Dependent Information

Overview

Introduction	This guide provides the procedures for Servicing Personnel Offices (SPOs) to enter, correct, update, or delete Dependent Information in Direct Access (DA).

Required Roles To view current and historical dependent/beneficiary information, or enter new dependent/beneficiary information, the user must have the CG SPO Technician functional role.

To use Correct History mode, the user must have the CG SPO Auditor functional role.

References
(a) Coast Guard Pay Manual, COMDTINST M7220.29 (series)
(b) Military Personnel Data Records (PDR System), COMDTINST M1080 series)
(c) Identification Cards for members of the Uniformed Services, Their Eligible Family Members and Other Personnel, COMDTINST M5512.1A (series)
(d) Personnel & Pay Procedures Manual, TTP, Chapter 6

Information Dependent Information should be completed or updated:
- Upon initial entry into the Coast Guard/ Coast Guard Reserves of a member with dependents.
- When a Coast Guard Reserve member with dependents begins any form of Active Duty.
- Upon reenlistment after a break in service.
- Upon recall to Active Duty of retired members.
- Upon reporting to a new Permanent Duty Station.
- Anytime a member acquires an initial or additional dependent.
- When any change occurs regarding the status of a dependent (i.e., separation, divorce, death of dependent, dependent enters the Armed Forces, has an incapacitated child who turns 18, or a child over age 21 who is a full-time student).
- When a spouse of a Coast Guard or Coast Guard Reserve member remarries another member of any Uniformed Service, and the former spouse has physical custody and/or receives child support payments on behalf of any children born or adopted during the previous marriage.
- When starting or updating a member's OHA/OCONUS COLA Entitlement Rows or when authorized a dependent locality BAH rate by PSC-psd-fs.

Overview, Continued

BAH Dependency Data Form

Both beneficiaries and BAH eligible dependents, as defined in reference (a), are to be entered on the member's Dependent Information page.

Changes made in Dependent Information/Personal Information will **not immediately appear** on the BAH Dependency Data form. The form relies on an update process that runs nightly. Allow the changes to process through a nightly update prior to attempting to print the BAH Dependency form.

Dependent Status Changes

Do **NOT** delete dependents from the member's record if their status changes. For example, if a member reports a divorce, **insert** a new **Personal History** row on the **Personal Profile** tab and change the spouse's relationship to ExSpouse and enter the divorce date. It is recommended to use the Divorce Annulment or Death of Dependent guide for divorces. Do **NOT** overtype an existing marriage row. This will potentially cause multiple overpayments.

NOTE: Be sure to advise the member to stop the FSGLI deduction through the Servicemembers' Group Life Insurance (SGLI) Online Enrollment System (SOES) if the member is divorced or the member's spouse dies AND the member was participating in the program.

Required Legal Documentation

Per references (b) and (c), the following legal supporting documents are required when adding BAH eligible dependents:
- Birth Certificate(s) for dependent child (ren).
- Marriage Certificate (for spouse).
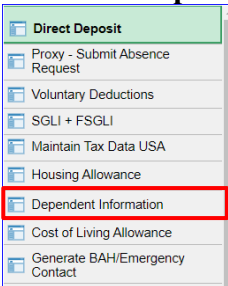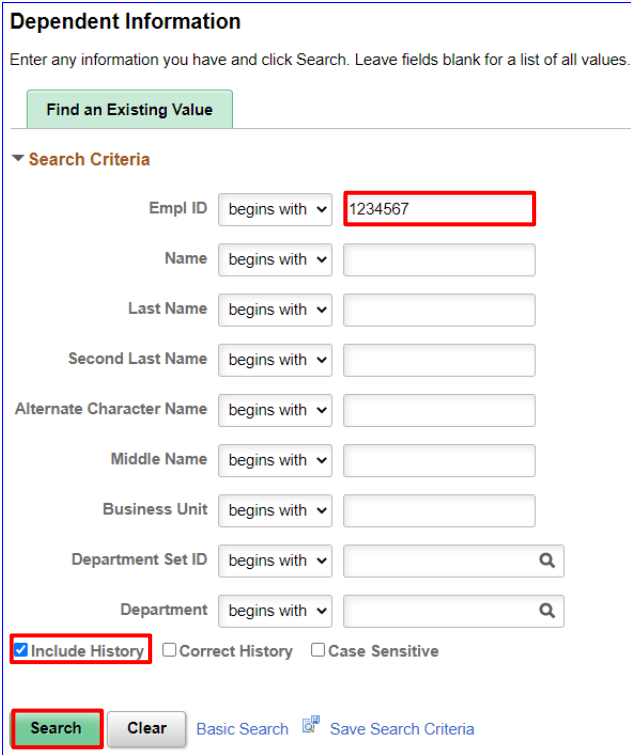- Any additional documentation which may be required when adding dependents requiring PPC approval.

Contents

Entering Dependent Information

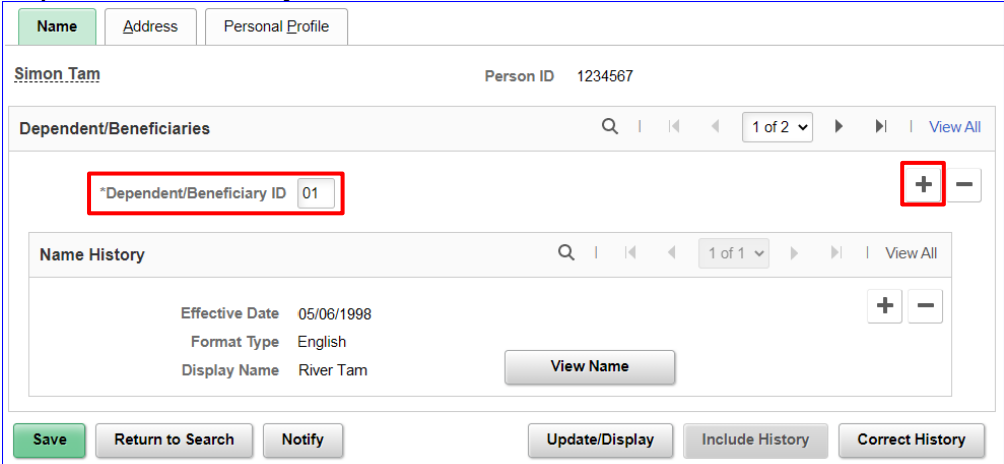**Introduction**   This section provides the procedures for entering Dependent Information in Direct Access (DA).

Procedures   See below.

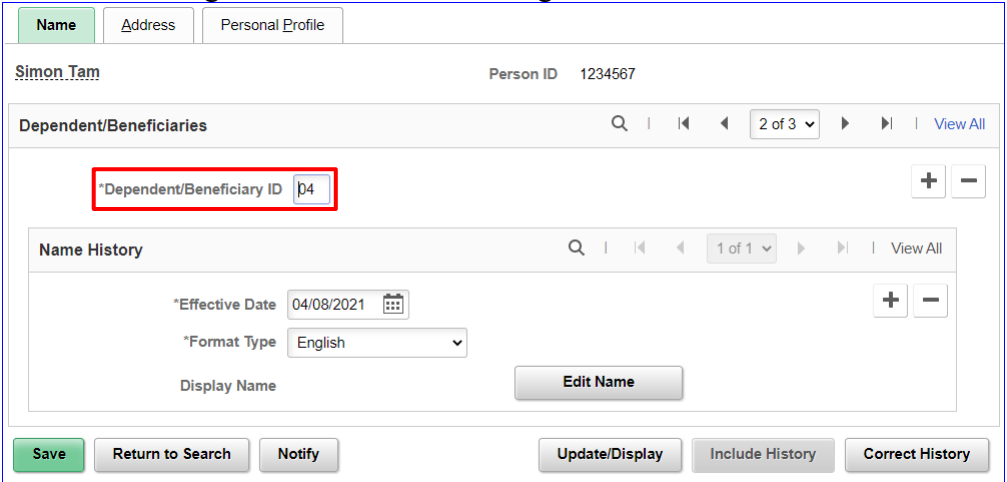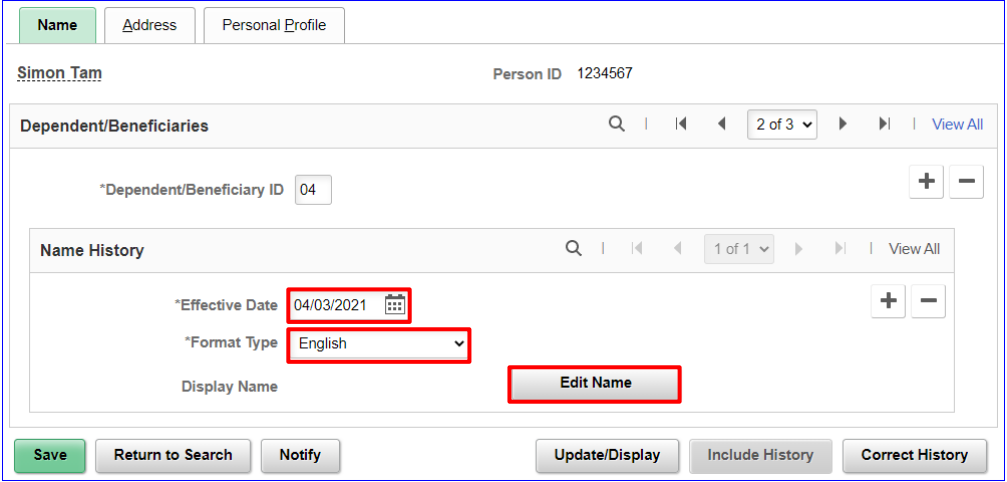| Step	Action
1	Click on the **Active/Reserve Pay** Tile.
1.5	Select the **Dependent Information** option.
2	Enter the member's **Empl ID**, check the **Include History** box, and click **Search**.

Entering Dependent Information, Continued

Procedures,
continued

Step	Action
3	The Name tab will display. The **Dependent/Beneficiary ID** uniquely identifies each dependent of the member and is automatically generated. Do **<u>NOT</u>** change this number. Click the **Plus** button in the Dependent/Beneficiaries section to add a new Dependent/Beneficiary row.

Entering Dependent Information, Continued

Procedures, continued

Step	Action
4	A new row will open and the next sequential **Dependent/Beneficiary ID** number will be generated. Do **NOT** change this number.
5	The **Effective Date** defaults to the current date. **Enter** the date of the dependency change (i.e., date of birth, date of marriage, date dependency status approved, date of beneficiary status selected, etc.). The **Format Type** defaults to English, leave as is. Click **Edit Name**. **NOTE:** Birth dates (Effective Date) cannot be future dated.

Entering Dependent Information, Continued

Procedures, continued
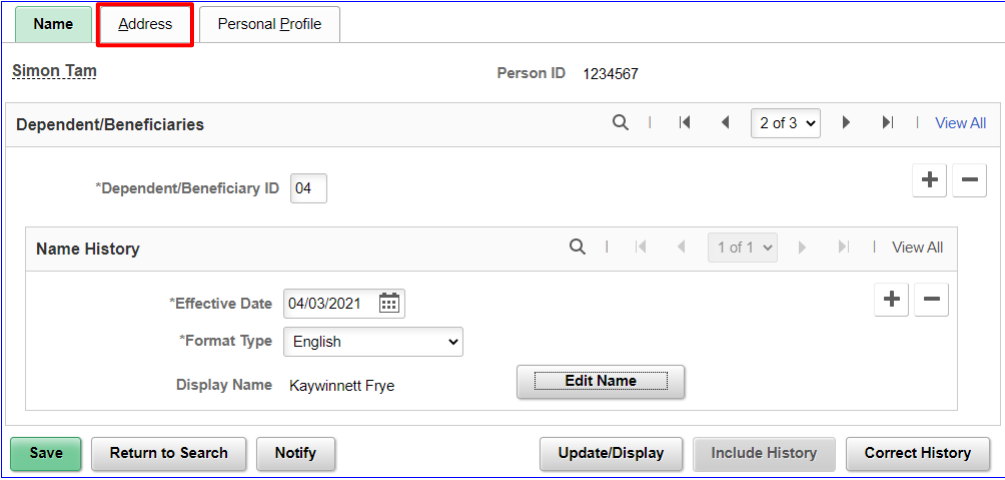
Step	Action
6	Complete each field as appropriate, then click **Refresh Name**. **Name** **English Name Format** Name Prefix [▾] *First Name Kaywinnett Middle Name Lee *Last Name Frye Name Suffix [▾] Display Name Formal Name Name [OK] [Cancel] [**Refresh Name**]
7	The name will be displayed in the **Display Name**, **Formal Name**, and the **Name** lines. Verify everything looks correct, click **OK**. **Name** **English Name Format** Name Prefix [▾] *First Name Kaywinnett Middle Name Lee *Last Name Frye Name Suffix [▾] Display Name Kaywinnett Frye Formal Name Kaywinnett Frye Name Frye,Kaywinnett Lee [OK] [Cancel] [Refresh Name]

Entering Dependent Information, Continued
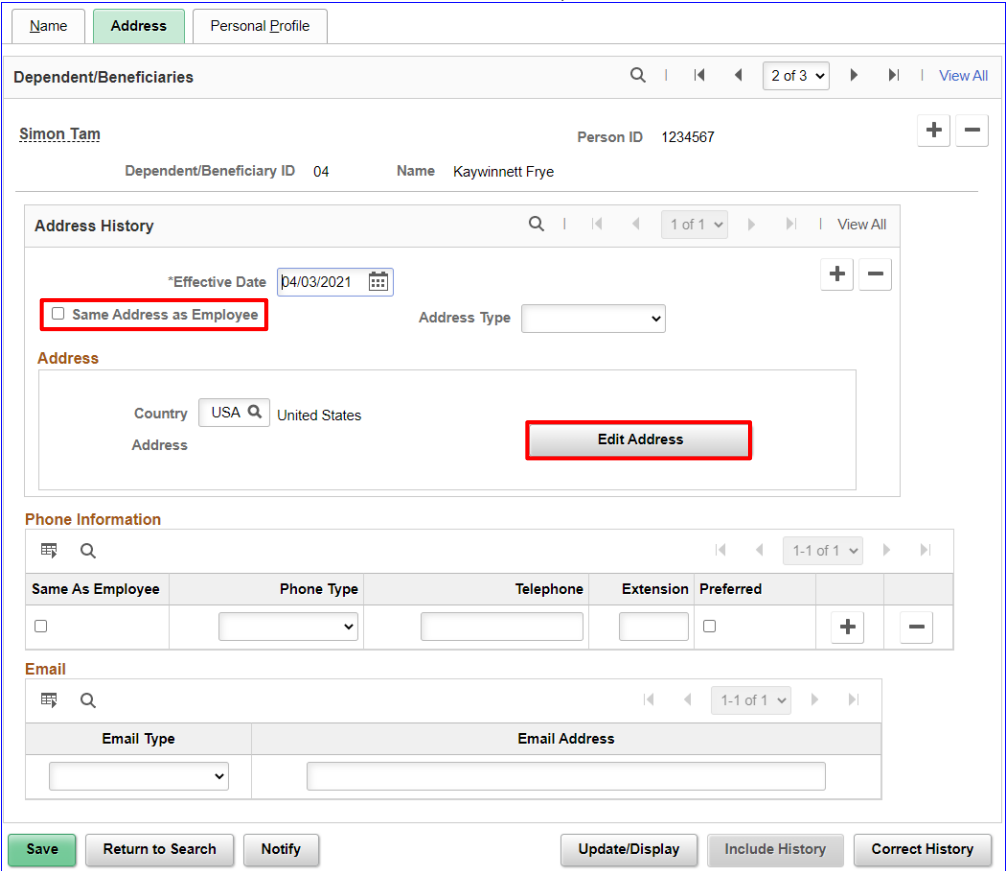
Procedures,
continued

Step	Action
8	Click the **Address** tab.

Entering Dependent Information, Continued

Procedures,
continued

Step	Action
9	If the Address is the **same** as the member, check the **Same Address as Employee** box under the Address History section. If the address is **different** from the member, click the **Edit Address** button.

Entering Dependent Information, Continued

Procedures, continued

Step	Action
10	Update each field as appropriate, then click **OK**. **NOTE:** Do **NOT** use any special characters. **Edit Address** Country United States [Change Country] Address 1 1234 Firefly Lane Address 2 Address 3 City Serenity State KS Kansas Postal 54321 County [OK] [Cancel]

Entering Dependent Information, Continued
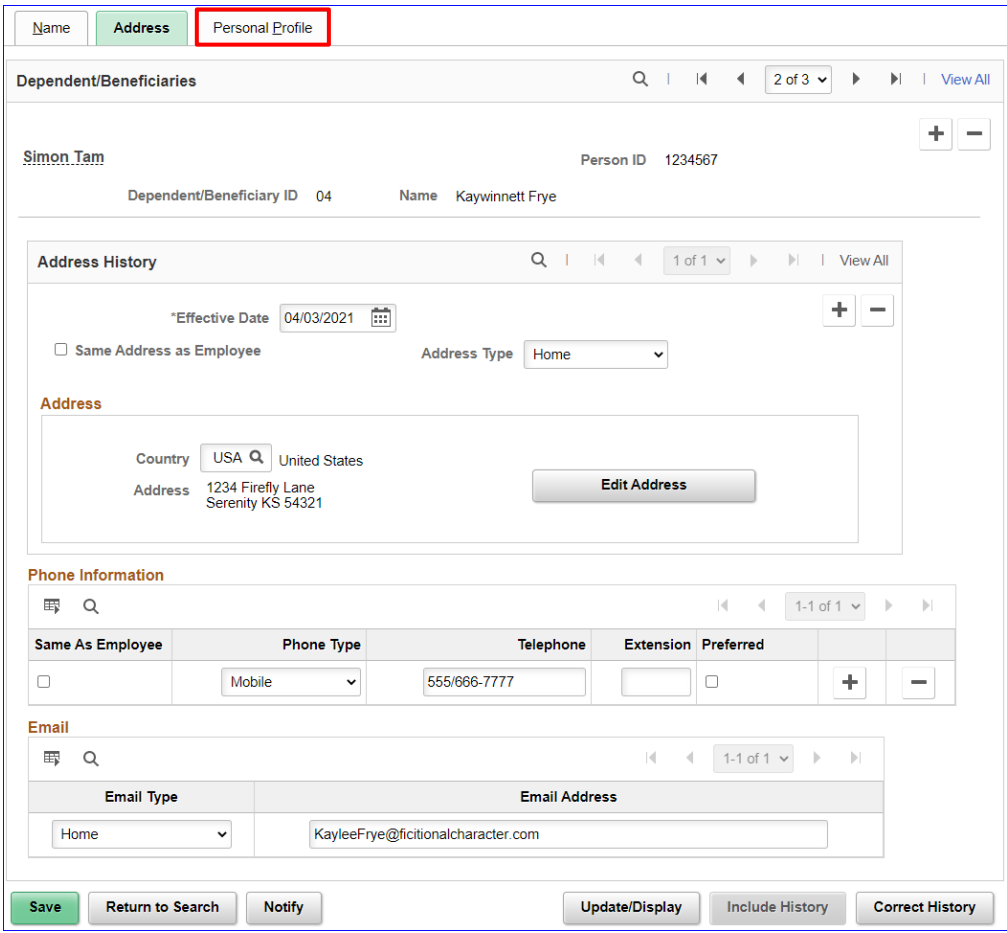
Procedures,
continued

Step	Action
11	If the phone number is the same as the member, check the **Same as Employee** box under Phone Information. To add a phone number: Using the drop-down, select the appropriate **Phone Type**. Enter the **Telephone** number and Extension as appropriate. To add additional phone numbers, click the **(+)** button and repeat this step as necessary. Check the **Preferred box** for the primary phone number to reach the dependent/beneficiary. If the dependent/beneficiary has an email address, using the drop-down, select the appropriate **Email Type** and enter the **Email Address**.

Entering Dependent Information, Continued

Procedures,
continued

Step	Action
12	Click the **Personal Profile** tab.

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Entering Dependent Information, Continued

Procedures,
continued

Step	Action
13	Enter the dependent/beneficiary information (ensure you are entering the correct information for the correct dependent/beneficiary). See Step 14 for a description of each field.

Entering Dependent Information, Continued

Procedures,
continued

Step	Action
14	

Field	Description
Date of Birth	Defaults to the current date. Enter the correct date of birth.
Birth Country	Using the lookup, select the appropriate birth country.
Birth Location	Enter the location (city) of birth.
Birth State	Using the lookup, select the appropriate birth state.
Effective Date	Defaults to the current date. Enter the correct date of dependency.
Relationship to Employee	Using the drop-down, select the appropriate relationship to the member.
Dependent Beneficiary Type	Using the drop-down, select the appropriate dependent beneficiary type.
Gender	Using the drop-down, select the appropriate gender.
Marital Status	Using the drop-down, select the appropriate marital status.
Occupation	(Optional) Enter the dependent/beneficiary occupation.
National ID	Enter the dependent/beneficiary social security number, if known.

Entering Dependent Information, Continued

Procedures,
continued

Step	Action
15	Click the **Dependent Data** link.

Entering Dependent Information, Continued

Procedures,
continued

Step	Action
16	Complete the following fields: • **BAH Eligible:** If this is a BAH eligible dependent, check the BAH Eligible box and enter the **BAH Eligibility Date**. • **Greater Than 50% Support:** If the member is providing more than 50% support for a dependent that does not reside with member, check the Greater Than 50% Support box. • **Spouse in Service:** If the dependent spouse is currently serving in the U.S. military, check the Spouse in Service box. • **Branch:** If the spouse is assigned to the Coast Guard, select the appropriate component from the drop-down. • **If Branch CG/CGR:** If the spouse is a member of the Coast Guard Regular, Coast Guard Reserve, NOAA, or PHS, enter the spouse's Employee ID number. When finished, click **OK**. **Dependent Allowance Data** **Dependent Data** ☑ BAH Eligible BAH Eligibility Date: 04/03/2021 ☐ Greater Than 50% Support ☑ Spouse in Service Branch: Coast Guard Regular If Branch CG/CGR - Spouse EMPLID: 9876543 Last Update: 8529637 When: 04/08/2021 4:58:22PM OK Cancel

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Entering Dependent Information, Continued

Procedures,
continued

Step	Action
17	Click **Save**.

Correcting or Updating Dependent Information

Introduction   This section provides the procedures for correcting a member's Dependent Information in Direct Access (DA).

Only CGHRSUP users can use Correct History mode to make data corrections (e.g., correct an erroneous date of birth).

NOTE: Use the Divorce Annulment or Death of Dependent guide for a divorce or death. Do **NOT** overtype an existing marriage row. This will potentially cause multiple overpayments.

Procedures   See below.

Step	Action
1	Click on the **Active/Reserve Pay** Tile.
1.5	Select the **Dependent Information** option.

Correcting or Updating Dependent Information, Continued

Procedures,
continued

Step	Action
2	Enter the member's **Empl ID**, check the **Correct History** box, and click **Search**. **Dependent Information** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value ▼ Search Criteria Empl ID [begins with ▾] [1234567] Name [begins with ▾] [ ] Last Name [begins with ▾] [ ] Second Last Name [begins with ▾] [ ] Alternate Character Name [begins with ▾] [ ] Middle Name [begins with ▾] [ ] Business Unit [begins with ▾] [ ] Department Set ID [begins with ▾] [🔍] Department [begins with ▾] [🔍] ☐ Include History ☑ Correct History ☐ Case Sensitive [Search] [Clear] Basic Search Save Search Criteria

Correcting or Updating Dependent Information, Continued

Procedures,
continued

Step	Action
3	Locate the dependent that requires correction (may have to click **View All** or use the **arrows** to scroll through the dependent rows). **NOTE:** Use the Divorce Annulment or Death of Dependent guide for divorces. Do **NOT** overtype an existing marriage row. This will potentially cause multiple overpayments.

Correcting or Updating Dependent Information, Continued

Procedures,
continued

Step	Action
4	**Name** tab: To **correct** the dependent/beneficiary name due to being entered incorrectly (i.e., spelled incorrectly), click **Edit Name** in the Name History section. (**NOTE**: If the dependent/beneficiary changed their name, it is **NOT** a correction; it is an update). To **update** a dependent/beneficiary name (i.e. beneficiary divorces and returns to maiden name), click the **(+)** button under Name History to add a new row and then click **Edit Name**.

Correcting or Updating Dependent Information, Continued

Procedures,
continued

Step	Action
5	Update the fields as appropriate and click **Refresh Name**. If all the changes appear correct, click **OK**. **NOTE:** For more information on entering a dependent/beneficiary name, see Steps 6-7 of the Entering Dependent Information section of this guide. **Name** **English Name Format** Name Prefix [▼] *First Name Jayne Middle Name *Last Name Cobb Name Suffix [▼] Display Name Jayne Cobb Formal Name Jayne Cobb Name Cobb, Jayne [OK] [Cancel] [Refresh Name]

Correcting or Updating Dependent Information, Continued

Procedures, continued

Step	Action
6	**Address** tab: To **correct** the dependent/beneficiary address due to being entered incorrectly (i.e., incorrect spelling), click **Edit Address** in the Address History section. (**NOTE**: If the dependent/beneficiary moves, it is **NOT** a correction; it is an update.) To **update** a dependent/beneficiary address (i.e. dependent/beneficiary relocates), click the **(+)** button under Address History to add a new row and then click **Edit Address**.

Correcting or Updating Dependent Information, Continued
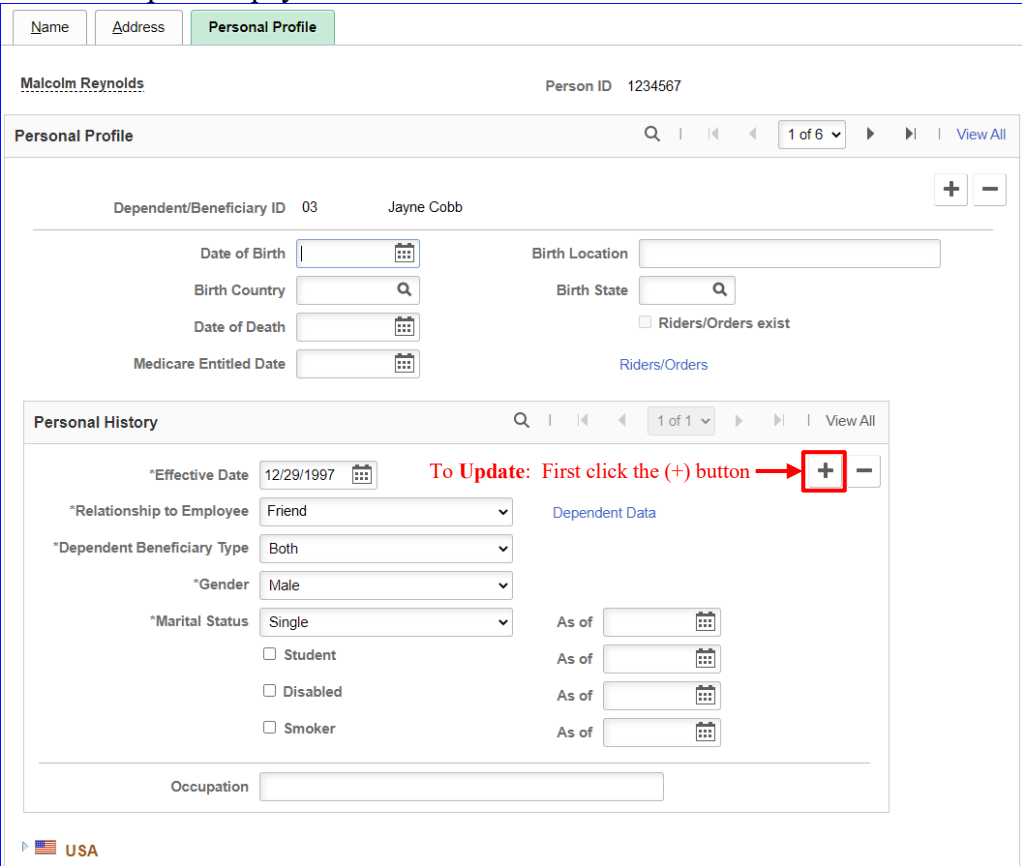
Procedures, continued

Step	Action
7	If updating an address, notice the Address History now indicates **1 of 2** rows and the new row displays with the new **Effective Date (**defaults to current date). Click **Edit Address** (see NOTE). **NOTE:** Address changes should **only** be made if the address of the dependent/beneficiary you are correcting is **not** the same address as the Employee. See Step 10 of the section of this guide for more information on entering an address.
8	Update each field as appropriate and click **OK.**

Correcting or Updating Dependent Information, Continued

Procedures,
continued
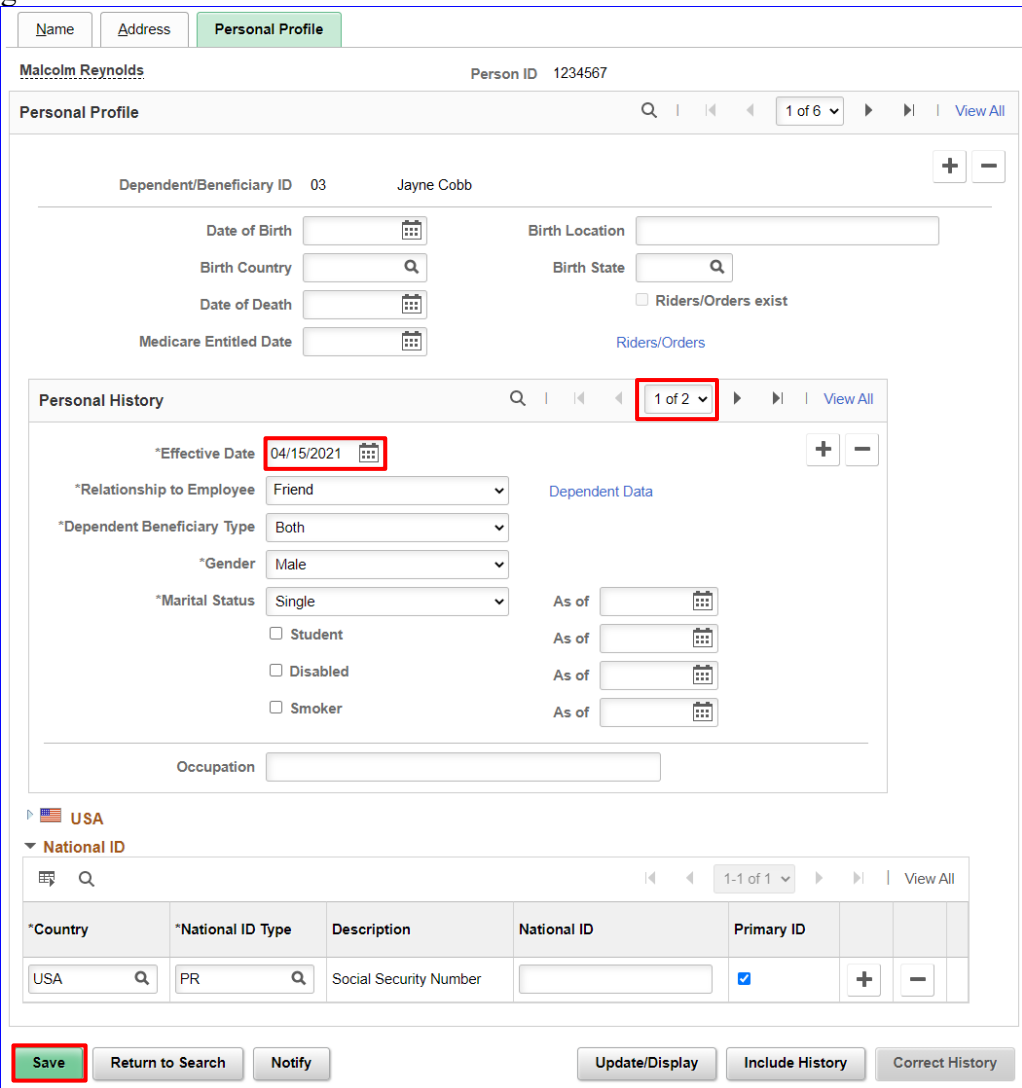
Step	Action
9	**Personal Profile tab:** To **correct** the dependent/beneficiary personal profile due to being entered incorrectly, overtype the information as appropriate (i.e., birth country was entered incorrectly, incorrect gender selected). To **update** a dependent/beneficiary's personal profile (i.e. change in relationship, beneficiary type, gender, or marital status), click the **(+)** button under Personal History to add a new row and update each field as appropriate. **NOTE:** Use the Divorce Annulment or Death of Dependent guide for divorces. Do **NOT** overtype an existing marriage row. This will potentially cause multiple overpayments.

Correcting or Updating Dependent Information, Continued

Procedures,
continued

Step	Action
10	If updating, notice the Personal History now indicates **1 of 2** rows and the new row displays with a new **Effective Date** (defaults to current date). Update each field as appropriate (see NOTE). Click **Save**. **NOTE:** For more information on entering information on the Personal Profile tab, see Steps 13-16 of the Entering Dependent Information section of this guide.

Deleting Dependent Information

Introduction　　This section provides the procedures for deleting Dependent Information in Direct Access (DA).

Only CGHRSUP users can use the Correct History mode to delete a dependent/beneficiary.

Dependent Status Changes　　Do **NOT** delete a dependent/beneficiary due to a status change. The delete function should only be used to remove a dependent/beneficiary that was erroneously added to an incorrect member's profile.

Use the Divorce Annulment or Death of Dependent guide for a divorce or death. Do **NOT** overtype an existing marriage row. This will potentially cause multiple overpayments.

Procedures　　See below.

Step	Action
1	Click on the **Active/Reserve Pay** Tile.
1.5	Select the **Dependent Information** option.

Deleting Dependent Information, Continued

Procedures,
continued

Step	Action
2	Enter the member's **Empl ID**, check the **Correct History** box, and click **Search**. **Dependent Information** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value ▼ Search Criteria Empl ID begins with ⌄ 1234567 Name begins with ⌄ Last Name begins with ⌄ Second Last Name begins with ⌄ Alternate Character Name begins with ⌄ Middle Name begins with ⌄ Business Unit begins with ⌄ Department Set ID begins with ⌄ 🔍 Department begins with ⌄ 🔍 ☐ Include History ☑ Correct History ☐ Case Sensitive Search Clear Basic Search 🔲 Save Search Criteria

Deleting Dependent Information, Continued

Procedures, continued

Step	Action
3	Locate the dependent/beneficiary that needs to be deleted (may have to click **View All** or use the **arrows** to scroll through the dependent rows). This member currently has 6 dependent/beneficiary rows. **NOTE:** Use the Divorce Annulment or Death of Dependent guide for a divorce or death. Do **NOT** overtype an existing marriage row. This will potentially cause multiple overpayments.

Deleting Dependent Information, Continued

Procedures,
continued

Step	Action
4	Once the appropriate dependent/beneficiary row has been located (**ENSURE YOU HAVE THE CORRECT DEPENDENT/BENEFICIARY TO BE REMOVED**), click the **(–)** button to delete the dependent/beneficiary row. In this example, we will delete Dependent/Beneficiary 03.

Deleting Dependent Information, Continued

Procedures,
continued

Step	Action
5	A confirmation message will display. If you are sure you want to delete this dependent/beneficiary, click **OK**. Delete current/selected rows from this page? The delete will occur when the transaction is saved. [OK] [Cancel]
6	Notice the number of dependent/beneficiary rows now indicates **5** vice 6. Click **Save**. Name | Address | Personal Profile **Malcolm Reynolds** Person ID 1234567 Dependent/Beneficiaries [1-5 of 5] View 1 *Dependent/Beneficiary ID 02 [+] [−] Name History 1 of 1 View All *Effective Date 12/29/1997 [+] [−] *Format Type English Display Name Malcolm Reynolds [Edit Name] *Dependent/Beneficiary ID 04 [+] [−] Name History 1 of 1 View All *Effective Date 12/29/1997 [+] [−] *Format Type English Display Name Inara Serra [Edit Name] *Dependent/Beneficiary ID 07 [+] [−] [Save] [Return to Search] [Notify] [Update/Display] [Include History] [Correct History]