

U.S. Department of
Homeland Security

United States
Coast Guard



Military Personnel Data Records (PDR) System



COMDTINST M1080.10G
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Commandant
United States Coast Guard

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COMMANDANT INSTRUCTION M1080.10G

Subj: MILITARY PERSONNEL DATA RECORDS (PDR) SYSTEM

1. PURPOSE. This Manual establishes policy and prescribes procedures for administering the Military Personnel Data Records (PDR) System, applicable to active duty and reserve forces, officers, and enlisted personnel. Specific guidance for processing changes to documentation contained in the PDR system is published in the Personnel and Pay Procedures Manual, PSCINST M1000.2 (series).
2. ACTION. Area, district, and sector commanders, commanders of maintenance and logistics commands, commanding officers of integrated support commands, commanding officers of headquarters units, assistant commandants for directorates, Judge Advocate General, and special staff offices at Headquarters (HQ) shall ensure compliance with the provisions of this Manual. Internet release authorized.
3. DIRECTIVES AFFECTED. Military Personnel Data Records (PDR) System, COMDTINST M1080.10F is canceled.
4. MAJOR CHANGES. The major changes to this manual include: Change office name from Commandant (G-WRI) to Commandant (CG-102); Considers Direct Access an “e-PDR” for Privacy Act purposes; Adds a requirement for CGPC-adm3 to establish and implement a quality assurance process which ensures I PDR compliance with this instruction; Requires units to request written consent to deviate from filing requirements; Change office name from Commandant (G-WT) to Commandant (CG-13); Changes the name of the CGPC PDR to I PDR; Allows SPO PDR to be hand carried under certain circumstances; Removed requirement to file DD1172; Changed award citation entry from SPO to unit for units that have a Memorandum of Understanding (MOU) on file with PSC and their SPO; Removed filing of PDIF; Added filing of Statement of Entitlement to Educational Assistance benefits for Reserve Component Members Ordered to Active Duty per Chapter 1607, 10 USC; Added filing of Statement of Election to Educational Assistance benefits Based On qualifying for Educational Assistance under Chapter 30, Title 38 USC & Chapter 1607, Title 10 USC; Removed requirement to Electronic Image Direct Access Image Report; Added the

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requirement to image supporting documentation when imaging a Statement of Creditable Service (CGPSC-1071) and State of Creditable Sea Service (CGPSC-1072); Added an Enclosure that lists all cancelled forms required to be maintained in the PDRs.

5. RECOMMENDATIONS TO IMPROVE THE MILITARY PDR SYSTEM. Submit recommendations to improve the PDR system to Commandant (CG-102) using enclosure (12). The PDR System is intended to provide a structured, yet flexible records system to meet the Coast Guard's continuing and diverse needs.
6. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. Environmental considerations were examined in the development of this directive and have been determined to be not applicable.
7. FORMS/ REPORTS. The forms noted with an "*" have been canceled, but are still required to be maintained in the PDR. Forms noted with an "***" are not in the in the Coast Guard Forms Library. All other Forms called for in this Manual are available in USCG Electronic Forms on the Standard Workstation or on the Internet: <http://www.uscg.mil/ccs/cit/cim/forms1/welcome.htm> or Intranet: <http://cgweb2.comdt.uscg.mil/CGFORMS/Welcome.htm>.

CLIFFORD I. PEARSON /s/
Assistant Commandant for
Human Resources

RECORD OF CHANGES

CHANGE NUMBER	DATE OF CHANGE	DATE ENTERED	BY WHOM ENTERED

TABLE OF CONTENTS

CHAPTER 1	PROGRAM RESPONSIBILITY	1-1
	A. Overall Responsibility	1-1
	B. Unit Responsibility	1-1
CHAPTER 2	PRIVACY ACT REQUIREMENTS	2-1
	A. General	2-1
	B. Access to and Disclosing PDR Documents	2-1
	C. Handling FOIA and Privacy Act Inquiries	2-2
	D. Safeguarding PDRs	2-2
	E. Recording Disclosures of Information	2-2
	F. Releasing Documents or Information	2-2
CHAPTER 3	PDR SYSTEM	3-1
	A. Background	3-1
	B. Uses	3-1
	C. PDR Description	3-1
	D. Definitions	3-1
	E. Types of PDR's	3-2
CHAPTER 4	CORRECTING THE PDR	4-1
	A. General	4-1
	B. Opening a Personnel Data Record (CG-5354)	4-1
	C. Maintaining the PDR	4-1
	D. Correcting the PDR	4-2
	E. Transmitting the PDR on Permanent Change of Station (PCS) Transfer	4-3
	F. Transmitting the SPO PDR when Assigned TDY, ADSW-AC or ADSW-RC or Mobilization under Title 10 or Title 14	4-3
	G. Missing/Lost PDR	4-4
	H. PDR Review	4-4
	I. Removing Documents and Transactions from the SPO and Unit PDR	4-4
	J. Terminating PDR Maintenance	4-5
	K. Disposing of PDRs	4-6
ENCLOSURES	(1) Table of Documents Filing Locations	
	(2) Coast Guard Personnel Command I PDR Structure	
	(3) Servicing Personnel Office (SPO) PDR Structure	
	(4) Unit PDR Structure	
ENCLOSURES	(5) Disclosure Log	

(cont.)

- (6) Separation Documents Checklist
- (7) Medical/Dental Record Disposition Instructions template
- (8) List of Cancelled Forms
- (9) List of Forms not in USCG Forms Inventory
- (10) Suggestions to Improve the Military PDR System

CHAPTER 1. PROGRAM RESPONSIBILITY

- A. Overall Responsibility. Commandant (CG-102) is overall responsible for the Military PDR System.

- B. Delegated Responsibility.
 - 1. Administration of the Coast Guard Electronically Imaged (I) PDR system has been delegated to Commander, Coast Guard Personnel Command (adm-3).

 - 2. Procedure implementation and development for the e-PDR (Direct Access) has been delegated to Commanding Officer, Coast Guard Personnel Service Center. Those inputting data into the e-PDR are responsible for the accuracy of that data.

- C. Unit Responsibility. Units that submit electronic pay or personnel information via Direct Access (DA) are responsible for notifying members via their unit commanding officer of transactions submitted on them as well as forwarding source documentation to substantiate the transactions to CGPC (adm-3).

CHAPTER 2. DISCLOSURE REQUIREMENTS

- A. General. All personnel using or maintaining PDRs and preparing associated documents must maintain these records and documents security and integrity at all times. Personnel must exercise care to prevent unauthorized disclosure from occurring and ensure that all records and documents are properly disposed of by shredding or other secure disposal methods. Recycling shredded material is authorized and encouraged. The Coast Guard's human resources management system, Direct Access, is considered an e-PDR and the same care is to be exercised as with the other forms of the PDR (i.e. need to know and right to know).
- B. Access to and Disclosing PDR Documents. The Coast Guard Freedom of Information and Privacy Acts Manual COMDTINST M5260.3 (series) governs the release of information contained in record systems. PDR access may be granted when authorized to persons/officials who can verify their identity through positive identification utilizing, military or government ID cards; driver's license; or other similar documents which establish the identity and purpose for whom access has been granted. Complete a disclosure log entry for access to the PDR as indicated for the following:
1. On requests of the PDR's subject:
 - a. To a representative(s) the PDR's subject has designated in writing;
 - b. To any minor's parent or any person's legal guardian if a court of competent jurisdiction acting on behalf of that person has declared him or her incompetent;
 2. To Coast Guard military members or Coast Guard or Department of Homeland Security employees who need PDR document(s) for official purposes;
 3. When the Freedom of Information Act (FOIA) so requires;
 4. To the Department of Veterans Affairs so it can determine a person's eligibility for VA benefits, and entitlement to use VA medical facilities;
 5. For civil or criminal law enforcement purposes. A written request must specify the information requested, the law authorizing collection of the information, and the enforcement activity for which the record is sought. The head of the local, state, or federal agency must have signed the request. Consultation with the unit's Privacy Act Coordinator is required;
 6. When an order or subpoena signed by a judge of a court of competent jurisdiction so directs. Consultation with a legal officer is required;

7. To consumer reporting agencies for debts owed to the Federal Government. Coordinate the release through the legal officer processing the debt collection and ensure compliance with 31 U.S.C. 3711(e);
 8. To the Department of Health and Human Services' parent locator service;
- C. Handling FOIA and Privacy Act Inquiries: Refer to the Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series), before responding to any FOIA or Privacy Act information request.
- D. Safeguarding PDRs. PDRs must have adequate administrative and physical security as prescribed in Chapter 7 of Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series).
1. Store PDRs in cabinets or other containers attended during working hours and locked when unattended. A suitable container must protect the files comparably to a class 7110 file cabinet.
 2. When destruction of a PDR document is authorized, destruction must be so complete it prevents reconstructing or recovering the information. Destroy only by burning, shredding, or pulverizing.
- E. Recording Disclosures of Information. Record on the PDR Disclosure Log the release or disclosure of all PDR system information or documents that fall under the FOIA or Privacy Act.
- F. Releasing Documents or Information. Release documents and information as authorized in 2.B above.

CHAPTER 3. PDR SYSTEM

- A. Background. Since its inception in March 1989, the PDR system continues to change as technology permits us to rely more on electronic data. In 1997 all HQ PDRs (now the I PDR) transitioned to an imaged record which allows for greater flexibility in data retrieval.
- B. Uses. PDR data frequently serves as the basis for determining Coast Guard responses to Chief Financial Officer (CFO) Act and Inspectors General Audits; Personnel Records Review Board (PRRB); and Board for Correction of Military Records (BCMR) applications. More importantly, the PDR system supports validation of Government funds released for disbursement and Financial Management requirement of the Coast Guard Chief Financial Officer. Accordingly, the complete and accurate documentation that is required to be submitted to Commander, CGPC (adm-3) for electronic imaging should be the best possible copy of the original paper document. Enclosure (3) serves as the basis of a complete I PDR. Any documentation submitted to correct or modify any item contained in the PDR system in and of itself becomes an additional item in the record and should be imaged for inclusion in the I PDR accordingly.
- C. PDR Description.
1. The Personnel Data Record (PDR) (CG-5354) is a four-part folder. The organization maintaining the PDR must identify the type of PDR on the folder's front cover, e.g., the SPO PDR will clearly indicate "**SPO PDR**".
 - a. Identification. Identify personnel by name and EMPLID. SSNs shall no longer be recorded on the PDR folder.
- D. Definitions.
1. General. The PDR System is the only system of military personnel records retrievable by a personal identifier authorized for personnel documents. Enclosure (2) describes how to maintain each PDR.
 - a. The PDR will contain either the original document or best copy available per Enclosure (1). Best copy is either a legible photo copy or electronically scanned image (.pdf, .jpg, .tif, etc.). When forwarding a copy to CGPC (adm-3), the forwarding office will ensure that the copy is completely legible.

- b. The PDR System retains **only** those specific military personnel records necessary for responding to official requests to substantiate the data elements of Direct Access and to manage the Coast Guard's military workforce.

E. Types of PDRs.

1. Commander, Coast Guard Personnel Command (CGPC) I PDR. Commander, CGPC (adm-3) maintains the permanent PDR. It is called the I PDR. They are responsible for development and implementation of quality assurance (QA) process and procedures that carry out measures of effectiveness which ensure electronically imaged documents required by enclosures (1) and (2) are included in a **complete** I PDR. The I PDR contains only those electronically imaged documents that enclosure (3) authorizes. Commander, CGPC (adm-3) will destroy all **copies** of documents received, which are not authorized for imaging. **All medical documents** will be returned to the appropriate addressee as noted in paragraph 7.b. (2)(e)2. Units should carefully check the list of authorized documents for imaging prior to forwarding any documents to Commander, CGPC (adm-3); see enclosures (1) and (2).
2. Direct Access (electronic data PDR). Direct Access is considered an e-PDR and critical data elements contained therein are utilized to establish disbursement of government funds in the form of payments of the Coast Guard Military Payroll. It is the responsibility of every Command/Service Personnel Office to ensure that personal, benefits, and pay related data are entered correctly and timely into Direct Access. Instructions for data entry can be found at the following website maintained by CG Personnel Service Center Topeka, KS (PSC); <http://cgweb.psc.uscg.mil/Direct-Access/index.htm>. Several Direct Access elements are critical to annual audit processes. Documents listed in Enclosures 1 and 2 are used to substantiate many of these e-PDR data elements. Particular, timely attention should be given to the transmission of all supporting documentation to CGPC for electronic imaging into the I PDR as outlined above.
3. Service Personnel Office (SPO) PDR. The SPO PDR is designated as the member's official PDR. It contains pay, service, and administrative documents and transactions; see enclosure (3) for instructions on filing procedures for these documents and transactions.
4. Unit PDR. The Unit PDR is optional for units that do not have a MOU with their SPO to submit SPO transactions. Units maintaining personnel/pay and travel documents must file them in an official Personnel Data Record folder (CG-5354) only; see enclosure (4) for instructions on filing procedures.

5. Medical Record. The Medical Manual, COMDTINST M6000.1 (series), prescribes how to maintain the Medical Record (CG-3443) also called the "Health Record". See Enclosure 7 for disposition instructions when a member transfers to another unit or separates from the service.
6. National Personnel Records Center (NPRC), St. Louis, MO. The NPRC maintains a copy of a members PDR that is a consolidation of the member's CGPC PDR and the separation documents forwarded by the member's SPO. Commander, CGPC (adm-3) forwards permanent records and separation documents to NPRC within six months after a member's final separation date..

CHAPTER 4. MAINTAINING THE PDR.

- A. General. Every effort should be made to maintain the PDR without error or the requirement for correction/amendment. However, if a need arises that would require that the PDR be corrected/amended, the **source documentation used to substantiate changes to forms or personnel information/data contained in any section of the current PDR system (CGPC (I) PDR, SPO PDR, and Unit PDR) shall be retained in the PDR.**
- B. Opening a Personnel Data Record (CG-5354). These accession entry commands will open the SPO PDR for each member who enters the Coast Guard or Coast Guard Reserve:
1. Academy for cadets and Officer Candidate School (OCS);
 2. USCG Training Center Cape May for recruits;
 3. SPO for members (direct shippers) reporting directly from any other location not listed in 1.a. (1) - (2) above.
- C. Maintaining the PDR.
1. (I) PDR. The (I) PDR is maintained electronically by CGPC (adm-3) as electronic images. Units shall submit to CGPC (adm-3) the **best possible copy** of original documents for imaging into the electronic imaging system. The (I) PDR filing structure is outlined in enclosure (2). Commands sending copies of documents to CGPC (adm-3) for imaging should ensure that those documents are clean, whole, and the most legible, complete copy available.
 - a. When CGPC (adm-3) receives authorized documents to image, they shall complete the imaging process (scan, index). Copies of documents received by CGPC (adm-3), which are not authorized for imaging, will be shredded in accordance with the Coast Guard Freedom of Information and Privacy Acts Manual, COMDTINST M5260.3 (series). All **medical documents**, received in error, by CGPC (adm-3) will be returned to the appropriate addressee.
 2. SPO PDR. SPO PDR shall contain only the documents prescribed by this instruction and filed in their designated parts of the PDR folder. The SPO PDR filing structure is outlined in enclosure (3). Do not remove any Reserve specific documents from a PDR when a Reserve component reports to active duty for any period. The directives that govern document and transactions that are to be filed in the SPO PDR contain directions for completing these documents. This instruction does not contain instructions for the completion of forms.
 3. Unit PDR. The Unit PDR ***shall be maintained for those units that maintain a MOU with their servicing SPO for submitting transactions.*** The Unit PDR is optional for units that do not maintain a MOU with their SPO. This manual does

not authorize units not maintaining PDRs to subsequently shift additional work to another unit nor does it change command responsibilities. The Unit PDR structure is outlined in enclosure (4). Units may file copies of other documents not listed in enclosure (4) in the Unit PDR at the discretion of the Commanding Officer or Officer In Charge. Unit PDRs can vary, depending on what the Commanding Officer or Officer In Charge deems necessary. Commands that decide to maintain a Unit PDR shall make sure all personnel, pay or travel documents are filed in a PDR Folder (CG-5354) with the words “**Unit PDR**” clearly noted on the front cover. Personnel pay, or travel documents are not authorized to be included in unit files. Commands co-located with their SPO are not required to maintain a Unit PDR unless they maintain a MOU with their SPO.

4. Medical PDR. See 4.A of the Medical Manual COMDTINST, M6000.1 (series) for instructions on how the Medical PDR is to be maintained.

D. Correcting the PDR.

1. Corrections to Name, SSN, EMPLID, and Date of Birth. If a correction is required to be made after creation of the e-PDR, the source document used to make the change (i.e. birth certificate, Social Security Card, etc.) shall be forwarded to CGPC (adm-3) to be imaged into the (I) PDR. When the source document for name change is a divorce decree, only the page that authorized the name change and court signature page is to be filed in the PDR and forwarded to CGPC (adm-3). All other pages of the decree are not to be filed or forwarded and will be properly destroyed by CGPC (adm-3) if received.
2. Corrections to other information contained in the PDR. Corrections to other information contained in the PDR will be handled in the following manner;
 - a. Corrected, added or removed from the CGPC (I)PDR by CGPC (adm-3) only when authorized by Commandant (CG-1), Commandant (CG-12), Commandant (CG-13), or Commander, CGPC (epm/opm/rpm) when directed by a PRRB, or BCMR;
 - b. Corrected or removed only as Commander, CGPC (epm/opm/rpm) or Commandant (CG-13) authorize in all other cases not requiring administrative discretion;
 - c. Filed according to existing instructions when a new document replaces an existing one. For PDR purposes, file the new document in the same manner as the old one;
3. Amending documents contained in the PDR. A member may request the organization holding the record to amend his or her PDR information. The SPO will correct information within their scope when a responsible party, e.g. member, command, PSC, HQ or CGPC, so notifies and provides necessary supporting

documentation. If the SPO cannot effect the change, it will send the request to the cognizant authority for a determination. In all cases, the SPO must give the member a copy of the request for amendment or advise the member it has sent the request to a cognizant authority for determination.

E. Transmitting the PDR on Permanent Change of Station (PCS) Transfer.

1. SPO PDR. Within 5 working days after a member's departure date send the SPO PDR via First Class mail to the new SPO. **The use of special services i.e registered, certified, or express shipments is not authorized. Hand carrying the SPO PDR is authorized if ALL of the following are met: 1) Member's new SPO will be co-located with the new unit. 2) There are NO adverse entries in the PDR (i.e. Court Memorandums (CG-3304), Alcohol Page 7's or letters, etc. NOTE: Page 7's indicating a member currently or has previously exceeded the Maximum Allowable Weight is not considered and adverse page 7 for the purpose of hand carrying the SPO PDR. SPO's that allow members to hand carry their SPO PDR shall include an authorization statement in the remarks block of the members PCS travel order (CG-5131).** If the new SPO is "unknown", contact the member's new unit to inquire as to which SPO maintains their SPO PDRs. If a SPO receives a SPO PDR in error, they should forward the PDR within 2 working days of receipt to the correct SPO.
2. Unit PDR. **Hand carrying the Unit PDR is authorized and encouraged** to help reduce mailing costs. If a member elects not to hand carry the Unit PDR, the unit will send the PDR to the member's new field unit via First Class mail within 5 working days after a member's departure date. **The use of special services i.e. registered, certified, or express mail is not authorized.** If the new field unit does not maintain Unit PDRs, it may give the Unit PDR to the member.
3. Medical PDR. Within ***10 working days PRIOR*** to a members departure PCS the SPO shall forward Enclosure (7) to the members medical office to give them adequate time to prepare the medical PDR for forwarding via their established procedures.

F. Transmitting the SPO PDR when Assigned TDY, ADSW-AC or ADSW-RC or Mobilization under Title 10 or Title 14.

1. For Temporary Duty (TDY), Active Duty for Special Work In Support of the Active Component (ADSW-AC) or Active Duty for Special Work In Support of the Reserve Component (ADSW-RC) and Reservist Mobilized under Title 10 or Title 14, for more than 60 days, the SPO PDR forwarding requirements described in 3.a. above apply. When sending a member's SPO PDR to another SPO, direct coordination between both SPOs is important.
2. For TDY, ADSW-AC, or ADSW-RC and Mobilization under Title 10 or Title 14,

for less than 60 days, the member's permanent SPO will retain and maintain the SPO PDR.

G. Missing/Lost PDR. If the new unit or new SPO does not receive the Unit PDR or SPO PDR within 5 working days after the member reports, they should contact the member's previous unit or previous SPO as applicable to locate the missing PDR. If it has been determined that the SPO PDR is lost:

- a. The previous SPO shall notify CG-61, CG-CIRT and the member that the PDR has been lost.
- b. The SPO will reconstruct the SPO PDR and if necessary request copies of documents maintained in the I PDR from CGPC (adm-3). If a Unit PDR held by a unit is lost and must be reconstructed, the unit should request copies of the required documents from their SPO. If documents are not available in the SPO PDR the Unit can open a Unit PDR i.a.w. C.3 above.

H. PDR Review.

- a. SPOs must afford Commanding Officers and their designated representatives, e.g., Executive Officer, Department Heads, Personnel Officer, etc., an opportunity to review the SPO PDR and copy any documents needed to carry out their responsibilities. The SPO and unit Commanding Officer will determine how to accomplish this. Any person requesting information from the SPO PDR shall make the appropriate disclosure log entries as required by enclosure (5).
- b. Record custodians must review the SPO PDR and Unit PDR to ensure the information collected and used to administer our personnel programs is correct. **It is highly desirable to conduct these reviews jointly with the member.** These reviews must include at least these actions: screening for misfiled or temporary documents, identifying incorrect information, or other requirements to update various documents and transactions, e.g., BAH/Dependency Form (CG-4170). Review the SPO PDR on:
 - (1) Reenlistment;
 - (2) PCS departure or arrival;
 - (3) Discharge and appointment to warrant officer;
 - (4) Temporary to permanent commissioned status,
 - (5) Reporting for TDY longer than 60 days;
 - (6) Annually during BAH/Dependency validation period; and
 - (7) Upon members request

I. Removing Documents and Transactions from the SPO and Unit PDR. Documents and transactions shall only be removed if 4.D above applies, the documents are temporary (see below), or your are superseding and existing document that does not require retention per Enclosure (1) (e.g. 4170, SGLV-8286, etc.).

1. Temporary Documents. A “temporary” document filed in Part 3 of the SPO PDR is an official document that:
 - a. Changes or is replaced monthly or quarterly;
 - b. Has been superseded by a later similar document or whose action is no longer pending;
 - c. Has been reflected in a member's;
 - (1) Monthly Leave and Earnings Statement (LES), except the BAH/Dependency Form (CG-4170) transactions;
 - (2) Change in status; and
 - (3) Other official documents retained or a matter of record.
 - d. At the SPOs the Direct-Access software application replaced SDA II. The basis for recording transactions and events in Direct-Access are worksheets, message traffic, e-mail, letters, or other correspondence with any supporting documentation. Direct-Access screen prints or other source documents identified above become “temporary” documents; the SPOs shall retain these documents in Part 3 of the SPO PDR until they have been posted or are superseded by a later “temporary” document.
 - e. The SPOs shall remove “temporary” documents and transactions from the SPO PDR after they have served their purpose and ***forward them to the member for disposition.*** When a Reserve member reenlist on Active Duty (e.g. integrates NOT Extended Active Duty (EAD), ADSW, etc.), remove Reserve documents and transactions that are not required to be maintained in an Active Duty SPO PDR and forward them to the member.
 - f. Purging documents such as Court Memorandums or the Direct-Access Disciplinary Report and any other types of derogatory information is unlawful. These are considered “**permanent**” documents and shall be maintained unless official policies, regulations, or Commander, CGPC, PRRB, or BCMR directs removal.

J. Terminating PDR Maintenance.

- a. Discontinue maintaining a PDR for any of the following reasons;

- (1) Discharge without immediate enlistment or reenlistment in the Reserves.
- (2) Retirement, including RET-1 and RET-2 for Reserves.
- (3) Missing, including those Coast Guard members determined absent in a status of:
 - (a) Missing in action;
 - (b) Interned in a foreign country;
 - (c) Captured, beleaguered, or besieged by a hostile force;
 - (d) Involuntarily detained in a foreign country; and
 - (e) Desertion as described in Chapter 8, Coast Guard Personnel Manual, COMDTINST M1000.6 (series);
- (4) Death

K. Disposing of PDRs.

1. For members who are **Retired** or are **Discharged** without immediate reenlistment, or enlistment in the Coast Guard Reserve.
 - (a) The unit must send all **original** documents from the member's Unit PDR, e.g., Performance Qualifications (CG-3303C (series)), to the SPO within 2 working days after the member separates. The unit shall give the member the remainder of the Unit PDR and his or her separation documents, e.g., Certificate of Release or Discharge from Active Duty (DD-214), Honorable Discharge Certificate (DD-256CG), etc.
 - (b) The SPO must send all **original** documents from the member's SPO PDR to CGPC (adm-3) per the Separation Checklist in enclosure (8) within 5 working days after separation ensuring the package contains all **original** documents received from the member's Unit PDR. **DO NOT** send the member's SPO PDR folder to CGPC (adm-3). Give the member the rest of the SPO PDR.
 - (c) The SPO shall notify the health record custodian to forward the medical record to the Veterans Affairs Records Management Center, with a photocopy of the final Certificate of Release or Discharge from Active Duty (DD-214) copy 2. See enclosure (6) & (7) for additional information.

- (d) Upon receipt of the separation documents Commander, CGPC (adm-3) will:
- (1) Consolidate the EI PDR with the separation documents from the SPO PDR to form the NPRC PDR, which should contain only the original or one copy of PDR documents;
 - (2) Maintain this consolidated NPRC PDR at CGPC for up to six months after separation. After six months, send the NPRC PDR to the National Personnel Records Center (NPRC), in St. Louis, MO, for storage.
- b. For members who affiliate with the **Coast Guard Selected Reserve (SELRES)** via Release from Active Duty (RELAD) or immediate enlistment after discharge from active duty.
- (1) The unit must send all **original** Unit PDR documents, e.g., Performance Qualifications (CG-3303C (series)), to the member's SPO within 2 working days after the member affiliates. The unit shall give the member the remainder of the Unit PDR and his or her separation documents, e.g., Certificate of Release or Discharge from Active Duty (DD-214), etc.
 - (2) The SPO must send the required separation documents to Commander, CGPC (adm-3) per the Separation Checklist in enclosure (6) within 5 working days after affiliation. Send the SPO PDR of a member assigned to the SELRES to the new SPO for the member's newly assigned unit.
 - (3) The SPO shall notify the health record custodian to forward the health record to the member's new assigned unit per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (7) is provided to aid in notification.
- c. For members who affiliate with the **Coast Guard Individual Ready Reserve (IRR)** via Release from Active Duty (RELAD):
- (1) The unit must send all **original** Unit PDR documents, e.g., Performance Qualifications (CG-3303C (series)), to the SPO within 2 working days after the member separates. The unit shall give the member the remainder of the Unit PDR and his or her separation documents, e.g., Certificate of Release or Discharge from Active Duty (DD-214).
 - (2) The SPO must send the required separation documents to Commander, CGPC (adm-3) per the Separation Checklist in enclosure (6) within 5 working days after affiliation.

- (3) The SPO shall send the SPO PDR of a member assigned to the IRR to CGPC (rpm-2) within 5 working days of affiliation with copies of the following documents;
 - (a) Certificate of Release or Discharge from Active Duty (DD-214);
 - (b) Employee Review Summary; and
 - (c) Separation Orders in Direct-Access
 - (4) The SPO shall notify the health record custodian to forward the medical record to CGPC (rpm-2) per the Medical Manual, COMDTINST M6000.1 (series). See enclosure (9).
- d. On determining a member is a deserter;
- (1) The unit must send the Unit PDR to the SPO within 2 working days after a member is declared a deserter.
 - (2) The SPO must send the Unit PDR, and SPO PDR to CGPC (adm-3) within 5 working days after member is *declared a deserter*. CGPC (adm-3) will consolidate the PDRs and maintain the file.
 - (3) The SPO shall notify the health record custodian to forward the medical record to CGPC (adm-3) per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (9) is provided to aid in notification.
 - (4) CGPC maintains the PDR(s) until the status of the member changes. If the member returns, the SPO must request that CGPC return PDR(s).
- e. When a member dies;
- (1) The unit must send the Unit PDR to the SPO within 2 working days after a member dies with a copy of the Personnel Casualty report.
 - (2) The SPO must send the Unit PDR and SPO PDR to CGPC (adm-3). The SPO shall notify the health record custodian to forward the medical record to CGPC (adm-3) per the Medical Manual, COMDTINST M6000.1 (series). Enclosure (7) is provided to aid in notification

TABLE OF DOCUMENT FILING LOCATIONS

Under no circumstances will any document not specified in this manual be filed in the I PDR or SPO PDR without specific written consent from CG-102.

The number after the letter designation indicates in which part of the SPO PDR or UNIT PDR to file the document. No location is given for electronically stored documents.

The first column, labeled with an “N”, denotes non-standard distribution. The notes at the end of this table contain additional information.

- O = Original paper document
- C = Paper copy
- EI = Electronically stored imaged document
- DB = Data Base (includes summary printouts)

N	DOCUMENT/TRANSACTION	CGPC I PDR		SPO PDR	UNIT PDR
		ENL	OFF		
	CG-2520	EI		O1	
	CG-2842	EI		O2	
N	CG-3029A*				O1
	CG-3211 (series)		EI	O1	
	CG-3301	EI		O1	
	CG-3301A	EI	EI	O1	
	CG-3301B	EI		O1	
	CG-3301C	EI		O1	
	CG-3303	EI			
N	CG-3303C (series)*				O1
	CG-3304 (all) *	EI	EI	O2	
	Court Memorandum Transaction Log (all)*	EI	EI	O2	
	Direct-Access Disciplinary Report (all)	EI	EI	O2	
	CG-3306*	DB			
	Employee Review Summary	DB			
	CG-3307 (all)	EI	EI	O2	C2
	CG-3453 *			O1	C4
	CG-3309	EI	EI		
	CG-3822	EI	EI	O2	
	CG-3853			C4	
	CG-4082	EI	EI		
	CG-4170	EI	EI	O4	C4
	CG-4328D		EI		
	CG-4671 *			C2	

Enclosure (1) to COMDTINST M1080.10G

N	DOCUMENT/TRANSACTION	CGPC I PDR		SPO PDR	UNIT PDR
		ENL	OFF		
	CG-4714	EI	EI		
	CG-4916 *	EI	EI	C1	
N	CG-5131			C4	
	CG-5209 **			O3	
	CG-5274				O3
	CG-5286			O2	C1
N	CG-5310 (series)		EI		
	CG-5311		EI		
	CG-5312 *		EI		
	CG-5313 *		EI		
	CG-5314		EI		
	CG-5315 **		EI		
	CG-5315A		EI		
	CG-5316		EI		
	CG-5317		EI		
	CG-5411	EI	EI	O1	
	CG-5412	EI	EI	O2	
	CG-5482			O2	
N	CG-5588	EI	EI		C3
	CG-9556		EI	O1	
	CGHQ-2511B **	EI	EI	C2	
	CGHQ-3433	EI	EI		
	CGHQ-4290 **	EI	EI	C2	
	CGHQ-4717	EI	EI	C2	
	CGHQ-4973	EI	EI		
	CGHSIC/PSC-1071 **	EI	EI	O2	
	CGHSIC/PSC-1072 **	EI	EI	O2	
	CGHSIC/PSC-1075 **	EI	EI	C2	
	CGHSIC/PSC-2075 **			C4	
	CGHSIC/PSC-2426 **	EI	EI	C2	
	CGHSIC-4700 (series) **	EI	EI	C4	
	CGPSC-2020D **	EI	EI	O4	C4
	DD-4 (with annexes) **	EI	EI	O1	
	DD-108	EI	EI		
	DD-214 (ALL Coast Guard and Prior Military Service Periods)	EI	EI	C1	
	DD-215 (ALL Coast Guard and Prior Military Service Periods)	EI	EI	C1	
	DD-368	EI	EI	O1	

N	DOCUMENT/TRANSACTION	CGPC I PDR		SPO PDR	UNIT PDR
		ENL	OFF		
	DD-553	EI	EI	O2	
	DD-1882	EI	EI		
	DD-1883	EI	EI		
	DD-1966	EI		O1	
	DD-2058CG			O3	
	DD-2366	EI	EI	O2	
	DD-2366-1 **	EI	EI		
	DD-2384-1	EI	EI	O2	
	DD-2494 **			C3	
	DD-2494-1			C3	
	DD-2648 **	EI	EI	O1	
	DD-2648-1 **	EI	EI	O1	
	DD-2895			C1	
N	SF-312			C2	C3
	SGLV-8285 **	EI	EI	O4	
	SGLV-8286 **	EI	EI	O4	C4
	SGLV-8285A **	EI	EI	O4	
	SGLV-8286A **	EI	EI	O4	C4
	OPNAV 5510/413	EI	EI		C3
N	VA-21-3101 **	EI	EI		
	Active Duty Agreements	EI	EI	O1	
	Application For Direct Commission	EI	EI		
N	Award Citations	EI	EI	C3	
N	Government Travel Card (Individually Billed Account) Setup Form (Mbr's initial submission only)			O2	C4
N	Government Travel Card Program Recommendation/Acceptance Statement (Mbr's initial submission only)			O2	C4
	Boards				
	Administrative Discharge	EI		C2	
	BCMR decisions	EI			
	MED/PE	EI		C2	
	PRRB decisions	EI			
	DNA Tracking for Prisoners	EI	EI		
	Disclosure Log			O2	O4

Enclosure (1) to COMDTINST M1080.10G

N	DOCUMENT/TRANSACTION	CGPC I PDR		SPO PDR	UNIT PDR
		ENL	OFF		
	Educational Transcripts/GED results	EI	EI		
	Entire separation package when CGPC, MLC, District, TRACEN Cape May, or CG Academy directs separation	EI	EI	O1	
	Letter(s) of/for authorization:				
	Alcohol Incident	EI	EI	O2	
	Appointment	EI	EI	O1	
N	Course Completion			O2	
N	Designation			O2	
N	Request for Advance/Restoration/ Rate Change, Removal of Designator, or Promotion	EI	EI		
	Designation as CG Aviator	EI	EI		
	Designation as Law Specialist	EI	EI		
	Integration/Extension	EI	EI	C1	
	Non-Selection/Lock-in	EI	EI	C2	
	Obligating Service	EI	EI	C1	
	20 Years Service	EI	EI	C2	
	Statement of Entitlement to Educational Assistance Benefits for Reserve Component Members Ordered to Active Duty (Chapter 1607, 10 USC)	EI	EI	C2	
	Statement of Election to Educational Assistance Benefits Based on Qualifying for Educational Assistance Under Chapter 30, Title 38 USC & Chapter 1607 10 USC)	EI	EI	C2	
	Orders:				
	Recall (Retired & Reserve)	EI	EI	C1	
	Separation/Retirement	EI	EI	C1	
	Punitive Letters	EI	EI		
	Report(s) of Civil arrest letter			C2	
	Civil arrest letter	EI	EI		C2
	Reserve Point Statements – Other Service			C2	
	Summary Sheet	EI			

Note: Many forms listed above have become obsolete, e.g., CG-3303, CG-3304, CG-3309, CGHQ-2511B, CGHQ-4290, CGHQ-4717, CGHSIC-1071, CGHSIC-1072, CGHSIC-1075, CGHSIC-2075, CGHSIC-2426, CGHSIC-4700 (series), OPNAV-5510/413, and the Court Memorandum Transaction Log. Though no longer authorized for use, retain the original paper or imaged document in their current location for historical purposes.

Non-standard distribution notes

CG-3029A	If the unit does not maintain a Unit PDR, file in Part 2 of the SPO PDR.
CG-3303C (series)	If the unit does not maintain a Unit PDR, the unit CO or OINC retains.
CG-5310 (series)	CGPC (adm-3) enters original OERs into electronic imaging system and then mails them to the Reported on Officer.
SF-312/CG-5588	Send original to G-CFI in Chesapeake, VA with a copy to CGPC (adm-3); include CG-5588 as a source Document. File properly executed SF-312 with the CG-5588 attached in Part 3 of the Unit PDR, if Unit PDR is not kept file in Part 2 of SPO PDR.
Award Citations	Only personal and unit awards (with member's EMPLID in the upper right corner of the citation) requiring entry into Direct-Access are to be entered by the member's SPO. Send a copy of the award to CGPC (adm-3) for imaging. Filed only until award is posted in DA.
Statement of Entitlement & Statement of Election of Educational Assistance	These forms can be found at the following URL: www.uscg.mil/hq/g-w/training/learning/portal.htm
Letter of Designation/ Course Completion	If another PDR entry does not support Letter of Designation and Course Completion information or the Coast Guard does not track it electronically in a personnel information system, file in the appropriate PDR section. <u>Example:</u> Do not file Letter of Designation as OINC in the PDR; Direct-Access should reflect the appropriate enlisted qualification code for the member. Do not file CG Institute course completion information in the PDR; the Institute records it electronically and provides the member a completion letter.
Request for Advance/ Restoration/ Rate Change, Removal of Designator, Promotion	Send these requests to Commander, CGPC (epm-1) for final a decision.

CG Personnel Command (I) PDR Structure – All EI & Indexed

CG-2520	Application for Enlistment
CG-2842	Notification of Removal of Absentee Wanted Notice
CG-3211	Officer Candidate School Agreement (No Prior Military Service)
CG-3211A	Officer Candidate School Agreement (Former member of CG or other Armed Forces)
CG-3211B	Officer Candidate School Agreement (Enlisted Member of the CG or CG Reserves)
CG-3211C	Officer Candidate School Agreement between USA, DOT, USCG (Chief Warrant Officer)
CG-3301	Enlistment Contract – USCG
CG-3301A	Statement of Understanding (original CG enlistment)
CG-3301B	Agreement to Extend/Re-extension Enlistment
CG-3301C	Discharge and Reenlistment Contract
CG-3303	Achievement Sheet
CG-3304	Court Memorandum, SDA II transaction log printout or Direct-Access Disciplinary Report
CG-3306	Marks
CG-3307	Administrative Remarks (all)
CG-3309	Record of Discharge, Release from Active Duty, or Death
CG-3822	Injury Report for not misconduct and in-line of duty determination (FPL)
CG-4082	Officer Education Record (05/77)
CG-4082	Record of Professional Development (09/98)
CG-4170A	BAH/Dependency Form
CG-4328D	Report on the Fitness of Admirals
CG-4714	Reserve Points from Previous Service
CG-4916	Active Duty Initial Information Form
CG-5310	Officer Evaluation Report (OPR/OER)—CAPT
CG-5311	Officer Evaluation Report (OPR/OER)—CDR
CG-5312	Officer Evaluation Report (OPR/OER)—LCDR
CG-5313	Officer Evaluation Report (OPR/OER)—LT
CG-5314	Officer Evaluation Report (OPR/OER)—LTJG
CG-5315	Officer Evaluation Report (OPR/OER)—ENS
CG-5316	Officer Evaluation Report (OPR/OER)—CWO
CG-5317	Officer Evaluation Report (Reserve Officer 6-29 days)
CG-5311	Officer Evaluation Report (OER)—Level I (Rev. 12/88, 5/92)
CG-5312	Officer Evaluation Report (OER)—Level II (Rev. 12/88, 5/92)
CG-5313	Officer Evaluation Report (OER)—CAPT (Rev. 12/88, 5/92)
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5412	Termination/Recoupment Data (SELRES GI Bill)
CG-9556	Acceptance and Oath of Office
CGHQ-2511B	Statement of Creditable Service or equivalent document(s)

Enclosure (2) to COMDTINST M1080.10G

CGHQ-3433	Statement of Service—Retired Personnel
CGHQ-4290	Transcript of Sea Service or equivalent
CGHQ-4717	Statement of Service or equivalent
CGHQ-4973	Computation of Retirement Point Credits
CGHSIC-1071	Statement of Creditable Service
CGHSIC-1072	Statement of Creditable Sea Service
CGHSIC-2426	Career Status Bonus (CSB) Election
CGHSIC-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Plan Election
CGPSC-1071	Statement of Creditable Service
CGPSC-1072	Statement of Creditable Sea Service
CGPSC-2020D	Designation of Beneficiaries
CGPSC-2426	Career Status Bonus (CSB) Election
CGPSC-4700	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election
DD-4	Enlistment/Reenlistment Document, Armed Forces of the United States
DD-108	Application for Retired Pay Benefits
DD-214	Certificate of Release/Discharge from Active Duty
DD-215	Correction to DD-214, Armed Forces of the U.S. Report of Transfer or Discharge
DD-368	Request for Discharge or Clearance from Reserve Component
DD-553	Deserter/Absentee Wanted by the Armed Forces
DD-1882	Survivor Benefit Plan Election Change
DD-1883	Survivor Benefit Plan - Election Certificate
DD-1966	Record of Military Processing – Armed Forces of the United States
DD-2366	Montgomery GI Bill Act of 1984 (MGIB) (May 90)
DD-2384-1	Notice of Basic Eligibility (NOBE) (Nov 91)
DD-2648	Pre-separation Counseling Checklist
DD-2895	Agreement to Serve in the Selected Reserve or TRS
OPNAV 5510/413	Personnel Security Action Request
SGLV-8285	Request for Insurance (SGLI)
SGLV-8286	SGLI Election
SGLV-8286A	SGLI Family Coverage Election and Certificate
VA-21-3101	VA Claim (request for information)
---	Active Duty Agreements
---	Administrative Discharge Boards
---	Application for Direct Commission
---	Award Citations
---	Board for Correction of Military Records (BCMR)
---	Disclosure Log
---	Educational Transcripts
---	Entire separation package if CGPC, MLC, District, TRACEN Cape May, or Superintendent CGA directed separation
---	GED results
---	Letter of Alcohol Incident

- Letters of Appointment
- Letter of Designation as CG Aviator/Law Specialist
- Letters of Integration/Extension
- Letters of Non-Selection/Lock-in
- Letters obligating service
- Letters/CG-3307 Removal/Relief for Cause
- Letter for 27-Point Screening
- Letter for 20 Years' Service
- Memo from CGPC-opm to document certain officer assignments for board purposes.
- Personnel Record Review Boards (PRRB)
- Physical Evaluation (PE) Boards
- Punitive Letters
- Recall Orders
- Report of Civil Arrest
- Report(s) of Civil Conviction
- Report of Investigation
- Request for Advancement/Restoration/Change in Rate, Removal of Designator, Promotion
- Separation/Retirement Orders from Direct Access
- Summary Sheet
- TRACEN Cape May Recruit Personnel
- Weight Compliance (Letter)

Servicing Personnel Office (SPO) PDR Structure

Part 1: Accession and Separation(s)

File chronologically, with the oldest documents on the bottom and the newest on top.

CG-2520	Application for Enlistment
CG-3211 (series)	Officer Candidate School Agreement
CG-3301	Enlistment Contract
CG-3301A	Statement of Understanding
CG-3301B	Agreement to Extend/Re-extension Enlistment
CG-3301C	Discharge and Reenlistment Contract
CG-3453	Request for Reserve Orders
CG-4916	Active Duty Initial Information Form
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5525	CG Reserve Assignment Request and Orders (Initial SELRES Request)
CG-9556	Acceptance and Oath of Office
DD-4	Enlistment/Reenlistment Document, Armed Forces of the United States
DD-214	Certificate of Release or Discharge from Active Duty
DD-215	Correction to DD-214, Armed Forces of the U.S. Report or Transfer of Discharge
DD-368	Request for Discharge or Clearance from Reserve Component
DD-1966	Record of Military Processing – Armed Forces of the United States
DD-2648	Pre-separation Counseling Checklist
---	Active Duty Agreements
---	Appointment Letters
---	Integration/Extension Letters
---	Letters Obligating Service
---	Recall Orders
---	Separation/Retirement Orders from Direct Access

Part 2: Career Documentation (File in order listed below.)

(Top) ---	Disclosure Log (see enclosures (6) and (7) for instructions)
CG-2842	Notice of Removal of Absentee Wanted Notice
CG-3029A	Individual Record of Small Arms Training. (File only if Unit PDR not kept by unit).
CG-3304	Court Memorandum (all)
----	Transaction Log Printout from SDA II (all)
----	Direct-Access – Disciplinary Report (all)
CG-3307	Administrative Remarks (all) (Including Pg. 6 of the overseas screening package)
CG-3822	Injury Report for not misconduct and in-line of duty determination
CG-4175A	Annual Reserve Retirement Point Statement (current only)
CG-4671	Disability Orders & Notification of Eligibility for Disability Benefits

Part 2: Career Documentation (cont'd)

CG-5286	Class A School Training Request (remove on orders to "A" school)
CG-5411	Statement of Understanding (SELRES GI Bill)
CG-5412	Termination/Recoupment Data (SELRES GI Bill)
CG-5588	Personnel Security Action Request (Rev. 6/98)
CGHQ-2511B	Statement of Creditable Service
CGHQ-4290	Transcript of Sea Service
CGHQ-4717	Statement of Service
CGHSIC-1071	Statement of Creditable Service
CGHSIC-1072	Statement of Creditable Sea Service
CGHSIC-1075	Transcript of Sea Service
CGHSIC-2426	Career Status Bonus (CSB) Election & Instructions
CGPSC-2426	Career Status Bonus (CSB) Election & Instructions
DD-553	Deserter/Absentee Wanted by the Armed Forces
DD-2366	Montgomery GI Bill Act of 1984 (MGIB)
DD-2384-1	Notice of Basic Eligibility (NOBE)
DD-2895	Agreement to Serve in the Selected Reserve for TRS
SF-312	Classified Information Non-Disclosure Agreement (File here if no Unit PDR is maintained at unit)
---	Administrative Discharge Board
---	Alcohol Incident Letter
---	Course Completion Letters
---	Designation Letters
---	Government Travel Card (Individually Billed Account) Setup Form (Mbr's initial submission only)
---	Government Travel Card Program Recommendation/Acceptance Statement (Enclosure (1) to Government Travel Charge Card (GTCC) Program, COMDTINST 4600.14 (series)) (Mbr's initial submission only)
---	Medical or Physical Evaluation Board
---	Training and Qualification Letters
---	Non-Selection/Lock-in Letters
---	Letters/CG-3307 Removal/Relief for Cause
---	27-Point Screening Letter
---	Letter Authorizing Lateral Change in Rate
---	Officer Promotion Authorization List (OPAL)
---	Physical Evaluation Boards
---	Report of Civil Conviction(s)
---	Reserve Letter for 20 Years' Service
---	Reserve Points from Previous Service
---	Weight Compliance (Letter)
---	Statement of Election of Educational Assistance Benefits Based on Qualifying for Educational Assistance Under Chapter 30, Title 38 USC and Chapter 1607 Title 10 USC

Statement of Entitlement to Educational Assistance Benefits for Reserve Component Members Ordered to Active duty in Support of Contingency Operations and Certain Other Operations (Chapter 1607, 10 USC)

Part 3: PMIS/JUMPS Documentation

(Top) CG-5209 USCG Leave and Earnings Statement (3 to 6 months only)
DD-2058CG State of Legal Residence Certificate
--- Award Citation (until posting in DA is verified)
DD-2494 TRICARE Active Duty Family Member Dental Plan Enrollment Election
DD-2494-1 TRICARE Active Duty Family Member Dental Plan Enrollment Election
(Supplemental Election)

Part 4: Dependency & Support Documentation

(Top) CG-3853 Personal Effects Inventory & Disposition
CG-4170A BAH/Dependency Form
(Most recent only)
CG-5131 Standard Travel Order for Military Personnel (Two most recent PCS(s))
CGHSIC-2075 Family Subsistence Supplemental Allowance (FSSA) Application
CGPSC-2020D Designation of Beneficiaries
CGPSC-2075 Family Subsistence Supplemental Allowance (FSSA) Application
SGLV-8285 Request for Insurance (SGLI)
SGLV-8285A Dependent Request for Insurance (SGLI)
SGLV-8286 SGLI Election and Certificate
SGLV-8286A Dependent SGLI Election and Certificate
----- Personnel Data Info File (PDIF)
----- Supporting documents to change SSN, EMPLID, birth date, or minority
designator;

UNIT PDR Structure

Part 1: Training, Education, & Qualifications

CG-3303C Performance Qualifications
CG-5286 Class "A" Training Request (remove on receipt of orders to "A" school)

Part 2: Performance/Discipline

(Top) CG-3307 Administrative Remarks
 ---- Report(s) of Civil Arrest/Conviction

Part 3: Security Data

(Top) CG-5274 Personnel Security Record
SF-312 Classified Information Non-disclosure Agreement
OPNAV 5510/413 Personnel Security Action Request
CG-5588 Personnel Security Action Request (Rev. 6-98)

Part 4: General Administration

(Top) --- Disclosure Log (see enclosures (6) and (7) for instructions)
CG-3788A-C File counseling sheet only for current evaluation
CG-4170 BAH/Dependency Form (most recent only)
CG-5525 CG Reserve Assignment Request and Orders (9/97)
CGPSC-2020D Designation of Beneficiaries
SGLV-8286 SGLI Election and Certificate
SGLV-8286A Dependent SGLI Election and Certificate
 ---- Government Travel Card (Individually Billed Account) Setup Form
 (Mbr's initial submission only)
 ---- Government Travel Card Program Recommendation/Acceptance
 Statement (Enclosure (1) to Government Travel Charge Card (GTCC)
 Program, COMDTINST 4600.14 (series) (Mbr's initial submission only)

SEPARATION DOCUMENTS CHECKLIST

Send these documents in complete packages only to CGPC (adm-3)

NAME:	
SERVICING PERSONNEL OFFICE	SPO PHONE NUMBER:

<p>_____ Reenlistment</p> <p>_____ Enlistment/Reenlistment Document, DD-4 (copy only)</p> <p>_____ Administrative Remarks, CG-3307 (copy only)</p>

<p>_____ Discharge Without Immediate Reenlistment, Enlistment in USCGR, or Retirement</p> <p>_____ Copy of Separation or Retirement Orders from Direct Access</p> <p>_____ Certificate of Release/Discharge From Active Duty (DD-214), Copies 2 and 8</p> <p>_____ Original Pre-Separation Counseling Checklist (DD-2648)</p> <p>_____ Original Administrative Remarks (CG-3307)</p> <p>* Applies only to USCGR members who made SBP election on completing 20 years' service and document is still in PDR.</p>
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<p>_____ Release From Active Duty (RELAD)</p> <p>_____ Copy of Separation Orders from Direct Access</p> <p>_____ Certificate of Release/Discharge From Active Duty (DD-214), Copies 2 and 8</p> <p>_____ Original Pre-Separation Counseling Checklist (DD-2648)</p> <p>_____ Administrative Remarks (CG-3307) (copy only)</p>
--

<p>_____ Discharge With Immediate Enlistment in USCGR</p> <p>_____ Enlistment/Reenlistment Document, DD-4 (copy of reserve enlistment only)</p> <p>_____ Copy of Separation Orders from Direct Access</p> <p>_____ Certificate of Release/Discharge From Active Duty (DD-214), Copies 2 and 8</p> <p>_____ Original Pre-Separation Counseling Checklist (DD-2648)</p> <p>_____ Administrative Remarks, CG-3307 (copy only)</p>

LOCAL REPRODUCTION AUTHORIZED

Medical/Dental Record Disposition Instructions

Date: _____

From: _____

PDR Technician:

Servicing Personnel Office

To: _____

Health Record Custodian

Subj: _____

Member name, EMPLID, and Unit

1. Subject member's health record is to be forwarded as directed below in accordance with the Military Personnel Data Record (PDR) System, COMDTINST M1080.10 (series) and the Medical Manual, COMDTINST M6000.1 (series).

____ VA Record Management Center
4300 Goodfellow Blvd Bldg 104
St Louis, MO 63120-1703

For members being Retired or Discharged without enlistment in the CG Reserves

Note: Copy of DD-214 provided. Place in record prior to mailing.

____ Transferred _____

For members PCS'd, Discharged with enlistment and assignment in the SELRES, or RELAD with assignment in the SELRES

Unit name and address

____ Commander (rpm-2)
CG Personnel Command
Attn: **IRR**
4200 Wilson Blvd, Suite 950
Arlington, VA 22203

For member being RELAD to the Individual Ready Reserve (IRR)

____ Commander (adm-3)
CG Personnel Command
4200 Wilson Blvd, Suite 1100
Arlington, VA 22203

For members that have been declared a deserter, or member dies

For health record custodian use: Tracking information: _____

LOCAL REPRODUCTION AUTHORIZED.

List of Forms that have been cancelled

FORM NUMBER	FORM TITLE	CANCELLED DATE
CG-3029A	INDIVIDUAL RECORD OF SMALL ARMS TRAINING	08/23/06
CG-3303	ACHIEVEMENT SHEET	10/01/00
CG-3303C-1	RECORD OF PERFORMANCE QUALIFICATIONS	11/29/02
CG-3303C-2	RECORD OF PERFORMANCE QUALIFICATIONS	03/01/04
CG-3303C-11	RECORD OF PERFORMANCE QUALIFICATIONS	03/01/00
CG-3303C-13	RECORD OF PERFORMANCE QUALIFICATIONS	11/01/03
CG-3303C-18	RECORD OF PERFORMANCE QUALIFICATIONS	02/01/04
CG-3303C-33	RECORD OF PERFORMANCE QUALIFICATIONS	03/01/04
CG-3303C-34	RECORD OF PERFORMANCE QUALIFICATIONS	03/01/04
CG-3303C-35	RECORD OF PERFORMANCE QUALIFICATIONS	03/01/04
CG-3304	COURT MEMORANDUM	01/01/97
CG-3306	MARKS SUMMARY SHEET	07/31/02
CG-3453	REQUEST FOR RESERVE ORDERS	12/19/05
CG-4170A	BAH/DEPENDENCY FORM	10/23/03
CG-4671	DISABILITY ORDERS & NOTIFICATION OF ELIGIBILITY FOR DISABILITY BENEFITS	01/01/01
CG-4916	ACTIVE DUTY INITIAL INFORMATION FORM	08/01/94
CG-5312	OFFICER EVALUATION REPORT (OPR/OER)-LCDR	04/16/01
CG-5313	OFFICER EVALUATION REPORT (OPR/OER)- LT	04/16/01

FORMS NOT IN THE USCG INVENTORY		
FORM NUMBER	FORM TITLE	LOCATION
CG-4170	BAH/DEPENDENCY FORM	https://cg.direct-access.us/servlets/iclientservlet/USCGPIHR/?cmd=login
CG-4714	Reserve Point Statement from Previous Service	Not available online
CG-5209	CG Leave and Earnings Statement	Not available online
CG-5315	Reviewer Comments (W2 – O2)	http://www.uscg.mil/ccs/cit/cim/forms1/FO RMS/CG_5315A_NEW.pdf
CG-5316	Officer Evaluation Report (OPR/OER)—CWO	Not available online
CGHQ-2511B	Statement of Creditable Service or equivalent document(s)	Not available online
CGHQ-3422	Unknown	Not available online
CGHQ-4290	Transcript of Sea Service or equivalent	Not available online
CGHSIC/PSC-1071	Statement of Creditable Service	Not available online
CGHSIC/PSC-1072	Statement of Creditable Sea Service	Not available online
CGHSIC/PSC-1075	Transcript of Sea Service	Not available online
CGHSIC/PSC-2075	Family Subsistence Supplemental Allowance Application FY 2007	http://www.uscg.mil/hq/psc/forms/psc2075.pdf
CGHSIC/PSC-2426	Career Status Bonus (CSB) Election Form	http://www.uscg.mil/hq/psc/forms/psc2426.pdf
CGHSIC-4700(SERIES)	Retired (Active or Reserve) Pay Account Worksheet and Survivor Benefit Election Form	http://www.uscg.mil/hq/psc/forms/psc4700.pdf
CGPSC-2020D	Designation of Beneficiaries	http://www.uscg.mil/hq/psc/forms/psc2020d.pdf
DD-4	Enlistment/Reenlistment Document, Armed Forces of the United States	https://cg.direct-access.us/servlets/iclientservlet/USCGPIHR/?cmd=login
DD-2366-1	Montgomery GI BILL Increased Benefit Contribution Program	http://www.uscg.mil/hq/psc/forms/dd2366-1.pdf
DD-2494	TRICARE – Active Duty Family Member Dental Plan (FMDP) Enrollment Election	http://www.dtic.mil/whs/directives/infomgt/forms/forminfo/forminfo1724.html

Enclosure (9) to COMDTINST M1080.10G

DD-2648	Preparation Counseling Checklist for Active Component Service Members	http://www.uscg.mil/hq/psc/forms/DD2648.PDF
DD-2648-1	Preparation Counseling Checklist for Reserve Component Service Members	http://www.uscg.mil/hq/psc/forms/DD2648-1.PDF
SGLV-8285	Request for Insurance (SGLI)	http://www.insurance.va.gov/sgliSite/forms/forms.htm
SGLV-8286	Servicemembers' Group Life Insurance Election & Certificate\	http://www.uscg.mil/hq/psc/forms/sglv8286.pdf
SGLV-8285A	Request for Family Coverage for Spouse (SGLI)	http://www.insurance.va.gov/sgliSite/forms/forms.htm
SGLV-8286A	Family Coverage Election	http://www.uscg.mil/hq/psc/forms/sglv8286A.pdf
VA-21-3101	VA Claim (request for information)	Not available online

SUGGESTIONS TO IMPROVE THE MILITARY PERSONNEL DATA RECORD SYSTEM

NAME:	
PERMANENT UNIT:	PHONE NUMBER:
SERVICING PERSONNEL OFFICE	

• SUGGESTED IMPROVEMENT (S) •
• HEADQUARTERS ACTION ON SUGGESTION (S) •

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