

**Combat SGLI Allowance**      Members serving in certain areas (as designated by SECDEF/SECDCDHS), will receive an allowance in an amount equal to the amount of the deduction made for the maximum amount of SGLI coverage plus the amount for TSGLI coverage. All members serving in designated areas will have automatically have maximum SGLI coverage.

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*Continued on next page*



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

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**Instructions for completing the SGLV-8286**

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

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**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.

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

See Ref. (a), 6.06.

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*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 unit representative must sign and date when the SGLV-8286 is received from the member**

An authorized representative of the U. S. Coast Guard (i.e., CO, XO, OINC, XPO, Yeoman, etc.) must sign his or her name below the member's signature to indicate that he/she received the form from the member (whether in person, by mail or electronically) and should include the date he/she received it. The date the form is received and signed 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 received by or received date.
  - 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	Unit	<p>Unit representative signs and dates form upon receipt from member (whether in person, by mail or electronically).</p> <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>
3	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

## Section Overview

---

**Introduction** This section will guide you through the procedures required for members with dependents. It will assist you in reporting dependency changes, and issuing dependent ID cards.

---

**In this section**

<b>Topic</b>	<b>See Page</b>
<a href="#">Dependency Information</a>	5-B-2
<a href="#">BAH/Dependency Data Form</a>	5-B-4
<a href="#">TRICARE Dental Plan</a>	5-B-6
<a href="#">Applying for a Uniformed Service Identification and Privilege Card (DD Form 1173)</a>	5-B-8
<a href="#">Verification of Eligibility for the DD Form 1173</a>	5-B-10
<a href="#">Reserve Family Member Identification Card (DD Form 1173-1)</a>	5-B-12
<a href="#">Information concerning the Application For Uniformed Services Identification Card-DEERS Enrollment (DD Form 1172)</a>	5-B-14
<a href="#">Defense Enrollment Eligibility Reporting System (DEERS)</a>	5-B-16

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## Dependency Information

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**Introduction** In order to avoid overpayment, underpayment and to determine eligibility for benefits and privileges administered by the uniformed services, members must notify their units/SPOs immediately upon a change in dependency status.

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**References**

- (a) [PAYMAN](#)
- (b) ID Cards ([DODINST 1000.13](#)) Procedures for manually issued (non-RAPIDS) ID cards.
- (c) [COMDTINST M5512.1\(series\)](#), Identification cards for members of the uniformed services, their eligible family members, and other personnel.
- (d) [Direct Access, Dependency/Emergency Data Activity Guide](#)

---

**Responsibility** The member has responsibility for reporting dependency status changes. Complete a [Dependency Worksheet \(CG PSC-2020\)](#) (and other supporting worksheets if required by the instructions in this section and on the reverse of the Dependency Worksheet) upon initial accession **and if a member:**

- Gets Married, Separated or Divorced
- Has an incapacitated child who turns 18 (If the member is approaching retirement, forward supporting documentation regardless of the age of the child)
- Gains or loses a dependent (e.g., after a dependent dies, marries or divorces and reverts to dependent status)
- Has a questionable case of dependency

**Also** submit form [SGLV-8286A, Family Coverage Election \(SGLI\)](#), whenever a married member is accessed into the service and when a member's marital status changes.

---

**Final divorce decree not available** To avoid overpayment, members with no other dependents who are awaiting a copy of a final divorce decree should request payment of BAH, OHA and/or COLA at the with dependents rates be stopped effective the date the divorce will become final. The divorce decree must be provided when it becomes available.

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*Continued on next page*

**Section B  
DEPENDENT AFFAIRS**

## Dependency Information, Continued

**Systems that need to be updated**

When a member reports a change in dependency, the information is recorded in Direct Access, JUMPS for pay purposes, and in the Defense Eligibility Enrollment System (DEERS), to record eligibility for benefits and privileges.

**Forms**

This table shows the forms that are needed, as indicated, when a member has a change in dependency or there is a need to verify dependency status (e.g. Child over age 21). To determine when to use a form and the procedures for completing the form, consult the reference.

<b>Form</b>	<b>Purpose</b>	<b>Reference</b>
Application For Uniformed Service Identification Card- DEERS Enrollment (DD-1172)	Determine entitlement to ID cards, medical care, exchange, theater, and commissary privileges. Update DEERS database	<a href="#">COMDTINST M5512.1 (series)</a>
Designation of Beneficiaries ( <a href="#">CG PSC-2020D</a> )	Casualty reporting, list next of kin and designate beneficiaries	<a href="#">PPPM 5-A</a>
Dependency Worksheet ( <a href="#">CG PSC-2020</a> )	Provide dependency information to SPO and also to determine eligibility for payment of BAH with dependents	<a href="#">PAYMAN Chap 3-F</a>
DOD Guard and Reserve Family Member ID Card DD-1173-1	Identify dependents of Ready Reserve Members	<a href="#">COMDTINST M5512.1 (series)</a>
Full-Time Student Statement ( <a href="#">CG PSC-2020B</a> )	Supporting documentation for a member claiming a child over age 21 as a dependent (Support Statement CG PSC-2020A also required, see below).	<a href="#">COMDTINST M5512.1 (series) &amp; PAYMAN Chap 3-F</a>
SGLI Election and Certificate ( <a href="#">SGLV-8286</a> )	Elect SGLI amount and designate beneficiaries	<a href="#">PPPM 5-A</a>
<a href="#">SGLV-8286A, Family Coverage Election</a>	Married members must make an election or specifically decline Family SGLI coverage	<a href="#">PPPM 5-A</a>
Support Statement ( <a href="#">CG PSC-2020A</a> )	Supporting documentation for a member claiming a child over age 21 (incapacitated or full-times student status), parent or parent-in-law as a dependent.	<a href="#">COMDTINST M5512.1 (series) &amp; PAYMAN Chap 3-F</a>
Uniformed Services Identification and Privilege Card (DD-1173)	Identify individual eligible for dependent benefits and privileges	<a href="#">COMDTINST M5512.1 (series)</a>

## **BAH/Dependency Data Form**

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**Introduction** The BAH/Dependency Data form is computer generated via Direct Access. Members update the information contained in the BAH/Dependency Data form by submitting a [Dependency Worksheet \(CG PSC-2020\)](#) with the new data to their SPO. Instructions for completing the CG PSC-2020 are on the back of the form. Members must also submit form [SGLV-8286A, Family Coverage Election \(SGLI\)](#), whenever their marital status changes.

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**References**

- (a) [PAYMAN](#), Chap 3-F
- (b) ID Cards ([DODINST 1000.13](#)) Procedures for manually issued (non-RAPIDS) ID cards.
- (c) [COMDTINST M5512.1\(series\)](#), Identification cards for members of the uniformed services, their eligible family members, and other personnel.
- (d) [Direct Access, Dependency/Emergency Data Activity Guide](#)

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**Purpose** The BAH/Dependency Data form is an official document required by law for the use pertaining to:

- Person(s) to notify in case of emergency or death
  - Name of person(s) receiving death gratuities
  - Person(s) who receive allotment of pay if missing or unable to transmit funds
  - Person(s) who receive unpaid pay and allowances
  - Record dependents as defined in the PAYMAN to determine dependency for BAH entitlement purposes
  - Verify (on an annual basis) that dependents, on who BAH is being paid, continue to be related to and supported by the member.
- 

**Annual Verification** Annually, during the months of October and November, members must verify their computer generated BAH/Dependency Data form. Refer to Section [5-C](#) of this manual for procedures on the annual verification.

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*Continued on next page*



## **BAH/Dependency Data Form, Continued**

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**Other uses for the BAH/Dependency Data form**

The BAH/Dependency Data form may be used as partial supporting documentation as long as the individual claimed as a dependent remains a dependent.

Here are some examples of when the BAH/Dependency Data forms may be used as partial supporting documentation:

- Payment of family separation allowance and/or family separation - housing
  - Payment of station allowances at the with dependents rate
  - Payment of dislocation allowance at the with dependents rate
  - When applying for dependent ID cards and DEERS privileges
- 

**Cases not to use the Dependency Worksheet (CG PSC-2020)**

Do not use the CG PSC-2020 to designate a beneficiary or change amount of coverage for:

- National Service Life Insurance
  - Servicemembers' Group Life Insurance (use VA Form [SGLV-8286](#))
  - SGLI Family Coverage (Use form [SGLV-8286A, Family Coverage Election \(SGLI\)](#)).
  - Government Life Insurance
- 

**When to submit the Designation of Beneficiaries (CG PSC-2020D)**

The CG PSC-2020D must be submitted by all active duty and reserve members and cadets upon:

- Initial entry into the Coast Guard or Coast Guard Reserve
- Reenlistment after a break in service
- Change in status from enlisted to officer or officer to enlisted
- Recall to active duty of retired members
- Reporting to a new Permanent Duty Station
- Anytime a member acquires an initial or additional dependents
- When any material change occurs in dependency status.
- (Separation, divorce, death of dependent, dependent entering the Armed Forces, voluntarily withdrawing dependency claim, etc.)
- Changes to the form occurring in any item

**Note:** When removing any dependent from the BAH/Dependency Data that originally required PSC approval of the dependent, a copy of the new BAH/Dependency Data form must be forwarded to PSC (1gl).

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## **Tricare Dental Plan**

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**Introduction**      The TRICARE Dental Program (TDP) replaced TRICARE dental programs for active duty family members (TFMDP) and Selected Reserve (SELRES) personnel (TSRDP). There are no Direct Access entries associated with the Tricare Dental Plan.

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**Reference**            (a) [PAYMAN](#) Chap 6-C  
                              (b) <http://www.tricare dental program.com/tdptws/home.jsp>  
                              (TRICARE Dental Program Contractor website).  
                              (c) TRICARE Dental Program Benefit Booklet  
                              [http://www.tricare dental program.com/tdptws/forms/TDP\\_Booklet\\_Lo\\_Res.pdf](http://www.tricare dental program.com/tdptws/forms/TDP_Booklet_Lo_Res.pdf)

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**Discussion**            Members desiring coverage under the TRICARE Dental Plan must enroll through the contractor, United Concordia Companies, Inc. (UCCI). Enrollment in the plan is automatic for members previously enrolled in the Family Member Dental Plan (FMDP). All other active duty members and SELRES and IRR personnel must enroll to participate.

- TDP provides the same dental benefits to all participants.
- Premiums will be paid through payroll allotment from the sponsor's pay for family members of active duty personnel. In some cases, it may be direct billing.
- Premiums for reservists will be paid by deduction from the member's pay or by direct billing. Premium payments for a reservist's family members will be made by direct billing.

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**Eligibility / Enrollment requirements**      See reference (b) (<http://www.tricare dental program.com/tdptws/enrollees/eligibility/eligibility.jsp>) OR reference (c), chapter 2.

---

**TDP premiums and changes**      TDP premium amounts change annually on February 1st. See reference (b) ([http://www.tricare dental program.com/tdptws/enrollees/premiums/costshares\\_premiums.jsp](http://www.tricare dental program.com/tdptws/enrollees/premiums/costshares_premiums.jsp)) or reference (c), chapter 5.

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*Continued on next page*

**Section B**  
**DEPENDENT AFFAIRS**

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## **Tricare Dental Plan, Continued**

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<b>Enrollment options</b>	Individual and family enrollment options are available. See reference (b) ( <a href="http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp">http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp</a> ) or reference (c), chapter 2 for more information.
<b>Enrollment period</b>	The minimum enrollment period is 12 months. See reference (b) ( <a href="http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp">http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp</a> ) or reference (c), chapter 2 for exceptions.
<b>Disenrollment procedure</b>	See reference (b) ( <a href="http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp">http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp</a> ) or reference (c), chapter 2 for disenrollment procedures.
<b>Automatic disenrollment</b>	Separation, retirement or a family member's loss of eligibility (e. g. dependent child reaches age 21) will result in automatic disenrollment. See reference (b) ( <a href="http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp">http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp</a> ) or reference (c), chapter 2 for more information.
<b>Effective date of coverage / Evidence of coverage</b>	Enrollment will be confirmed with the issuance of dental identification cards. Please do not seek dental treatment without confirmation of enrollment. If a member has received their identification card and are seeking care, contact United Concordia's Enrollment and Billing Member Services Department at 1-888-622-2256. See reference (b) ( <a href="http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp">http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp</a> ) or reference (c), chapter 2 for more information.
<b>New enrollment in the TDP</b>	United Concordia handles the enrollment process. Enrollment must be initiated by the sponsor and is accomplished by completing a TDP Enrollment Form. Forms are available by calling United Concordia at 1-888-622-2256 to request a form, by accessing the United Concordia website at <a href="http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp">http://www.tricare dental program.com/tdptws/enrollees/enrollment/enrollment.jsp</a> , or from your Health Benefits Advisor. With the initial enrollment application, all new enrollees must submit a payment equal to the member's portion of one month's premium.

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## Applying for a DD Form 1173

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**Introduction**      The DD Form 1173 is an ID Card used to identify individuals eligible for privileges administered by the uniformed services. This will guide you through the application process.

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- References**
- (a) [PERSMAN](#), Chap. 18-C, Uniformed Service Identification and Privilege Card, DD Form 1173
  - (b) ID Cards ([DODINST 1000.13](#)) Procedures for manually issued (non-RAPIDS) ID cards.
  - (c) [COMDTINST M5512.1A](#), Identification cards for members of the uniformed services, their eligible family members, and other personnel, Chap. 15,
- 

**How to apply**      This is the process for applying for a DD Form 1173

<b>When</b>	<b>Then</b>
the member is active duty CG and at the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is away from the command,	submit a DD Form 1172 to any military installation that issues ID cards.
the active duty member is on extended deployment outside CONUS	the dependent can renew an expired card at any military installation that issues ID cards.
the active duty member is retiring,	before retiring submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the active duty members is placed on the Temporary Disability Retirement List,	submit a DD Form 1172 to any military installation that issues ID cards.
the reserve member is retired with pay,	submit a DD Form 1172 for the dependent to any military installation that issues ID cards.
the member is a 100% disabled veteran,	submit a DD Form 1172 for the dependent(s) to any military installation that issues ID cards.
the member is separating and is eligible for Transition Assistance benefits	submit a DD Form 1172 for the member and dependent(s) to the command holding the PDR.

*Continued on next page*

**Section B  
DEPENDENT AFFAIRS**

## Applying for a DD Form 1173, Continued

### How to apply (continued)

When	Then
The member is from an armed force of a foreign nation	<ul style="list-style-type: none"> <li>• DD Form 1172</li> </ul>
The member has a foreign marriage or divorce	<ul style="list-style-type: none"> <li>• DD Form 1172</li> <li>• Translated copy of foreign marriage certificate/divorce decree</li> </ul>
The member has a dependent parent or parent-in-law	<ul style="list-style-type: none"> <li>• DD Form 1172</li> <li>• <a href="#">Support Statement, (CG PSC 2020A)</a></li> <li>• Copy of member's tax return (IRS Form 1040/1040A showing parent claimed as dependent)</li> </ul>
Member has a child, full-time in college, over age 21 but less than age 23.	<ul style="list-style-type: none"> <li>• <a href="#">Support Statement, (CG PSC 2020A)</a> (<i>See note</i>)</li> <li>• <a href="#">Full-Time Student Statement, (CG PSC-2020B)</a></li> </ul> <p><b>Note:</b> The Support Statement, (CG PSC 2020A) is required to be completed with the first application for an ID card when the child is age 21 or over. If there is a need to reissue a card, prior to the child's 23<sup>rd</sup> birthday, the sponsor may certify in block 89 of the DD Form 1172 that he or she is providing over 50% of the child's support.</p>
Member has a child over age 21 incapable of self support	<ul style="list-style-type: none"> <li>• DD Form 1172</li> <li>• <a href="#">Support Statement, (CG PSC 2020A)</a></li> <li>• Medical/psychological statement of incapacitation</li> <li>• Social Security Administration determination concerning Medicare Part A entitlement</li> <li>• Copy of member's tax return (IRS Form 1040/1040A showing child claimed as a dependent)</li> </ul>
The member has an unremarried or unmarried former spouse AND this is an initial ID card issuance (the former spouse is not enrolled in DEERS)	<ul style="list-style-type: none"> <li>• DD Form 1172</li> <li>• <a href="#">Statement for Former Spouse, (CG PSC 2020C)</a></li> <li>• Certified copies of marriage and divorce decrees</li> </ul>

### How to complete the DD Form 1172 and DD Form 1173

Detailed instructions on how to complete the DD Form 1172 and DD Form 1173 can be found in [COMDTINST M5512.1A](#), Identification cards for members of the uniformed services, their eligible family members, and other personnel.

## **Verification of Eligibility for the DD Form 1173**

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**Introduction** This information is provided to aid you in determining the eligibility of a member's past and present dependents for the DD Form 1173.

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**Reference** (a) [PERSMAN, Article 18-C-2, Eligibility](#)  
(b) [COMDTINST M5512.1A](#), Identification cards for members of the uniformed services, their eligible family members, and other personnel, Chap. 15,

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**Verification of eligibility** Any ID card issuing unit can verify eligibility and issue original cards by using DEERS or by presentation of:

- Retirement orders
  - DD-214
  - Marriage, birth, or death certificate
  - VA letter of certification
- 

**If eligibility cannot be established** When eligibility cannot be established through DEERS or by documentation presented then contact these offices;

<b>Coast Guard</b>	COMMANDER (RAS) COAST GUARD PERSONNEL SERVICE CENTER 444 SE QUINCY STREET TOPEKA KS 66683-3591 (800) 772-8724/(785) 357-3416
<b>Air Force</b>	HQ AFCGPC/DPMDOP NORTHEAST OFFICE PLACE 9504 I H 35 NORTH SAN ANTONIO TX 78233-6636 (210) 652-2089
<b>Marine Corps</b>	COMMANDANT OF THE MC CODE: MMSR6 WASHINGTON DC 20380-0001 (202) 614-1031/1038

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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 B**  
**DEPENDENT AFFAIRS**

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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>• If single member with dependents, or member married to member with dependents, certify availability for worldwide assignment IAW reference (b), Art. 4.A.6.g.</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 accessed USCG/USCGR member with prior service that has not been verified by prior issuance of SOCS. Request for SOCS should be submitted by the accession processing point (as listed in section 3-A-4 of this manual).
- Any reserve member entering Extended Active Duty (EAD) 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*

## Personnel Data Extract (PDE)

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**Introduction**      The Personnel Data Extract (PDE), CG-4902, is periodically produced by Direct Access and provides important personnel database information.

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**Reference**            [Direct Access Online Manual](#)  
                           [SWE PDE](#) (Self Service for Members)  
                           [Warrant PDE](#) (Self Service for Members)  
                           [Command Access to SWE PDEs](#) (Self Service for Commands)

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**The PDE**             The PDE is provided to give the member a description of all the items in the database concerning the next servicewide exam cycle or warrant officer appointment cycle. It is issued prior to each active and reserve exam cycle.

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**Upon receipt**        Follow these rules upon receipt of a PDE.

If	Then
no errors are found,	member signs and returns to unit
errors are found or suspected,	forward to the SPO with necessary supporting documents

---

**Direct Access Path**      Field units have the capability to view/print SWE PDE's for their enlisted members. Once PSC (adv) creates PDE's for a SWE cycle, the unit may access the SWE PDEs for individuals or entire departments. This process is available to DA users with "Self Service for Commands" access level and may be used on a For Official Use Only (FOUO) basis.

**Individual SWE PDE:**

- Self Service> Self Service for Commands> Use> PDE.

**SWE PDEs for all members of a department:**

- Self Service for Commands> Reports> PDE by Dept Report

**Members may view both their SWE and CWO PDEs by following this menu paths in Direct Access:**

- Self-Service > Employee > View > SWE PDE    or    > Warrant PDE

**Note:** Members are to verify that any needed corrections have been made by the SPO. This verification must be done before the PDE correction deadline indicated in the SWE announcement message.

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## Security Clearances

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**Introduction**      This has been provided to help you locate the policies and procedures for maintaining personnel security clearance information.

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**Reference**      (a) [PERSEC](#), Chap. 2, Administrative Procedures.

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**Personnel Security Record**      When the Central Adjudication Facility (CAF) makes a favorable security determination, notification is made via Direct Access updates and by a certificate of clearance known as the source document. This source document shall have a properly executed SF-312 and CG-5588 attached and is filed in Part 3 of the Unit PDR, if Unit PDR is not kept file in Part 2 of SPO PDR.

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**Preparation and Maintenance of Security Documents**      Policies and procedures governing the preparation and maintenance of security documents can be found in the PERSEC.

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**Section D  
MISCELLANEOUS**

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## Section Overview

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**Introduction** This section provides you with the information needed to understand and perform miscellaneous personnel transactions that are not covered in any other section of this manual.

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**In this section**

<b>Topic</b>	<b>See Page</b>
<a href="#">Leave Authorization (CG-2519)</a>	5-D-2
<a href="#">Leave Carried over in Excess of 60 Days</a>	5-D-4
<a href="#">Issuance of the Common Access Card (CAC)</a>	5-D-6
<a href="#">Manual Preparation of the DD Form 2 CG (active ID card)</a>	5-D-9
<a href="#">Reporting Change in Mailing Address</a>	5-D-11
<a href="#">Employment Verification</a>	5-D-12
<a href="#">E-Resume</a>	5-D-13
<a href="#">Assignment/Termination of Government Quarters</a>	5-D-14
<a href="#">Permissive Travel Authorization</a>	5-D-16
<a href="#">Corrections/Changes of Names, SSN, Date of Birth, or Minority Designator</a>	5-D-17
<a href="#">TRICARE Selected Reserve Dental Program</a>	5-D-19
<a href="#">Issuance/Termination of Official Passport</a>	5-D-21

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## Leave Authorization (CG-2519)

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**Reference** (a) PERSMAN, Chap. 7-A, Leave  
(b) [ALCOAST 387/04](#)  
(c) Direct Access Guide, Leave

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**CG-2519 usage** The Leave Authorization (CG-2519) is used to authorize:

- Regular, sick or emergency leave  
**Note:** The CG-2519 is only required for sick leave in excess of 2 days.
- Compensatory absence in connection with leave

---

**Do NOT use the CG-2519 for Compensatory Absence in conjunction with TDY/PCS orders** The Leave Authorization (CG-2519) must not be used for compensatory absence (CA) in the following instances:

- Periods of CA which are associated with PCS
- Periods of CA in conjunction with TDY orders
- CA, unless such absence is granted consecutively with leave

---

**Do NOT use the CG-2519 for Administrative Absences** An administrative absence is a period of authorized absence, not chargeable as leave. Examples of administrative absences include:

- Hometown Recruiting Program.
- Relocation and familiarization when in receipt of PCS orders.
- Allowing members to return to their old duty stations to move their families to their new duty stations when PCS orders were issued and executed on short notice (fewer than 60 days).
- Allowing retiring and involuntarily separated members time to participate in pre-separation job search and house hunting activities prior to separation.
- Authorizing a member to attend to associated family needs following the birth or adoption (Note: Adoption “*Leave*” (up to 21 days in a calendar year) is an Administrative Absence it is not chargeable as leave) of a child.

The policy for granting administrative absences is provided in Chapter 7-A-10, CG Personnel Manual. Procedures for administrative absences are provided on page 5-D-16 of this manual.

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*Continued on next page*

**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 **USCG 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.

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### Reference

- (a) PERSMAN, Article 7.A.15
  - (d) [ALCOAST 149/07](#)
- 

### Period in which to use leave carried over from previous fiscal year(s)

Members who are authorized to carry over leave in excess of 60 days to a maximum of 120 days due to service in an Imminent Danger Pay area for a continuous period of at least 120 days in a fiscal year, assignment to a deployable ship or mobile unit, and deployed or operated away from their designated homeport or home base for a continuous period of at least 60 days, or performed duty, on or after 29 Aug 2005, designated by the Secretary of Homeland Security as duty qualifying for carryover leave, have 3 years to use any carryover leave. 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 carryover leave). During fiscal year 1997 this member uses 32 days leave and accrues 30 days leave. This reduces the member’s carryover leave balance from the prior year to 3.0 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.

Members who are authorized to carry over leave in excess of 60 days to a maximum of 90 days due to (a) service in support of a Commandant approved contingency operation, and (b) do not qualify for 120 days leave carryover as described above, have until the end of the succeeding fiscal year to utilize the carry over leave. The carry over balance will not be reduced until all of the regular leave accrued for the year has been used.

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*Continued on next page*



Section D  
MISCELLANEOUS

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

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

Step	Who Does It	Action Taken
1	MEMBER	Submits a memo, via the chain of command, to PSC (MAS) with: <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.

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

Step	Who Does It	Action Taken
1	UNIT	Must submit a memo or message to PSC (MAS) with: <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.

## Issuance of the Common Access Card (CAC)

---

**Introduction** The Common Access Card (CAC) is used as a means of identifying military, DoD and Coast Guard government employees and contractors. The CAC can be issued at any Real-Time Automated Personnel Identification System (RAPIDS) to military, civilian and eligible contractors. Location of RAPIDS sites can be found at: <http://www.dmdc.osd.mil/rsl/owa/home>.

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**Reference** (a) [COMDTINST M5512.1A, Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel](#).

---

**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.

---

**Availability of RAPIDS Facilities** Under the DEERS/RAPIDS Cross-Service Support Agreement, each of the seven Uniformed Services RAPIDS facilities agrees to verify identity and eligibility and issue ID Cards to certain categories of eligible persons regardless of the parent Service or DoD affiliation.

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

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

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

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## Issuance of the Common Access Card (CAC), Continued

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**Categories of Personnel who are eligible for a CAC**

The following categories of personnel are authorized a CAC:

- Active duty members.
  - Members of the SELRES.
  - Coast Guard Civilian Employees (both Appropriated and Non-appropriated fund activity (NAFA)).
  - Contractors whose contracts authorize a CAC for computer access or frequent visits to DoD facilities.
- 

**Categories of personnel that can be cross-serviced**

Under the DEERS/RAPIDS Cross-Service Support Agreement, each of the seven Uniformed Services RAPIDS facilities agrees to verify identity and eligibility and issue ID Cards to certain categories of eligible persons regardless of the parent Service or DoD affiliation. This includes:

- Active, Reserve, and Retired members of any service on active duty for 31 days or more.
  - Retired Reserve members of any service who have reached their 60th birthday.
  - Family members of sponsors on active duty for 31 consecutive days or more.
  - Family members of retirees.
  - Family members of reservist.
  - Unremarried or unmarried former spouses previously enrolled DEERS.
  - Medal of Honor recipients and their eligible family members.
  - 100% disabled veteran's and their family members.
  - DoD Civilian and contractor employees.
  - Military affiliate (formerly foreign military).
  - Active Duty, Retired, and Reserve members of any service.
- 

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## Issuance of the Common Access Card (CAC), Continued

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**Categories of personnel that cannot be cross-serviced**

The following categories of personnel cannot be cross-serviced:

- Initial verification for unremarried or unmarried former spouses.
- Incapacitated children.
- Other individuals who require a dependency determination (over 50% support) (i.e., wards, parents, parents-in-law)
- Retirees from other Services and former members not currently enrolled in DEERS.
- Illegitimate child of a male sponsor, when paternity has not been judicially determined.
- Illegitimate child of sponsor's spouse, when the sponsor is a member of another Service.
- Navy and Marine Corps dependents residing in the Philippines
- Abused Dependents.

Contact Personnel Service Center (RAS) for Coast Guard members, dependents, and beneficiaries who fall into the categories than can not be cross-serviced.

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## Manual Preparation of the DD Form 2 CG (Active)

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**Introduction** Afloat units may issue DD Form 2 (Active) on a case-by-case basis, when underway and a RAPIDS facility is not available. This section provides the procedure for manual preparation of the DD Form 2 CG (Active). Procedures for all other card types can be found in [COMDTINST M5512.1A, Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel](#).

---

**Preparation** Prepare the DD Form 2 CG using a typewriter. All dates will be in YYYYMMDD format. Most entries on the card are self-explanatory, there are a few exceptions:

Block	Description
Grade	<ul style="list-style-type: none"><li>• For pay grades E-1 to E-3, enter NON PETTY OFFICER.</li><li>• For pay grades E-4, E-5 or E-6, enter PO3 (E-4), PO2 (E-5), or PO1 (E-6).</li><li>• For pay grades E-7, E-8 or E-9, enter CPO (E-7), SCPO (E-8), or MCPO (E-9).</li><li>• For pay grades CWO2 to CWO4 enter CWO (W-2), (W-3), (W-4), as appropriate.</li><li>• For pay grades O-1 to O-10, enter ENS (O-1), LTJG (O-2), as appropriate.</li><li>• For Cadets enter CDT.</li></ul>
Expiration Date	<ul style="list-style-type: none"><li>• Active duty enlisted, enter expiration of enlistment.</li><li>• Cadets, enter expected date of graduation.</li><li>• Reservists on active duty, enter expiration of active duty.</li><li>• Officers, enter INDEFINITE.</li></ul>
Signature	Type the full name below the line, member signs in black or blue ink above typed name.

*Continued on next page*

**Section D  
MISCELLANEOUS**

**Manual Preparation of the DD Form 2 CG (Active), Continued**

**Preparation (cont'd)**

<b>Block</b>	<b>Description</b>	
Social Security No.	Enter 9 digit SSN in format 000000000.	
Blood Type	Enter the member's blood type (e.g., B-, O+).	
Geneva Convention	Refer to the table below or see <a href="#">COMDTINST M5512.1(series)</a> , <a href="#">Attachment 13</a> , and enter I, II, etc. as appropriate.	
	<b>Pay grade</b>	<b>Geneva Convention Cat.</b>
	E-1 to E-4	I
	E-5 to E-9	II
	W-1 to O-3	III
	O-4 to O-6	IV
	O-7 to O-10	V
Date of Issue	Enter the date of signature by the issuing officer.	
Signature of Issuing Officer	Enter first name or initial, middle initial, last name, rate/rank, and branch of military service. Signature must be in black or blue ink.	

**Photograph (for manually prepared ID cards only)**

The size of the photo should be approximately 1 inch by 1 inch. The portrait will have the member's full face and consist of the largest image that will include the member's head and information on a title board before a neutral background. The portrait can be black and white or color. The member will be uncovered. An information board is required for members on active duty who are issued a manually prepared ID card. The information board will contain the following information about the member, each on a separate line below each other.

- Last name
- First name and middle initial
- Social security number

**Lamination**

Use only polyester, polyethylene coated plastic film, preferably .010 mil. in thickness and thermoplastic laminating equipment.

## Issuance of Official Passport

---

<b>Introduction</b>	This section provides procedures for issuance or termination of official passports.
<b>Reference</b>	<p>The following directives and web pages provide information about travel and official passports.</p> <ul style="list-style-type: none"><li>(a) <a href="#">CG Personnel Manual, COMDTINST 1000.6 (series)</a></li><li>(b) <a href="#">Foreign Travel, Passports and VISAS, COMDTINST 5000.5F</a> (as modified/superseded by <a href="#">ALCOAST 113/07</a>)</li><li>(c) Commandant, CG-00I Webpage <a href="http://www.uscg.mil/international/">http://www.uscg.mil/international/</a></li></ul>
<b>Policy</b>	<p>Per <a href="#">ALCOAST 113/07</a>, official passports shall only be issued to Coast Guard personnel whose official duties are expected to result in international travel into or out of a country requiring that U.S. service personnel present an official passport to enter or exit that country (see <a href="https://www.fcg.pentagon.mil">https://www.fcg.pentagon.mil</a>). In such cases, personnel shall only use diplomatic (black) or official (red) passports as credentials. In those countries where official passports are not required, other accepted forms of identification such as military ID and orders shall suffice. Official passports shall not be issued to deploying crews based solely on the prospect of a mid-patrol break or logistics stop in a foreign country.</p>
<b>Passport issuance procedure</b>	<p>The most updated information, forms, detailed instructions, and illustrative examples are maintained on the CG-00I internet site: <a href="http://www.uscg.mil/international">http://www.uscg.mil/international</a>.</p> <p>Passport acceptance agents are available at servicing ISCs and MLCs to assist with and verify passport applications. A complete listing of these agents and their locations is available in the international affairs community of CG Central and on the CG-00I internet site.</p>

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## Leave and Earnings Statement (LES)

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**Introduction** The Leave and Earnings Statement (LES) may be the most important document a member receives and therefore must be well understood by administrative support personnel to assist members when they have questions concerning their pay.

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**Description** Block-by-block descriptions may be found on the reverse of the LES. A comprehensive description is contained in “You and Your LES”, [Appendix \(F\)](#) of this manual.

---

**Disposition** Leave and Earnings Statement are distributed as follows:

- For active duty members, except members assigned to detached OPFACs, PSC (MAS) mails the Privacy Act copy of the LES to the member’s permanent unit for delivery to the member. If LESs for the entire unit are not received by the fifth day of the following month, notify the SPO and [PSC-Customercare@uscg.mil](mailto:PSC-Customercare@uscg.mil) or submit an online trouble ticket at [www.uscg.mil/hq/psc/customerservice.htm](http://www.uscg.mil/hq/psc/customerservice.htm). If an LES for one member is not received by the fifth of the following month notify the SPO.
- If a member is transferred before the LES is delivered, the unit from which the member departs forwards the LES to the new unit for delivery to the member.
- For reserve members, and members assigned to detached OPFACs, PSC (MAS) mails the Privacy Act copy of the LES to the member’s mailing address (the address shown in block 22 of the LES). Reserve members not on active duty, or members assigned to detached OPFACs, who do not receive their LES by the fifth day of the following month, should contact their SPO.
- SPO copies of LESs are forwarded by PSC (MAS) to the member’s SPO for review and filing in the SPO PDR. If the member has been transferred, the SPO will forward the SPO copy of the LES to the member’s new servicing SPO. The SPO process for reviewing and validating LES’s is contained in App (F) of this manual.

An abbreviated LES is available for members by using the Direct Access self-service module.

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**Direct Access path** [Self Service](#) > [Employee](#) > [View](#) > View Paycheck

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*Continued on Next Page*

## Leave and Earnings Statement (LES), Continued

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**Non-Computes** Occasionally, a member's file may not meet the conditions necessary to compute pay. When this occurs, the member will receive an LES for projected pay for the month(s) the member is in a non-compute status. The projected LES will only reflect allotment deductions. When the file is corrected, the member will receive a corrected LES for each month the file was in a non-compute status.

---

## Pay Notification for Members Assigned to Deployed Cutters or Overseas/Isolated Units

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**Net Pay Advice Message (NPAM)** Cutters and overseas/isolated units may receive mid and end of month pay information via Net Pay Advice Message (NPAM).

---

**Requesting NPAMs**

Eligible units must submit a one-time request to receive NPAMS.

- Requests for NPAMs may be submitted by message or E-mail to [PSC-CustomerCare@uscg.mil](mailto:PSC-CustomerCare@uscg.mil) or submit an online trouble ticket at <http://www.uscg.mil/hq/psc/customerservice.shtm>.

After the request has been processed, the unit will receive NPAMS on a continuous basis. There is no need to submit a new request prior to each deployment.

**Section A**  
**NOTIFICATION OF PAY**

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

---

## 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**

Topic	See Page
<a href="#">Regular Payments</a>	6-B-2
<a href="#">Special Payments</a>	6-B-3
<a href="#">Offline Payment Template</a>	6-B-5
<a href="#">Advance Payments</a>	6-B-6
<a href="#">Death Gratuity Payments</a>	6-B-8

---

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

---

## **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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**Background**

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:

1. **Nonreceipt of pay**: Member did not receive his/her regular semimonthly payment, or received it but it was lost or stolen.
  2. **Significant pay shortage**: Member's regular semi-monthly payment was significantly less than it should have been, and the member will experience a hardship if he/she must wait until the next scheduled payday to receive the pay due.
- 

**Reference**

(a) [PAYMAN](#), Section 9-C

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**Criteria for special payments due to nonreceipt of pay**

A member may be authorized a special payment once the ACH (Automated Clearing House) department at the member's financial institution verifies that no payment has been received. Special payments may only be requested by SPO personnel E-7 and above using the Offline Payment template (see page 6-B-5) and sent via email to [PSC-CustomerCare@uscg.mil](mailto:PSC-CustomerCare@uscg.mil) or submit an online trouble ticket at <http://www.uscg.mil/hq/psc/customerservice.shtm>. If Be sure to put member's Name, Emplid, and Special Payment Request in subject line.

---

**Criteria for special payments due significant pay shortage**

A member may be authorized a special payment if he or she meets all of the following 5 criteria:

- (1) The member is underpaid \$100.00 or more in his/her regular semimonthly payment; and
  - (2) The pay shortage amounts to 10% or more of the member's total pay entitlements; and
  - (3) The member is not scheduled to receive the reimbursement of the pay shortage in the next scheduled payday; and
  - (4) The pay shortage is causing the member to experience a financial hardship; and
  - (5) The SPO has submitted documentation certifying the member's entitlement to the additional pay due.
- 

*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 4 June 2007 will be deducted from the member's 15 June 2007 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.

<b>When member's pay delivery is</b>	<b>Then the ...</b>	<b>Does this...</b>
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 sends email to <a href="mailto:PSC-CustomerCare@uscg.mil">PSC-CustomerCare@uscg.mil</a> or via online trouble ticket using the Offline Payment template.
	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.

<b>When member's pay delivery is</b>	<b>Then the ...</b>	<b>Does this...</b>
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 information and sends email to <a href="mailto:PSC-CustomerCare@uscg.mil">PSC-CustomerCare@uscg.mil</a> or via online trouble ticket using the Offline Payment template.</li> </ul>
	PSC (mas)	<ul style="list-style-type: none"> <li>• Makes or authorizes special payment if needed within 3 working days.</li> </ul>

*Continued on next page*



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

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## Special Payments, Continued

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**Offline  
Payment  
template**

To: [PSC-CustomerCare@uscg.mil](mailto:PSC-CustomerCare@uscg.mil)  
Cc: Unit POC; Member  
Subject: Request for Special Payment

1. Request a special payment for RATE/RANK NAME, EMPLID, USCG
2. (*Reason for request*) Request for special direct deposit payment of pay and allowances for the period 16 June 2007 to 30 June 2007, due to non-receipt of pay for 01 July 2007. An e-mail statement of intent was submitted on 08 June 2007, reflecting member's intentions to extend current contract but was not submitted in time to make the 15 June 2007 pay cut.

Computation of payment are as follows:

<u>CREDIT</u>	<u>PERIOD</u>	<u>MONTHLY/DAILY AMOUNT</u>
BASIC PAY	2007JUN16 - 2007JUN30	\$60.91 X 15 DAYS = \$913.64
SDAP STRIKE TM	2007JUN16 - 2007JUN30	\$4.67 X 15 DAYS = \$70.05
ENL BAS	2007JUN16 - 2007JUN30	\$8.31 X 15 DAYS = \$124.68
BAH WITH DEP	2007JUN16 - 2007JUN30	\$37.74 X 15 DAYS = \$566.06

<u>DEBIT</u>	<u>PERIOD</u>	<u>MONTHLY/DAILY AMOUNT</u>
TAXES	2007JUN15 - 2007JUN30	\$9.13 X 15 DAYS = \$137.02

TOTAL PAYMENT **\$1,526.79**

3. Request meets the criteria of chapter 6-A of PSCINST M1000.2(series), Personnel and Pay Procedures Manual.
  4. Corrective actions taken by the SPO to rectify the non pay issue...(for example, documents submitted and when)
  5. SPO Point of Contact: (provide rate, name, e-mail address and phone number)
  6. Released by: (Must be a Designated Payment Approving Official (PAO), provide rate, name, e-mail address and phone number)
-

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

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## Advance Payments

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**Introduction** This information is 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.  
(b) [Direct Access Online Manual](#), SPO Transactions > Advances

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**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 reference. (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:

Step	Who Does It	Action Taken
1	Member	Submits appropriate worksheet to unit <ul style="list-style-type: none"><li>• Submits <a href="#">Advances Worksheet (CG PSC-2010)</a>, or</li><li>• Submits <a href="#">PCS Departing Worksheet (CG PSC 2000)</a>, if applicable.</li></ul>
2	Unit	Authorizes advance and forwards to SPO.
3	SPO	Completes Advance transactions in Direct Access per reference (b)

---

**Liquidation** Refer to reference. (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 reference (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.
requests a payment decrease and the liquidation period for advance pay will not exceed 24 months.  Note: Applicable to liquidation of advance pay only. The liquidation period for advance BAH, OHA, and Interim Housing Allowance is limited to 12 months.	decrease may be authorized by unit commanding officer.
requests a payment decrease for liquidation of advance OHA or Interim Housing Allowance, and BAH in conjunction with Overseas Assignment	decrease may be authorized by unit commanding officer.
is separated during liquidation schedule,	ensure a lump sum payment is effected.
did not use advance for its intended purpose,	ensure a lump sum payment is effected.

Changes in the monthly installment amount being deducted are made in Direct Access by the servicing SPO [following the procedures in reference \(b\)](#).

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

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## Death Gratuity Payments

---

**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.

---

**References** (a) [PERSMAN, Article 18-A-4, Death Gratuity](#)  
(b) [PAYMAN, Section 10-K, Death Gratuity](#)

---

**Discussion** 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.

---

**Procedure** This is the procedure 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 <a href="#">DD Form 397 (Claim Certification and Voucher for Death Gratuity Payment)</a>.<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) at (785) 339-3784 for payment.</li></ol>
2	PSC (ses)	Issues payment.

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**Section C**  
**METHODS OF PAYMENT**

---

**Payment of Mobile Unit Personnel, Continued**

---

**Certifying entitlement**

To accomplish payment of continuous CSEAPAY, each member's eligibility must be certified monthly by the appropriate personnel:

- District (ole) staffs.
  - Group Commanders.
  - CO of the PACAREA TACLET.
  - Regional TACLET Commanders.
  - Senior CG liaison officer attached to Navy mobile units.
- 

**Monthly Roster**

A certification roster must be submitted within 3 working days after the first of each month and signed by the CO or Chief of the District Office (ole) staff, to the servicing SPO with the following information:

- Rate/Rank.
  - SSN.
  - Each member must be annotated that they either remain eligible for CSEAPAY or are ineligible for CSEAPAY effective (date).
  - A copy of each member's ride sheet must be attached.
- 

**Roster not received by SPO**

If the monthly certification roster is not received by the fifth working day after the first of the month, the SPO will submit Direct Access transactions to stop CSEAPAY on all members not certified.

---

**Record keeping**

The CO/staff chief signing the certification roster shall retain copies for 3 years and have it available for audit. The servicing SPO will retain the CO's monthly certification roster for 3 years and shall retain a copy of the mobile unit designation and designation removal document(s) for 3 years after removal of the designation for audit.

---

**Section C**  
**METHODS OF PAYMENT**

---

## Payment of Recruits

---

**Introduction** Recruits are accessed in Direct Access/JUMPS upon reporting to TRACEN Cape May, and are required to be on Direct Deposit (pay option 4).

---

**Method of payment** This table describes the payment methods used to pay recruits at various stages of recruit training.

<b>Stage</b>	<b>Description</b>
During training	Depending upon the JUMPS input/cutoff dates, direct deposit payments will be made on the first or second payday after arrival at Cape May. For recruits with dependents who are not paid on the first payday after arrival due to missing cutoff, Cape May shall solicit off-line payment by sending an e-mail request to <a href="mailto:PSC-CustomerCare@uscg.mil">PSC-CustomerCare@uscg.mil</a> or by sending an online trouble ticket at <a href="http://www.uscg.mil/hq/psc/customerservice.shtm">http://www.uscg.mil/hq/psc/customerservice.shtm</a> .
At separation	Discharged recruits will have their first direct deposit payment made by PSC within 4 working days of notification of discharge.
At graduation	Within 2 working days after graduation, Cape May's Payment Authorization Official (PAO) shall ensure all Direct Access transactions are submitted.
After graduation	JUMPS will continue to generate payments on regularly scheduled paydays for EFT to member's direct deposit account.
Advances	Recruits are entitled to advance pay during their first PCS move. TRACEN Cape May will coordinate their entitlements with PSC (MAS) for inclusion in their last direct deposit payment prior to graduation. If the normally authorized amount of advance (\$500) is insufficient to cover anticipated PCS expenses, Cape May will issue additional advance pay in form of traveler's checks.

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

---

**Waiver of Pension/Disability Compensation or Retired Pay,**  
Continued

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**The waiver process**

This is how the process for waiving pension/disability compensation or retired pay works.

<b>Stage</b>	<b>Who does it</b>	<b>What happens</b>
1	Dept. of Veterans Affairs (VA)	Mails a VA Form 21-8951 to active reserve members who, at the end of the fiscal year are receiving VA compensation, and do not have a waiver on file
2	Member	Completes VA Form 21-8951 and forwards to local VA office
3	PSC	Verifies the number of drills and active duty periods the member performed  Provides totals to VA
4	VA	Adjusts member's VA compensation

---

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

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## Annual Reserve Retirement Point Statement

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**Discussion**      Annually, each member of the SELRES is issued an Annual Reserve Retirement Point Statement (CG-4175A). These statements are produced and distributed by PSC (mas) monthly. The monthly run produces a CG-4175A for selected reservists whose anniversary month is three months past. For example, in February 2008, PSC (mas) issues CG-4175As to all selected reservists whose anniversary month is in November 2007.

---

**References**      (a) [RPM](#), Section 8.C.10  
(b) [PDR Manual](#)  
(c) [JUMPS Analysis Manual, PSCINST M5230.3 \(series\)](#)  
Note: PSC (mas) no longer provides copies of CG-4175A forms to SPOs. The data (used to produce the form) is available in JUMPS and can be accessed by the SPO following the procedures in reference (c). SPOs are no longer required to maintain a copy of the CG-4175A in the member's SPO PDR. This policy will be reflected in the next change to reference (b).

---

**Discrepancies on the CG-4175A**      Instructions on the CG-4175A advise the reservist to verify the entries on the CG-4175A. If an entry is incorrect, the reservist is instructed to identify the discrepancy, and:

<b>If</b>	<b>Then</b>
there is any discrepancy:	<ul style="list-style-type: none"><li>• The discrepancy will be submitted by the member and sent to his/her servicing SPO.</li><li>• The SPO will take appropriate action to correct the discrepancy. For instance submitting out of range IDT Drills.</li></ul> <p><b>Note:</b> The following supporting documentation should be sent with the request:</p> <ul style="list-style-type: none"><li>• Endorsed ADT/IDT orders,</li><li>• CGHQ-4973A,</li><li>• CG-4175A,</li><li>• Correspondence course completion letters,</li><li>• Any other supporting documentation</li></ul>

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*Continued on next page*



## Section Overview

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**Introduction** This section provides the information needed to understand how the different kinds of special pay work, who is entitled to them, and how to get members paid.

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**In this section**

Topic	See Page
<a href="#">Aviation Career Incentive Pay (ACIP)</a>	7-A-2
<a href="#">Hazardous Duty Incentive Pay (HDIP)</a>	7-A-3
<a href="#">Flight Deck Hazardous Duty Incentive Pay (FDHDIP)</a>	7-A-4
<a href="#">High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)</a>	7-A-5
<a href="#">Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)</a>	7-A-6
<a href="#">Funeral Honors Duty Allowance for Reservists</a>	7-A-8
<a href="#">Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams</a>	7-A-9
<a href="#">Combat-Related Injury Rehabilitation Pay</a>	7-A-11
<a href="#">Foreign Language Proficiency Pay</a>	7-A-13

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**Section A  
SPECIAL PAY**

---

## Aviation Career Incentive Pay (ACIP)

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**Introduction** Aviation Career Incentive Pay (ACIP) is authorized for rated/designated officers, and officers in flight training. Aviation service information used to establish an aviator’s JUMPS record is contained in the PAYMAN, Chapter 5.

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**Reference** (a) [PAYMAN](#), Section 5-A, Aviation Career Incentive Pay (ACIP) for Rated/Designated Officers  
 (b) Direct Access Online Manual, [Aviation Career Incentive Pay \(ACIP\)](#)

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**Direct Access Path (SPO)** Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

---

**Procedures** Follow these procedures to start, stop, suspend, and reinstate ACIP.

<b>If</b>	<b>And</b>	<b>Then</b>
Officer becomes first eligible for ACIP	prior aviation service	enclose documentation to substantiate flying time/status and notify SPO to start entitlement. SPO will enter an <b>Establish officer as an aviator</b> (earnings code “ESACIP”) transaction and another transaction to start ACIP based on the officer’s PCS orders.
	without prior aviation service	notify SPO to start entitlement. SPO will enter an <b>Establish officer as an aviator</b> (earnings code “ESACIP”) transaction and another transaction to start ACIP based on the officer’s PCS orders.
Aviator fails to qualify for continuous ACIP		notify SPO to stop entitlement
	member later qualifies	notify SPO to start entitlement
Reinstating ACIP for aviators with over 25 years aviation service	performing flying duty	notify SPO to start entitlement
	not performing flying duty	JUMPS automatically stops entitlement
Reporting suspension from flight status	affects eligibility for ACIP	notify SPO to stop entitlement
	does not affect eligibility for ACIP	no action taken to stop entitlement
Reporting errors in ACIP	inaccurate information on LES	send letter to PSC (mas) via SPO. Include supporting documentation from aviation flight record, PDR and/or member’s file

**Note:** USCGR officers ordered to active duty are only entitled to ACIP if the officer is assigned to flight status (DIFOPS).

---

## Hazardous Duty Incentive Pay (HDIP)

---

**Introduction** Members issued flight orders in accordance with the PERSMAN and meeting all requirements of the PAYMAN are entitled to Hazardous Duty Incentive Pay (HDIP).

---

**Reference**

- (a) [PAYMAN](#), Section 5-B, Hazardous Duty Incentive Pay for Enlisted Members and nonrated or nondesignated Officers
- (b) [PERSMAN](#)  
[Article 6-A-4](#), Technical Observers  
[Article 6-B-4](#), Flight Orders for Enlisted Personnel
- (c) Direct Access Online Manual, [Aviation Crew/Non-Crew Hazardous Duty Incentive Pay](#)

---

**Direct Access Path (SPO)** Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

---

**How to start HDIP** To start HDIP forward copies of flight orders to the SPO.

---

**When to stop HDIP** To stop HDIP forward a letter to the SPO if one of these situations occur:

- Member's order is revoked
- Member fails to meet minimum flying time
- Member is suspended from flying

**Note:** HDIP automatically stops on a PCS departure.

---

## Flight Deck Hazardous Duty Incentive Pay (FDHDIP)

---

**Introduction** Flight Deck Hazardous Duty Incentive Pay (FDHDIP) is an entitlement to members assigned to duty involving frequent and regular participation in flight operations on the flight deck of a cutter.

---

**Reference** (a) [PAYMAN](#), Section 5-C, Flight Deck Hazardous Duty Incentive Pay (FDHDIP)  
(b) Direct Access Online Manual, [Flight Deck Hazardous Duty Incentive Pay](#)

---

**Direct Access Path (SPO)** Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

---

**Procedures to start FDHDIP** Use these procedures to start FDHDIP.

Step	Action	
1	Complete letter authorizing payment <b>Note:</b> Unit commanding officer must sign authorization	
2	Ensure authorization contains a start and stop date using this criteria:	
	<b>If</b>	<b>Then</b>
	the entitlement is for a full month, and the start date will be the first of the month,	the stop date will be the last day of the month.
	the entitlement is for part of the month,	provide the appropriate start and stop dates.
3	Forward authorization to SPO.	

---

## High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)

---

**Introduction** High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP) is an entitlement to qualified Coast Guard Divers serving under Duty Involving Diving Orders (DUID) and who meet the special conditions described in the CG Pay Manual.

---

**Reference** (a) [PAYMAN](#), Section 5-D, High Pressure Chamber Hazardous Duty Incentive Pay (HPCHDIP)  
(b) Direct Access Online Manual, [Hazardous Duty Incentive Pay for High Pressure Chamber](#)

---

**Direct Access Path (SPO)** Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

---

**Payments** Payments for HPCHDIP are made on a monthly basis.

- Members must qualify for HPCHDIP on a monthly basis.
- HPCHDIP may be prorated to adjust for issuance or revocation of DUID orders.

---

**Procedure** Each month that the member is qualified for HPCHDIP the unit commanding officer will send a letter to the SPO authorizing payment.

- If the member was not serving under DUID orders for the entire month, indicate the date of issuance or revocation of the DUID orders.

---

**Amount of HDIP** See reference (a) for current rates.

---

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

---

**Introduction** Special pay for Duty Subject to Hostile Fire or Imminent Danger (HF/ID) is an entitlement to members who meet the special conditions described in the CG Pay Manual. This special pay is in addition to any other pay and allowances a member may be entitled.

---

**Reference** (a) [PAYMAN](#), Section 4-H, Special Pay - Duty Subject to Hostile Fire or Imminent Danger  
(b) Direct Access Online Manual, [Imminent Danger \(Hostile Fire\) Pay](#)

---

**Direct Access Path (SPO)** Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

---

**Qualified Areas for HF/ID Pay** Areas designated as qualifying for HF/ID pay are listed in the [PAYMAN](#), Figure 4-11. The listing of qualified areas may be modified, from time to time, via ALCOAST messages.

---

**Rules for HF/ID Pay** The following rules apply when determining entitlement to HF/ID Pay:

- A member who serves on official duty in one of the designated areas for any part of a month is entitled to imminent danger pay for the entire month;
- In those areas where airspace is designated, personnel who fly through the area are eligible for payment if the members are assigned to official temporary duty to the airspace of the combat zone.
- Some members entitled to Imminent Danger Pay may be entitled to Income Tax Exclusion due to their location. Refer to the [PAYMAN](#), Section 8-G-2 to verify income tax exclusion locations.

---

**Amount of HF/ID Pay** See PAYMAN, Section 4-H for current rates.

---

*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. Notification of eligibility for HF/ID pay will normally be included with a notification of eligibility for combat tax exclusion. See page 8-B-11 of this manual for the procedures for reporting entitlement to HF/ID and, if applicable Combat Servicemembers' Group Life Insurance (SGLI) Allowance. See page 7-B-10 of this manual for Combat SGLI procedures.

Step	Action	
1	The unit commanding officer sends a letter or message to the SPO authorizing HF/ID. In addition to the name, rank, SSN and designated HF/ID area, include one of these entitlements in the letter:	
	<b>Entitlement</b>	<b>Description</b>
	Continuing	If starting, include: <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> If stopping, include: <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	Include: <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	The SPO Submits a Direct Access Start Pay transaction for imminent danger pay. There are two options available: Option 1: HF/ID pay for a single month only Option 2: Continuous HF/ID pay until submission of a subsequent stop transaction.	

## Funeral Honors Duty Allowance for Reservists

---

**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.

---

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

---

**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.

---

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

---



## Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS)

---

**Introduction** Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS) is an entitlement to members participating in maritime interdiction operations boardings taking place within a designated combat theatre of operations.

---

**Reference** (a) [ALCOAST 353/04](#)  
(b) [ALSPO N/04](#)  
(c) Direct Access Online Manual, [HDIP-VBSS](#)

---

**Direct Access Path (SPO)** Compensate Employees > Maintain Entitlements > Use > Employee Entitlements

---

**Procedures to start HDIP-VBSS** Use these procedures to start HDIP-VBSS.

Step	Action
1	Member completes at least three eligible boarding evolutions in a calendar month.  <b>Notes</b> Members may not receive concurrent payment of FDHDIP and HDIP-VBSS.  Members must be assigned to an authorized HDIP-VBSS eligible billet.  See Ref. (a) for additional qualifications.

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*Continued on next page*

Section A  
SPECIAL PAY

## Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS), Continued

Procedures to start HDIP-VBSS, Continued

Step	Action										
2	<p>Each calendar month that the member is qualified for HDIP-VBSS the unit commanding officer will send a letter, message or e-mail to the SPO authorizing payment. The authorization must include the name, rank, EMPLID, date of boardings and designated HDIP-VBSS areas.</p> <p>Below is a sample format:</p> <p>Subj: QUALIFICATION FOR HDIP-VBSS</p> <p>Ref: (a) <a href="#">ALCOAST 353/04</a></p> <p>1. I certify that the member listed below has completed three operational HDIP-VBSS boardings during the calendar month of _____ . The member is assigned an authorized HDIP-VBSS eligible billet. The following information is provided:</p> <p style="text-align: center;">Rate/Name: _____</p> <p style="text-align: center;">EMPLID: _____</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%;"><u>HDIP-VBSS</u></td> <td style="width: 50%;"><u>Location:</u></td> </tr> <tr> <td><u>Boarding Dates:</u></td> <td></td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> </tr> </table> <p>2. Process transaction in Direct Access (earn code VBS) to credit member for one month HDIP-VBSS as per Ref. (a).</p> <p><b>Note:</b> A new authorization is required for each calendar month the member is qualified to receive HDIP-VBSS.</p>	<u>HDIP-VBSS</u>	<u>Location:</u>	<u>Boarding Dates:</u>		_____	_____	_____	_____	_____	_____
<u>HDIP-VBSS</u>	<u>Location:</u>										
<u>Boarding Dates:</u>											
_____	_____										
_____	_____										
_____	_____										
3	Forward authorization to SPO for input into Direct Access.										

## Combat-Related Injury Rehabilitation Pay

---

**Introduction** This section provides the procedures for payment of Combat-Related Injury Rehabilitation Pay (CIP).

---

**About CIP** [ALCOAST 002/07](#) implemented Section 642 of the National Defense Authorization Act for Fiscal Year 2006, which amended Title 37 U.S.C. Section 328, to authorize monthly special pay to a member of the armed forces who, while in the line of duty, incurs a wound, injury, or illness in a combat operation or combat zone designated by the Secretary of Defense (SECDEF) and is evacuated from the theater of the combat operation or from the combat zone for medical treatment.

CIP may be paid in addition to any other pay and allowances to which the member is entitled or authorized. CIP will be paid at the full monthly rate for any month in which the member is eligible for the pay in the full amount. The monthly amount of CIP shall equal \$430 less any payment of Hostile Fire/Imminent Danger Pay received by the member for the same month.

---

**Entitlement** A member, who is hospitalized for a wound, injury, or illness as a result of hostile action, is entitled to CIP for each month that hospitalization continues and the member does not meet termination criteria described below:

- CIP will terminate at the end of the first month during which any of the following applies:
    - (1) The member is paid a benefit under Traumatic Servicemembers Group Life Insurance (T-SGLI), or
    - (2) The member receives notification of the eligibility to T-SGLI and a period of 30 days expires after the date of such notification, or
    - (3) The member is no longer hospitalized in a military treatment facility or a facility under the auspices of the military health care system.
  - Once the member loses entitlement to CIP and if a military member is re-hospitalized for the same injury, wound, or illness, eligibility for CIP cannot be reestablished.
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*Continued on next page*

## Combat-Related Injury Rehabilitation Pay, Continued

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**Procedure**

The member's Commanding Officer shall notify Commandant (CG-1222) and the Personnel Service Center (MAS), via message, to commence payment of monthly CIP to an eligible member when the member is evacuated from the theater of the combat operation or the combat zone for medical treatment.

Personnel Service Center (mas) will commence payment of CIP the month beginning after the date on which the member is eligible.

---

## Foreign Language Proficiency Pay (FLPP)

**Introduction** This section provides the procedures for entitlement to Foreign Language Proficiency Pay (FLPP).

**References**

- (a) [ALCOAST 585/05](#)
- (b) [ALCOAST 275/06](#)
- (c) [Direct Access Online Manual; Foreign Language Test Results \(ESO\)](#)
- (d) [Direct Access Online Manual; Foreign Language Proficiency Pay \(SPO\)](#)
- (e) [Direct Access Online Manual; Schedule Drills \(Commands and SPOs\)](#)

**Discussion** Reference (a) authorizes payment of FLPP, Phase I, effective 1 January 2006 for members meeting the eligibility criteria. Reference (b) addresses Foreign Language Proficiency Pay (FLPP) at the **Linguist** level. Reference (a) identified seven languages of strategic importance to Coast Guard missions. Reference (b) added Arabic, French, Indonesian, Portuguese and Tagalog.

**Process** This is the process for authorizing Active Duty and Reserve Component members' entitlement to FLPP or Foreign Language Proficiency Bonus (FLPB), for Reservists on IDT.

Stage	Description
1	The Foreign Language Program Manger (CG-132-2) designates authorized Linguist positions (billets) and Unit Collateral Duty Interpreter (UCDI) Allocations. <ul style="list-style-type: none"><li>• UCDI Allocations are listed in reference (a), para. 4.</li><li>• Linguist positions are listed in reference (b), para. 2.</li></ul>
2	Member completes and obtains qualifying scores on the Defense Language Proficiency Test (DLPT) for an eligible language skill.
3	Unit Educational Services Officer (ESO) enters DLPT results in Direct-Access. <ul style="list-style-type: none"><li>• The menu item is Develop Workforce &gt; Manage Competencies (GBL) &gt; Use &gt; <b>Foreign Language Test Results</b>. It is only accessible to users with the ESO (CGFTESO) user role. Unit ESOs may request the role by completing a Direct-Access User Authorization Form (<a href="#">CG-PSC-7421/2</a>) and forwarding it to PSC Customer Care for account update.</li></ul>

*Continued on next page*

## Foreign Language Proficiency Pay (FLPP), Continued

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Process (continued)

Stage	Description
3 (cont'd)	ESO Procedures are available in reference (c).
4	<p><b>For FLPP-Linguist:</b></p> <ul style="list-style-type: none"><li>• Ensure qualified member is assigned to a position designated by CG-132 as requiring linguist skills.</li></ul> <p><b>For FLPP/FLPB-Interpreter:</b></p> <ul style="list-style-type: none"><li>• Unit Commanding Officer designates qualified member to occupy a command interpreter allocation and forwards a copy of the designation to the SPO.</li></ul> <p style="text-align: center;">Note: For Reservists on Active Duty for less than 140 days ADT/181 days ADOT, orders must specifically authorize FLPP.</p>
5	<p>For Active Duty members and Reservists on Active Duty, the SPO enters the start FLPP transaction using the Employee Entitlements Component in Direct-Access.</p> <ul style="list-style-type: none"><li>• SPO Procedures are available in reference (d).</li></ul> <p>For Reservists on IDT or RMP, the Unit "Reserve IDT" or "Command User" (user roles in Direct-Access) records FLPB entitlement using the Schedule Drills (<i>Individual</i>) Component in Direct-Access.</p> <ul style="list-style-type: none"><li>• IDT/RMP drill pay procedures are available in reference (e).</li></ul>

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*Continued on next page*

## Foreign Language Proficiency Pay (FLPP), Continued

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### **Terminating FLPP**

FLPP will automatically stop when the:

- Member is separated from active duty.
- Member departs on PCS orders.
- Member's certification lapses (shown as the Expiration date in the member's [Licenses & Certifications](#) in Direct Access for the language skill). Members must retest annually to maintain their eligibility for FLPP. If a member's FLPP is automatically stopped, a new transaction must be input in Direct-Access to restart it after the member's test scores are entered.

FLPP must be manually stopped when the member is no longer performing interpreter/linguist duties or when the command wishes to designate other qualified members to fill unit allocations.

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**Section B  
ALLOWANCES**

---

## Section Overview

---

**Introduction** This section will guide you through the procedures for payment of Basic Allowance for Subsistence, Family Separation Allowance, Overseas Housing Allowance, Family Subsistence Supplemental Allowance, and Officer Uniform Allowance.

---

**In this section**

<b>Topic</b>	<b>See Page</b>
<a href="#">Refund for Missed Meals – Discounted Meal Rate (DMR)</a>	7-B-2
<a href="#">Family Separation Allowance (FSA)</a>	7-B-3
<a href="#">Overseas Housing Allowances (OHA)</a>	7-B-7
<a href="#">Family Subsistence Supplemental Allowance (FSSA)</a>	7-B-8
<a href="#">Officer Uniform Allowance Claim Worksheet (CG PSC-5100)</a>	7-B-9
<a href="#">Combat SGLI Allowance</a>	7-B-10

---

**Section B  
ALLOWANCES**

---

## Refund for Missed Meals – Discounted Meal Rate (DMR)

---

**Introduction** This section provides procedures for crediting Discount Meal rate charges to a member who is unable to eat meals normally furnished at a government dining facility.

---

**Reference** (a) [PAYMAN](#), Section 3-B  
(b) Direct Access Online Manual, [Refund of DMR for Missed Meals](#)

---

**Direct Access Path (SPO)** [Home](#) > [Compensate Employees](#) > [Maintain Entitlements](#) > [Use](#) > Employee Entitlements

---

**Discounted Meal Rate Credits** This is the procedure utilized for crediting Discount Meal Rate charges to a member who is assigned to a mandatory messing unit and the member's duties, or dining facility exigencies, prevent government furnished meals from being provided.

<b>Step</b>	<b>Action</b>																								
1	Log meals throughout the month																								
2	<p>Forward the following information to the SPO at the end of the month:</p> <p>Subj: CERTIFICATION OF MISSED MEALS</p> <p>Ref: (a) CG Pay Manual, Section 3-B, Basic Allowance for Subsistence (BAS - Enlisted)</p> <p>1. I certify that the member listed below was assigned to a mandatory messing unit and their duties or dining facility exigencies prevented government furnished meals (including box lunches) from being provided as follows:</p> <table style="margin-left: 40px;"><tr><td>Rate/Name: _____</td><td></td><td></td><td></td></tr><tr><td>EMPLID: _____</td><td></td><td></td><td></td></tr><tr><td><u>Date(s)</u></td><td><u>Breakfast</u></td><td><u>Lunch</u></td><td><u>Dinner</u></td></tr><tr><td>2/14/02</td><td></td><td>x</td><td></td></tr><tr><td>2/15/02</td><td>x</td><td></td><td></td></tr><tr><td>2/18/02</td><td></td><td>x</td><td></td></tr></table> <p>2. Process transaction in Direct Access (earn code RMM) to credit the member for the missed meals per reference (b).</p>	Rate/Name: _____				EMPLID: _____				<u>Date(s)</u>	<u>Breakfast</u>	<u>Lunch</u>	<u>Dinner</u>	2/14/02		x		2/15/02	x			2/18/02		x	
Rate/Name: _____																									
EMPLID: _____																									
<u>Date(s)</u>	<u>Breakfast</u>	<u>Lunch</u>	<u>Dinner</u>																						
2/14/02		x																							
2/15/02	x																								
2/18/02		x																							

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**Section B  
ALLOWANCES**

---

## **Family Separation Allowance (FSA)**

---

**Introduction** This is provided to assist in the process of starting and stopping Family Separation Allowance (FSA) and Family Separation Housing (FSH).

---

**Reference** (a) [PAYMAN](#), Section 3-G, Family Separation Allowance (FSA)  
(b) Direct Access Online Manual, [Family Separation Allowance \(FSA\)](#)  
(c) [CG PSC-2035 \(FSA Worksheet\)](#)

---

**Types of FSA** See [PAYMAN](#), Section 3-G, Family Separation Allowance (FSA).

---

**Eligibility of FSA Entitlement** Refer to [PAYMAN, Section 3-G-5](#) for detailed information concerning “with dependent” requirements for FSA.

---

**Verification of FSA on the FSA Worksheet** FSA entitlement verification will be completed on the [FSA Worksheet \(CG PSC-2035\)](#), which is available on PSC’s web site at: <http://www.uscg.mil/hq/psc/forms/psc2035.pdf>.

---

**Procedures for Family Separation Housing (FSH)** For members who are entitled to Family Separation Housing (See [PAYMAN](#), Section 3-G-3, entitlement rules), use the following procedure:

<b>Step</b>	<b>Action</b>
1	The member must complete an <a href="#">FSA Worksheet</a> when he/she becomes entitled to FSH.
2	The unit will endorse the FSA Worksheet and forward to the SPO.
3	Upon Receipt of the FSA Worksheet the SPO will: 1. Submit a BAH transaction on the member to start BAH W/dependents using the zip code of the member’s dependents. 2. Forward the FSA Worksheet to PSC (mas), via fax to (785) 339-3760.
4	PSC (mas) will start the member’s FSH entitlement in a monthly amount equal to the BAH or OHA payable (for the PDS) to a member without dependents in the same pay grade.

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*Continued on next page*

**Section B  
ALLOWANCES**

## Family Separation Allowance (FSA), Continued

**Procedures for FSA-R** Use the following procedures if the member becomes entitled to FSA-R:

Step	Action
1	The member must complete an <a href="#">FSA Worksheet</a> when he/she becomes entitled to FSA-R.
2	The unit will endorse the FSA Worksheet and forward to the SPO. An E-mail may be sent by the unit to the SPO to notify the SPO that this entitlement needs to be started on the member (this will allow the SPO to start the entitlement on the member in a timely manner). However, the unit must still submit the FSA Worksheet to the SPO).
3	Upon Receipt of the FSA Worksheet or E-mail, the SPO will submit a FSA transaction on the member to start FSA-R. <b>Note:</b> After the FSA transaction has been submitted, the SPO will ensure that a FSA Worksheet has been received by the unit, if an E-mail was sent by the unit.

**Procedures for FSA-S 60 days or less** For ship deployments of 60 days or less, use the following procedures:

Step	Action
1	The unit must ensure that each eligible member has completed an <a href="#">FSA Worksheet</a> for FSA-S and the worksheet must have a command endorsement. This worksheet will be kept on file at the unit level (suspense file). <ul style="list-style-type: none"> <li>• If the current FSA Worksheet on the member is more than 1 year old, a new FSA Worksheet must be completed by the member to re-certify FSA eligibility.</li> <li>• If the current FSA Worksheet on the member is less than 1 year old, then no new FSA Worksheet will have to be completed on the member.</li> </ul> <b>Note:</b> This removes the requirement of having the member complete a FSA Worksheet every time he/she becomes entitled to FSA-S.
2	Upon return of the ship to homeport, the unit will notify the SPO by message or E-mail with the names and Employee ID Numbers of the members entitled to FSA-S. The start and stop dates of FSA-S must also be included in the message or E-mail (normally the end date will be the day prior to the day returning to homeport).
3	Upon receipt of the message or E-mail, the SPO will submit a single FSA transaction for each member to establish a one time credit of FSA-S.

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## Overseas Housing Allowance (OHA)

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**Introduction** This is provided to assist in the process of starting Overseas Housing Allowance (OHA) and requesting Move-In Housing Allowance (MIHA). MIHA provides a one-time payment for move-in costs while stationed in an OHA locale.

---

**Reference** (a) [JFTR](#), Chapter 9  
Appendix K, Overseas Housing Allowance  
Appendix N, Move-In Housing Allowance  
(b) [Direct Access Online Manual, Overseas Housing Allowance \(OHA\)](#)

---

**Direct Access Path (SPO)** [Compensate Employees](#) > [Maintain Entitlements](#) > [Use](#) > Employee Entitlements

---

**Starting OHA** To start OHA complete the following forms and forward to the SPO with a copy of the lease/purchase agreement:

- Sign an Overseas Housing Allowance Briefing Sheet (found in the JFTR, Appendix K)
  - Complete an Individual Overseas Housing Allowance form ([DD Form 2367](#))
- 

**Requesting MIHA** MIHA is requested by completing a Move-In Housing Allowance Claim form ([DD Form 2556](#)) and forwarding it to the SPO. A second payment of MIHA may be paid only after approval from Commandant (CG-1222).

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## Family Subsistence Supplemental Allowance (FSSA)

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**Introduction** This section provides procedures for payment of the Family Subsistence Supplemental Allowance (FSSA).

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**Reference** (a) [PAYMAN](#), Section 3-N  
(b) [CG PSC-2075 \(Family Subsistence Supplemental Allowance Application\)](#),

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**Definition** See reference (a) for definitions, background information and limitations to FSSA.

---

**Application** Applications for FSSA can be obtained from the PSC web site:  
<http://www.uscg.mil/hq/psc/forms/> ([CG PSC-2075](#)).

Or call PSC Customer Service @ (866) 772-8724. Customer Service will fax or mail you a copy of the form and USDA Monthly Income Eligibility Limits.

Submission of the FSSA Application can be done by mail or fax:

Fax to (785) 339-3760

Mail to: Commanding Officer (mas)  
Coast Guard PSC  
444 SE Quincy  
Topeka, KS 66683-3593.

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**Recertification** See reference (a), 3-M-10.

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## Officer Uniform Allowance Claim Worksheet (CG PSC-5100)

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**Introduction**      The [CG PSC-5100](#) is used to substantiate payment of uniform allowances to Coast Guard regular and reserve officers.

---

**Reference**          (a) [PAYMAN](#)  
Section 3-I, Clothing Allowances for Officers  
Section 3-K, Uniform Allowances for Reserve Officers

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**Procedure**        A copy of the [CG PSC-5100](#) can be found at  
<http://www.uscg.mil/hq/psc/forms>.

Officers who are appointed:

- Upon graduating from the CG Academy; or
- Upon graduating from OCS; or
- To Warrant Officer from Enlisted status;

Will automatically be paid the appropriate Officer Uniform Allowance by the CG Pay System. A CG PSC 5100 need not be completed, and no Direct Access input should be completed.

If an Officer is entitled to a Uniform Allowance due to:

- Direct Commission; or
- Completion of at least 14 days Active duty as a member of a Reserve component; or
- Completion of 14 periods of Reserve IDT;

Then complete an [Officer Uniform Allowance Claim Worksheet \(CG PSC-5100\)](#) and forward to the SPO.

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## Combat SGLI (Servicemembers Group Life Insurance) Allowance

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**Introduction** This section provides the procedures for payment of Combat Servicemembers' Group Life Insurance (SGLI) Allowance.

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**Reference** (a) [National Defense Authorization Act for Fiscal Year 2007 \(Public Law 109-364\)](#)  
(b) [ALCOAST 523/06](#)  
(c) [Direct Access User Online Manual, Combat SGLI Allowance](#)

---

**Discussion** Per references (a) and (b), members serving in Operations Enduring Freedom or Iraqi Freedom Theaters or serving outside the U.S. on orders in support of Operations Enduring Freedom or Iraqi Freedom shall receive an allowance equal to the amount of the cost for the maximum SGLI coverage plus the cost of Traumatic SGLI coverage.

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**Rules for Entitlement to Combat SGLI Allowance**

A member must be serving in Operations Enduring Freedom or Iraqi Freedom Theaters or be serving outside the U.S. on orders in support of Operations Enduring Freedom or Iraqi Freedom in order to be eligible for Combat SGLI Allowance.

- Orders in support of Operations Enduring Freedom or Iraqi Freedom may be specific orders to the member, or general tasking to an entire unit such as a ship. The member must be outside the U.S. for at least part of the month. No minimum part of a month is defined.

Combat SGLI Allowance can be recorded as a one-time entitlement (allowance for a single month only) or as a continuous entitlement (allowance will continue until submission of a stop transaction). Entries for entitlement to Combat SGLI and Combat Tax Exclusion must match:

- If a member is entitled to Combat Tax Exclusion for one month only, then the entry for Combat SGLI must also be for one month only.
  - If a member is entitled to Combat Tax Exclusion continuously, then the entry for Combat SGLI must also be for a continuous entitlement and a stop transaction must be entered when the stop Combat Tax Exclusion is entered.
- 

*Continued on next page*



Section B  
ALLOWANCES

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## Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

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**Amount of  
Combat SGLI  
Allowance**

Combat SGLI Allowance is equal to the monthly cost of \$400,000 SGLI coverage plus the cost of Traumatic SGLI coverage. The cost of \$400,000 SGLI coverage is currently \$28.00 per month and the cost of Traumatic SGLI coverage is \$1.00. The total Combat SGLI Allowance is \$29.00.

Combat SGLI Allowance entitlements will appear in JUMPS Segment 23 “Miscellaneous Allowances” (Note: The title of Segment 23 has changed, it was previously titled “Personal Money Allowance”).

---

**Combat SGLI  
Allowance for  
members with  
no or less than  
\$400,000 SGLI  
coverage**

Members with SGLI coverage elections of \$0 (declined) or any other amount less than the maximum coverage available, who become entitled to Combat SGLI Allowance, will temporarily have their SGLI coverage increased to \$400,000 for the duration of the entitlement to Combat SGLI Allowance. The member’s previous SGLI coverage resumes the first day of the month following the month the member’s entitlement to Combat SGLI Allowance ends, unless the member submits a new SGLI or SGLI Family election.

JUMPS will open a new Segment 32 to increase the member’s SGLI coverage to \$400,000 when a start Combat SGLI Allowance transaction processes. The temporary increase is effective the first day of the month in which the member is entitled to Combat SGLI and ends the last day of the month the entitlement to Combat SGLI stops. The letter “S” will appear in the “Combat Code” field of any Segment 32 opened by JUMPS to record a temporary SGLI coverage increase.

- Temporary SGLI coverage changes, made in JUMPS, due to receipt of Combat SGLI allowance will not appear in the member’s SGLI elections in DA ([Compensate Employees](#) > [Administer Base Benefits](#) > **Life and AD/D Benefits**).

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*Continued on next page*

## Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

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**Unit  
Procedures**

Notify the SPO, via letter or message, when a member qualifies for or loses entitlement to Combat SGLI Allowance. When starting Combat SGLI Allowance, include a statement indicating the member is entitled on either a:

- Continuous basis (tax exclusion will continue until submission of a subsequent stop transaction) or on a,
- One time basis (tax exclusion for a single month only).

Notification of eligibility for Combat SGLI Allowance will be included with a notification of eligibility for Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID). See page [7-A-6](#) of this manual for the procedures for reporting entitlement to HF/ID and Combat Tax Exclusion. See page [8-B-11](#) for procedures for reporting entitlement to Combat Tax Exclusion.

---

**SPO Action**

SPOs shall record entitlement to Combat SGLI Allowance in Direct-Access for any eligible member. Procedures for recording entitlement to Combat SGLI Allowance are in reference (c).

SPOs are reminded to submit Combat SGLI Allowance transactions in connection with Combat Tax Exclusion transactions. Currently, any member who is entitled to Combat Tax Exclusion while serving in Operations Enduring Freedom or Iraqi Freedom is also entitled for Combat SGLI Allowance.

---

**SGLI  
Beneficiary  
Designations  
and FSGLI  
Elections**

When starting Combat SGLI Allowance SPOs shall also:

- Review member's current SGLI Election and Certificate (form [SGLV-8286](#)) for accuracy and completeness. If no SGLV-8286 form is on file, provide the member with a blank form with instructions to complete and return to the SPO as soon as possible.
- 

*Continued on next page*

## Combat SGLI (Servicemembers Group Life Insurance) Allowance, Continued

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**SGLI  
Beneficiary  
Designations  
and FSGLI  
Elections**  
(cont'd)

- Inform married members, who have previously declined SGLI coverage, or have coverage at the \$50,000 level, that Family SGLI coverage is available while they are receiving Combat SGLI Allowance. The member must submit a SGLI Family Coverage Election (form [SGLV-8286A](#)) and [SGLV-8286](#) form, with a coverage level of at least \$100,000, if they desire coverage under the SGLI Family program. Premiums for SGLI and SGLI Family coverage will be deducted from the member's pay and will continue after entitlement to Combat SGLI Allowance ends.

Compare SGLV-8286 (and SGLV-8286A, if applicable) with LES to confirm correct deductions are (or were) in effect.

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**Section B  
ALLOWANCES**

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## Nonreceipt of an Allotment or Bond

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**Introduction** This job aid explains the process for reporting nonreceipt of an allotment, or the loss, theft, or destruction of a savings bond.

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**Reference** (a) [PAYMAN](#), Section 7, Allotments from Pay

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**Procedures** Follow these procedures for claiming nonreceipt of an allotment or savings bond.

When Allotment Type is	Then the....	Does This....
An allotment other than a Savings Bond	Member or Admin unit	<ul style="list-style-type: none"> <li>• Verifies with financial institution ACH Department that allotment payment has not been received by electronic fund transfer (EFT).</li> <li>• Sends an E-Mail message to <a href="mailto:PSC-CustomerCare@uscg.mil">PSC-CustomerCare@uscg.mil</a> or submit an online trouble ticket with the following information:                             <ul style="list-style-type: none"> <li>• member's EMPLID</li> <li>• member's name (last, first, mi)</li> <li>• member's rank</li> <li>• member's unit</li> <li>• member's phone number</li> <li>• date of missing allotment payment</li> <li>• name of financial institution</li> <li>• allotment amount</li> <li>• allotment account number</li> </ul> </li> </ul>
	PSC (mas)	<ul style="list-style-type: none"> <li>• Locates original payment or makes special EFT payment, normally within 3 business days</li> </ul>

*Continued on next page*

**Section A  
ALLOTMENTS AND BONDS**

**Nonreceipt of an Allotment or Bond, Continued**

**Procedures (continued)**

<b>When Allotment Type is</b>	<b>Then the....</b>	<b>Does This....</b>		
Savings Bond	Member	For non-receipt of savings bonds, members must wait 30 days from expected delivery date then: <ul style="list-style-type: none"> <li>• Send an E-mail message to PSC (mas-dc) using the <b>CG Network</b> E-mail address --“<a href="#">PSC-DG BONDS</a>” with the following information:               <ul style="list-style-type: none"> <li>• Member’s EMPLID</li> <li>• Member’s name (last, first, mi)</li> <li>• Member’s rank</li> <li>• Member’s unit</li> <li>• Approximate issue date of bond</li> <li>• Face value of bond</li> <li>• Name and SSN of bond owner (if the member is not the owner)</li> <li>• Mailing address of lost bond</li> <li>• Correct mailing address</li> </ul> </li> </ul>		
		<b>If</b>	<b>Then</b>	<b>And</b>
		For lost, stolen, or mutilated savings bonds: <ul style="list-style-type: none"> <li>• Obtain Bureau of the Public Debt (BPD) Form <a href="#">PD-1048, Claim for Lost, Stolen or Destroyed United States Savings Bonds</a>, from any banking institution, or PSC (dc)</li> <li>• Forward completed PD-1048 to BPD (instructions and address are on the form)</li> </ul>		
	PSC (dc)	<ul style="list-style-type: none"> <li>• Verifies bond information and provides Bond serial number</li> <li>• Forwards appropriate BPD form to member</li> </ul>		
	Member	<ul style="list-style-type: none"> <li>• Completes form and forwards directly to BPD</li> </ul>		

## State Income Tax Withholding and State of Legal Residence

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### Introduction

Every member, who is a resident of a state authorized to have state income tax withheld from military pay, is required to file the appropriate state tax-withholding document when a pay account is initially opened. Once the tax withholding is started there are times when it may need to be changed. This provides a job aid in assisting a member who is changing their tax withholding.

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### Reference

(a) [PAYMAN](#), Section 8-B, Withholding of State and Local Tax

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### State Income Tax Withholding

To change state income tax withholding, the member must:

Step	Action
1	Complete the appropriate State tax form (see State Tax Listing beginning on page 8-B-4)
2	If only changing marital status, number of exemptions, or additional amount to be withheld, and have access to Direct Access application, complete change in the Self Service “State Tax Data” application; otherwise, forward to SPO for completion in “Employee Tax Data” Direct Access application.

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### Changing State of Legal Residence

To change a member’s state of legal residency, submit a [DD Form 2058 \(CG\)](#) to the SPO for completion in “Employee Tax Data” Direct Access. Provide a copy to the member.

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**Section B**  
**TAXES**

## State Tax Listing

### Introduction

The two charts below provide valuable information to the member on each state concerning withholding requirements, tax forms addresses, phone numbers and internet addresses. The first chart separately lists those states which offer internet addresses and tax forms available on-line for downloading.

State	Internet Address
Alabama	<a href="http://www.ador.state.al.us/">http://www.ador.state.al.us/</a>
Alaska	<a href="http://www.revenue.state.ak.us/">http://www.revenue.state.ak.us/</a>
Arizona	<a href="http://www.revenue.state.az.us/">http://www.revenue.state.az.us/</a>
Arkansas	<a href="http://www.state.ar.us/dfa/dfa_taxes.html">http://www.state.ar.us/dfa/dfa_taxes.html</a>
California	<a href="http://www.ftb.ca.gov/">http://www.ftb.ca.gov/</a>
Colorado	<a href="http://www.revenue.state.co.us/">http://www.revenue.state.co.us/</a>
Connecticut	<a href="http://www.ct.gov/drs">http://www.ct.gov/drs</a>
Delaware	<a href="http://www.state.de.us/revenue">http://www.state.de.us/revenue</a>
D.C.	<a href="http://cfo.dc.gov/otr/site/default.asp">http://cfo.dc.gov/otr/site/default.asp</a>
Florida	<a href="http://www.state.fl.us/dor/">http://www.state.fl.us/dor/</a>
Georgia	<a href="http://www.etax.dor.ga.gov/">http://www.etax.dor.ga.gov/</a>
Hawaii	<a href="http://www.state.hi.us/tax/">http://www.state.hi.us/tax/</a>
Idaho	<a href="http://tax.idaho.gov/">http://tax.idaho.gov/</a>
Illinois	<a href="http://www.revenue.state.il.us/">http://www.revenue.state.il.us/</a>
Indiana	<a href="http://www.state.in.us/dor/">http://www.state.in.us/dor/</a>
Iowa	<a href="http://www.state.ia.us/tax/index.html">http://www.state.ia.us/tax/index.html</a>
Kansas	<a href="http://www.ink.org/public/kdor/">http://www.ink.org/public/kdor/</a>
Kentucky	<a href="http://revenue.ky.gov/">http://revenue.ky.gov/</a>
Louisiana	<a href="http://www.rev.state.la.us/">http://www.rev.state.la.us/</a>
Maine	<a href="http://www.state.me.us/revenue/homepage.html">http://www.state.me.us/revenue/homepage.html</a>
Maryland	<a href="http://www.comp.state.md.us/">http://www.comp.state.md.us/</a>
Massachusetts	<a href="http://www.state.ma.us/dor">http://www.state.ma.us/dor</a>
Michigan	<a href="http://www.michigan.gov/treasury">http://www.michigan.gov/treasury</a>
Minnesota	<a href="http://www.taxes.state.mn.us/">http://www.taxes.state.mn.us/</a>
Mississippi	<a href="http://www.mstc.state.ms.us/">http://www.mstc.state.ms.us/</a> Form: <a href="http://www.mstc.state.ms.us/taxareas/withhold/89350001.pdf">http://www.mstc.state.ms.us/taxareas/withhold/89350001.pdf</a>

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**Section B**  
**TAXES**

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**State Tax Listing**, Continued

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Missouri	<a href="http://www.dor.mo.gov/index.htm">http://www.dor.mo.gov/index.htm</a>
Montana	<a href="http://www.state.mt.us/revenue/">http://www.state.mt.us/revenue/</a>
Nebraska	<a href="http://www.revenue.state.ne.us/">http://www.revenue.state.ne.us/</a>
Nevada	<a href="http://www.tax.state.nv.us/">http://www.tax.state.nv.us/</a>
New Hampshire	<a href="http://www.state.nh.us/revenue/">http://www.state.nh.us/revenue/</a>
New Jersey	<a href="http://www.state.nj.us/treasury/taxation/">http://www.state.nj.us/treasury/taxation/</a>
New Mexico	<a href="http://www.state.nm.us/tax/">http://www.state.nm.us/tax/</a>
New York	<a href="http://www.tax.state.ny.us/">http://www.tax.state.ny.us/</a>
No. Carolina	<a href="http://www.dor.state.nc.us/">http://www.dor.state.nc.us/</a>
No. Dakota	<a href="http://www.nd.gov/tax/">http://www.nd.gov/tax/</a>
Ohio	<a href="http://www.state.oh.us/tax/">http://www.state.oh.us/tax/</a>
Oklahoma	<a href="http://www.oktax.state.ok.us/">http://www.oktax.state.ok.us/</a>
Oregon	<a href="http://www.dor.state.or.us/">http://www.dor.state.or.us/</a>
Pennsylvania	<a href="http://www.revenue.state.pa.us/">http://www.revenue.state.pa.us/</a>
Puerto Rico	<a href="http://www.hacienda.gobierno.pr/">http://www.hacienda.gobierno.pr/</a>
Rhode Island	<a href="http://www.doa.state.ri.us/">http://www.doa.state.ri.us/</a>
So. Carolina	<a href="http://www.sctax.org/">http://www.sctax.org/</a>
So. Dakota	<a href="http://www.state.sd.us/drr2/revenue.html">http://www.state.sd.us/drr2/revenue.html</a>
Tennessee	<a href="http://www.state.tn.us/revenue">http://www.state.tn.us/revenue</a>
Texas	<a href="http://www.window.state.tx.us/">http://www.window.state.tx.us/</a>
Utah	<a href="http://www.tax.utah.gov/">http://www.tax.utah.gov/</a>
Vermont	<a href="http://www.state.vt.us/tax/">http://www.state.vt.us/tax/</a>
Virginia	<a href="http://www.virginia.gov/cmsportal2/residents_4096/residents_services_4099/taxes_resources.html">http://www.virginia.gov/cmsportal2/residents_4096/residents_services_4099/taxes_resources.html</a>
Washington	<a href="http://www.dor.wa.gov/">http://www.dor.wa.gov/</a>
W. Virginia	<a href="http://www.state.wv.us/taxdiv">http://www.state.wv.us/taxdiv</a>
Wisconsin	<a href="http://www.dor.state.wi.us/">http://www.dor.state.wi.us/</a>
Wyoming	<a href="http://revenue.state.wy.us/">http://revenue.state.wy.us/</a>

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**Section B  
TAXES**

**State Tax Listing, Continued**

<b>State and contact phone number</b>	<b>Authorized to Have SITW Withheld From Military Members</b>	<b>Tax Withholding Form State Requires</b>	<b>State Tax Office Address</b>
Alabama (334) 242-1170	Yes	State Form A-4	Alabama Department of Revenue Individual & Corporate Tax Division PO Box 327465 Montgomery, AL 36132-7465
Alaska (907) 465-2300	NO STATE INCOME TAX		
Arizona (602) 255-3381	Yes	State Form A-4 or A-4M	Arizona Department of Revenue Taxpayer Information & Assistance PO Box 29086 Phoenix, AZ 85038-9086
Exemption to state withholding: Legal residents of the state who do not reside in the state may elect not to have state taxes withheld. However, members should be cautioned that this is not an exemption from state taxes, and individuals are required to file returns and remit any taxes owed.			
Arkansas (501) 682-7225	Yes	State Form AR-4EC	Arkansas Department of Finance and Administration Individual Income Tax Section Rm 138, Ledbetter Building Little Rock, AR 72203
California 800-338-0505 (automated) 800-852-5711 Conditions for exemption from state tax: If member is on active service and is stationed outside the state.	Yes	State Form EDD DE4*	California Franchise Tax Board PO Box 942840 Sacramento, CA 94240-0040
Colorado 303-232-2446	Yes	Federal Form W-4 *	Colorado Department of Revenue 1375 Sherman Street Denver, CO 80261
Connecticut 800-382-9463 (in state) (860)297-5962(out of state)	Yes	State Form CT-W4	Taxpayer Services Division Department of Revenue Services 25 Sigourney Street Hartford, CT 06106-5032
Conditions for exemption from state tax: If the member does not maintain a permanent place of abode in the state, AND maintains a permanent place of abode outside the state, AND spends not more that 30 days in the state during the tax year. Members occupying single-type government quarters are NOT considered to be maintaining a permanent place of abode in the state.			
Delaware (302) 577-8200	Yes	Federal Form W-4 *	Delaware Division of Revenue 820 N. French Street Wilmington, DE 19801
District of Columbia (202) 727-4829	Yes	State Form D-4	DC Government Office of Tax & Revenue 941 Capitol St. NE Washington, DC 20002
Florida (850) 922-4827/4826	NO STATE INCOME TAX		
Georgia (404) 656-4188	Yes	State Form G-4	Georgia Department of Revenue 270 Washington St. SW Atlanta, GA 30334
Hawaii 800 222-3229	Yes	State Form HW-4	Hawaii Department of Taxation PO Box 3559 Honolulu, HI 96811-3559

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

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**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
Idaho (208) 334-7660 800-972-7660	Yes	Federal Form W-4*	Taxpayer Services Idaho State Tax Commission PO Box 36 Boise, ID 83722-0036
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			
Illinois 800-732-8866	No (exempts all active duty military pay)		Illinois Department of Revenue Taxpayer Correspondence PO Box 19044 Springfield, IL 62794-9044
Indiana (317) 232-2240	Yes	State Form WH-4	Indiana Department of Revenue Taxpayer Services Division Indiana Government Center 100 N. Senate Avenue, No. 105 Indianapolis, IN 96811
Iowa 800-367-3388 (in state) (515) 281-3114 (out of state)	Yes	State Form IA-W4	Finance Taxpayer Services and Iowa Department of Revenue PO Box 10457 Des Moines, IA 50306-0457
Kansas (785) 368-8222	Yes	Federal Form W-4 *	Kansas Department of Revenue Taxpayer Assistance Bureau 915 SW Harrison Street Topeka, KS 66625-0001
Kentucky (502) 564-4581	Yes	State Form K-4	Kentucky Revenue Cabinet Taxpayer Assistance 200 Fair Oaks Lane Frankfort, KY 40620
Louisiana (225) 925-4611	Yes	Federal Form W-4 *	Louisiana Department of Revenue PO Box 201 Baton Rouge, LA 70821
Maine (207) 626-8475	Yes	Federal Form W-4 *	Maine Revenue Services Income/Estate Tax Division 24 State House Station Augusta, ME 04333-0024
Maryland (410) 260-7980 (Central MD) 800-638-2937 (Others)	Yes	State Form MW-507	Maryland Taxpayer Service 110 Carroll St Annapolis, MD 21411
Massachusetts (617) 887-6367	Yes	Federal Form W-4 *	Massachusetts Taxpayers Assistance 200 Arlington St Chelsea, MA 02150
Michigan 800-487-7000	No (exempts all active duty military Pay)		Michigan Department of the Treasury Treasury Building Lansing, MI 48922
Minnesota (651) 296-3781 800-652-9094	Yes	Federal Form W-4 *	Minnesota Department of Revenue Individual Income Tax Division Mail Station 5510 St. Paul, MN 55146-5510
Conditions for exemption from state tax: If member is on active service and is stationed outside the state.			

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

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**Section B  
TAXES**

**State Tax Listing, Continued**

<b>State and contact phone number</b>	<b>Authorized to Have SITW Withheld From Military Members</b>	<b>Tax Withholding Form State Requires</b>	<b>State Tax Office Address</b>
Mississippi (601) 923-7089	Yes	State Form 62-420	Mississippi State Tax Commission PO Box 1033 Jackson, MS 39215-3338
Use form: <a href="http://www.mstc.state.ms.us/taxareas/withhold/89350001.pdf">http://www.mstc.state.ms.us/taxareas/withhold/89350001.pdf</a>			
Missouri (573) 751-7191 800-411-8524	Yes	State Form MO W-4	Taxpayer Services Missouri Department of Revenue PO Box 3300 Jefferson City, MO 65105
Conditions for exemption from state tax: See the rules for Connecticut.			
Montana (406) 444-6900:	Yes (exempts all active duty military pay)	Federal Form W-4 *	Montana Department of Revenue PO Box 5805 Helena, MT 59604
Conditions for exemption from state tax	If member performs active duty in the Regular Armed Forces, is legal resident of Montana, and entered into active duty from Montana. However, members serving in Reserve components should have state income taxes withheld. Active duty personnel must file a return even if qualified for an exemption.		
Nebraska 800-742-7474	Yes	Federal Form W-4 *	Nebraska Department of Revenue 301 Centennial Mall S. PO Box 94818 Lincoln, NE 68509-4818
Nevada (775) 687-4892	NO STATE INCOME TAX		
New Hampshire (603) 271-2186	NO STATE INCOME TAX		
New Jersey (609) 292-6400	Yes	Federal Form W-4 *	Division of Taxation PO Box 266 Trenton, NJ 08695-0266
Conditions for exemption from state tax: See the rules for Connecticut.			
New Mexico (505) 827-0827	Yes	Federal Form W-4 *	Taxation and Revenue Department PO Box 25122 Santa Fe, NM 87504-5122
New York 800-225-5829	Yes	Federal Form W-4 *	Correspondence Unit W.A. Harriman Campus Albany, NY 12227
Conditions for exemption from state tax: See the rules for Connecticut			
North Carolina (919) 733-2332	Yes	State Form NC-4	Department of Revenue PO Box 25000 Raleigh, NC 27640-0640
North Dakota 800-638-2901 (In state) (701) 328-3450 (Out of state)	Yes	Federal Form W-4 *	State the Tax Commissioner State Capitol 600 E Boulevard Avenue Bismarck, ND 58505-0599
Ohio 800-282-1780	Yes	State Form IT-4*	Taxpayer Services Division 830 Freeway Drive N Columbus, OH 43229
Conditions for exemption from state tax: Effective with tax year 2007, if member is on active service and is stationed outside the state.			
Oklahoma 800-522-8165 (In state) (405) 521-3160	Yes	Federal Form W-4 *	Taxpayer Assistance Division 2501 Lincoln Boulevard Oklahoma City, OK 73194
Oregon 800-356-4222 (In state) (503) 378-4988 (All others)	Yes	Federal Form W-4 *	Revenue Building Tax Help, Room 135 955 Center Street NE Salem, OR 97310-2555
Conditions for exemption from state tax: See rules for Connecticut.			

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

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## **Income Tax Exclusion for Duty in Combat Zone, Continued**

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**Amount of  
Combat Tax  
Exclusion**

For enlisted members and warrant officers, all taxable military pay items earned by a member during a month while serving in a combat zone are excluded from federal taxation.

For officers O-1 and above, the first \$6,529.20 per month of taxable military pay items is excluded from federal taxation.

Note 1: The \$6,529.20 figure increases annually to match the current base pay rate for an E-10 plus Imminent Danger Pay

Note 2: Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID)(if entitled) is not included in the \$6,529.20 ceiling.

Members entitled to combat tax exclusion will not have any Federal income tax withheld from the exempted amount of their pay. Members may voluntarily elect to have taxes withheld. Check specific state regulations regarding state withholding.

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**Extension of  
filing date for  
tax returns**

Members serving in a combat zone are allowed an extension of up to 180 days to file their federal income tax return.

The due date for filing state tax returns is regulated by each state. Members serving in a combat zone should contact their state tax office regarding the postponement of filing state tax returns

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**Procedures**

Notify the servicing SPO, via letter or message, when a member qualifies for or loses entitlement to combat tax exclusion. When starting combat tax exclusion, include a statement indicating the member is entitled on either a:

- Continuous basis (tax exclusion will continue until submission of a subsequent stop transaction) or on a,
- One time basis (tax exclusion for a single month only).

Notification of eligibility for combat tax exclusion will be included with a notification of eligibility for Special Pay - Duty Subject to Hostile Fire or Imminent Danger (HF/ID). See page 7-A-6 of this manual for the procedures for reporting entitlement to HF/ID and, if applicable Combat Servicemember's Group Life Insurance (SGLI) Allowance. See page 7-B-10 of this manual for Combat SGLI procedures.

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## Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form

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### Mailing of IRS Form W-2

IRS Form W-2s are mailed no later than 31 January of each year. To allow for reasonable mailing and forwarding due to address changes, reporting of lost or missing W-2 forms is after 15 February.

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### Ensuring Tax Mailing Address is correct

**To furnish the member with a timely IRS Form W-2, all active duty, reserve and retired personnel must:**

- Continuously keep his/her home mailing address up to date in Direct Access.
- Notify Post Office in late December, so W-2 can be forwarded.
- Ensure all addresses comply with prescribed postal address standards.

**Note:** Information about mailing addresses:

- To comply with Postal regulations and to receive mailing discounts, addresses contained in JUMPS are run through a monthly postal standard address conversion program.
- The postal database does not recognize that numerous Coast Guard units may reside at a given address. For instance, in Portsmouth, there are several units located at 4000 Coast Guard Blvd. For single members living in barracks or shipboard berthing, the unit's name may be part of the address.
- To ensure proper delivery, the unit's name must be entered at the BEGINNING of the street information on the Tax Mailing Address transaction and the accurate 9-digit zip code must also be entered.
- If the unit's name is at the end of the street information or as part of the city/town information or the 9-digit zip code was not entered, the unit's name will be deleted by the monthly postal address conversion program.

Example of Good Address: ISC (BEQ) 4000 CG Blvd  
Portsmouth, VA 23703-2199

Example of Bad Address: 4000 CG Blvd ISC (BEQ)  
Portsmouth, VA 23703-2199

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*Continued on next page*

## Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

**For members entering the Coast Guard late in the calendar year**

If transactions to access a member into Direct Access do not properly process until after the end month compute December polling cutoff, the member will not receive a W-2 for the year member entered the Coast Guard.

For example: A member enlists on 16 December 2007, but was not paid by until 15 January 2008. The member will not receive a W-2 for 2007. The taxable wages earned by the member during calendar year 2007 will be reported on the member's 2008 IRS Form W-2 (as per IRS regulations).

**Taxable wages are reported when paid vice when earned**

For example, an E-5 serves aboard a Career Sea Pay eligible vessel from 12 to 16 December 2007, but the member does not receive payment for the Career Sea Pay earned in 2007 until 15 January 2008. Per IRS regulations, the taxable income is reported on the IRS Form W-2 for 2008.

**General information regarding the IRS Form W-2**

General information regarding each block on the IRS Form W-2 can be found on the reverse of "Copy C for Employee's Records". Below is information concerning blocks 12.T and 15 of the IRS Form W-2.

<b>Block</b>	<b>Information about the block</b>
12.T	Adoption Assistance Benefits. Qualified adoption expenses paid by the Coast Guard are not subject to federal income tax withholding.
15	<ul style="list-style-type: none"><li>• For active duty members, IRS regulations require the "Retirement Plan" block be checked.</li><li>• For reserve members, the "Retirement Plan" block will only be checked if the member served on active duty, other than for training, for more than 90 days. If the cumulative active service during the calendar year was less than 91 days, the "Retirement Plan" block will not be checked on the reserve member's IRS Form W-2.</li></ul>

*Continued on next page*

## Information about the W-2 Form and How to Request a Duplicate or Corrected W-2 Form, Continued

**How to request a duplicate IRS Form W-2**

To receive a duplicate W-2 form for the previous year, the member must:

Step	Action	
1	Review address on December LES (Block #22).	
	<b>If</b>	<b>Then</b>
	Correct	The unit submits a request (E-mail, FAX, letter, etc.) to PSC (ses) after 15 February indicating: <ul style="list-style-type: none"> <li>• Lost, destroyed or did not receive.</li> <li>• Member's name, and SSN/EMPLID</li> </ul>
	Incorrect	<ul style="list-style-type: none"> <li>• Contact prior unit/residence and request the W-2 form be forwarded.</li> <li>• Update current mailing address.</li> </ul>
2	If after 15 February the W-2 has not been located or is lost; the member's unit or SPO submits request (E-mail, FAX, letter, etc..) to PSC (ses) including: <ul style="list-style-type: none"> <li>• Member's name and SSN.</li> <li>• Mailing address for duplicate W-2.</li> <li>• Reason why block #22 was not updated with current address and action taken to update address or</li> <li>• If W-2 was lost or destroyed indicate "lost".</li> </ul>	
3	PSC (ses) will reissue W-2 within 7 days of receipt of request.	

**How to request a corrected IRS Form W-2**

Follow the procedures below when questioning a figure reported on the IRS Form W-2:

Stage	Who Does It	What Happens
1	Member	Notifies unit admin office with the following: <ul style="list-style-type: none"> <li>• Item on W-2 suspected to be in error</li> <li>• What the member thinks is the right amount and why</li> <li>• Calculations</li> </ul>
2	Unit	<ul style="list-style-type: none"> <li>• Review member's calculations and supporting documentation, i.e., LES</li> </ul>
3	SPO	<ul style="list-style-type: none"> <li>• Verify calculations provided by member/unit</li> <li>• Notify PSC (ses) via E-mail and provide calculations.</li> </ul>



## 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).

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### 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.

The Internal Revenue Code places an annual limit on elective deferrals, e.g., tax-deferred employee contributions to the TSP. For 2007, the elective deferral limit is \$15,500.

**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. The limit for 2007 is \$45,000 or 100% of compensation, whichever is less. This limit applies to all TSP contributions, including tax-exempt contributions. If contributions are also made to a civilian TSP account, the total of all contributions cannot exceed this limit.
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## TSP Enrollment

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

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**Reference** (a) [PAYMAN](#), 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.

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**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>

## Section Overview

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**Introduction** This section provides you with the procedures for collecting an in-service debt and counseling a member on an overpayment.

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**Cash deposits** If a member desires to repay part of all of an in-service debt, mail a check, made out to U.S. Coast Guard, to PSC (dc) with a copy of the LES or Notice of Overpayment (NOP).

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**Interest, administrative fees, and penalties** Interest will be applied to all overpayments that occur earlier than the current JUMPS processing period, and on all non-payroll debts to the Coast Guard unless waived by CO, PSC. No interest will be applied if debt is paid in full prior to the start of collection action. A 30-day notice will be provided to the member with interest being applied from the date of notification.

- Administrative fees and penalties will be applied on a case by case basis in accordance with [4 C.F.R.](#), and the CG Pay Manual.
- 

**In this section**

Topic	See Page
<a href="#">Collection of JUMPS Overpayments</a>	9-A-2
<a href="#">Collection of Other Debts</a>	9-A-4

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## Collection of JUMPS Overpayments

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**Introduction** An overpayment of pay and allowances is the result of errors or delays in processing pay-related transactions. This will assist the unit when counseling a member on an overpayment.

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**Reference** (a) [PAYMAN](#), Chapter 11, In-Service Debt Collection

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**How a member is notified of an overpayment** PSC (mas) will provide a Notice of Overpayment (NOP) letter for each member with a debt of \$751 or more. Members with debts of \$750 or less will be notified by a message on the LES.

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**Action upon receipt of a Notice of Overpayment letter** Upon receipt of a Notice of Overpayment (NOP) letter the member's commanding officer shall:

- provide a copy of the NOP letter to the member.
- counsel the member regarding the debt and the collection procedure.

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**Overpayment collection – Reserves not on active duty** Overpayments to selected reservists (SELRES) will be collected from future drill/ADT/active duty pay earned by the reservist. Collection will be established at 20% of the reservist's future available pay if the overpayment was through no fault of the member. The member's commanding officer may propose collection at a lower percentage if collection of 20% of available pay would cause a financial hardship.

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*Continued on next page*

## Collection of JUMPS Overpayments, Continued

**Overpayment collection process**

Use this table when counseling the member on overpayment collection procedures.

**Note:** The standard procedures described below do not apply if the time remaining before the member's scheduled date of separation is not sufficient to complete collection. Every effort will be made to collect debts prior to separation.

If overpayment is	Then collection will be
less than \$150	<p>taken during current month if sufficient net pay exists, with a remark on the LES</p> <p><b>Note:</b> If sufficient net pay does not exist, then the member will be advanced the overpayment amount and collection will start the next month</p>
\$150 to \$750	scheduled for automatic repayment at a rate not to exceed \$150 a month starting the next month with a remark on the LES
\$751 to \$1999	scheduled in 5 equal monthly installments 30 days after unit CO receives written notice of member's debt
\$2000 or greater	<p>scheduled as 20% available pay if overpayment was through no fault of the member or \$400 per month whichever is greater unless:</p> <ul style="list-style-type: none"> <li>• 20% of available pay makes repayment less than 5 months, collection will be set at 5 months</li> <li>• repayment exceeds 12 months then repayment rate will be 1/12 of debt, provided it doesn't exceed available pay</li> <li>• if 12 equal installments exceed available pay, then repayment will be amount of available pay</li> </ul>

**Requesting a different repayment schedule**

The member's commanding officer may propose a different repayment schedule based upon the member's financial status, as long as repayment is completed prior to separation. Repayment of less than 10% of available pay will only be approved in cases of legitimate financial hardship. If a financial hardship exists, a Financial Statement, [CG-5489B](#), (from Enclosure (1) to this manual) must be completed and forwarded to PSC (mas) for review and approval.

**Section A  
COLLECTIONS**

## Collection of Other Debts

**Introduction**      There are several types of debts that a member may incur that can be collected directly from their pay.

**Reference**            (a) [PAYMAN](#), Chapter 11, In-Service Debt Collection

**Types of debts**      This table lists several types of debts that can be collected from a member's pay.

<b>Type</b>	<b>Who does it</b>	<b>Action taken</b>
Unliquidated Travel Advance	PSC (tvl)	Issues *dunning letter to member.
	FINCEN	Initiates collection (Active duty members).
	PSC (dc)	Initiates collection (Reserve members).
IRS Tax Levy	Unit	<ul style="list-style-type: none"> <li>• Forwards notice of levy to PSC (mas)</li> <li>• Notifies originating IRS unit that notice of levy has been forwarded.</li> </ul>
	PSC (mas)	Initiates collection.
Garnishment Involuntary Allotment	Unit	Upon receipt of a court order for garnishment returns order to sender with a letter informing them that the order must be sent directly to PSC (lgl) for action.
	PSC (lgl)	Prior to starting an involuntary allotment, PSC (lgl) will forward documentation to both the member and the member's commanding officer, notifying them that automatic processing will occur if a response is not received within 90 days from the date PSC mailed the documentation. Specific procedures to be followed by the member and the command will be included with the documentation provided by PSC.
Private Damages	Unit	Submits the report of investigation to PSC (dc).
	PSC (dc)	Initiates collection.

\*dunning – “An important demand for payment”

*Continued on next page*



## 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**

Topic	See Page
<a href="#">Remissions</a>	9-B-2
<a href="#">Waivers</a>	9-B-3

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**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 forms (CG-5489-1) 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 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 the SPO and [PSC-Customercare@uscg.mil](mailto:PSC-Customercare@uscg.mil), 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-5489-1 from member</li> </ul>
3	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>• Within 3 working days of receipt of CG-5489-1</li> </ul>

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

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## Waivers

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

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

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**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.

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**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	PSC (MAS)	<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</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 (ccb) for information on waiver requests.

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## Section Overview

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**Introduction** This section will guide you through the procedures following NJP or courts-martial proceedings, reporting a member UA or a deserter, and reporting a member who has returned after being absent or declared a deserter.

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**In this section**

<b>Topic</b>	<b>See Page</b>
<a href="#">Nonjudicial Punishment (NJP) Checklist</a>	10-B-2
<a href="#">Courts-Martial Checklist</a>	10-B-3
<a href="#">Confinement Processing</a>	10-B-4a
<a href="#">Unauthorized Absence</a>	10-B-5
<a href="#">Desertion</a>	10-B-8
<a href="#">Reporting Return of Absentee or Deserter</a>	10-B-11
<a href="#">Reporting Civil Arrest or Conviction</a>	10-B-14

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## Nonjudicial Punishment (NJP) Checklist

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**Introduction** This checklist has been provided as a job aid to assist the unit/HRS/SPO in completing all necessary tasks required after NJP proceedings. This job aid is designed to be reproduced locally.

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**Reference**

- (a) [MJM](#), Article 1-G-3, Personnel Record Entries
- (b) Direct Access Online Manual, [EER Instructions](#)
- (c) [PERSMAN](#)
- (d) [Military Personnel Security Program](#), COMDTINST M5520.12(series)

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**NJP checklist** Follow these procedures after NJP proceedings.

Step	Action	Reference	Date
1	Forward a copy of the CG 4910 to the SPO	MJM	
2	Complete an Enlisted Employee Review in Direct Access. Use "Discipline" for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2  Direct Access Enlisted Employee Review Instructions	
3	File the original Report Of Offense And Disposition (CG-4910), Acknowledgment of Rights Acceptance of NJP, PIO's report and appeals in the unit punishment log.	MJM, 1 -G-4	
4	Initiate report to COMDT (CG-862).	PERSEC, 2-V	

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## Courts-Martial Checklists

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**Introduction**      These checklists have been provided as a job aid to assist the unit/HRS/SPO in completing all necessary tasks required after a courts-martial. This job aid is designed to be reproduced locally.

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**Reference**      (a) [MJM](#),  
                         Section 5-G, Courts-Martial Action and Review  
                         Section 5-E, Suspension of Sentence  
                         (b) [PERSMAN](#)  
                         (c) [PERSEC](#)

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**Summary courts-martial**      Follow these procedures after the convening authority has acted on a summary courts-martial where the member was found guilty.

<b>Step</b>	<b>Action</b>	<b>Reference</b>	<b>Date</b>
1	Forward to the servicing HRS/SPO: <ul style="list-style-type: none"><li>• Copy of <a href="#">DD-Form 2329</a></li><li>• Acknowledgment of Rights</li><li>• Copy of Supplementary Promulgating Order</li></ul>	MJM	
2	Complete an Enlisted Employee Review in Direct Access. Use “Discipline” for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2  Direct Access Enlisted Employee Review Instructions	
3	Initiate report to COMDT (CG-862).	PERSEC, 2-V	

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**Section B  
DISCIPLINE**

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**Courts-Martial Checklists, Continued**

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**Special or general courts-martial** Follow these procedures after the convening authority has acted on a special or general courts-martial.

<b>Step</b>	<b>Action</b>	<b>Reference</b>	<b>Date</b>
1	<ul style="list-style-type: none"><li>Forward copy of promulgating order to servicing HRS/SPO</li></ul>	MJM	
2	Notify servicing HRS/SPO of member's fine repayment intentions (if fine imposed)	MJM	
3	Complete an Enlisted Employee Review in Direct Access. Use "Discipline" for the review type and enter remarks in the comments section for the conduct competency.	PERSMAN, 10-B-2  Direct Access Enlisted Employee Review Instructions	
4	Initiate report to COMDT (CG-862).	PERSEC, 2-V	

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## **Confinement Processing**

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**Introduction** This section has been provided as a job aid to assist the unit and SPO in completing all necessary tasks required when a member is sentenced to confinement.

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**References** (a) PERSMAN, Articles 8-F-4 and 7-A-21

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**Confinement for 90 days or less with no punitive discharge** When a member is sentenced to confinement for 90 days or less with no punitive discharge the unit will:

1. Make notification in accordance with Personnel Manual, 8.F.4.K.
2. Issue TDY orders to confinement facility.

The SPO will:

1. Stop pay entitlements as applicable. A member in military confinement may lose entitlement to BAS, BAH, COLA, Hardship Duty Pay-Location, Career Sea Pay/Premium, Crew & Noncrew Flight Pay, Imminent Danger Pay, SDAP, ACIP, Board PYA Pay, HDIP-VBSS, FLPP, or Diving Duty Pay. See Figure 3-2, 4-2, 4-4, and 4-5 of the [CG Pay Manual](#) for more information.
  2. Enter Court Memorandum. Reported Date is date of courts-martial. Action Date is 14 days after date of courts-martial.
  3. Place member in a confinement status (Administer Workforce > Monitor Absence(GBL) > Use > General Absence). Start Date/Time will be date of court-martial unless the member was in pre-trial confinement. If member was in pre-trial confinement, the start date/time will be the date member was placed in pre-trial confinement.
  4. Return member from confinement status and restart pay entitlement, as applicable, upon the member's release from confinement.
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## Confinement Processing, Continued

**Confinement for over 90 days or confinement with an unsuspended punitive discharge approved by the convening authority**

Coast Guard members with sentences to confinement of 90 days or more, or with an unsuspended punitive discharge approved by the convening authority, shall be assigned to the Personnel Service Center, Topeka, KS, for administrative control. Members will also be administratively assigned to PSC if the assignment authority considers it unlikely that the offender will be ordered to return to his or her parent command after release from confinement.

This is the process:

<b>When Member</b>	<b>Then the ...</b>	<b>Does This ...</b>
Is sentenced to 90 days or more confinement or confinement with an unsuspended punitive discharge (approved by the convening authority)	Unit	Makes notification in accordance with Personnel Manual, 8.F.4.K.
	SPO	<p>Obtains the Results of Trial letter. This letter contains the member's adjudged sentence. Completes the following transactions in Direct Access:</p> <ul style="list-style-type: none"> <li>• Stop pay entitlements as applicable. A member in military confinement may lose entitlement to BAS, BAH, COLA, Hardship Duty Pay-Location, Career Sea Pay/Premium, Crew &amp; Noncrew Flight Pay, Imminent Danger Pay, SDAP, ACIP, Board PYA Pay, HDIP-VBSS, FLPP, or Diving Duty Pay. See Figure 3-2, 4-2, 4-4, and 4-5 of the <a href="#">CG Pay Manual</a> for more information.</li> <li>• Enters Court Memorandum. Reported Date is date of courts-martial. Action Date is 14 days after date of courts-martial.</li> <li>• Places member in a confinement status (<u>Administer Workforce &gt; Monitor Absence(GBL) &gt; Use &gt; General Absence</u>). Start Date/Time will be date of court-martial unless the member was in pre-trial confinement. If member was in pre-trial confinement, the start date/time will be the date member was placed in pre-trial confinement.</li> </ul>

Note: If discharges are upgraded by convening authority, the member's record will be transferred back to the original unit for discharge processing.

If allotment amounts exceed the total amount of 2/3<sup>rds</sup> pay after forfeiture, then the allotments are stopped.

*Continued on next page*

**Section B  
DISCIPLINE**

**Confinement Processing, Continued**

**Confinement for over 90 days or confinement with an unsuspended punitive discharge approved by the convening authority (continued)**

When Member	Then the ...	Does This ...
<p>Is sentenced to 90 days or more confinement or confinement with an unsuspended punitive discharge (approved by the convening authority)</p>	<p>SPO</p>	<ul style="list-style-type: none"> <li>• Mails the SPO PDR to PSC (pers). The Medical PDR will be maintained by the assigned brig.</li> <li>• Faxes a copy of Court Memorandum to PSC (pers) at (785)339-3790.</li> </ul>
	<p>PSC SPO (PERS)</p>	<p>Transfers member to confinement facility:</p> <ol style="list-style-type: none"> <li>1. Obtains the Department ID and Position number for facility (<u>Develop Workforce</u> &gt; <u>Manage Positions</u> &gt; <u>Inquire</u> &gt; Positions at a Dept)</li> <li>2. Issues PCS order to transfer member to Department/Position obtained above (<u>Develop Workforce</u> &gt; <u>Plan Successions(GBL)</u> &gt; <u>Use</u> &gt; Succession Plan) <ul style="list-style-type: none"> <li>• Effective date of PCS is the day before confinement begins.</li> <li>• Next Succession Plan Date is day of confinement.</li> </ul> </li> <li>3. Completes PCS Endorsements (<u>Administer Workforce</u> &gt; <u>Track Global Assignments(GBL)</u> &gt; <u>Use</u> &gt; PCS Orders) <ul style="list-style-type: none"> <li>• Actual Depart Date is same as Court Memorandum.</li> </ul> </li> </ol> <ul style="list-style-type: none"> <li>• Updates DEERS/RAPIDS with confinement status.</li> <li>• Enters member into the Confinement/Appellate database.</li> <li>• Ensures entitlements have stopped and court memorandum has been entered. <ul style="list-style-type: none"> <li>○ If total forfeiture of pay and allowance is awarded, stops SGLI after the 31<sup>st</sup> day of confinement. Use Benefit Plan code “Y”.</li> <li>○ Changes BAH accordingly. Effective date will be date of confinement.</li> <li>○ Enlisted - Stops BAS entitlement. Starts BAS minus DMR.</li> <li>○ Officer – Continues BAS entitlement.</li> <li>○ Changes COLA to PSC zip code.</li> <li>○ Changes special pay and allowances accordingly (e.g. Flight Pay, HDIP, etc)</li> </ul> </li> </ul>

**Note:** Appellate Leave issues are maintained by PSC (pers).

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## Reporting Return of Absentee or Deserter, Continued

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**District  
responsibility**

When notified of the return of an absentee or deserter, the district commander for the homeport/permanent duty station from which the member is absent will:

- Direct the return of an absentee or deserter to a unit in the district for disciplinary action.
  - Request assignment instruction from CGPC (epm) or CGPC (opm) if the member has been temporarily assigned to a unit other than the unit from which the member is absent for disciplinary action.
  - Coordinate with PSC (dc) for checkage of the member's pay account for travel costs.
- 

**Absentee or  
deserter from  
other branch of  
the Armed  
Forces**

Follow these procedures for reporting the return of an absentee or deserter from another branch of the U. S. Armed Forces.

<b>Step</b>	<b>Action</b>
1	Immediately notify the commanding officer of the parent organization by message and request instructions.
2	Included the following as info addressees as appropriate: <ul style="list-style-type: none"><li>• CGPC (epm) or CGPC (opm)</li><li>• Adjutant General, Department of the Army</li><li>• Chief of Naval Personnel</li><li>• Air Adjutant General, Department of the Air Force</li><li>• Commandant, Marine Corps</li></ul>
3	Prepare a statement in triplicate that includes the following: <ul style="list-style-type: none"><li>• Time date and place taken into CG custody.</li><li>• Circumstances of return (whether surrendered, delivered, or apprehended).</li><li>• Name and address of person or agency effecting apprehension or delivery.</li></ul>
4	<ul style="list-style-type: none"><li>• Provide an original and one copy of the statement to the representative of the agency taking custody of the member.</li></ul>

---

**Section B  
DISCIPLINE**

## Reporting Civil Arrest or Conviction

**Introduction**      The arrest or conviction of a Coast Guard member (active or reserve) by civil authorities must be reported in accordance with the following references.

**Reference**      (a) [PERSMAN](#), Article 8-B  
 (b) [PAYMAN](#), Articles 2-C-4 thru 2-C-6  
 (c) [PERSEC](#), Article 2-V

**Process Overview**      This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references.

Stage	Who Does It	When	What Happens	References
1	Unit	Upon learning of a member's arrest or detention by civil authorities	<ul style="list-style-type: none"> <li>Notifies cognizant Security Officer (For units below the Group level this will be the Group Security Officer).</li> <li>Notifies servicing HRS/SPO if the member is not entitled to service credit while in the custody of civil authorities.</li> </ul>	PERSMAN, Article 8-B  PAYMAN, Articles 2-C-4 thru 2-C-6
2	Security Officer	Upon notification of member's arrest	<ul style="list-style-type: none"> <li>Completes a Personnel Security Action Request (CG-5588) (The form is available in the "USCG Adobe Forms Library" program).</li> <li>Sends completed CG-5588 to COMDT (CG-862).</li> <li>Sends copies of the report to: CGPC (epm) or (opm) and (adm-3).</li> <li>Sends a copy of the report to the district or area security officer (if not collocated).</li> </ul>	PERSEC, Article 2-V

*Continued on next page*

**Section B  
DISCIPLINE**

## Reporting Civil Arrest or Conviction, Continued

**Process Overview, Continued** This is the process used when reporting civil arrest or conviction. Complete details and procedures can be found in the appropriate references, continued.

Stage	Who Does It	When	What Happens	References
3	SPO/ISC	Upon notification of member's arrest and detention beyond the normal expiration of authorized leave or liberty	<ul style="list-style-type: none"> <li>Completes a "General Absence" Transaction in Direct Access.</li> </ul> <p>Direct Access path:  <a href="#">Administer Workforce</a> &gt; <a href="#">Monitor Absence (GBL)</a> &gt; <a href="#">Use</a> &gt; General Absence</p> <ul style="list-style-type: none"> <li>Upon the member's return to duty, completes a "General Absence" Transaction" and "Employee Entitlements" transaction to start allowances.</li> </ul> <p>Direct Access path:  <a href="#">Home</a> &gt; <a href="#">Compensate Employees</a> &gt; <a href="#">Maintain Entitlements</a> &gt; <a href="#">Use</a> &gt; Employee Entitlements</p>	PAYMAN, 2-C-4  Direct Access Guides, <a href="#">General Absence</a> and <a href="#">Employee Entitlements</a>
4	Security Officer	Upon notification of member's arrest and detention and every 60 days until final disposition of the case is known	<ul style="list-style-type: none"> <li>Submits an interim report to COMDT (CG-862) using form CG-5588.</li> <li>Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).</li> </ul> <p>Note: PERSMAN, 8-B-2 specifies 30 days as the interval for interim reports, however PERSEC, 2-V (dtd 04 Sep 2001), which was issued after the most recent change to the PERSMAN, page 8-B-2 (Ch 30 dtd. 19 Mar 1999), specifies 60 days.</p>	PERSEC, 2-V
5	Security Officer	Upon notification of the final disposition of the case	<ul style="list-style-type: none"> <li>Submits a Final report to COMDT (CG-862), using form CG-5588.</li> <li>Sends a copy of the report to the district or area security officer (if not collocated), CGPC (epm) or (opm) and (adm-3).</li> </ul>	PERSEC, 2-V

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## Chapter Overview

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**Introduction** This chapter provides pay and personnel procedures for reserve mobilization. This chapter also provides checklists, guides, and information required to complete the tasks associated with reserve mobilization.

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**Use of This Chapter for Mobilization Planning** The process for mobilizing Reservists will be exceptionally smoother if units use this chapter as a guide in training members on mobilization entitlements, and utilize the provided checklists for ensuring necessary paperwork has been completed to make a member medically and legally ready for mobilization.

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**In This Chapter** The following topics are covered in this chapter.

Topic	See Page
<a href="#">The Mobilization Process</a>	11-2
<a href="#">Types of Mobilization</a>	11-5
<a href="#">Mobilization Orders</a>	11-6
<a href="#">Pay Entitlements When Mobilized</a>	11-9
<a href="#">Travel Entitlements When Mobilized</a>	11-18
<a href="#">Other Entitlements When Mobilized</a>	11-22
<a href="#">Mobilization Checklist</a>	11-24
<a href="#">SPO Mobilization Procedures</a>	11-27
<a href="#">Recall of Retired Members</a>	11-31
<a href="#">Travel Claims During Mobilization Status</a>	11-34
<a href="#">Monthly Verification Procedures</a>	11-45
<a href="#">Continuance On Active Duty</a>	11-46
<a href="#">The Demobilization Process</a>	11-48
<a href="#">Unit Demobilization Checklist</a>	11-50
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<a href="#">SPO Demobilization Procedures</a>	11-52
<a href="#">TRICARE Benefits</a>	11-54

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## The Mobilization Process

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

---

**Reference**            (a) Direct Access Online Manual, [Reserve Orders](#)  
 (b) [Coast Guard Manpower Mobilization And Support Plan, COMDTINST M3061.1](#)

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**Process**              This table provides an overview of the mobilization process.

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
1	Commandant	A mobilization message is issued.
2	District, ISC (fot) and Field Units	Coordinate mobilization needs to identify reserve members for mobilization. Provide clear information on berthing and messing facilities at the Mobilization Site.
3	ISC (pf)	Receives direction from operational command (district or area commander) to supply mobilization resources. Coordinates with units to identify Reservists to meet mobilization needs.
3	Source Command/Detailer	If possible, creates the Request for Reserve Orders in Direct Access, otherwise information may be sent directly to SPO for orders generation.
3	ISC (pf)	Provides information on Berthing and Messing at Mobilization Site to SPO/Field for order preparation.
4	Unit	<ul style="list-style-type: none"> <li>• Screens member for mobilization/medical fitness.</li> <li>• Verifies all personal information is current.</li> <li>• Verifies no other duty/drills are scheduled during timeframe desired.</li> <li>• Ensures member has enough obligated service.</li> <li>• Assists member in making travel arrangements to mobilization site.</li> <li>• Sends letter to member's employer notifying of the recall status.</li> <li>• Mails member's medical record to the mobilization unit.</li> </ul>

*Continued on next page*

## The Mobilization Process, Continued

<b>Stage</b>	<b>Who Does It</b>	<b>What Happens</b>
5	Member's Regularly Assigned SPO	Prepares Reserve orders in Direct Access and routes to ISC (pf) for approval.
6	Servicing ISC (pf)	Approves the orders and routes back to the SPO for endorsement.
7	Member's Regularly Assigned SPO	<ul style="list-style-type: none"> <li>• Prints the Reserve orders.</li> <li>• Signs the Reserve orders.</li> <li>• Mails the Reserve orders to the member.</li> <li>• Coordinates any service obligation paperwork.</li> <li>• Coordinates processing of travel advance requests.</li> <li>• Completes endorsements on Reserve Orders in Direct Access</li> <li>• Starts BAS and BAH</li> <li>• Forwards SPO PDR to the SPO that will be servicing the member at the mobilization site.</li> </ul>
8	Member	<ul style="list-style-type: none"> <li>• Reports for mobilization duty.</li> <li>• Completes check-in paperwork.</li> <li>• Prepares travel claim.</li> <li>• Verifies SGLI for self and spouse.</li> <li>• Updates mailing/e-mail address and direct deposit information in Direct Access (if applicable) [if access to the intranet is unavailable, requests that SPO input mailing address / direct deposit information].</li> </ul>
9	Mobilization Site	Reports member aboard. Notifies member's regularly assigned SPO of any unique pay entitlements (SDAP for example).
10	Member's Regularly Assigned SPO	Prepares Direct Access transactions to start pay entitlements
11	PSC (tvI)	Processes requests for travel advances.
12	SPO / PSC	Maintains pay and leave accounts during mobilization.
13	Member	Submits periodic travel claims (normally monthly) if entitled to per diem while in mobilization status.

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## The Mobilization Process, Continued

**Process (cont'd)**

<b>Stage</b>	<b>Who does it</b>	<b>What Happens</b>
14	PSC (tvI)	Processes travel claims.
15	Mobilization Site & ISC (pf)	Coordinate demobilization in advance with member and SPO.
16	Mobilization Site	Ensure member is physically qualified for demobilization. Notifies SPO of any uncollected CG Mutual Assistance loan(s) that need to be collected from member's final active duty pay.
17	Member	Notifies SPO of desires concerning disposition of accrued leave (at least 50 days prior to demobilization unless exigent circumstances exist) via a Career Intentions Worksheet.
18	Member's Regularly Assigned SPO	<ul style="list-style-type: none"> <li>• Inputs Statement of Intent in Direct Access (at least 45 days prior to demobilization unless exigent circumstances exist).</li> <li>• Prepares Certificate of Release or Discharge from Active Duty (DD-214) and mails to Mobilization Site for delivery to member.</li> <li>• Verifies member's Personnel Data Information File (PDIF) and inputs any missing competencies earned, awards issued or school completions in Direct Access.</li> </ul>
19	Mobilization Site	<ul style="list-style-type: none"> <li>• Delivers demobilization documents to member (DD-214 and instructions for filing travel claim).</li> <li>• Mails member's medical record back to the member's regularly assigned unit.</li> </ul>
20	Member's Regularly Assigned SPO	<ul style="list-style-type: none"> <li>• Verifies the member's leave balances.</li> <li>• Prepares Direct Access transactions to record the member's release from active duty (RELAD).</li> <li>• Forwards SPO PDR back to the SPO for the member's regularly assigned unit.</li> </ul>
21	Member	Updates mailing/e-mail address and bank account information in Direct Access, if they are changing (if access to the CG intranet is unavailable, requests that SPO input mailing address / direct deposit information). Submits updated SGLI election forms if SGLI coverage was converted to the maximum level during mobilization, and less than maximum coverage is desired after demobilization.
22	PSC (ses)	Processes final active duty payment to member. Collects CG Mutual Assistance debts.

## Types of Mobilization

**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.

**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 Department of Homeland Security	Serious natural or manmade disasters, accidents or catastrophes or prior to an incident or event to aid in prevention of an imminent catastrophe, act of terrorism, or transportation security incident.	Involuntary (Title 14) Not more than 60 days per four-month period or 120 per two year period
10 U.S.C. 12301(a)	Congress	War or National emergency declared by Congress	Involuntary (Title 10) Duration of war or national emergency plus six months.
10 U.S.C. 12301(d)	Designated Authority	Any Event or request for EAD, ADSW, Retired recall, etc.	Voluntary (ADSW-AC) Retain only with member consent
10 U.S.C. 12302	President	National Emergency declared by the President	An involuntary call to active duty under 10 U.S.C. 12302 for the Global War on Terror may not exceed 24 consecutive months per set of orders.  Note: Reservists involuntarily called to active duty will typically serve no more than 12 months under a set of involuntary active duty orders. Urgent service need identified by operational commanders could result in extension of orders, consistent with the time limits provided by Title 10. However, the extension of involuntary orders beyond 12 months to address this urgent service need must be approved by the Headquarters Office of Reserve Affairs COMDT (CG-131).
10 U.S.C. 12304	President	SELRES Augmentation for any mission deemed necessary by President	Involuntary (Title 10) Not more than 270 days.

## Mobilization Orders

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**Introduction**      The mobilization orders authorized by the ISC (pf) drive travel and per diem entitlements. Orders issued in conjunction with mobilization shall specifically state that the member is on active duty in support of a contingency operation.

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**Reference**      (a) Direct Access Online Manual, [Reserve Orders](#)  
 (b) [Coast Guard Manpower Mobilization And Support Plan, COMDTINST M3061.1](#)  
 (c) [ALCOAST 381/07; Changes to Reserve Mobilization Policy](#)

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<b>Duration and Document Type Of Mobilization Orders</b>		
<b>Citation</b>	<b>Type &amp; Limitations</b>	<b>Travel Document Type Recommended</b>
14 U.S.C. 712	Involuntary. Not more than 60 days per four-month period or 120 per two year period	11 – Standard TDY Orders if 30 or less days 13 – Blanket TDY Orders if 31 to 60 days
10 U.S.C. 12301(a)	Involuntary. Duration of war or national emergency plus six months.	13 – Blanket TDY Orders
10 U.S.C. 12301(d)	Voluntary (ADSW-AC) Retain only with member consent	13 – Blanket TDY Orders
10 U.S.C. 12302	Involuntary. Not more than 24 consecutive months.	13 – Blanket TDY Orders
10 U.S.C. 12304	Involuntary. Not more than 270 days.	13 – Blanket TDY Orders

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## Mobilization Orders, Continued

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**Order “Notes” / Standard Remarks** Orders issued under Title 10 or Title 14 require the following entries in the remarks section (e. g. Order “Notes” in Direct Access):

- A statement that the order to active duty is in "Support of a Contingency Operation." And the name of the operation being supported (e.g., Noble Eagle, Enduring Freedom, Iraqi Freedom for Title 10 orders), (Hurricane *Katrina* Recovery Response for Title 14 orders).
- 
- All mobilization orders shall contain the following statement: “If you have any questions regarding your employment/reemployment rights, you may call 1-800-336-4590 (National Committee for Employer Support Of the Guard and Reserve), check online at <http://www.esgr.org/> or the CG Legal Fact Sheet about The Soldiers' and Sailors' Civil Relief Act (SSCRA) - [http://www.uscg.mil/legal/la/topics/sscra/about\\_the\\_sscra.htm](http://www.uscg.mil/legal/la/topics/sscra/about_the_sscra.htm)“
- In the case where the reporting location is not within commuting distance of the member's home, add a statement that the call to active duty is in a temporary duty status (TDY).

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## Mobilization Orders, Continued

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Order “Notes” / Standard Remarks (**continued**)

- The applicable legal authority (statute) under which the member is serving (Note: It is not necessary to include the terms “voluntary” or “involuntary” active duty within these orders):
    - (a) 14 U.S.C. 712 (Title 14 orders for members called active duty involuntarily)
    - (b) 10 U.S.C. 12302 (Title 10 orders for members called to active duty involuntarily), and reference to “Executive Order 13223, dated September 14, 2001.” The period of service is exempt from the five-year limit as provided in 38 U.S.C. 4312(c)(4)(A).
    - (c) 10 U.S.C. 12301(d) (ADSW-AC for members serving voluntarily) the Secretaries of the Military Departments have each determined the period of service as exempt from the five year limit as provided in 38 U.S.C. 4312(c)(4)(B).
    - (d) Involuntary recall orders must specify the dates for unit training and for post-deployment leave periods
-



## Pay Entitlements When Mobilized

**Introduction** Pay entitlements depend on the legislative authority under which the orders are issued ([Title 10 or Title 14, U.S. Code](#)).

**References** (a) [PAYMAN](#)  
(b) [JFTR](#)

**Summary** This table is a summary of mobilization pay entitlements:

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Basic Pay	Basic Pay	Basic Pay	<a href="#">PAYMAN</a> Figure 2-1
Officer Basic Allowance for Subsistence (BAS)	OFF BAS	OFF BAS	<a href="#">PAYMAN</a> Section 3-A
Enlisted Basic Allowance for Subsistence (BAS)	<b>Ashore unit:</b> ENL BAS No government dining facility available	<b>Ashore unit:</b> ENL BAS No government dining facility available	<a href="#">PAYMAN</a> Section 3-B-4.b
	ENL BAS minus Discount Meal Rate (ESM or EUM)	ENL BAS minus Discount Meal Rate (ESM or EUM)	<a href="#">PAYMAN</a> Section 3-B-5
	<b>Afloat unit with an established dining facility:</b>	<b>Afloat unit with an established dining facility:</b>	
	ENL BAS minus DISCOUNT MEAL RATE (ESM)	ENL BAS minus DISCOUNT MEAL RATE	<a href="#">PAYMAN</a> Section 3-B-5.b
Reserve Income Replacement Program	Member must complete 18 continuous months of service; or complete 24 months of active duty during the previous 60 months; or is involuntarily mobilized for service on active duty for a period of 180 days or more within 6 months or less following the member's separation from a previous period of involuntary active duty for a period of 180 days or more.	Not Applicable	37 U.S.C. 910. (See <a href="http://www.defenselink.mil/ra/">http://www.defenselink.mil/ra/</a> for policy guidance and application form. Applications (DD Form 2919) should be submitted to PSC (MAS) via the member's command and SPO.)

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## Pay Entitlements When Mobilized, Continued

### Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Basic Allowance For Housing (BAH)	<p><u>Member with dependents.</u> BAH is based upon the principal place of residence from which recalled, <i>unless</i> authorized transportation of household goods, then BAH is authorized for duty station location</p> <p><u>Member without dependents.</u> BAH is based upon the principal place of residence from which recalled, if the member is ordered to a duty locale where member is unable to occupy their principal residence and was not authorized special storage of household goods.</p> <p>Military member married to another military member. See Figure 3-12, reference (a).</p>	<p>BAH-RC (if active duty orders are for 30 days or less).</p> <p>Locality-Based (active duty orders for 31 days or more) or OHA (if outside the U.S.) based upon the principal place of residence from which recalled.</p> <p>A member retains entitlement to locality-based BAH even if RELAD before completion of the initial period of duty so long as the orders were initially issued for 31 or more days of consecutive active duty. If the member receives an order modification/extension, and the member serves more than 30 days from the date the orders are extended, the member's BAH entitlement changes from BAH-RC to full BAH effective the date the orders are officially modified. Otherwise, BAH-RC remains the housing allowance entitlement.</p>	<p><a href="#">PAYMAN</a> Section 3-C-10 Figure 3-7 Figure 3-8 Figure 3-12 <a href="#">ALCOAST 462/06</a></p>
Cost-of-Living Allowance in CONUS (CONUS COLA).	CONUS COLA is payable at the rate prescribed for the location of the member's principal place of residence.	Not payable.	<a href="#">JFTR</a> Para U8011,

*Continued on next page*

## Pay Entitlements When Mobilized, Continued

### Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Overseas Housing Allowance (OHA)	OHA is <u>only</u> payable when ordered to active duty from an OUTCONUS residence. The OHA rate payable will be based on the location of the member's primary residence.	OHA is <u>only</u> payable when ordered to active duty from an OUTCONUS residence and the orders are for more than 30 days. The OHA rate payable will be based on the location of the member's primary residence.	<a href="#">JFTR</a> , Para U7150-H
Overseas Cost of Living Allowance (OUTCONUS COLA)	OUTCONUS COLA is <u>only</u> payable when ordered to active duty from an OUTCONUS residence. The OUTCONUS COLA rate will be based on the location of the member's primary residence.	OUTCONUS COLA is <u>only</u> payable when ordered to active duty from an OUTCONUS location and there is no per diem entitlement and the orders are for greater than 30 days.	<a href="#">JFTR</a> , Para U7150-H
Family Separation Allowance (FSA)	<u>Member with dependents.</u> FSA- T if assigned in a TDY status <i>OR</i> FSA-S to a ship away from dependents for a continuous period of 31 days or more. NOTES: (1) A member must be away for 30 continuous days without family visits at the onset of the mobilization. (2) After the first 30 days, reasonable visits are permissible provided visits are of a temporary nature not exceeding 30 consecutive days in duration.	<u>Member with dependents.</u> FSA- T if assigned in a TDY status <i>OR</i> FSA-S to a ship away from dependents for a continuous period of 31 days or more. NOTES: (1) A member must be away for 30 continuous days without family visits at the onset of the mobilization. (2) After the first 30 days, reasonable visits are permissible provided visits are of a temporary nature not exceeding 30 consecutive days in duration.	<a href="#">PAYMAN</a> Section 3.G
Family Supplemental Subsistence Allowance (FSSA)	FSSA is payable when the household income is less than 130% of the federal poverty level and the member is normally eligible for food stamps.	FSSA is payable when the household income is less than 130% of the federal poverty level and the member is normally eligible for food stamps.	<a href="#">PAYMAN</a> Section 3-N

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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. For orders greater than 30 days, the entitlement is BMA or SMA	<a href="#">PAYMAN</a> Figure 3-26
Civilian Clothing Monetary Allowance	STADCMA-CIV Use <a href="#">PSC-5150</a>	STADCMA-CIV (period is 30 days in duration) Use <a href="#">PSC-5150</a>	<a href="#">PAYMAN</a> 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).	<a href="#">PAYMAN</a> Section 3.K.3
Hardship Duty Pay for Location (HDP-L)	If mobilized to a designated Hardship Duty Location for over 30 consecutive days.	If mobilized to a designated Hardship Duty Location for <b>over 30 consecutive days.</b>	<a href="#">PAYMAN</a> 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.	<a href="#">PAYMAN</a> Figure 4-6
Diving Duty Pay	When assigned by orders to diving duty.	When assigned by orders to diving duty.	<a href="#">PAYMAN</a> 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.	<a href="#">PAYMAN</a> Figure 4-9
Board Certified Pay for Physician Assistants	Officers designated as physician assistants.	Officers designated as physician assistants.	<a href="#">PAYMAN</a> Section 4-J

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## 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.			<a href="#">PAYMAN</a> Section 8-G
Combat SGLI Allowance	Must be serving in Operations Enduring Freedom or Iraqi Freedom Theaters or be serving outside the U.S. on orders in support of Operations Enduring Freedom or Iraqi Freedom			PPPM Chap 8-B
Special Duty Assignment Pay (SDAP) Enlisted	If ordered to duties which qualify for SDAP. Orders must state entitlement to SDAP.	If ordered to duties which qualify for SDAP. Orders must state entitlement to SDAP.		<a href="#">PAYMAN</a> Section 4-I  <a href="#">COMDTINST 1430.1 (series)</a>
Hazardous Duty Incentive Pay (HDIP)	When under flight orders as a non-crew member or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is <u>not</u> payable.)	When under flight orders as a non-crew member or technical observer and if minimum flight requirements are met. (Note: Duty must be performed on a military aircraft. Duty as an air marshal on a commercial aircraft is <u>not</u> payable.)		<a href="#">PAYMAN</a> 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.		<a href="#">PAYMAN</a> 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	<a href="#">PAYMAN</a> Article 7.A.11 <a href="#">ALCOAST 449/05</a> <a href="#">ALCOAST 462/06</a>
		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 if orders are for 30 days. If more than 30 days, then lump sum payment is not subject to the 60 day career max.		<a href="#">PAYMAN</a> (10-A-1.a.(2) for members on Title 10). (10-A-1.a.(2)

*Continued on next page*

## Pay Entitlements When Mobilized, Continued

### Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Servicemembers' Group Life Insurance (SGLI)	When ordered to active duty for more than 30 days - <u>automatically</u> insures Member SGLI for \$400,000 and Spouse SGLI for \$100,000. If the member does not desire maximum SGLI / Spouse SGLI coverage, <u>must execute a new</u> election for reduced or no coverage.  Also entitled to Child SGLI coverage, \$10,000 per child at no cost.  Note: SGLI Coverage <u>does not</u> revert back to original SELRES designation upon demobilization.	Continues prior level of SGLI / Family SGLI coverage while on active duty for 30 days or less. If orders are for 31 or more days – See Title 10 Orders column.	<a href="#">PAYMAN</a> Section 6-A <a href="#">ALCOAST</a> <a href="#">462/06</a>
Savings Deposit Program	When assigned to a qualifying combat area is entitled to deposit up to \$10,000 in a Savings Deposit Program earning 10% interest per year, compounded quarterly.	Not applicable.	<a href="#">PAYMAN</a> Section 6-F
Advance Pay / BAH / OHA	When recalled to active duty is <u>not</u> entitled to advance pay or advance BAH / OHA.	Not applicable.	<a href="#">PAYMAN</a> Section 9-D-3
Hazardous Duty Incentive pay for Visit, Board Search and Seizure Boarding Teams (HDIP-VBSS)	When assigned to a designated boarding team billet within a designated combat theatre of operations and a minimum of three boardings are made during a calendar months.	When assigned to a designated boarding team billet within a designated combat theatre of operations and a minimum of three boardings are made during a calendar months.	<a href="#">ALCOAST</a> <a href="#">353/04</a>
FLPP Interpreter	Same allowances as Active duty component.	Same allowances as Active duty component.	<a href="#">ALCOAST</a> <a href="#">585/05</a>
FLPP Linguist			<a href="#">ALCOAST</a> <a href="#">275/06</a>

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## Pay Entitlements When Mobilized, Continued

### Summary (cont'd)

Pay Entitlement	Title 10 Orders	Title 14 Orders	Reference
Thrift Savings Plan (TSP)	If called to active duty for a period of more than 30 days, a member of the Ready Reserve may make a new/revised TSP election within 60 days of being called to active duty. Current TSP election will remain in effect.	Not applicable for orders of 30 days or less. Same as Title 10 for orders of more than 30 days. Current TSP election will remain in effect.	<a href="#">PAYMAN</a> Section 6-G <a href="#">ALCOAST</a> <a href="#">462/06</a> TSP Web site <a href="http://www.tsp.gov/">http://www.tsp.gov/</a>
TRICARE Dental Program	Reservists enrolled in TRICARE Dental for themselves and/or their families prior to mobilization are automatically converted to the lower active duty rate(s) while in a mobilized status.  Reservists not enrolled in TRICARE Dental prior to mobilization may enroll their family while on active duty. Upon demobilization: (1) the family will be automatically converted to the higher reserve rate; and (2) the Reservist has the opportunity to enroll in TRICARE Dental for him/herself.	Member continues prior level of TRICARE Dental Program coverage if orders are 30 or less days.	<a href="#">PAYMAN</a> Section 6-C <a href="#">ALCOAST</a> <a href="#">462/06</a> United Concordia Web Site @ <a href="http://www.ucci.com/">http://www.ucci.com/</a> or United Concordia Customer Service @ 1-800-866-8499

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**Chapter 11  
RESERVE MOBILIZATION**

Title 10 Reserve Mobilization Pay and Allowance Matrix									
Entitlement	Paid To	Eligibility &/or Rate Based Upon							Note(s)
		Pay Grade	Longevity	Dep Status	Unit Type	Duty Locale	Home Locale	Nature of Orders	
All	Some								
Basic Pay	X	X	X						Key Longevity Date is Pay Base Date (LES Block 5)
Basic Allowance for Subsistence	X	X		X					
Basic Allowance for Housing	X	X					X		Not pd if OHA paid. Special Mbr to Mbr. <a href="http://www.dtic.mil/perdiem/">www.dtic.mil/perdiem/</a>
INCONUS Cost of Living Allowance	X	X	X				X		Special mbr to mbr rules. <a href="http://www.dtic.mil/perdiem/">www.dtic.mil/perdiem/</a>
Overseas Housing Allowance	X	X	X				X		ONLY if Residence OUTCONUS <a href="http://www.dtic.mil/perdiem/">www.dtic.mil/perdiem/</a>
OUTCONUS Cost of Living Allowance	X	X	X				X		ONLY if Residence OUTCONUS <a href="http://www.dtic.mil/perdiem/">www.dtic.mil/perdiem/</a>
Family Separation Allowance	X		X	X	X		X		Away from depts TDY or afloat for > 30 Days. \$250 per month
Family Supplemental Subsistence Allow	X		X						Income qualifies for food stamps. <a href="http://www.dmdc.osd.mil/fssa/">www.dmdc.osd.mil/fssa/</a>
Enlisted Clothing Maintenance Allow	X	X							
Enlisted Clothing Issue to IRR/Retired	X	X						X	Recalled IRR & retired mbrs are auth issuance on CG-3019(A)
Additional Officer Uniform Allowance	X	X							\$200 each acdu > 90 DAYS. Not payable > once within 2 years
Hardship Duty Pay for Location	X						X		\$50-\$150. <a href="http://www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/">www.uscg.mil/hq/g-w/g-wp/g-wpm/g-wpm-2/</a>



**Chapter 11  
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Entitlement	Paid To		Eligibility &/or Rate Based Upon							Nature of Orders	Note(s)
	All	Some	Pay Grade	Longevity	Dep Status	Unit Type	Duty Locale	Home Locale			
Career Sea Pay	X		X	X		X					\$20-\$610. Payable at Level 1 rate only as temp assignment unless operating in-theater, then Level 3 rate
Diving Duty Pay	X		X						X		\$150-\$240. www.uscg.mil/hq/g-w/g-wp/g-wprm/g-wprm-2
Imminent Danger Pay	X								X		\$225. Assigned (including TDY) to 1 of 45 quality areas.
Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams (HDIP-VBSS)	X					X					\$150.00. Minimum of 3 operational boarding in combat theatre.
Board Certified Pay	X			X							\$166-416 per month. For PYAs certified by (G-WKH)
Physician Asssts	X										Assigned (including TDY) to 1 of 6 qualifying areas.
Combat Tax Exclusion	X							X			
Special Duty Assignment Pay	X		X				X				\$75-\$375.
Non-Crew HDIP Flight Pay	X		X			X					\$150-\$250. non-crew mbr or tech observer military aircraft
Flight Deck Hazardous Duty Pay	X					X					\$150. On ship launching, recovering, refueling aircraft.
Leave Accrual & Lump Sum Leave	X										Earn 2.5 days per month. Can sell leave > 60 days in career.
Servicemembers' Group Life Insurance	X				X						\$400K/\$100K/\$10K automatic coverage unless decline.
Thrift Savings Plan											60 days to enroll or change election if called to acdu > 30 days Current TSP election will remain in effect – member has option to change
TRICARE Dental Program	X										See enrollment rules at <a href="http://www.ucci.com">www.ucci.com</a>
Savings Deposit Program	X							X			\$10,000@10% interest. Only 6 qual'g areas. Must withdraw.
FLPP Intepreter	X					X					Linguist - \$150.00, Interpreter - \$100.00, Interim - \$50.00. See ALCOAST <a href="#">585/05</a> & <a href="#">275/06</a>
FLPP Linguist								X			

## Travel Entitlements When Mobilized

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**Introduction** Members mobilized on active duty are entitled to temporary duty (TDY) travel entitlements. When not provided with government/ contracted berthing and messing, the member is entitled to lodging plus per diem (meals and incidental expenses, M&IE). Mobilized members are not entitled to permanent change of station (PCS) entitlements.

**Note:** It is Coast Guard policy that mobilized members shall be provided Government or contracted berthing and messing to the maximum extent possible.

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**References**

- (a) [JFTR](#)
- (b) Lodging Plus Per Diem rates online at <https://secureapp2.hqda.pentagon.mil/perdiem/pdrates.html>
- (c) [ALCOAST 544/02](#)

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**Important Rules, Which Prohibit the Payment of Per Diem**

Payment of per diem is not authorized when the member:

1. Commutes between his/her home and his/her duty station, even if the residence lies outside the local reasonable commuting distance.
2. Is on leave.

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**Travel Advances on Blanket orders (13 document type)**

Advances drawn for periods of TDY under blanket orders will only be liquidated against the member's final claim (either at the end of TDY or the end of the Fiscal Year, which ever occurs first). Members should only take one advance during a TDY/Recall period and only annotate the advance (in block 10) on the final TDY claim. This method will eliminate the need for multiple advances during the TDY period, while ensuring adequate funds are available to execute orders. The final claim will serve to liquidate the advance.

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## Travel Entitlements When Mobilized, Continued

**Summary**      The table below summarizes the travel entitlements of mobilized members:

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
Mileage	Authorized reimbursement for one round trip from residence to/from TDY site <u>unless</u> the residence and TDY site are in the same city/town corporate limits.	Current local mileage rate not to exceed the cost of Government-procured transportation.	<a href="#">JFTR U7150</a>
Local Mileage	The Order Issuing Official <u>may</u> authorize local mileage for travel between lodging, duty site and dining facility.	Current local mileage rate.	<a href="#">JFTR U3510</a>
Lodging, Meals, And Incidental Expenses (M&IE)	<p>Only authorized if:</p> <p>(1) <u>not</u> provided government quarters; <u>and</u></p> <p>(2) <u>not</u> assigned to a career sea pay eligible vessel; <u>and</u></p> <p>(3) member does not commute between home and duty station.</p> <p>Notes:</p> <p>(1) If government quarters are not available, by regulation, government messing is considered not available.</p> <p>(2) If mobilized on TDY orders to another location, and required to procure and maintain quarters at both locations, the member may be entitled to dual lodging. The orders must specifically authorize dual lodging and state the location and period of time.</p> <p>(3) M&amp;IE is payable for whole days except for the departure and return day, which are payable at 75% of the appropriate M&amp;IE rate.</p>	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	<a href="#">JFTR U7150</a>

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## Travel Entitlements When Mobilized, Continued

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### Summary (cont'd)

Travel Entitlement	Summary of Entitlement	Entitlement Rate	Reference
On Base & Proportional Per Diem	At an INCONUS military installation with quarters and messing (all 3 meals) -- Government Base M&IE.  At a location with berthing but only one or two meals are available -- Proportional Per Diem.  Note: Travel claims for proportional per diem must be submitted manually to PSC (tvl). They cannot be processed through the T-PAX system.	See reference (a) for current lodging, meal, and incidental (M&IE) rates for the location.	<a href="#">JFTR</a> U4125

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## Travel Entitlements When Mobilized, Continued

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**Special Rules  
When Lodging  
Is Obtained On  
a Monthly  
Basis**

Mobilized members, who obtain lodging on a monthly basis and take short periods of leave, may be reimbursed the monthly lodging charge. However, per reference (b), they are not entitled to meals and incidental expenses (M&IE) on leave days. The monthly lodging reimbursement (including utilities and maintenance) may not exceed the daily lodging per diem for the total days of per diem.

Examples:

- The monthly lodging cost is \$1,200 in a \$50 lodging area. Takes 5 days of leave. The monthly lodging reimbursement will be calculated by dividing the remaining days (25 days) into the monthly lodging cost of \$1,200 to arrive at \$48 per day. Since \$48 is below the maximum daily limit (of \$50), the member would be reimbursed the full monthly \$1,200 lodging cost.
- The monthly lodging cost is \$1,200 in a \$50 lodging area. Takes 10 days of leave. The monthly lodging reimbursement will be calculated by dividing the remaining days (20 days) into the monthly lodging cost of \$1,200 to arrive at \$60 per day. Since \$60 exceeds the maximum daily limit (of \$50), the member would only be reimbursed \$1,000 (\$50 times 20 entitled days).

In both of the above examples, the member is NOT entitled to M&IE on leave days. Leave must be indicated on the travel claim even if monthly calculation for lodging is used.

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## Other Entitlements When Mobilized

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

- 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-1222).  Members without dependents that are authorized special storage of household goods (but no POV) lose entitlement to BAH-I.	Ref. (a), U4470-B and U5466-A.2
Identification Card (ID Card)	Members recalled to active duty for more than 30 days are entitled to an active duty ID card. Members and their eligible dependents are afforded full commissary, exchange, and MWR privileges.	Ref. (b)
Civilian Reemployment	Detailed in the following web sites: <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.	<a href="#">10 USC 1607</a>

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## 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 11-54, <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

**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.

### 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 Direct Access if they are changing. If member does not have access to the CG intranet, supply address and direct deposit information to SPO for data entry into Direct Access.	
7	Advise member that changes in marital or dependency status while in a mobilization status need to be immediately reported to the SPO to avoid potential overpayments/underpayments.	
8	Upon reporting to the mobilization site, ensure member's orders are endorsed to show date member reported, the mobilization unit's subsistence status, the quarters the member will occupy during mobilization, and the member's current dependent status. Ensure endorsed orders are forwarded to SPO.	
9	If the member is assigned outside his/her state of legal residence, and that state does not tax military pay while assigned outside the state (i.e., applies to residents of AZ, CA, CT, ID, MN, MO, MT, NJ, NY, OH, OR, PA, VT, PR), advise the member that he/she may submit a state tax withholding form to claim exemption from state tax withholding.	
10	Ensure member completes travel claim. Administratively review & approve the travel claim and forward to PSC (tv).	

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**Chapter 11**  
**RESERVE MOBILIZATION**

## Mobilization Checklist, Continued

### 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).	
22	Counsel member on the Reserve Income Replacement Program. Member must complete 18 continuous months of service; or complete 24 months of active duty during the previous 60 months; or is involuntarily mobilized for service on active duty for a period of 180 days or more within 6 months or less following the member's separation from a previous period of involuntary active duty for a period of 180 days or more. Eligible members must complete <a href="#">DD Form 2919</a> and forward it to PSC (MAS) via their command and SPO. See <a href="http://www.defenselink.mil/ra/">http://www.defenselink.mil/ra/</a> for more information.	

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## Mobilization Checklist, Continued

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### SAMPLE LETTER

#### TO BE SENT TO EMPLOYER OF MOBILIZED RESERVIST

Dear Sir or Madam:

I am writing this letter to thank **the Employer** for its past support of **Member's Full Name's** participation as a valued member of U.S. Coast Guard **Unit – Long Title**. It is only with positive support from our reserve members' families and employers that the United States military services are able to protect the national interests of our country.

At this time I need to advise you that – due to recent events – **member** has been involuntarily called to active duty with our unit under Title **10/14** of the United States Code. As **a Yeoman Second Class** at **unit**, he/she will be deployed either within the United States or overseas as directed by proper authority. The orders are for a period of **###** days.

I am enclosing some information from the Employer Support of the Guard and Reserve (ESGR) that might answer questions that you have concerning your rights and the employee's rights under the law, and provide some resources to answer others. I'd also like you to feel comfortable in contacting me personally, at **Phone Number / E-mail address**, should you still have questions or concerns.

Once again, my personal thanks for the part your organization is playing in helping to keep America strong.

Sincerely,  
Commanding Officer

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## SPO Mobilization Procedures

**Introduction**     The following checklists provide listings of the transactions to be completed by the servicing SPO when a Reservist is mobilized.

**Title 10 Checklist**     Utilize this checklist when processing Title 10 mobilizations.

<b>Checklist for Title 10 Mobilizations</b>		
<b>Required / Optional</b>	<b>Transaction / Input</b>	<b>Reference</b>
Required	Reserve Orders in Direct Access.	<a href="#">Direct Access Guide, Reserve Orders</a>
Required if primary residence is INCONUS	Change BAH. Be sure the transaction shows: Postal Code = zip code of primary place of residence as prescribed on page 11-10 of this chapter.	<a href="#">Direct Access Guide, BAH</a>
Required if principal residence is INCONUS	Start CONUS COLA. Be sure the transaction shows: Postal Code = zip code of member's principal place of residence as prescribed on page 11-10 of this chapter.	<a href="#">Direct Access Guide, COLA</a>
Required if member is enlisted	Start Subsistence Allowance. Be sure the transaction starts the appropriate subsistence prescribed on page 11-9 of this chapter.	<a href="#">Direct Access Guide, BAS</a>
Optional	FSA-T or FSA-S. Submit <u>only</u> if a member with dependents meets requirements prescribed on page 11-11 of this chapter.	<a href="#">Direct Access Guide, FSA</a>
Optional	Start OHA. Submit <u>only</u> if ordered to active duty from OUTCONUS residence. Be sure the transaction starts OHA based on the location of the primary residence.	<a href="#">Direct Access Guide, OHA</a>
Optional	Start OUTCONUS COLA. Submit <u>only</u> if ordered to active duty from OUTCONUS residence.	<a href="#">Direct Access Guide, COLA</a>

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## SPO Mobilization Procedures, Continued

### Title 10 Checklist (cont'd)

Checklist for Title 10 Mobilizations		
Required / Optional	Transaction / Input	Reference
Optional	Enlisted Uniform Issue for Members Recalled From IRR or Retired Reserve. Fax Form CG-3019 or CG-3019A, with a copy of the mobilization orders, to COMDT (G-WTR) at 202-267-4243.	<a href="#">ALCOAST 418/01</a>
Optional	Additional Reserve Officer Uniform Allowance. Submit <u>only</u> if the officer meets requirements prescribed on page 11-12 of this chapter.	Direct Access Guide, <a href="#">Officer Uniform Allowance</a>
Optional	Start Hardship Duty Pay – Location. Start Career Sea Pay. Start Diving Duty Pay. Start Imminent Danger Pay. Start Combat Tax Exclusion/Combat SGLI Allowance Start Special Duty Assignment Pay. Start Non-crew Flight Pay. Start Flight Deck Hazardous Duty Incentive Pay. Start Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams. Foreign Language Proficiency Pay  Submit <u>only</u> if member meets the requirements prescribed on pages 11-11 and 11-12 of this chapter.	Direct Access Guide, <a href="#">Employee Entitlements</a>  <a href="#">PAYMAN</a>
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PSC (mas).	<a href="#">PPPM, 7-B-8</a>
Optional	Board Certified Pay for Physician Assistants. If meets the requirements prescribed on page 11-12 of this chapter, fax copy of orders to PSC (mas) at 785-339-3760.	<a href="#">PAYMAN</a> , 4.J.2
Optional	Thrift Savings Plan. Fax Form <a href="#">TSP-U-1</a> and <a href="#">TSP-U-1-C</a> (if appropriate) to PSC (mas) at 785-339-3760.	<a href="#">PPPM, 8-C</a>
Optional	TRICARE Dental Program. Enrollment changes are made directly through United Concordia, the TRICARE dental contractor.	<a href="#">PPPM, 5-B-4</a>

*Continued on next page*

## SPO Mobilization Procedures, Continued

### Title 10 Checklist (cont'd)

Checklist for Title 10 Mobilizations		
Required / Optional	Transaction / Input	Reference
Optional	Servicemembers' Group Life Insurance. Members will be insured for the maximum \$400,000 SGLI coverage during mobilization status unless an election for lesser coverage is submitted. Required for Retired Recall.	<a href="#">PPPM, 5-A-7</a> Direct Access Guide, <a href="#">SGLI</a>
Optional	Spouse SGLI. Spouses will be insured for the maximum \$100,000 Spouse SGLI coverage during mobilization status unless an election for lesser coverage is submitted. Required for Retired Recall if has Spouse.	<a href="#">PPPM, 5-A-14</a> <a href="#">Direct Access Guide, SGLI</a>
Optional	Direct Deposit Account Change. If the member is unable to enter transaction in Direct Access then the SPO will complete it. Required for Retire Recall.	<a href="#">Direct Access Guide, Direct Deposit Change</a>
Optional	Mailing Address Change. If the member is unable to enter the transaction in Direct Access then the SPO will complete it. Required for Retire Recall.	<a href="#">Direct Access Guide, Mailing Address Change</a>
Optional Retired Recall Required	State Tax Change, if the member is assigned to duty outside his/her state of legal residence and requests that state tax withholding be stopped because his/her state does not tax military pay while stationed outside the state.	<a href="#">Direct Access Guide, State Tax Change</a>
Optional	Change in Dependency/Emergency Data if there is a change in dependents or beneficiaries. Required for Retire Recall	<a href="#">Direct Access Guide, Dependency/Emergency Data</a>
Required at beginning of mobilization	Reserve Orders in Direct Access.	<a href="#">Direct Access Guide, Reserve Orders</a>

## SPO Mobilization Procedures, Continued

**Title 14 Checklist** Utilize this checklist when processing Title 14 mobilizations.

<b>Checklist For Title 14 Mobilizations</b>		
<b>Required / Optional</b>	<b>Transaction / Input</b>	<b>Reference</b>
Optional	<p>If member is ordered to active duty from an OUTCONUS residence and entitled to OUTCONUS COLA, two transactions shall be submitted:</p> <ul style="list-style-type: none"> <li>• Start OUTCONUS COLA transaction at beginning of active duty period.</li> <li>• Stop OUTCONUS COLA transaction at end of active duty period.</li> </ul>	<a href="#">Direct Access Guide, OUTCONUS COLA</a>
Optional	<p>If member meets the requirements prescribed on Pages 11-11 and 11-12 of this chapter, the below pay entitlements shall be started at the beginning of the active duty period, and stopped at the end of the active duty period.</p> <ul style="list-style-type: none"> <li>• Career Sea</li> <li>• Diving Duty Pay</li> <li>• Imminent Danger Pay</li> <li>• Combat Tax Exclusion/Combat SGLI Allowance</li> <li>• Special Duty Assignment Pay</li> <li>• Non-crew Flight Pay</li> <li>• Flight Deck Hazardous Duty Incentive Pay</li> <li>• Hazardous Duty Incentive Pay for Visit, Board, Search and Seizure Boarding Teams</li> <li>• Foreign Language Proficiency Pay</li> </ul>	<a href="#">Direct Access Guide, Special and Incentive Pays</a>
Optional	Start FSSA (Family Subsistence Supplement Allowance) Submit application to PSC (mas).	PPPM, <a href="#">7-B-8</a>
Optional	Board Certified Pay for Physician Assistants. If member meets the requirements prescribed on page 11-12 of this chapter, fax copy of orders to PSC (mas) at 785-339-3760.	<a href="#">PAYMAN</a> , 4.J.2
Optional	Change in Dependency/Emergency Data if the member has a change in dependents or beneficiaries.	<a href="#">Direct Access Guide, Dependency/Emergency Data</a>

## Recall of Retired Members

**Introduction**      During a mobilization, reserve retirees may be called to active duty. This includes both retired with pay (RET-1) and retired awaiting pay at age 60 (RET-2). The process/procedures for mobilizing recalled reserve retirees are described below

**Process**              This is the process for recalling a reserve retiree.

<b>Stage</b>	<b>Who does it</b>	<b>What Happens</b>
1	CG Personnel Command (rpm) / (opm) / (epm)	Issues recall from retirement orders. Coordinates travel needs with the recalled member.
2	Member	Reports for mobilization duty. Prepares travel claim.
3	Unit	Reports member aboard for mobilization. Arranges for member to be issued active duty ID card and Dependent Application. If reaches 60 prior to end of orders submit Age Waiver Request to COMDT (G-WTR-1) as soon as possible.
4	SPO	Access member's recall orders, via the Airport Terminal or Track Global Assignments menu, and completes the Depart/Report members tab. This will generate transactions to record the recall from retirement.  If retired awaiting pay at age 60 (RET-2), prepares transactions to transfer the member out of RET-2 status.
5	PSC (ras)	If retired with pay (RET-1), stops retired pay.
6	Member	Enters mailing address, emergency contact and direct deposit information in Direct Access. (If access to the CG intranet is unavailable, requests that SPO input.)
7	PSC (tvl)	Processes travel claims and requests for travel advances.
8	Unit	Ensures member is physically qualified for demobilization.
9	Member	Notifies Unit and SPO of desires concerning disposition of accrued leave (at least 50 days prior to demobilization unless exigent circumstances exist).
10	SPO	Inputs Statement of Intent in Direct Access (at least 45 days prior to demobilization unless exigent circumstances exist).
11	SPO	Prepares Certificate of Release or Discharge from Active Duty (DD-214) and mails to unit.

*Continued on next page*

## Recall of Retired Members, Continued

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### Process (cont'd)

Stage	Who does it	What Happens
12	Unit	Delivers demobilization documents (DD-214 and instructions to file travel claim). Notifies SPO if uncollected CG Mutual Assistance loan(s) need to be collected from final active duty pay.
13	SPO	Prepares Direct Access transactions to record release from active duty (RELAD). E-mails PSC-RAS and <a href="mailto:PSC-CustomerCare@uscg.mil">PSC-CustomerCare@uscg.mil</a> notifying completion of recall, including effective date of last day of active service.  If retired awaiting pay at age 60 (RET-2), prepare transactions to transfer back to RET-2 status.
14	PSC (ses)	Processes final active duty payment. Collects CG Mutual Assistance debts if requested.
15	PSC (ras)	If retired with pay (RET-1) or reached 60 <sup>th</sup> birthday during mobilization, starts/restarts retired pay.

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## Recall of Retired Members, Continued

**Mobilization Checklist**      The unit shall follow the mobilization checklist on page 11-24 of this chapter.

**SPO Procedures**      The SPO shall prepare the following transactions to record recall of a retired reserve under Title 10:

<b>Checklist For Title 10 Mobilization Of Recalled Retiree</b>		
<b>Required/ Optional</b>	<b>Transaction / Input</b>	<b>Reference</b>
Required	<p>Direct Access Recruit Workforce Transaction:</p> <p>Complete the following transactions in Direct Access the instructions in the Directed Access reference for processing a "Rehire" transaction.</p> <ul style="list-style-type: none"> <li>• Applicant Data Transaction</li> <li>• Identification Data Transaction</li> <li>• Applicant Contract Data Transaction</li> <li>• Complete PCS Departing/Reporting only if there was delay enroute.</li> </ul> <p>Note: The PCS Departing/Reporting transaction is input and processed by the assignment officer. SPOs will need to modify the transaction only if authorized delay was required to report to PCS unit.</p>	<a href="#">Direct Access Guide, Accessions</a>
Required	<p>Send an E-Mail to PSC-CustomerCare@uscg.mil and PSC-RAS providing:</p> <ul style="list-style-type: none"> <li>• Name, Rank, and SSN of recalled retiree</li> <li>• Effective date and period of recall</li> <li>• TONO under which the recall is being effected</li> <li>• Reference the letter/message from CGPC (rpm)/(opm)/(epm) which authorizes the recall.</li> </ul>	PPPM, <a href="#">Sections 3-A-4 and 3-A-5</a>
<p>The SPO shall also prepare the transactions prescribed on pages 11-27 thru 11-30 of this chapter, with the following exceptions:</p> <p>(1) The Reserve Orders transaction on page 11-27 shall <u>not</u> be prepared.</p> <p>(2) The first six transactions on page 11-27 are <u>required</u> transactions for a recalled retiree.</p>		

## Travel Claims During Mobilization Status

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<b>Introduction</b>	Members submit travel claims to be reimbursed for travel, lodging, meals, and incidental expenses.
<b>Reference</b>	(a) The Travel Claim Quick Reference Guide, available on-line at <a href="http://www.uscg.mil/hq/PSC/Travel/qrg.pdf">http://www.uscg.mil/hq/PSC/Travel/qrg.pdf</a> , provides assistance in preparing travel claims.
<b>Methods for Submitting Travel Claims</b>	Travel claims may be submitted by 2 methods: <ul style="list-style-type: none"><li>• Travel Preparation and Examination System (T-PAX) – the preferred method.</li><li>• Hardcopy DD Form 1351-2.</li></ul>
<b>Supporting Documentation</b>	Travel claims shall be supported by the documentation listed below: <ul style="list-style-type: none"><li>• Original itemized receipt for lodging expenses</li><li>• Original receipts for transportation expenses (airline, rental car, etc.)</li><li>• Any original receipts for reimbursable expenses required by the Joint Federal Travel Regulations (JFTR) – Volume 1 – generally, any expense that is \$75.00 or more.</li></ul> <p>On T-PAX claims, this documentation shall be provided to the approving official; for manually submitted claims, this documentation shall be sent to PSC (tv1) with DD Form 1351-2.</p>
<b>Recording of Leave Taken</b>	Members shall indicate all leave days used on the TDY travel claim. The leave shall be indicated as follows: <ul style="list-style-type: none"><li>• In T-PAX, on the Itinerary and Exceptions-To-Daily-Expense screens. See sample on pages 11-35 thru 11-37.</li><li>• On DD Form 1351-2, in Block 29 (Remarks) on page 2.</li></ul> <p>Note: (1) Do <u>not</u> start or end a T-PAX claim in a leave status. (2) Mobilized Reservists are entitled to Per Diem for lodging while on leave.</p>

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*Continued on next page*

**Chapter 11  
RESERVE MOBILIZATION**

**Travel Claims During Mobilization Status, Continued**

**Sample T-PAX Travel Claim – Leave Taken**

TRAVEL VOUCHER OR SUBVOUCHER				UTS FILE NO. 27472				
Read privacy act statement, penalty statement and instructions on back before completing form. Use typewriter ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed continue in Remarks.								
1. PAYMENT REQUIRED BY (X one) <input checked="" type="checkbox"/> Electronic Funds Transfer (EFT) <input type="checkbox"/> Payment By Check Split Disbursement: Amt to Govt. Tvl Charge Card \$				2. TYPE OF PAYMENT (X as applicable) <input checked="" type="checkbox"/> TDY <input checked="" type="checkbox"/> Member/Employee <input type="checkbox"/> PCS <input type="checkbox"/> Other <input type="checkbox"/> Dependent(s) <input type="checkbox"/> DLA		FOR D.O. USE ONLY		
4. NAME (Last, First, Middle Initial) (print or type) PERFORMANCE, STELLA R				5. GRADE E6	6. SSN 987-65-4321	3. D.O. VOUCHER NUMBER	SUBVOUCHER NUMBER	
7. ADDRESS a. NUMBER AND STREET 12 ELM STREET		b. CITY TOPEKA		c. STATE KS	d. ZIP CODE 66609	c. PAID BY		
8. DAYTIME TELEPHONE NUMBER & AREA CODE 785-339-2250		9. TRAVEL ORDER NUMBER 130300003374000		10. PREVIOUS GOVERNMENT PAYMENT /ADVANCES (Do not include ATM Advances)				
11. ORGANIZATION AND STATION 5347400 - CG HUMAN RESOURCES SERVICE & INFORMATION CTR								
12. DEPENDENTS (X and complete as applicable) <input type="checkbox"/> ACCOMPANIED <input type="checkbox"/> UNACCOMPANIED				13. DEPENDENTS ADDRESS ON RECEIPT of ORDERS (include Zip Code)				
a. NAME (Last, First, Middle Initial)		b. RELATIONSHIP	c. Date of Birth or Marriage	14. Have Household Goods Been Shipped? (X one) <input type="checkbox"/> YES <input type="checkbox"/> NO (Explain in Remarks)				
15. ITINERARY								
a. DATE 02	b. PLACE (home, office, base, activity, city and state, city and country, etc.)			c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES	
11/1	DEP	SAINT LOUIS ; MISSOURI		PA				
11/1	ARR	TOPEKA ; KANSAS;			TD		270	
11/10	DEP	TOPEKA ; KANSAS		CA		63.00		
11/10	ARR	LAWRENCE ; KANSAS;			LV		0	
11/13	DEP	LAWRENCE ; KANSAS		CA		0.00		
11/13	ARR	TOPEKA ; KANSAS;			TD		0	
11/30	DEP	TOPEKA ; KANSAS		GA		63.00		
11/30	ARR	TOPEKA ; KANSAS;			MC		0	
	DEP							
	ARR							
	DEP							
	ARR							
	DEP							
	ARR							
	DEP							
	ARR							
e. SUMMARY OF PAYMENT								
(1) Per diem								
(2) Actual Expenses Allowance								
(3) Mileage								
16. POC TRAVEL (X one) <input checked="" type="checkbox"/> OWN/OPERATE <input type="checkbox"/> PASSENGER				DURATION OF TDY TRAVEL				
				(4) Dependent Travel				
				(5) DLA				
				(6) Reimbursable Expenses				
				(7) Total				
				(8) Less Advance				
				(9) Amount Owed				
				(10) Amount Due				
18. REIMBURSABLE EXPENSES								
a. DATE	b. NATURE OF EXPENSE			c. AMOUNT	d. ALLOWED	12 HOURS OR LESS		
11/1/02	AUTO MILEAGE			360 MI	360 MI			
11/1/02	TOLLS			2.20	2.20			
11/1/02	LAUNDRY SERVICES			60.00	60.00	X	MORE THAN 12 HOURS BUT 24 HOURS OR LESS	
11/1/02	PARKING			30.00	30.00		MORE THAN 24 HOURS	
11/1/02	LODGING TAX-CONUS/US TERR			240.00	240.00			
11/1/02	LODGING/TONO-2-TONO TRANSI			63.00	63.00			
11/1/02	PER DIEM (25%) TONO-TO-TON			7.50	7.50			
19. GOVERNMENT/DEDUCTIBLE MEALS								
	a. DATE	b. NO. OF MEALS	a. DATE	b. NO. OF MEALS				
(SEE DAILY EXPENSES)								
20 a. CLAIMANT SIGNATURE STELLA R PERFORMANCE				b. DATE 01/06/2003	21 a. APPROVING OFFICER SIGNATURE NOT YET APPROVED			b. DATE
22. ACCOUNTING CLASSIFICATION 2 3 301 132300 EC 51282 2151								
23. COLLECTION DATA								
24. COMPUTED BY		25. AUDITED BY		26. Travel Order Posted by		27. RECEIVED (Payee Signature and Date or Check No.)	28. AMOUNT PAID	

UTS GENERATED FORM 1351-2, AUG 1997 (EG)

*Continued on next page*

Travel Claims During Mobilization Status, Continued

Sample T-PAX Travel Claim – Leave Taken

<b>PRIVACY ACT STATEMENT</b>																																																													
AUTHORITY: 5 USC 5701, 37 USC 404-427, and EO 9397.																																																													
PRINCIPAL PURPOSE(S): Used for reviewing, approving, accounting and disbursing for official travel. SSN is used to maintain a numerical identification system for individual claims.																																																													
ROUTINE USE(S): To substantiate claims for reimbursement for official travel.																																																													
DISCLOSURE: Voluntary; however, failure to furnish information requested may result in total or partial denial of amount claimed.																																																													
<b>PENALTY STATEMENT</b>																																																													
There are severe criminal and civil penalties for knowingly submitting a false, fictitious, or fraudulent claim (U.S. Code, Title 18, Section 287 and 1001 and Title 31, Section 3729).																																																													
<b>INSTRUCTIONS</b>																																																													
<p><b>ITEM 1 - PAYMENT</b> Member must be on electronic funds (EFT) to participate in split disbursement. Split disbursement is a payment method by which you may elect to pay your official travel card bill and forward the remaining settlement dollars to your pre-designated account. For example: \$250.00 in the "Amount to Government Travel Charge Card" block means that \$250.00 of your travel settlement will be electronically sent to the charge card company. Any dollars remaining on this settlement will automatically be sent to your pre-designated account. Should you elect to send more dollars than you are entitled, all of the settlement will be forwarded to the charge card company. Notification: you will receive your regular monthly billing statement from the Government Travel Charge Card contractor; it will state: paid by Government \$250.00, 0 due. If you forwarded less dollars than you owe, the statement will read as: paid by Government, \$250.00, \$15.00 now due. Payment by check is made to travelers only when EFT payment is not directed.</p> <p><b>USCG TRAVEL PAYMENT STATUS AND DEBT/OVERPAYMENT COLLECTION</b> - When Industrial Site accounting used - contact the accounting office that funded travel. - For all others - contact the CG Finance Center at 1-800-564-5504 and follow the prompts. For personal assistance and instructions for repayments or rescheduling of travel debts call (757) 523-6940. A Due Process debt notification letter w/instructions will be sent to you. - If no payment status is indicated call HRSIC Travel at 1-888-USCG-TVL.</p> <p><b>REQUIRED ATTACHMENTS FOR TRAVEL VOUCHER AUDIT SUBMISSIONS</b> Claims will be audited based on a random sampling plan or because the net entitlement of the travel equaled or exceeded \$2,500.00. Assemble your claim as follows: 1. (Top) Travel Voucher, Continuation Page, and Daily Expense Record, DOD or UTS record. 2. Original of all travel orders and amendments, as applicable. 3. Dependent and/or other family member travel authorizations or claim documentation. 4. Required Receipts: Hotel/motel receipts and any item of expense claimed in the amount of \$75.00 or more. (Ticketless Travel records require a method of purchase statement). When directed, submit the above in an envelope addressed to HRSIC (TVL) marked "Audit".</p>	<p><b>ITEM 15. ITINERARY - SYMBOLS</b> 15c. MEANS/MODE OF TRAVEL (Use two letters)</p> <table style="width: 100%; border: none;"> <tr> <td>GTR/TKT</td> <td>- T</td> <td>Automobile</td> <td>- A</td> </tr> <tr> <td>Government Transportation</td> <td>- G</td> <td>Motorcycle</td> <td>- M</td> </tr> <tr> <td>Commercial Transportation (Own Expense)</td> <td>- C</td> <td>Bus</td> <td>- B</td> </tr> <tr> <td>Privately Owned</td> <td>- P</td> <td>Plane</td> <td>- P</td> </tr> <tr> <td>Convenience (POC)</td> <td>- P</td> <td>Rail</td> <td>- R</td> </tr> <tr> <td>Alaska Ferry System</td> <td>- AF</td> <td>Vessel</td> <td>- V</td> </tr> <tr> <td>Change Status</td> <td>- CS</td> <td></td> <td></td> </tr> </table> <p>15d. REASON FOR STOP</p> <table style="width: 100%; border: none;"> <tr> <td>Authorized Delay</td> <td>- AD</td> <td>Change of Home Port</td> <td>- HP</td> </tr> <tr> <td>Awaiting Transportation</td> <td>- AT</td> <td>Leave En Route</td> <td>- LV</td> </tr> <tr> <td>Continuous OS Travel</td> <td>- CT</td> <td>Mission Complete</td> <td>- MC</td> </tr> <tr> <td>Designated Location</td> <td>- DL</td> <td>Pick Up Passengers</td> <td>- PP</td> </tr> <tr> <td>Drop Off Passengers</td> <td>- DP</td> <td>Pick Up Vehicle</td> <td>- PV</td> </tr> <tr> <td>Drop Off Vehicle</td> <td>- DV</td> <td>Sick Leave</td> <td>- SL</td> </tr> <tr> <td>Enroute Stop Over</td> <td>- ES</td> <td>Temporary Duty</td> <td>- TD</td> </tr> <tr> <td>House Hunting</td> <td>- HH</td> <td>Voluntary Return</td> <td>- VR</td> </tr> </table> <p>15e. LODGING COST UTS requires the entry of the per-day (daily) cost of Lodging. Place and claim INCONUS lodging taxes in the reimbursable expense section.</p> <p><b>ITEM 19 - DEDUCTIBLE MEALS</b> Use the UTS "Exception" button to enter deductible meals. Meals consumed by a member when furnished with or without charge incident to an official assignment by sources other than a government mess (see JFTR, par. U4125-A3g and JTR, par. C4554-B for definition and deductible meals). Meals furnished on commercial aircraft or by private individuals are not considered deductible meals.</p>	GTR/TKT	- T	Automobile	- A	Government Transportation	- G	Motorcycle	- M	Commercial Transportation (Own Expense)	- C	Bus	- B	Privately Owned	- P	Plane	- P	Convenience (POC)	- P	Rail	- R	Alaska Ferry System	- AF	Vessel	- V	Change Status	- CS			Authorized Delay	- AD	Change of Home Port	- HP	Awaiting Transportation	- AT	Leave En Route	- LV	Continuous OS Travel	- CT	Mission Complete	- MC	Designated Location	- DL	Pick Up Passengers	- PP	Drop Off Passengers	- DP	Pick Up Vehicle	- PV	Drop Off Vehicle	- DV	Sick Leave	- SL	Enroute Stop Over	- ES	Temporary Duty	- TD	House Hunting	- HH	Voluntary Return	- VR
GTR/TKT	- T	Automobile	- A																																																										
Government Transportation	- G	Motorcycle	- M																																																										
Commercial Transportation (Own Expense)	- C	Bus	- B																																																										
Privately Owned	- P	Plane	- P																																																										
Convenience (POC)	- P	Rail	- R																																																										
Alaska Ferry System	- AF	Vessel	- V																																																										
Change Status	- CS																																																												
Authorized Delay	- AD	Change of Home Port	- HP																																																										
Awaiting Transportation	- AT	Leave En Route	- LV																																																										
Continuous OS Travel	- CT	Mission Complete	- MC																																																										
Designated Location	- DL	Pick Up Passengers	- PP																																																										
Drop Off Passengers	- DP	Pick Up Vehicle	- PV																																																										
Drop Off Vehicle	- DV	Sick Leave	- SL																																																										
Enroute Stop Over	- ES	Temporary Duty	- TD																																																										
House Hunting	- HH	Voluntary Return	- VR																																																										
<b>29. REMARKS</b>																																																													
EMPLOYEES: INDICATE DATES ON WHICH LEAVE TAKEN FOR MORE THAN ONE-HALF OF PRESCRIBED DAILY WORKING HOURS																																																													
UNIFORMED MEMBERS: INDICATE DATES ON WHICH LEAVE WAS TAKEN																																																													
Receipts Required:																																																													
HOTEL RECEIPT(S) FOR TOPEKA ; KANSAS																																																													

UTS GENERATED FORM 1351-2 (BACK), AUG 1997

Continued on next page

Chapter 11  
RESERVE MOBILIZATION

Travel Claims During Mobilization Status, Continued

Sample T-PAX Travel Claim – Leave Taken

TRAVEL VOUCHER OR SUBVOUCHER												
(Daily Expenses)												
						PAGE	3	OF	3	PAGES		
4. NAME (Last, First, Middle Initial)												
PERFORMANCE, STELLAR												
Date	Day Type	Daily Lodging	Computed Meal Types			Claimed Meal Types			Actual Expenses Claimed			
			Br	Lu	Dn	Br	Lu	Dn	Br	Lu	Dn	Inc
11/01/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/02/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/03/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/04/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/05/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/06/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/07/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/08/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/09/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/10/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/11/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/12/2002	LV	0.00	CM	CM	CM	PDS	PDS	PDS				
11/13/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/14/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/15/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/16/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/17/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/18/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/19/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/20/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/21/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/22/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/23/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/24/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/25/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/26/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/27/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/28/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/29/2002	LDP	63.00	CM	CM	CM	CM	CM	CM				
11/30/2002	LDP	0.00	CM	CM	CM	CM	CM	CM				

Day Types  
 LDP = Lodging Plus, OB = OnBoard Ship, FD = Field Duty, SD = Sea Duty, LV = Leave, AE = Actual Expense, AELP = Actual Expense/Meals LDP  
 GRP = Group Travel, FLT = Flat Per Diem, RED = Reduced Per Diem, AF = Alaskan Ferry, NP = No Per Diem, SAE = 300 % AE, SAELP = 300 % AELP

*Continued on next page*

## Travel Claims During Mobilization Status, Continued

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### Liquidation of Advance Funds

Advances are to be claimed for the same travel period as they are received.

Advance funds are recorded on the travel claim in the block entitled "Previous Government Payments/Advances" (Block 9 in T-PAX; block 10 for manual claims).

ONLY electronic deposit advances (PSC processed), or advances made in the form of traveler's checks are to be reported on the travel claim. **DO NOT** report prior settlement payments or cash advances from credit cards.

If an advance of funds has been requested/processed through T-PAX for a specific TONO, it is already posted. **DO NOT** place this advance on a T-PAX settlement as the T-PAX system automatically applies this to the settlement and deducts from total reimbursable entitlement(s).

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### Special Procedures For Long-Term Mobilization Status

For members on long-term mobilization orders, who are entitled to per diem, it is beneficial to file a travel claim every 30 days. For a travel claim to be properly processed each 30 days, it is necessary that the orders be designated as Document Type 13 (Blanket TDY Orders) and not Document Type 11 (Standard TDY Orders) and submitted as a new claim each time.

The first travel claim under blanket orders should be filled out normally, except the traveler should request the additional Reserve Continued Lodging and the 25% per diem for the last day of the claim in block 18 (reimbursable expenses). See sample on page 11-40.

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*Continued on next page*

## Travel Claims During Mobilization Status, Continued

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**Special  
Procedures For  
Long-Term  
Mobilization  
Status**

Subsequent claims under blanket orders should be completed as follows:

- On the first line of block 15b, enter: “Continuation of Recall” with the location of the TDY site.
- In block 18, claim reimbursement for the additional 25% per diem for the first and last day of the claim.

Example: Claim was from 4/04/01 through 05/04/01. Reservist would claim reimbursement for the additional 25% per diem for 04/04/01 and 05/04/01.

For the last claim filed under the blanket orders, on the first line of block 15b, enter: “Continuation of Recall”. In block 18, request reimbursement for the additional 25% per diem for the first day of this claim. See sample on page 11-41.

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*Continued on next page*

**Chapter 11  
RESERVE MOBILIZATION**

**Travel Claims During Mobilization Status, Continued**

**Sample Travel Claim – (Claim 1) Long Term Mobilization  
Status with split TONOs**

TRAVEL VOUCHER OR SUBVOUCHER				Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.			
1. PAYMENT <input type="checkbox"/> Electronic Fund Transfer (EFT) <input type="checkbox"/> Payment by Check Split Disbursement: Amt to Govt Tvl Charge Card \$		2. TYPE OF PAYMENT (X as applicable) <input checked="" type="checkbox"/> TDY <input type="checkbox"/> Member/Employee <input type="checkbox"/> PCS <input type="checkbox"/> Other <input type="checkbox"/> Dependent(s) <input type="checkbox"/> DLA		3. FOR D.O. USE ONLY a. D.O. VOUCHER NUMBER			
4. NAME (Last, First, Middle Initial) (Print or type) SMITH, JOHN D		5. GRADE E7	6. SSN 123456789	b. SUBVOUCHER NUMBER			
7. ADDRESS. a. NUMBER AND STREET 444 SE QUINCY ST		b. CITY TOPEKA	c. STATE KS	d. ZIP CODE 66683	c. PAID BY		
8. DAYTIME TELEPHONE NUMBER & AREA CODE 785-555-1234		9. TRAVEL ORDER NUMBER 1302XXXXXXXXX000		10. PREVIOUS GOVERNMENT PAYMENTS/ADVANCES NON ELECTRONIC ADVANCE \$ AMOUNT PLACED HERE			
11. ORGANIZATION AND STATION CG HRSIC				13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS (Include Zip Code)			
12. DEPENDENT(S) (X and complete as applicable) <input type="checkbox"/> ACCOMPANIED <input type="checkbox"/> UNACCOMPANIED				14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? (X one) <input type="checkbox"/> Yes <input type="checkbox"/> No (Explain in Remarks)			
a. NAME (Last, First, Middle Initial)		b. RELATIONSHIP	c. DATE OF BIRTH OR MARRIAGE	d. COMPUTATIONS			
15. ITINERARY							
a. DATE	b. PLACE (Home, Office, Base, Activity, City and State, City and Country, etc.)	c. MEANS/ MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES		
1/01	DEP TOPEKA, KS (SHAWNEE)	CP					
1/01	ARR MANHATTAN, NY (COUNTY)		TD	120.00	70		
1/09	DEP BOSTON, MA (COUNTY)	CA					
1/09	ARR MANHATTAN, NY (COUNTY)		MC				
1/14	DEP BOSTON, MA (COUNTY)	CA					
1/14	ARR MANHATTAN, NY (COUNTY)		TD	120.00			
1/31	DEP CONTINUATION OF RECALL	CP					
1/31	ARR CONTINUATION OF RECALL		MC				
ARR							
ARR							
ARR							
ARR							
16. POC TRAVEL (X one) <input checked="" type="checkbox"/> OWN/OPERATE <input type="checkbox"/> PASSENGER				17. DURATION OF TDY TRAVEL			
18. REIMBURSABLE EXPENSES				19. GOVERNMENT/DEDUCTIBLE MEALS			
a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED	12 HOURS OR LESS		(1) Per Diem	
1/09/02	25% PERDIEM	11.25	11.25	MORE THAN 12 HOURS BUT 24 HOURS OR LESS		(2) Actual Expense Allowance	
1/14/02	25% PERDIEM	11.25	11.25	MORE THAN 24 HOURS		(3) Mileage	
1/31/02	25% PERDIEM	11.25	11.25			(4) Dependent Travel	
1/31/02	LODGING TAX	396.00	396.00			(5) DLA	
1/09-13	DUAL LODGING	600.00	600.00			(6) Reimbursable Expenses	
1/01/02	AIRFARE	375.00	375.00			(7) Total	
1/01/02	AIRFARE SVC FEE	35.00	35.00			(8) Less Advance	
1/31/02	LAUNDRY (\$2/DAY)	62.00	62.00			(9) Amount Owed	
1/31/02	TONO-TONO LODGING	120.00	120.00			(10) Amount Due	
20. a. CLAIMANT SIGNATURE		b. DATE	c. SUPERVISOR SIGNATURE		d. DATE		
21. a. APPROVING OFFICER SIGNATURE					b. DATE		
22. ACCOUNTING CLASSIFICATION This example is a manual claim of Beginning Recall, Mbr TAD is sent TAD under separate tono, dual lodging, and how to show continuation of recall. Mileage is for the trip to airport.							
23. COLLECTION DATA							
24. COMPUTED BY	25. AUDITED BY	26. TRAVEL ORDER POSTED BY	27. RECEIVED (Payee Signature and Date or Check No.)			28. AMOUNT PAID	

DD FORM 1351-2, MAR 2000

PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1 MAY BE USED UNTIL SUPPLY IS EXHAUSTED

Exception to SF 1012 approved by GSA/IRMS 12-91.

Continued on next page



**Chapter 11  
RESERVE MOBILIZATION**

**Travel Claims During Mobilization Status, Continued**

**Sample Travel Claim – (Claim 2) Long Term Mobilization  
Status with split TONOs**

TRAVEL VOUCHER OR SUBVOUCHER				Read Privacy Act Statement, Penalty Statement, and Instructions on back before completing form. Use typewriter, ink, or ball point pen. PRESS HARD. DO NOT use pencil. If more space is needed, continue in remarks.			
1. PAYMENT <input type="checkbox"/> Electronic Fund Transfer (EFT) <input type="checkbox"/> Payment by Check Split Disbursement: Amt to Govt Tvl Charge Card \$ _____		2. TYPE OF PAYMENT (X as applicable) <input checked="" type="checkbox"/> TDY <input type="checkbox"/> Member/Employee <input type="checkbox"/> PCS <input type="checkbox"/> Other <input type="checkbox"/> Dependent(s) <input type="checkbox"/> DLA		3. FOR D.O. USE ONLY			
4. NAME (Last, First, Middle Initial) (Print or type) SMITH, JOHN D		5. GRADE E7	6. SSN 123456789		a. D.O. VOUCHER NUMBER		
7. ADDRESS. a. NUMBER AND STREET 444 SE QUINCY ST		b. CITY TOPEKA	c. STATE KS	d. ZIP CODE 66683	b. SUBVOUCHER NUMBER		
8. DAYTIME TELEPHONE NUMBER & AREA CODE 785-555-1234		9. TRAVEL ORDER NUMBER 1102XXXXXXXXX000	10. PREVIOUS GOVERNMENT PAYMENTS/ADVANCES NON ELECTRONIC ADVANCE \$ AMOUNT PLACED HERE				
11. ORGANIZATION AND STATION CG HRSIC		12. DEPENDENT(S) (X and complete as applicable) <input type="checkbox"/> ACCOMPANIED <input type="checkbox"/> UNACCOMPANIED					
13. DEPENDENTS' ADDRESS ON RECEIPT OF ORDERS (Include Zip Code)		14. HAVE HOUSEHOLD GOODS BEEN SHIPPED? (X one) <input type="checkbox"/> Yes <input type="checkbox"/> No (Explain in Remarks)					
15. ITINERARY		d. COMPUTATIONS					
a. DATE 2002	b. PLACE (Home, Office, Base, Activity, City and State; City and Country, etc.)	c. MEANS/MODE OF TRAVEL	d. REASON FOR STOP	e. LODGING COST	f. POC MILES		
1/10	DEP MANHATTAN, NY (COUNTY)	CA					
1/10	ARR BOSTON, MA (COUNTY) - TAD		TD	159.00			
1/13	DEP WITHIN TAD UNDER SEP TONO	CA					
1/13	ARR MANHATTAN, NY (COUNTY) -		MC				
	DEP CONT UNDER SEP TONO						
	ARR						
	DEP						
	ARR						
	DEP						
	ARR						
	DEP						
	ARR						
	DEP						
	ARR						
	DEP						
	ARR						
16. POC TRAVEL (X one) <input checked="" type="checkbox"/> OWN/OPERATE <input type="checkbox"/> PASSENGER				17. DURATION OF TDY TRAVEL			
18. REIMBURSABLE EXPENSES				12 HOURS OR LESS		(4) Dependent Travel	
a. DATE	b. NATURE OF EXPENSE	c. AMOUNT	d. ALLOWED	MORE THAN 12 HOURS BUT 24 HOURS OR LESS		(5) DLA	
1/10/02	25% PERDIEM	12.50	12.50	MORE THAN 24 HOURS		(6) Reimbursable Expenses	
1/13/02	25% PERDIEM	12.50	12.50			(7) Total	
1/13/02	LODGING TAX	69.96	69.96			(8) Less Advance	
1/13/02	TONO-TONO LODGING	159.00	159.00			(9) Amount Owed	
1/13/02	RENTAL CAR	227.59	227.59			(10) Amount Due	
1/13/02	RENTAL FUEL	27.00	27.00				
				19. GOVERNMENT/DEDUCTIBLE MEALS			
		a. DATE	b. NO. OF MEALS	a. DATE		b. NO. OF MEALS	
20. a. CLAIMANT SIGNATURE		b. DATE	c. SUPERVISOR SIGNATURE		d. DATE		
21. a. APPROVING OFFICER SIGNATURE		b. DATE					
22. ACCOUNTING CLASSIFICATION This is an example of a manual claim for the second TAD taken while in a TAD status under a separate Tono.							
23. COLLECTION DATA							
24. COMPUTED BY	25. AUDITED BY	26. TRAVEL ORDER POSTED BY	27. RECEIVED (Payee Signature and Date or Check No.)		28. AMOUNT PAID		

DD FORM 1351-2, MAR 2000

PREVIOUS EDITIONS OF DD FORM 1351-2 AND 1351-1  
MAY BE USED UNTIL SUPPLY IS EXHAUSTED

Exception to SF 1012 approved by GSA/IRMS 12-91.

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## Travel Claims During Mobilization Status, Continued

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**Special  
Procedures for  
Overlapping  
TDY Periods**

Mobilized members on temporary duty (TDY) may be issued a second set of TDY orders to another location. This results in overlapping TDY periods involving multiple TONO(s) and requires special procedures. Members with overlapping travel TONO's need to submit multiple travel claims.

Example:

A member has TDY orders for period 1/1/02 to 2/28/02 in New York City. The member has commercial lodging and messing.

The member is sent TDY to Boston from 1/10/02 to 1/13/02. The member is required to procure commercial lodging in Boston and maintain the lodging in New York City.

Upon completion of the Boston TDY period, the member returns to New York to complete the original TDY period.

This member will need to submit *3 separate travel claims* as detailed on the next page.

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*Continued on next page*

## Travel Claims During Mobilization Status, Continued

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**Special  
Procedures for  
Overlapping  
TDY (cont'd)**

First Claim. The first claim will be submitted to cover the period 1/1/02 to 1/9/02. The claim should be submitted as Mission Complete (MC). The member needs to claim the additional 25 percent of M&IE for 1/9/02 as a Reimbursable item (under the Reimbursable Expenses Column in T-PAX, or in Block 18 of DD Form 1351).

Second Claim. The second claim will cover the TDY period to Boston and return trip to New York City. With the exception of the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2, this claim will be submitted as any other claim. In the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2, the member needs to claim the additional 25 percent M&IE for the first and last days of travel, in this case 1/10/02 and 1/13/02.

Third Claim. The third claim will be submitted for the period of TDY upon return to New York. The member will need to claim the additional 25 percent per diem for 1/14/02 in the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2. In addition, if the member is required to procure or maintain quarters at both locations, the member could be entitled to dual lodging. In this case, the member needs to claim the lodging costs for maintaining the New York quarters during the Boston TDY period as dual lodging in the Reimbursable Expenses Block in T-PAX, or Block 18 of DD Form 1351-2. The member's TDY orders to New York will have to be amended to authorize dual lodging. The amendment to authorize dual lodging must be location and date specific.

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## Monthly Verification Procedures

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**Introduction** Mobilized members are required to review and validate their monthly Leave and Earnings Statement (LES). Units are required to validate a roster of mobilized members each month.

---

**Validation of LES's** Members have the responsibility to review their LES each month and report any discrepancies via the chain of command. The member must report any instance where:

- The LES shows a pay entitlement to which the member is not entitled (under pages 11-9 through 11-15 of this chapter).
- The member continues to be paid pay and allowances after being released from active duty.

Members who are overpaid pay and allowances will be required to repay such overpayments, plus interest. Any overpayments will be collected in lump sum from a member's final separation pay, and from future ADT or IDT earnings to which the member is entitled after release from active duty.

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**Unit Verification of Mobilized Reservists** Units shall maintain a monthly roster of recalled members to ensure those members are timely removed from a mobilization status and not overpaid.

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## Continuance on Active Duty

**Introduction** A mobilized member's orders may be extended by the ISC (pf). Alternatively, a member may complete the initial mobilization assignment and be issued new long-term or short-term AD orders (ADT, ADSW, Title 14, EAD, etc.).

**Procedure** If a member's orders are extended, or the member is to be issued new orders immediately following completion of the recall orders, the ISC (pf) shall notify the member and the servicing SPO.

The Servicing SPO shall record the extension in Direct Access as follows:

If	Submit	Reference
Reservist is extended under Involuntary <a href="#">Title 10</a> orders	Modify the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. Note: This process is used only if amending the end date of the original orders and there is no change in the member's status.	<a href="#">Direct Access Guide, Reserve Orders</a>
Reservist is extended under Voluntary Title 10 orders (ADSW-AC)	Modify the member's current Reserve Orders in Direct Access to reflect the new expected Order End Date. Note: This process is used only if amending the end date of the original orders and there is no change in the member's status. If the status changes, e.g. Title 10 to EAD a new set of orders must be created.	<a href="#">Direct Access Guide, Reserve Orders</a>  <a href="#">ALPERSRU P/03</a>
Reservist is released from Title 10 orders and <u>immediately</u> placed, under a different set of orders, on further active duty for a period of more than 180 days ADOT or 139 days ADT	Process a new set of Reserve Orders in Direct Access to record the new reserve period.  The new orders must have an effective date of the day after release from Title 10 orders.  Change BAH transaction. If the member will not be assigned government quarters, be sure the transaction shows a BAH Postal Code of the member's duty station locale ( <u>not</u> the postal code of the member's principal place of residence).  Change INCONUS COLA transaction. Be sure the transaction shows a Postal Code of the member's duty station locale ( <u>not</u> the postal code of the member's principal place of residence).	Direct Access Guide, <a href="#">Report Additional Active Duty Authorized</a>  <a href="#">Direct Access Guide, Reserve Orders</a>  <a href="#">ALPERSRU P/03</a>  <a href="#">Direct Access Guide, BAH</a>  <a href="#">Direct Access Guide, COLA</a>

*Continued on next page*

## Continuance on Active Duty, Continued

If	Submit	Reference
<p>Reservist is released from Title 10 orders and <u>immediately</u> placed on active duty under a different set of orders for a period of less than 181 days ADOT or less than 140 days ADT</p>	<p>Process a new set of Reserve Orders in Direct Access to record the new reserve period.</p> <p>The new orders must have an effective date of the day after release from Title 10 orders</p> <p><b>Note: Back-to-Back Reserve Orders:</b></p> <p><b>Short-term</b> AD orders are normally issued with the "Partial Entitlements" option marked on the first tab of the reserve orders. However, if the member is just finishing up a <b>long-term</b> AD order, or the combined period of the two sets of orders will be greater than 181 days, the "Full Entitlements" option must be used on the new orders. IAW 3.C.10.a CG PAYMAN, these members are entitled to BAH.</p> <ol style="list-style-type: none"> <li>1. If the new orders are for duty at the same department ID the system will close out the old orders and generate an Amend Active Duty Termination Date transaction, based on the end date of the new orders, this will continue the member's pay and allowances. Unlike a <i>standalone</i> short-term order <b>you will need to RELAD</b> the member at the end of the duty period unless another set of orders or an extension is authorized.</li> <li>2. If the new orders are for a different department ID, you'll need to RELAD the member from the old orders (the system will prompt you when you try to endorse the new orders), before you can complete the Actual Duty End and Begin Dates on the new orders. In this situation, you'll need to go to the Employee Entitlements section (after the RELAD is approved) to restart BAH and other entitlements as applicable for the new duty station.</li> </ol>	<p><a href="#">Direct Access Guide, Report Additional Active Duty Authorized</a></p>

## The Demobilization Process

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

**Reference:**      (a) [ALCOAST 349/04](#)

**Release Site**      Per, Chapter 6.C.1(a) of [CG Manpower Mobilization Support Plan](#), COMDTINST M3061.1, recalled Reservists shall be RELAD at the same site at which they were initially ordered to report. Exceptions may be granted on a '**case-by-case**' basis. ISC (pf)s shall be the approving level for these exceptions as requested by units.

**Process**      This table describes the process.

**Note:** If member will be continuing on AD (e. g. Immediately begins a new set of orders following completion of mobilization orders), the demobilization process does not begin until the new orders are completed. See [Continuance on Active Duty.](#))

When	Who does it	What Happens
Member is identified for demobilization	Mobilization Unit (Unit member is serving at while on Active Duty)	Coordinates demobilization and transfer to unit from which the member was initially ordered to report (RELAD Unit) with ISC (pf) and SPO. <ul style="list-style-type: none"> <li>• Ensures member is physically qualified for demobilization.</li> <li>• Notifies SPO if the member has uncollected CG Mutual Assistance loan(s) that need to be collected from final active duty pay. Coordinates repayment plan with CGMA headquarters if lump-sum deduction from member's final pay is not appropriate.</li> </ul>
	Member	Completes <a href="#">Career Intentions Worksheet (CG PSC-2045)</a> to denote desires concerning disposition of accrued leave. Forwards to Mobilization Unit Servicing SPO.
	Mobilization Unit (or servicing SPO if unit has limited administrative capabilities)	Records in Direct Access any medals/awards/competencies earned by the member while in a mobilization status.

*Continued on next page*



**Chapter 11**  
**RESERVE MOBILIZATION**

## The Demobilization Process, Continued

### Process (cont'd)

When	Who Does it	What Happens
Upon receipt of Career Intentions Worksheet from member	Member's Regularly Assigned SPO	Inputs Statement of Intent in Direct Access at least 45 days prior to Demobilization or member's scheduled departure date on terminal leave.  Note: Use Career Intentions Reason -- 'SELRES Deactivation'.
Member transfers to RELAD Unit		Forwards SPO PDR back to the SPO of the member's regularly assigned unit RELAD Unit.
At least 30 days prior to demobilization	Member	Updates mailing/e-mail address (and bank account information if changing) in Direct Access. (If access to the internet is unavailable, unit or SPO will input mailing address/direct deposit information.)
At least 15 days prior to demobilization	Member's Regularly Assigned SPO	Prepares, Personnel Data Information File (PDIF) and Certificate of Release or Discharge from Active Duty (DD-214) and mails to unit for delivery to member.  Complete a special "MEMO" evaluation prior to departure if member is a mobilized Reservist TDY from parent unit and it has been more than 92 days since member's last review and member has been mobilized for more than 92 days and is returning to permanent command.
Upon Receipt from SPO	Member, with assistance of Unit	Verifies information on PDIF (competencies, awards, etc.), and DD-214, notifies SPO of any discrepancies.
Date of release from active duty	RELAD Unit	Delivers the Certificate of Release or Discharge From Active Duty (DD-214) and instructions for filing the final travel claim to the member. Mails member's medical record back to member's regularly assigned unit.
Date of release from active duty or Date of departure on terminal leave	Member's Regularly Assigned SPO	<b>Transmits separation transactions as prescribed on pages 11-52 and 11-53.</b>
Date of release from active duty	PSC (ses)	If SPO submits SOI as prescribed in this section, then JUMPS will automatically pay the member their final active duty pay on the payday following their demobilization date. If not, then PSC (ses) will have to manually calculate and process the final active duty payment.

*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> at least 45 days prior to separation or departure on terminal leave (whichever occurs first).	
3	Verify that member (and dependents) have the appropriate (reserve versus active duty) military ID card.	
4	Counsel member concerning transitional health-care benefits – see page 11-23 of this chapter. Ensure transitional health-care benefits are recorded in the DEERS database.	
5	Counsel member concerning civilian reemployment rights – see page 11-22 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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## SPO Demobilization Procedures

**Introduction** The below checklist is provided as a job aid to assist the SPO in completing the necessary transactions to release a member from active duty. It should be used along with the Checklist for Separations and the Checklist for RELAD in [section 3-B](#) of this manual.

**Checklist** Transactions required to release a mobilized member (including a recalled retiree) are listed below.

**Note:** Only the DD-214 (step 5) is required for a member who was mobilized under [14 U.S.C. 712](#).

**Note:** If member will be continuing on AD (e. g. Immediately begins a new set of orders following completion of mobilization orders), the demobilization process does not begin until the new orders are completed. See [Continuance on Active Duty](#)).

Personnel released from active duty following call-up, partial mobilization, or full mobilization: Personnel ordered to active duty in time of national emergency declared by either the President or Congress, or in time of war declared by Congress, shall be issued a DD-214 upon release from active duty, regardless of the length of active service.

Step	Action/Transaction	Reference	Date
1	<p>Statement of Intent (SOI) transaction shall be submitted in Direct Access 45 days prior to demobilization or member's departure on terminal leave. Use Career Intentions Reason—'SELRES Deactivation'</p> <p>Be sure that the SOI disposes of all leave earned during mobilization and shows any leave being sold.</p> <p>Note: Leave sold by a member that was mobilized under <a href="#">10 U.S.C.12302</a> is not subject to the 60 day career maximum.</p> <p>If notification of demobilization is received late, and is within 20 days of the member's release date, <i>in addition to submitting an electronic SOI</i>, an E-Mail SOI will ALSO need to be submitted as prescribed in Exhibit 3-B-1, PPPM.</p> <p>If member's intentions change within 15 days of the sep/DEMOB date notify PSC (ses) via email.</p>	<p>Direct Access Guide, SOI</p> <p>ALPERSRU <a href="#">P/03</a> and <a href="#">AD/02</a></p> <p>ALCOAST <a href="#">349/04</a></p> <p>ALCOAST 449/05</p>	
2	<p><u>Family Separation Allowance</u> stop transaction (if applicable).</p>	<p><a href="#">PAYMAN</a>, figure 3-22</p> <p><a href="#">Direct Access Guide, Entitlements</a></p>	

*Continued on next page*

## SPO Demobilization Procedures, Continued

Step	Action/Transaction	Reference	Date
3	<p>Direct Access Separation transaction</p> <p><i>Reminder:</i> Members with a remaining SELRES drill obligation may not be assigned to the IRR or ISL.</p>	<p><a href="#">Direct Access Guide, Reserve RELAD</a></p> <p><a href="#">ALPERSRU W/02</a></p> <p><a href="#">PAYMAN, 2.K.3</a></p>	
4	Complete a special "MEMO" evaluation if applicable.	ALCOAST <a href="#">077/04</a>	
5	<p><u>Certification of Release or Discharge From Active Duty (DD Form 214)</u>. A DD-214 shall be issued to all members upon completion of a period of mobilization. (However, if a member is being <u>immediately</u> ordered to further active duty upon demobilization, the DD-214 shall <u>not</u> be issued until the end of that additional active duty, i.e., when the member is <u>separated</u>.)</p> <p>Block 18 (Remarks) of the DD Form 214 shall be annotated to include the following information:            That the member was recalled under Title 10 and participated in a contingency operation and the title (s) of operations the member participated in (e.g. "Operation Enduring Freedom")            The member's duty location (s) while on active duty            The dates, if any, of service in a designated imminent danger pay area            All medals/awards received by the member while on active duty            Total cumulative career active duty service for retirement</p> <p>Note: If the member has 18 or more years of active duty, contact CGPC (rpm) prior to separating the member.</p>	DD 214 Manual	
6	<u>Member Competencies</u> . Input any competencies, awards or school completions earned by the member in Direct Access.	PPPM Chap 4-C	
7	<u>SGLI and Family Member SGLI Elections</u> : The member may wish to decrease or elect no SGLI coverage upon RELAD, ensure new elections are entered in Direct Access.	<p><a href="#">SGLV Form 8286</a> and/or <a href="#">8286A</a></p> <p><a href="#">Direct Access SGLI/SGLV Guide</a></p>	

## TRICARE Benefits

**Introduction** The National Defense Authorization Act for fiscal 2005, signed by the President, 28 October 2004, improves significantly the overall health benefits available to guardsmen, Reservists and their families and makes permanent several of the TRICARE benefits authorized “temporarily” under previous defense legislations while extending secretarial authorization for others.

- Reference**
- (a) TRICARE Website, <http://www.tricare.osd.mil/WWW.TRICARE.OSD.MIL/FACTSHEETS/VIEWFACTSHEET.CFM?ID=328>
  - (b) DOD News Release, [No. 1084-04](#)
  - (c) ALCOAST, [189/05](#) TRICARE Reserve Select Program
  - (d) Reserve Family Member Benefits Handbook, <http://www.defenselink.mil/ra/documents/family/benefitshandbook.pdf>
  - (e) TRS Website, <http://www.tricare.osd.mil/reserve/reserveselect/index.cfm>
  - (f) ALCOAST, [251/06](#) TRICARE Early Identification Program (E-ID)

TRICARE Benefit	Procedures
<p><b>(1) Pre-mobilization coverage (E-ID).</b></p> <p>Coverage begins the later of:</p> <ul style="list-style-type: none"> <li>(a) date mobilization orders are issued; or</li> <li>(b) 90 days before active duty commences.</li> </ul>	<p>Reservist provides copy of orders to DEERS/RAPIDS site. DEERS/RAPIDS site issues member ID card and records TRICARE benefit.</p> <ul style="list-style-type: none"> <li>• See reference (f).</li> </ul>
<p><b>(2) Post-mobilization coverage (free of charge).</b></p> <p>Coverage for 180 days from the date the Reservist is released from active duty. [<a href="#">P.L. 108-375, Sec 706</a>]</p>	<p>Reservist reports to DEERS/ RAPIDS site upon demobilization. DEERS/ RAPIDS site records that member served on a contingency operation; such recording extends member’s TRICARE eligibility for 180 days.</p>
<p><b>(3) TRICARE RESERVE SELECT (TRS), (Optional post-mobilization coverage (premium-based)).</b></p> <p>Coverage available after the 180-day post mobilization benefit expires. Coverage is available to any Reservist who was mobilized since 9/11/01 and served on active duty for at least 90 days (less if the member was disabled). Prior to demobilization, Reservist must sign an agreement to continue to serve in the SELRES for one or more years following demobilization. Coverage period is the lesser of: (a) one year for each period of 90 days continuous active duty served; or (b) number of whole years Reservist agrees to continue to serve in the SELRES. [<a href="#">P.L. 108-375, Sec 701</a>]</p>	<ul style="list-style-type: none"> <li>• Reservist enters into a service agreement before leaving active duty.</li> <li>• Those electing to participate must complete <a href="#">DD Form 2895</a> (Agreement to Serve in the Selected Reserve for TRICARE Select Reserve).</li> <li>• Retain copy in the member’s SPO PDR.</li> <li>• Send the original <a href="#">DD Form 2895</a> to the servicing ISC.</li> <li>• ISC DEERS/RAPIDS sites transmit the <a href="#">DD Form 2895</a> data to DMDC using the WEB application NLT 30 days prior to expiration of the members TAMP period.</li> <li>• Reservist submits initial premium payment NLT 30 before the first day of the month in which the TRS is to start.</li> </ul>

**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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***Nondisability Retirements***

1900  
15 May 2004

**MEMORANDUM**

From: M. R. Roberts CAPT  
CG GP Somewhere

To: John P. Jones GMC  
Thru: B. M. Chief  
CG STA Anywhere

Subj: SEPARATION PAYMENT UPON RETIREMENT FROM ACTIVE DUTY

1. The separation payment provided to you upon your retirement from active duty represents 100 percent of your final pay as calculated by JUMPS. Please be advised that this payment may be over or under the final pay due you as a result of clerical or administrative errors or delays in processing pay transactions, or changes in the planned disposition of your leave.
2. Any additional payment to you will be paid by the Coast Guard Coast Guard Personnel Service Center (PSC) after your separation transactions have processed in JUMPS and a final review of your pay account is made. This will normally be within 45 days after your date of retirement. You will also be sent a final Leave and Earnings Statement (LES) within 45 days after retirement.
3. If an overpayment is discovered upon final review of your active duty pay account, PSC will initiate action to collect the overpayment from your retired pay.
4. Your final LES and any additional payment will be mailed to the address you provided on the Career Intentions Worksheet (CG-PSC-2045) at the time of separation processing. If you wish to receive your final LES and any additional payment at a different address, you must notify PSC (ses) in writing within 20 days. Your letter must include your name, Employee Identification number (EMPLID) and the address you want the payment sent to. Please address your correspondence to:

COMMANDING OFFICER (SES)  
COAST GUARD PERSONNEL SERVICE CENTER  
444 SE QUINCY STREET  
TOPEKA KS 66683-3591

5. Your IRS form W-2 for calendar year 20\_\_ will be mailed by PSC to the address indicated on the Career Intentions Worksheet (CG-PSC-2045) unless PSC (ses) is notified otherwise in writing. Your IRS form W-2 will be mailed by 31 January next year.
6. Any questions concerning the final LES, additional payment, the IRS form W-2, retirement travel entitlements or settlement of travel claims should be coordinated with PSC (ccb) at 1-866-PSCUSCG (1-866-772-8724).

#



## ***Survivor Benefit Plan Election Requirements***

1900  
15 May 2004

### **MEMORANDUM**

From: M. R. Roberts CAPT  
CG GP Somewhere

To: John P. Jones, GMC

Subj: SURVIVOR BENEFIT PLAN

1. As a concerned commanding officer, I am writing this letter to ensure that you are fully aware of the Survivor Benefit Plan (SBP).
2. As you near retirement, it is important that you fully understand SBP.
  - If you do not make an election, you will be automatically enrolled at maximum level.
  - You may elect coverage at less than maximum or not to participate at all.
  - You will have a one-year period, beginning two years after the commencement of retired pay, to voluntarily terminate SBP coverage. You will be notified when you reach your second anniversary of retired pay, and if you wish to terminate SBP you should contact PSC (ras) for the disenrollment form. Once participation is discontinued under these provisions, no benefits may be paid in conjunction with your previous participation. No refund of any premiums properly collected shall be made and you may not resume participation in SBP for any category or beneficiary.
  - The decision not to participate at retirement in SBP is irrevocable.
3. If you do not elect coverage at the maximum level, your spouse must concur with your election.
  - You are required to advise your spouse of your election.
  - Your spouse may indicate concurrence with your SBP election by signing part VII of the Retired Pay Account Worksheet and Survivor benefit Election (CG PSC-4700).
  - If your spouse does not concur with your decision or is not available for signature, I am required by Public Law 99-145 to advise your spouse of their options. Your spouse can concur with your election of less than maximum. However, if your spouse does not concur or should not respond to my letter prior to your retirement, **you will be enrolled at the maximum level of participation.**
4. Your election is to be made on CG PSC-4700 (<http://www.uscg.mil/hq/psc/forms/psc4700.pdf>) and should be completed approximately 60 days prior to your retirement or date of departure on terminal leave. Failure to return a completed election will result in you being enrolled in the SBP at maximum level of participation, **regardless of your wishes.**
5. If you have any questions concerning the Survivor Benefit Plan, (enter name of local work-life Career Information Specialist or unit contact and phone number), or the staff at Coast Guard Personnel Service Center, Retiree and Annuitant Services (RAS) at 1-800-PSCUSCG (800-772-8724) or (785-339-3415) are available to assist you and your spouse.

M. R. ROBERTS  
CG GP Somewhere

**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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***Spousal Notification/Concurrence Letter***

CERTIFIED MAIL - RETURN RECEIPT REQUESTED

(Mr./Mrs.)

Date:

Dear (Mr./Mrs.) \_\_\_\_\_:

I am writing to tell you about the Survivor Benefit Plan (SBP) and a decision your spouse has made about participation in the SBP. It is important that you understand this, so please read it carefully.

In the event of your spouse's death, their Coast Guard retired pay automatically stops. Under SBP, your spouse can provide an annuity of up to 55 percent of their retired pay to you and /or your children. In order for you to receive the SBP annuity, your spouse must designate a "base amount" of \$300.00 up to the full amount of their monthly- retired pay. Your annuity would be 55 percent. The premium costs to participate in SBP are a small percentage of the designated base amount, and would be deducted from your spouse's monthly-retired pay.

Under this plan, your spouse must choose one of the following options before retirement:

- a. To cover both you and your children at the maximum level possible (full retired pay). This means you (or your children) would receive 55 percent of your spouse's retired pay after their death.
- b. To cover only you, or only your children, at the maximum level possible.
- c. To cover you or your children or both, at less than the maximum level. This means you (or your children) would only receive an annuity of 55 percent of this reduced "base amount."
- d. Not to participate in SBP at all, which means you (and your children) would receive no annuity in the event of your spouse's death.

Your spouse has elected option (b, c, or d). They have elected to choose the appropriate option below that corresponds to the member's election in blocks 8 and 9 of CG PSC 4700.

(cover only your children at the maximum base amount and not cover you).

or (cover you and your children but only at a reduced base amount of \$XXX.XX).

or (cover only you at a reduced base amount of \$XXX.XX).

or (cover only your children at a reduced base amount of \$XXX.XX).

or (not participate in SBP at all).

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*Continued on next page*

**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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Under Public Law 99-145, your written consent is required before the above election made by your spouse can be effective. It is important that you understand the decision not to participate in SPB at retirement is irrevocable, meaning it cannot be changed. The only exception to this may occur if there is an open season for election into the SBP.

After election into the Plan at any level, there is one opportunity to disenroll. This occurs two years after the commencement of retired pay, when your spouse will have a one year opportunity to voluntarily terminate SBP coverage. As His/Her spouse, you must also concur with that election if made. The decision to terminate SBP coverage during this one-year period is also irrevocable, and once participation is discontinued, no benefits may be paid in conjunction with previous participation, no refunds of any premiums properly collected shall be made and (he/she) may not resume participation in SBP for any category of beneficiary. Your choices at this time are as follows:

- a. Concur with your spouse's election; or
- b. Not concur with your spouse's election, in which case your spouse will be enrolled in SBP at the maximum level (based on full retired pay); or
- c. Not respond to this letter, in which case, your spouse will be enrolled in the SBP at the maximum level (based on full retired pay).

Your signature and that of at least one witness is required on the endorsement below. Return this letter and your endorsement to this Command. If your response to this letter is not received by (30 days prior to date of member's retirement), we will assume that you have chosen not to respond to this letter.

If you or your spouse have any questions about SBP, please write or call me at \_\_\_\_\_. I will be pleased to discuss this issue with you further and help you arrange the SBP coverage you both desire.

Sincerely,

Commanding Officer's Signature

---

**RETURN ENDORSEMENT**

I, \_\_\_\_\_ (spouse's name) \_\_\_\_\_, (wife/husband) of Retiree's Name, rank/rate and SSN have been advised that my (husband/wife) has made the following election under the Survivor Benefit Plan: (enter retiree's election--should be identical to the fourth paragraph of the above letter).

(Check only on block below:)

\_\_\_\_\_ I consent to my spouse's election.

\_\_\_\_\_ I do not consent to my spouse's election.

Signature

Witness: (over 18 and not a family member):

Signature \_\_\_\_\_ Address \_\_\_\_\_

**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

---

***Separation Pay (member due money)***

1900  
15 May 2004

**MEMORANDUM**

From: M. R. Roberts CAPT  
CG GP Somewhere

To: John P. Jones GMC  
Thru: B. M. Chief  
CG STA Anywhere

Subj: SEPARATION PAY AND RELATED DOCUMENTS

1. The separation payment provided to you upon your separation from active duty represents a substantial portion of your final pay and includes payment for any unused leave due you through your date of separation from the Coast Guard. Please be advised that this payment may be over or under the final pay due you as a result of clerical or administrative errors or delays in processing pay transactions, or changes in the planned disposition of your leave.
2. Any additional payment due you will be paid by the Coast Guard Personnel Service Center (PSC) after your separation transactions have processed in Direct Access/JUMPS and a final review of your pay account is made. This will normally be within 90 days after your date of separation. You will also be sent a final Leave and Earnings Statement (LES) within 90 days after separation.
3. The final LES and final separation payment will be mailed to your home address as listed in Direct Access.
4. Your IRS Form W-2 for this year will be mailed by PSC to the address indicated on your Leave and Earnings Statement (LES) unless PSC (ses) is notified otherwise in writing. Your IRS Form W-2 will be mailed by 31 January next year.
5. Any questions concerning the final LES, additional payment, the IRS form W-2, separation travel entitlements or settlement of travel claims after separation can be answered by PSC Customer Care (CCB) at 1-866-PSC-USCG/(785) 339-2200. Claims for reimbursement of Do it Yourself (DITY) Moves can be answered by Coast Guard Finance Center at 1-800-564-5504.

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**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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***Separation Pay (member owes money)***

1900  
xx xxx 20xx

**MEMORANDUM**

From: M. R. Roberts CAPT  
CG GP Somewhere

To: John P. Jones GMC  
Thru: B. M. Chief  
CG STA Anywhere

Subj: SEPARATION PAY AND RELATED DOCUMENTS

1. The Coast Guard Personnel Service Center (PSC) has determined that you are not entitled to any final payment upon your separation from the Coast Guard
2. A final review of your pay account will be made by PSC (ses) after your separation transactions have been processed in Direct Access/JUMPS. If this review indicates that you have been overpaid, you will be notified in writing of the nature and amount of any indebtedness. If the review indicates that you are entitled to additional moneys, a special check payment will be sent to you by PSC (ses). The payment should be mailed to you within 90 days after your date of separation. You will also be sent a final Leave and Earnings Statement (LES) within 90 days after separation.
3. The final LES and final separation payment (or notification of overpayment letter, if indebted) will be mailed to your home address as listed in Direct Access.
4. Your IRS Form W-2 for this calendar year will be mailed by PSC to the address indicated your LES unless PSC (ses) is notified otherwise in writing. Your IRS Form W-2 will be mailed by 31 January next year.
5. Any questions concerning the final LES, additional payment, the IRS form W-2, separation travel entitlements or settlement of travel claims after separation can be answered by PSC Customer Care (CCB) at 1-866-PSC-USCG/(785) 339-2200. Claims for reimbursement of Do it Yourself (DITY) Moves can be answered by Coast Guard Finance Center at 1-800-564-5504.

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**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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***Information Regarding Active Duty Separation Status***

1900  
xx xxx 20xx

**MEMORANDUM**

From: M. R. Roberts CAPT  
CG GP Somewhere

To: John P. Jones GMC  
Thru: B. M. Chief  
CG STA Anywhere

Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS

1. You have been given DD Form 214, Certificate of Release or Discharge from Active duty. We recommend that you store it in a safe place, as you will undoubtedly have need for it at some future date. The purpose of the DD Form 214 is to provide separated personnel with a concise record of data pertaining to active service within the Armed Forces for the purpose of obtaining civilian employment commensurate with service qualifications and experience. The DD Form 214 is also necessary for obtaining such benefits as may accrue under various federal and state legislatures as the result of active service in the Armed Forces. In the event the original of the DD Form 214 contains an erroneous entry, you may obtain a correction by addressing a request to Commander (adm-3) Coast Guard Personnel Command, 2100 2nd Street SW, Washington, DC. 20593-0001. If your DD Form 214 is lost, or you require a copy of your medical records, you may obtain a copy of them at the above address within the first six months of your separation. Once you have been separated for more than six months, you may obtain a copy of your DD Form 214 by addressing a request to National Personnel Record Center, Military Records, 9700 Page Blvd, St. Louis, MO 63132-5100. The Department of Veterans Affairs will maintain your medical record, and you may obtain a copy by writing to the VA Records Management Center, PO Box 5020, St Louis, MO 63115. Any such request as noted above must include your full name, rank, social security number, date of separation, and reason for request.

2. Upon separation from the U.S. Coast Guard, all persons are required to surrender all identification cards that may be in their possession, including your Armed forces Identification and Privilege Cards for yourself and all dependents.

3. The "Ex-servicemen's Unemployment Compensation Act of 1958" (Public Law 85-848) authorized unemployment insurance protection of ex-servicemen of all ranks who began their active service in the Armed Forces after 31 January 1955. The Department of Labor has prepared an informative pamphlet concerning the provisions of the Act. The pamphlet is available through normal source of supply.

4. Enclosed are travel vouchers for you and dependents (if applicable). Failure to submit these claims will result in you not receiving the per diem portion of your travel entitlements. When submitting these claims you are required to submit a copy of the original DD Form 214. You are required to complete the travel claims and submit them in the self-addressed envelope to: Commanding Officer (TVL), Coast Guard Personnel Service Center, 444 SE Quincy Street, Topeka, KS 66683-3591.

5. If you have Servicemember's Group Life Insurance (SGLI) in force, you may convert to Veteran's Group Life Insurance (VGLI) for a 5-year period commencing with the post-service SGLI coverage, which is the 121st day after separation. Applications, payments and inquires concerning SGLI and VGLI should be sent to: Office of Servicemember's Group Life Insurance, 212 Washington Street, Newark, NJ 07102. Any Veterans Administration Office can supply information and forms.

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*Continued on the next page.*

**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS

1900  
xx xxx 20xx

6. If you have contributed to the Thrift Savings Plan (TSP) during your career, you need to make a withdrawal option once you separate from the Coast Guard. You will need to complete Form TSP-U-70, Withdrawal Request, to specify the TSP withdrawal option you want. Mail the form to the TSP Service Office on the form. After your separation, the National Finance Center will be your primary contact for information about your account and withdrawal procedures.

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Encl: (1) Travel Vouchers

**Enclosure 4**  
**STANDARD SEPARATION LETTERS**

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***Release from Active Duty and Transfer to the IRR***

1900  
xx xxx 20xx

**MEMORANDUM**

From: M. R. Roberts CAPT  
CG GP Somewhere

To: John P. Jones GMC  
Thru: B. M. Chief  
CG STA Anywhere

Subj: TERMINATION OF ACTIVE DUTY IN THE REGULAR COAST GUARD AND TRANSFER TO THE  
COAST GUARD **INDIVIDUAL READY RESERVE (IRR)**

Ref: (a) 10 USC 651

1. Effective (**insert date of separation**) your active duty in the regular Coast Guard is hereby terminated by reason of expiration of enlistment. You are hereby immediately transferred to the Coast Guard Individual Ready Reserve (IRR) and concurrently released to inactive duty. You will be required to serve in the Coast Guard Individual Ready Reserve until (**insert expected loss date**), unless sooner discharged by competent authority.

2. During the period of your obligated service in the Coast Guard Individual Ready Reserve you shall be subject to such additional training as may now or hereafter be prescribed by law for such Reserve. Failure to fulfill all or any part of your service obligation may result in trial by appropriate authorities of the United States for violation of reference (a). Additionally, all members in the Ready Reserve or Standby Reserve, Active Status who are retirement qualified, except for having reached sixty years of age, must accrue a minimum of 50 retirement points in an anniversary year to remain in an active status (see Section 4.B.5).

3. You have stated that your mailing address is: (**insert correct final address**)

4. Subsequent to this date, your new unit will be **Coast Guard Personnel Command (rpm), Suite 900, Arlington, VA 22203, (202) 493-1723**. This command will advise you fully as to your obligations and other matters connected with your service in the Coast Guard Individual Ready Reserve. **You will keep this command informed of any change of address and any physical condition or other factor that would affect your immediate availability for active military service. You must promptly answer all official correspondence. You must maintain physical fitness and weight standards. Your initial uniform issue must be kept for a period of four years.** Any information you desire regarding your reserve obligation or status should be requested from your Commanding Officer or your unit administration office

#

Copy: (**provide copy to ISC (fot) responsible for geographic area which member will reside after separation**)



***Reserve Civilian Employer Thank You Letter***

Civilian Employer

Attn:

1234 Anywhere St

Elsewhere, KS 66601-0001

Dear Sir or Madam:

I am writing this letter to thank Civilian Employer for its past support of John Smith's participation as a valued member of U. S. Coast Guard Unit. It is only with positive support from our reserve members' family and employers that the United States military services are able to protect the national interests of our country.

At this time I need to advise you that – due to recent events – John Smith has been involuntarily called to active duty with Unit under Title 10 of the United States Code. As a Yeoman Second Class (YN2) at Unit, he will be deployed either within the United States or overseas as directed by proper authority. These orders are for a period of 1 Year, but it is impossible to tell at this time if they might be shortened or lengthened.

I am enclosing some information from the Employer Support of the Guard and Reserve (ESGR) that might answer questions that you have concerning your rights and the employee's rights under the law, and provide some resources to answer others. I'd also like you to feel comfortable in contacting me personally, at **(insert phone number)**, should you still have questions or concerns.

Once again, my personal thanks for the part your organization is playing in helping to keep America strong.

Sincerely,

RICHARD H. SMITH  
Captain  
U. S. Coast Guard

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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## **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 6**  
**ADMINISTRATIVE REMARKS**

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## **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**

---

## **General Instructions for Use and Preparation of CG-3307's**

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1. Administrative Remark entries are broken down into the following “types”:

- a. Accession (ACC-#)
- b. Assignment and Transfer (A&T-#)
- c. Advancement and Reduction (A&R-#)
- d. Performance and Discipline (P&D-#)

**Note:** Includes indebtedness, non-support of dependents, general (positive/negative), evaluations, good conduct eligibility, and weight

- e. Separation (SEP-#)
- f. Selective Reenlistment Bonus (SRB-#)
- g. Selective Reserve (SELRES) Enlisted Bonus Programs (BON-#)

2. Each of the sample entries consists of the following information:

- a. Entry type and number
- b. The reference providing the requirement to complete the CG-3307 entry.
- c. The responsible level for completing the entry, i.e., SPO or Unit.
- d. The entry itself. The entry should be modified to fit the circumstances as necessary.
- e. When and where applicable, a member’s acknowledge entry

**Note:** It has been determined that items a. thru c. are valuable for tracking authorized entries and therefore **MUST** be included as part of the Administrative Remark entry when actually preparing a CG-3307.

3. If a unit other than the member’s current permanent duty station is preparing the CG-3307 entry, that unit name **MUST** appear beneath the typed signature block, e.g.:

A.B. SEA, CAPT. USCG  
Commanding Officer  
USCGC JARVIS (WHEC 725)

---

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

---

## **CG-3307's for Accession**

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[Click here for Word CG-3307 \(ACC-2\)](#)

Entry Type: Accession (ACC-2)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): Honorably discharged from the USCGR Delayed Enlistment Program (DEP) for the Convenience of the Government to enlist in the Coast Guard on \_\_\_\_\_ having served in the DEP since \_\_\_\_\_. Time spent in the DEP is creditable toward completion of the eight-year military obligation, but is not creditable for purposes of longevity or pay and allowances.

J.P. JONES

---

[Click here for Word CG-3307 \(ACC-3\)](#)

Entry Type: Accession (ACC-3)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I have been advised that the illegal use or possession of drugs constitutes a serious breach of discipline; this will not be tolerated. In addition, illegal drug use or possession is counter to team spirit and mission performance and jeopardizes safety. No member will use, possess, or distribute illegal drugs or drug paraphernalia.

I also understand on reporting to recruit training, I will be tested by urinalysis for the presence of illegal drugs. If my urine test detects the presence of illegal drugs, I may be subject to discharge and receive a general discharge.

J. P. JONES

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[Click here for Word CG-3307 \(ACC-4\)](#)

Entry Type: Accession (ACC-4)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I am aware that upon arrival at the Recruit Training Center, Cape May, I will receive a complete, thorough pretraining physical examination, including a dental examination, which I must pass to enter recruit training.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Accession, Continued**

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[Click here for Word CG-3307 \(ACC-5\)](#)

Entry Type: Accession (ACC-5)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I do not yet possess a Social Security Card although I have applied for issuance/replacement of one on form SS-5. The Social Security Administration has advised me that the number being issued to me is \_\_\_\_-\_\_\_\_-\_\_\_\_. I authorize the Commander, Coast Guard Personnel Command (CGPC) to see my social security card for number identification purposes before sending it to me.

J. P. JONES

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[Click here for Word CG-3307 \(ACC-6\)](#)

Entry Type: Accession (ACC-6)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I certify that I am a resident alien and my number is:

\_\_\_\_\_

J. P. JONES

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[Click here for Word CG-3307 \(ACC-7\)](#)

Entry Type: Accession (ACC-7)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I understand I will not be eligible for re-enlistment, may enter only the DC, EM, FS, HS, MK, MST, SK, or YN rating, and will not be eligible to attend Officer Candidate School or become a Chief Warrant Officer until I become a United States citizen.

J. P. JONES

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*Continued on next page*

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

---

**CG-3307's for Accession, Continued**

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[Click here for Word CG-3307 \(ACC-8\)](#)

Entry Type: Accession (ACC-8)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I have been advised that my medical examination revealed that I do not have normal color vision. If I enlist in the Coast Guard or (Coast Guard Reserve), I understand I will not be permitted to enter the following ratings: AET, AMT, AST, BM, EM, ET, GM, IT, IV, HS, MK, OS, or PS during this period or subsequent enlistments. I am also aware if I enter the MST rating, I will not be able to advance to CWO (BOSN or MSS). Furthermore, I have been advised that my defective color vision will prevent my application for an officer commission.

J. P. JONES

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[Click here for Word CG-3307 \(ACC-10\)](#)

Entry Type: Accession (ACC-10)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I have been advised, per Article 5-C-33, Personnel Manual, COMDTINST M1000.6 (series), that I may be eligible for advancement to pay grade E-4, in my formerly held rating, without having to attend class "A" school or compete in the servicewide exam, if I am found eligible in all respects and I am recommended for advancement. I must serve a minimum of 6 months on my present enlistment, and either hold a designator or have been rated at the time of my last separation from active duty. My commanding officer's recommendation must be submitted within 5 years of my latest separation from active duty. If I am ineligible or not recommended for advancement under this program, I understand I must compete for advancement to pay grade E-4.

J. P. JONES

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[Click here for Word CG-3307 \(ACC-11\)](#)

Entry Type: Accession (Reserve) (ACC-11)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I hereby certify all information on my enlistment documents is current and accurate. I have not been involved with the police or had any changes in dependency/finances other than what I reported to my recruiter. I understand withholding information is punishable under the Uniform Code of Military Justice and may result in a less than honorable discharge for fraudulent enlistment.

J. P. JONES

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*Continued on next page*



**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Accession, Continued**

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[Click here for Word CG-3307 \(ACC-14\)](#)

Entry Type: Accession (Reserve) (ACC-14)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): (for all reserve applicants except RP & RK) I understand that inability to satisfy the swimming requirement detailed in Military Requirements (MRN) I.L.201 of the Enlisted Performance Qualifications Manual, COMDTINST M1414.8 (series), will adversely affect my career. I have been advised that the possible effects include: prohibition from advancement, reenlistment, or an afloat duty assignment; or involuntary transfer to the IRR, or discharge.

J. P. JONES

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[Click here for Word CG-3307 \(ACC-16\)](#)

Entry Type: Accession (ACC-16)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I understand I am accepted for enlistment with a spouse and \_\_\_\_ dependents. My spouse is an active duty Coast Guard member in the grade of \_\_\_\_\_. The Coast Guard shall make every attempt to co-locate me with my spouse, but such co-location is not guaranteed.

\_\_\_\_\_  
Enlistee's Signature

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[Click here for Word CG-3307 \(ACC-17\)](#)

Entry Type: Accession (ACC-17)

Reference: Recruiting Manual, COMDTINST M1100.2 (series)

Responsible Level: Recruiter

Entry:

(DATE): I understand I am accepted for commissioning with a spouse and \_\_\_\_ dependents. My spouse is an active duty Coast Guard member in the grade of \_\_\_\_\_. The Coast Guard shall make every attempt to co-locate me with my spouse, but such co-location is not guaranteed.

\_\_\_\_\_  
Candidate's Signature

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

## **CG-3307's for Assignment and Transfer**

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[Click here for Word CG-3307 \(A&T-1\)](#)

Entry Type: Assignment and Transfer (A&T-1)

Reference: Section 4-A, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

(DATE): I have been counseled on the requirement of Article 4-A-6, Personnel Manual, COMDTINST M1000.6 (series) regarding my availability for unrestricted worldwide assignment. I further certify that the situation, which occasioned my original request, in my letter 1326, dated (date), has been completely alleviated and I am now available for unrestricted worldwide assignment.

J. P. JONES

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[Click here for Word CG-3307 \(A&T-2\)](#)

Entry Type: Assignment and Transfer (A&T-2)

Reference: Section 4-B, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

(DATE): Received orders for Humanitarian assignment (HUMS) under the provisions of Article 4-B-11, Personnel Manual, COMDTINST M1000.6 (series). Instructions concerning nonentitlement to expenses incurred in the execution of these orders have been explained to me this date. In view of a permissive travel authorization for HUMS to a new permanent duty station being issued, I understand that under no circumstances will I be reenlisted or extended without Commandant approval. I must present clear documentation that my hardship situation is completely resolved, and that I am available for unrestricted reassignment in accordance with service needs, for Commandant approval to be granted.

J. P. JONES

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[Click here for Word CG-3307 \(A&T-3\)](#)

Entry Type: Assignment and Transfer (A&T-3)

Reference: Section 4-E, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

(DATE): Found to be unsuitable as (enter assigned special duty) due to (state reasons and specifics) per Article 4-E-4, Personnel Manual, COMDTINST M1000.6 (series). Commander (CGPC-EPM) notified this date and reassignment requested.

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I have been counseled and understand the reason(s) for the above action.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**CG-3307's for Assignment and Transfer, Continued**

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

Entry Type: Assignment and Transfer (A&T-4)

Reference: Section 4-C, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

(DATE): I have read and understand Article 4-C-11, Personnel Manual, COMDTINST M1000.6 (series), relating to suitability of members to serve on icebreaker duty. Neither I nor my dependents possess any physical or mental abnormalities, except as indicated, which might result in a determination that I be disqualified for such duty: (state disqualification or indicate "none to my knowledge"). I consider myself fully qualified for icebreaker duty.

J. P. JONES

(DATE): Compliance with the provisions of Article **4-C-11**, Personnel Manual, COMDTINST M1000.6 (series), is certified. John Paul Jones is considered to be suitable in all respects for icebreaker duty.

A. B. LIST, CWO4, USCG  
Personnel Officer

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

Entry Type: Assignment and Transfer (A&T-5)

Reference: Section 4-H, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

(DATE): I understand that neither my spouse nor I will be considered for reassignment under the provisions of Article 4-H-8b, Personnel Manual, COMDTINST M1000.6 (series), until eligible for normal rotation.

JOHN PAUL JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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**CG-3307's for Assignment and Transfer, Continued**

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

Entry Type: Assignment and Transfer (A&T-6)

Reference: Section 4-H, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

OVERSEAS SCREENING

(DATE): I, \_\_\_\_\_, am aware that failure to divulge disqualifying information, or amplifying information (medical, dental, psychological, physical, or educational problem(s)) pertaining to the questions on the checklist for overseas screening, may ultimately result in disciplinary action punishable under the UCMJ.

\_\_\_\_\_  
member (signature)      DATE      member (name, rank/rate)

\_\_\_\_\_  
spouse (signature)      DATE

On the basis of all available information, I endorse/I do not endorse (circle one) the member's orders to the overseas assignment. (A copy of the completed checklist will be forwarded to the receiving command.)

\_\_\_\_\_  
CO/OIC (signature)      DATE      CO/OIC (name, rank)

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[Click here for Word CG-3307 \(A&T-9\)](#)

Entry Type: Assignment and Transfer (A&T-9)

Reference: Section 4-E, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry

(DATE): I hereby request assignment to a non-rescue swimmer tour of duty as the needs of the service allow. I understand that two consecutive non-rescue swimmer tours of duty or an extension of a non-rescue swimmer tour are prohibited. If I decide not to return as an operational rescue swimmer, I must have over 18 years of active service and apply for retirement; obtain a change in rating; or request voluntary discharge. I also understand I will not be eligible for rescue swimmer Special Duty Assignment Pay during this non-rescue swimmer assignment.

J. P. JONES

(DATE): Witness this date

A. B. LIST, CWO4, USCG  
Personnel Officer

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

**CG-3307's for Assignment and Transfer, Continued**

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[Click here for Word CG-3307 \(A&T-10\)](#)

Entry Type: Assignment and Transfer (A&T-10)

Reference: Section 5.B, Reserve Policy Manual, COMDTINST M1001.28(series)

Responsible Level: Unit

Entry:

(DATE): You are hereby transferred to the Inactive Ready Reserve (IRR) at your request. You do/do not have a reserve obligation and are/are not required to return to the SELRES. Any future request to return to the SELRES from the IRR will be at the discretion of the receiving command and CGPC (rpm).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I have been counseled and understand the reason(s) for the above action.

J. P. JONES

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**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

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

---

[Click here for Word CG-3307 \(A&R-1\)](#)

Entry Type: Advancement and Reduction (A&R-1)

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

Responsible Level: Unit

Entry:

(DATE): YN2 Jones informed this date that he is a candidate for reduction in rate by reason of incompetence per Article 5-C-38, Personnel Manual, COMDTINST M1000.6 (series). YN2 Jones' mark(s) (provide specifics on which mark(s) meet the reduction in rate criteria) for the period ending (date). Advised that he has three months from this date to demonstrate satisfactory progress and meet the requirements or Article 5-C-38 in order to retain his present rate, and that failure to do so will result in reduction in rate to YN3. A special performance evaluation will be completed at that time for the purpose of determining competency, particular areas that require improvement are: (provide specifics, etc.).

A. B. SEA, CAPT, USCG  
Commanding Officer

(DATE): I have read and understand the above entry.

J. P. JONES

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[Click here for Word CG-3307 \(A&R-2\)](#)

Entry Type: Advancement and Reduction (A&R-2)

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

Responsible Level: Unit

Entry:

(DATE): As a result of being above the cutoff for advancement to (E-7, E-8, or E-9) I understand that I will be required to meet the two year obligated service requirement per Article 5-C-25, Personnel Manual, COMDTINST M1000.6 (series). I agree not to request voluntary retirement or early release to be effected prior to completion of required obligated service as stated above.

J. P. JONES

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*Continued on next page*

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

---

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

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[Click here for Word CG-3307 \(A&R-3\)](#)

Entry Type: Advancement and Reduction (A&R-3)

Reference: Article 5-C-8, Personnel Manual, COMDTINST M1000.6 (series)

Responsible Level: Unit

Entry:

(DATE): Correspondence course waived for the (date) servicewide competition due to non-availability of course as certified by CO, CG Institute letter of (date). When courses not previously available are developed, the Commanding Officer, Coast Guard Institute will publish the servicewide competition date for which the course will be available. This availability will be announced to all Educational Services Officers (ESO) as a change to the Correspondence Course Manual and to all units in the Commandant's Bulletin.

A. B. LIST, CWO4, USCG  
Personnel Officer

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*Continued on next page*

**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

**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: Sec. 2.F., 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), Waist: \_\_\_\_\_ (inches), Neck: \_\_\_\_\_ (inches), Buttocks (females only): \_\_\_\_\_ (inches). 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 greater than 35 weeks by weight calculation and more than 8 months by body fat standards. Therefore, you are hereby notified that, instead of probation, you will be recommended for separation (if active duty), recommended for transfer to the 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 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**

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

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

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

Reference: Sec. 3.A., COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

Your probationary period is held in abeyance this date pending your return to an “available for full-duty status”, not to exceed thirty days, 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 available 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 weight at the time the original probationary period started. 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 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, 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**

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

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

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

Reference: Sec. 2.F., COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

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(DATE): You have this date been determined to be \_\_\_\_\_ pounds overweight. However, in accordance with section 3.C. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series), you are hereby granted a one-time, six month abeyance to support you in your quest to stop using tobacco. You are strongly encouraged to complete a personal wellness profile and aggressively pursue your basic fitness plan. At any time during this period if it is determined that you are using tobacco, this abeyance period will immediately be lifted, and you will be reweighed and placed on probation if appropriate. If you fail to reach compliance by the end of your probationary period, you will be recommended for separation (if active duty), recommended for transfer to the ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).

By signature below, you acknowledge both this entry and that you have been afforded the opportunity to review 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**

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

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

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

Reference: Sec. 3.B., COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): You have this date been determined to be exempt from the Weight and Body Fat standards during your pregnancy, in accordance with paragraph 3.B. of Weight/Physical Fitness Standards for Coast Guard Military Personnel, COMDTINST M1020.8(series). This exemption will remain in force for a period of six months from the date of delivery or termination of pregnancy. An additional six month exemption period will be granted if nursing, but in no cases shall the total exemption period exceed twelve months from date of delivery. You will not be measured to determine weight and body fat standards until the end of the exemption period. If, at the end of the exemption period, you are determined to exceed both your weight and body fat standards, you will be subject to section 2.F. of COMDTINST M1020.8(series). During your pregnancy, you are reminded that you must maintain a neat military appearance. 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 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**

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## **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), Waist: \_\_\_\_\_ (inches), Neck: \_\_\_\_\_ (inches), Buttocks (females only): \_\_\_\_\_ (inches). 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 below \_\_\_\_\_% body fat 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 your 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 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: Sec. 2.J., 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

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*Continued on next page*

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

**ENCLOSURE 6  
ADMINISTRATIVE REMARKS**

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[Click here for Word CG-3307 \(P&D-4\)](#)

Entry Type: Performance and Discipline (Weight) (P&D-4)

Reference: Sec. 2.J., COMDTINST M1020.8(series)

Responsible Level: Unit

Entry:

(DATE): On this date your probationary period has come to an end. You weighed \_\_\_\_\_ (pounds) and 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 ISL (if reservist), or recommended to return to the Department of Health and Human Services (Public Health Service).

A. B. SEA, CAPT, USCG  
Commanding Officer

(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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[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

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(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**

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**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**

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**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**

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**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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## **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-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 re3spective 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, PSCINST 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.

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J. P. JONES

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[Click here for Word CG-3307 \(SEP-2\)](#)

Entry Type: Separation (SEP-2)

Reference: Sections 3-C and 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 Article 3-C-5 of the Personnel Manual, COMDTINST M1000.6 (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.

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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.

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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 \(SEP-4\)](#)

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

(DATE): I acknowledge the above entry.

J. P. JONES

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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 (4) 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 3-C, 12-B & 18-D-4, Personnel Manual, COMDTINST M1000.6 (series), COMDTINST 7220.1 (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 (indicate Unit or IRR) to complete obligation of military service. Member provided Certificate of Release or Discharge from active duty form (DD-214) and other separation documents as required by Article 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 and/or opportunity to contribute to the TSP within 60 days of joining the Ready Reserve;
- (3) the provisions of COMDTINST 1760.7 (series);
- (4) liability for SGLI premiums unless member declines coverage or joins the Individual Ready Reserve (IRR);
- (5) the requirement to answer official correspondence;
- (6) responding to Annual Screening Questionnaires;
- (7) maintaining physical fitness and weight standards;
- (8) maintaining your initial uniform issue for a period of four years;
- (9) the surrendering of your Citibank card prior to departure from active duty;
- (10) maintaining continuous service status; and
- (11) promptly advising CGPC-rpm if in IRR, or SPO if assigned to a drilling unit of changes of residence and changes of phone number(s) or mailing address and any physical condition or other factor that would affect your immediate availability for active military service.

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

(DATE): I acknowledge the above entries.

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 \(SEP-11\)](#)

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). Member counseled regarding retirement rights, benefits, and responsibilities.

A. B. SEA, YNCM, USCG

By direction

CGD FOURTEEN (SPO), Honolulu, HI

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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-llf, 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.

---

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: Sections 3-C and 12-B, Personnel Manual, COMDTINST M1000.6 (series), Section 8-B, Reserve Policy Manual, COMDTINST M1001.28(series), COMDTINST 7220.1 (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 (4) 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.

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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.

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SIGNATURE

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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.

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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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*Continued on next page*

**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.11.1  
Responsible Level: Unit

Entry:

(DATE): I have reviewed Article 3.C.12 of the Personnel Manual entitled "*Frequently Asked SRB Questions and Answers.*" I have been informed that:

My current Selective Reenlistment Bonus (SRB) multiple is \_\_\_\_ and is listed in ALCOAST \_\_\_\_\_, which has been made available for my review.

In accordance with article 12.B.4, I am eligible to reenlist/extend my enlistment for a maximum of \_\_\_\_\_ years. My SRB will be computed based on \_\_\_\_\_ years newly obligated service. (If extension/reenlistment is for less than 36 months, enter "00.")

I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

**SRB Payment Method Election** (*Include if member has an SRB multiple and is going to reenlist/extend on or after 16 July 2007*)

\_\_\_\_\_  
(mbr's initials)     **Installments.** The initial payment shall be 50 percent of the total bonus amount and the remainder paid in equal annual installments, on the anniversary date, as determined by the length of the extension or reenlistment. I understand this decision is irrevocable.

**Note:** An additional 25% is deducted from all SRB payments for tax withholding.

\_\_\_\_\_  
(mbr's initials)     **Lump Sum.** I hereby acknowledge that I have elected the lump sum SRB payment option and will receive **ONLY** 85 percent of the installment payment program amount. I understand this decision is irrevocable.

**Note 1:** An additional 25% is deducted from all SRB payments for tax withholding.

**Note 2:** *If member elects Lump Sum, the SPO shall fax a copy of this entry to PSC (MAS/Bonus Team) at (785) 339-3760 after the Statement of Intent (SOI) transaction is entered in Direct Access.*

The following SRB policies were unclear to me, but my SRB counselor provided me with the corresponding answers: (list specifics)

\_\_\_\_\_  
(Signature of Member/Date)

\_\_\_\_\_  
(Signature of Counselor)

*Continued on next page*



**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 \(SRB-2\)](#)

Entry Type: Selective Reenlistment Bonus (SRB-2)

Reference: COMDTINST M1000.6 (series), Art. 3.C.5.9 (Special Conditions) & 3.C.11.2

Responsible Level: Unit

Entry:

(DATE): I have reviewed Article 3.C.12 of the Personnel Manual entitled "*Frequently Asked SRB Questions and Answers.*" I have been informed that:

My current Selective Reenlistment Bonus (SRB) multiple is \_\_\_\_ and is listed in ALCOAST \_\_\_\_\_, which has been made available for my review.

In accordance with article 12.B.4, I am eligible to reenlist/extend my enlistment for a maximum of \_\_\_\_\_ years. My SRB will be computed based on \_\_\_\_\_ years newly obligated service. (If extension/reenlistment is for less than 36 months, enter "00.")

I must reenlist 3 months prior to (date), which is my 6 or 10-year active duty anniversary date, in order to receive a Zone (A or B) SRB.

I have also been counseled on the opportunity to have my SRB payment contributed to the Thrift Savings Plan (TSP).

**SRB Payment Method Election** (*Include if member has an SRB multiple and is going to reenlist/extend on or after 16 July 2007.*)

\_\_\_\_\_  
(mbr's initials)     **Installments.** The initial payment shall be 50 percent of the total bonus amount and the remainder paid in equal annual installments, on the anniversary date, as determined by the length of the extension or reenlistment. I understand this decision is irrevocable.

**Note:** An additional 25% is deducted from all SRB payments for tax withholding.

\_\_\_\_\_  
(mbr's initials)     **Lump Sum.** I hereby acknowledge that I have elected the lump sum SRB payment option and will receive **ONLY** 85 percent of the installment payment program amount. I understand this decision is irrevocable.

**Note 1:** An additional 25% is deducted from all SRB payments for tax withholding.

**Note 2:** *If member elects Lump Sum, the SPO shall fax a copy of this entry to PSC (MAS/Bonus Team) at (785) 339-3760 after the Statement of Intent (SOI) transaction is entered in Direct Access.*

The following SRB policies were unclear to me, but my SRB counselor provided me with the corresponding answers: (list specifics)

\_\_\_\_\_  
(Signature of Member/Date)

\_\_\_\_\_  
(Signature of Counselor)

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*Continued on next page*

**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) (Written Agreements)

Reference: COMDTINST M1000.6 (series), Art. 3.C.3

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.

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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 \(SRB-4\)](#)

Entry Type: Selective Reenlistment Bonus (SRB-4)

Reference: COMDTINST M1000.6 (series), Art. 3.C.5.7 (Special Conditions)

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)

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(Signature of Counselor)

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*Continued on next page*

**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)

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[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)

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[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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*Continued on next page*

**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)

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[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).

---

(Signature of Member/Date)

---

(Signature of Counselor)

---

[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).

---

(Signature of Member/Date)

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(Signature of Counselor)

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*Continued on next page*

**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)

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(Signature of Counselor)

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Enclosure 7  
CASUALTY REPORTING EXAMPLES

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## Personnel Casualty Report Message

When notified of a Personnel Casualty, IMMEDIATELY call Flag Plot at (202) 267-2100.  
Send this message within 4 hours of notification.

*MESSAGE ROUTING TO REPORT AN ACTIVE DUTY, RESERVE, OR AUXILIARY DEATH, OR THE DEATH OF A MEMBER WHO DIED WITHIN 120 DAYS OF SEPARATION:*

P 000000Z MON YR (COMCEN enters date time group)  
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)  
TO CCGDNUMBER ANYWHERE US (district where Next Of Kin resides)  
COGARD INTSUPRTCOM ANYWHERE USA (ISC where Next Of Kin resides)  
CCGDNUMBER ANYWHERE US (district where member's unit is located, if different from "To" line)  
COGARD INTSUPRTCOM ANYWHERE USA (ISC where casualty occurs)  
COGARD UNIT ANYWHERE US (member's unit, if different than "From" line)  
COMDT COGARD WASHINGTON DC//CG-1222/CG-112/CG-2-CGIS// (Omit CG-2-CGIS when death occurs in a hospital due to natural causes)  
INFO COGARD PSC TOPEKA KS  
COMCOGARD PERSCOM ARLINGTON VA//EPM or OPM//  
FHTNC NORFOLK VA (Fleet Home Town News Center)  
CCGDNUMBER ANYWHERE US (district where unit sending this msg is located, if different from above)  
COGARD MLC ANYWHERE US (if member's unit was a MLC unit)  
COGARD MLC LANT NORFOLK VA //KSE//  
  
COMCOGARD TISCOM//HONOR GUARD OPS//

*MESSAGE ROUTING TO REPORT A DEPENDENT DEATH*

P 000000Z MON YR (COMCEN enters date time group)  
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)  
TO COMDT COGARD WASHINGTON DC//CG-1222/G-WKW//  
COGARD INTSUPRTCOM ANYWHERE USA (ISC where member resides)  
INFO COGARD PSC TOPEKA KS

*MESSAGE ROUTING TO REPORT A RETIREE DEATH*

P 000000Z MON YR (COMCEN enters date time group)  
FM COGARD UNIT ANYWHERE US (unit where casualty occurs or is initially reported to)  
TO COGARD PSC TOPEKA KS//RAS//  
INFO COMDT COGARD WASHINGTON DC//CG-1222//  
INFO COMCOGARD PERSCOM ARLINGTON VA//ADM//  
COGARD INTSUPRTCOM ANYWHERE USA (ISC for AOR where deceased retiree resided)

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*Continued on next page*

## Personnel Casualty Report Message, Continued

ACCT CGW2GARC

BT

UNCLAS FOUO //N01770//

SUBJ: PERSONNEL CASUALTY REPORT

1. THE FOLLOWING INFO IS PROVIDED:

**ALPHA. Name.** Indicate member's full name, rank/rate, SSN, and branch of service. In the case of a dependent's death, first give the dependent's full name and relationship to member, and then give the member's full name, rank/rate, SSN, and branch of service.

**BRAVO. Status.** Indicate person's status, (e.g., active duty, active duty for training (ADT), Inactive Duty for Training (IDT), retired, dependent, absentee since, etc). In the case of reserve members, indicate whether the member was on active duty for training (ADT) or inactive duty for training (IDT), and the period of training authorized including hour and date. If the casualty occurred while traveling to or from training, indicate the time of the member's departure, scheduled arrival time, method of travel, itinerary, and immediate cause of death. Fax a complete copy of the reservist's order immediately to Commandant (G-WPM) @ 202-267-4823.

**CHARLIE. Type of Casualty.** Indicate whether casualty was caused by hostile or non-hostile actions. Also state whether member is Alive, Dead or Missing. If alive give the prognosis in case of illness or injury. If dead, state the cause such as accident, illness, suicide, killed in action, or died of wounds. When applicable, state how identification of remains was established. If missing, give cause of disappearance. Do not use indefinite statements such as "lost overboard" or "missing and presumed dead". If it cannot be determined if member is deceased, see Article 11-A-4, Coast Guard Personnel Manual, COMDTINST M1000.6 (series).

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*Continued on next page*



**APPENDIX C  
COMPUTATION OF SERVICE**

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## Overview

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**Introduction** This appendix will guide you through the procedures needed to compute service.

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**In this  
appendix**

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Deductible Time	11
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Active Duty Base Date	23
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## Introduction to Computation Procedures

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### **Introduction**

In this section you will learn the procedures to compute the following:

- Creditable Service
- Deductible Time
- Pay Base Date
- Active Duty Base Date
- Date of Rank
- Expiration of Enlistment
- Creditable Sea Duty

---

### **Procedure Tables**

There are procedure tables on each of the above throughout this section. Use the appropriate table on every computation.

---

## Expiration of Enlistment

---

### Introduction

Expiration of enlistment computations are figured on a **day for day** basis. Only active military service is creditable. This section provides examples of how to compute expiration of enlistment given the term of enlistment, extensions, and any deductible time.

---

### Procedure Table #8 Expiration of Enlistment

Use the following steps in computing Expiration of Enlistment.

Step	Procedure
1	Determine the date of entry into the Coast Guard.
2	Plus term of enlistment
3	Minus 01 day
4	Plus, if applicable, deductible time for expiration of enlistment. (day for day basis)
5	If the result is not a true date, convert to true date using the day for day rule.

Note: Review the examples carefully on the following pages to compute an accurate EOE when Extensions and Re-extensions are involved.

---

### Days in the month

When you need to convert to a true date it is very important for you to know how many days are in a given month. Listed below are the number of days in each month.

• Jan - 31 days	• Jul - 31 days
• Feb - 28 days (29 for leap years)	• Aug - 31 days
• Mar - 31 days	• Sep - 30 days
• Apr - 30 days	• Oct - 31 days
• May - 31 days	• Nov - 30 days
• Jun - 30 days	• Dec - 31 days

*Continued on Next Page*

## Expiration of Enlistment, Continued

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**Example  
Deductible  
Time**

**YN2 Crane enlisted in the Coast Guard on 25 May 1984 for 04 years. He also has 17 days for deductible time for expiration of enlistment purposes.**

- Step 1 - Determine date of entry into the Coast Guard.

84 05 25 Date of entry (Enlistment)

- Step 2 - Plus term of enlistment.

$$\begin{array}{r} 84\ 05\ 25 \text{ Date of entry (Enlistment)} \\ + \ 04\ 00\ 00 \text{ Term of Enlistment} \\ \hline 88\ 05\ 25 \end{array}$$

- Step 3 - Minus 01 day

$$\begin{array}{r} 88\ 05\ 25 \\ - \ \ \ \ \ 01 \text{ Day} \\ \hline 88\ 05\ 24 \text{ Normal Expiration of Enlistment} \end{array}$$

- Step 4 - Plus deductible time for expiration of enlistment

$$\begin{array}{r} 88\ 05\ 24 \\ + \ \ \ \ \ 17 \text{ Days of deductible time} \\ \hline 88\ 05\ 41 \end{array}$$

- Step 5 - Convert to a true date using the day for day rule

$$\begin{array}{r} 88\ 05\ 41 \\ - \ \ \ \ \ 31 \\ \hline 88\ 06\ 10 \end{array}$$

Subtract the number of days that belong to the month in the month's column (in this case May).  
Add the remaining days to the next month(s).

88 June 10 New Expiration of Enlistment

**Note**

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Remember expiration of enlistment is done on a **day for day** basis. So when you need to round up the days to months to make a real date, subtract the number of days that belong to that particular month. For example: if your computation came out as 92 07 43 you would subtract 31 days from the days column (July has 31 days) and add the remainder to the next month. So 92 07 43 would convert to 92 08 12.

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*Continued on Next Page*

## 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-CustomerCare@uscg.mil](mailto:PSC-CustomerCare@uscg.mil).

**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-CustomerCare@uscg.mil](mailto:PSC-CustomerCare@uscg.mil) or submit an online trouble ticket.

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