

Chapter 3: Accessions and Separations

Introduction

This chapter discusses Accessions and Separations.

In This Chapter

This chapter contains the following sections:

Section	Title	Page
A	Types of Accessions	3-2
B	Process for Accessions	3-4
C	Recalled Retired Members	3-7
D	Separation Processing Classification	3-9
E	Request for Expedited Separation	3-10
F	Active Duty Separation Processing	3-12
G	Disability Retirement	3-26
H	Reserve Retirement Processing	3-30
I	Enlisted to Cadet Status Processing	3-37
J	Separation & Retirement POET Processing	3-38
K	Cancellation of Approved Separation Order	3-41
L	SELRES Separations	3-44
M	Discharge of SELRES for Non-Participation	3-49
N	Standard Separation Letters	3-59
O	Statement of Service Letter for Civilian Appointment	3-71

Section A: Types of Accessions

A.1. **Introduction** This section describes the different types of accessions. An accession is the process of establishing pay and personnel records when a member comes on Active Duty.

A.2. **Types of Accessions** This table describes the types of accessions and identifies the processing points.

Type	Description	Processing Point
Direct Commission	When an officer comes from the civilian sector or other military service (not in DA) and is processed through Direct Commission Officer (DCO) course before departing for their first unit.	CG Recruiting Command
	When an officer is a current Active Duty/Reserve component member and reports directly to their first unit prior to attending the DCO course.	Responsible P&A for designated unit
NOTE:	<p>This is done IAW Decision Memo: Policy Change to Central Accession Point for Direct Commission Officer (DCO) Civilian Hires, dated 19 September 2018.</p>	
Cadet Graduates	When a cadet graduates from the Academy and becomes an officer.	CG Academy
Cadet	When a cadet reports to the Academy.	CG Academy
Former Cadet with a Reserve Obligation	When non-prior service cadets, whose appointment is terminated in their junior or senior year, are assigned to the CG Reserve SELRES Transition Pool for 59 days and subsequently assigned to either the IRR or a drilling unit to complete their military obligation.	CG Academy
Prior Service/ Prior Service Direct Accession (PSDA) (other than DCO)	When an enlisted member comes from another service and attends Basic Training.	TRACEN Cape May
	When a member comes from prior CG or CG Reserve and reports directly to a unit without going through basic training.	Responsible P&A for designated unit

<p>NOTE:</p>	<p>This includes members who are being discharged from the Active Duty component of the CG to be immediately accessed into the Reserve component of the CG and vice versa (PSDA). The servicing P&A losing the member must submit the discharge transaction in DA and accession transaction within 24 hours.</p>	
<p>Prior Service/ PSDA (other than DCO) (cont.)</p>	<p>When a member is reenlisted and rehired from a civilian status through the PSDA program.</p>	<p>Servicing P&A of gaining unit</p>
<p>Prior Service (other than DCO) (cont.)</p>	<p>When a member is reenlisted and rehired into Active Duty from the Individual Ready Reserve (IRR).</p>	<p>PSC-RPM-3</p>
<p>Prior Service (other than DCO) (cont.)</p>	<p>When a member reports directly to the Individual Ready Reserve (IRR).</p>	<p>Servicing P&A</p>
<p>Recruits</p>	<p>When an enlisted member goes to basic training before departing for their first unit.</p>	<p>TRACEN Cape May</p>

Table 3-1 Types of Accessions

Section B: Process for Accessions

B.1. Introduction This section describes the process for accessions which depends on communication between the member, unit, and P&A Office to ensure a smooth transition into the CG. This process is broken down into steps based on what needs to be completed and who is responsible.

NOTE:

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

B.2. References (a) [Coast Guard Military Human Resource Record \(CGMHRR\) System, COMDTINST 1080.10 \(series\)](#)
(b) [Correcting Military Records, COMDTINST 1070.1 \(series\)](#)

B.3. Accession Process Use this process for member accessions.

Step	Who Does It	What Happens
1	Member	Completes the following: <ul style="list-style-type: none"> • Appropriate state tax withholding certificate • IRS W4 Form • Direct Deposit information • CG-2005, PCS Reporting Worksheet • CG-2020, Dependency Worksheet (<i>if member has dependents</i>) • CG-2020D (Designation of Beneficiaries) • CG-2025 (BAH Housing Worksheet) • CG-5102 (Officer Uniform Allowance Claim Worksheet) <i>for eligible officers</i> • DD-1172-2 (Application for Uniformed Service Identification Card) • DD-1173 (Uniformed Service Identification and Privilege Card) <i>if member has dependents</i> • DD Form 2058, State of Legal Residence Certificate • DD 2366 (Montgomery GI Bill Election Form) <i>if member is eligible to enroll in MGIB</i> • SGLV-8286, if not electing default coverage or “by law” • SGLV-8286A (if member is married)

		<ul style="list-style-type: none"> • TSP-U-1 (if member desires to participate in TSP) • TDP Enrollment Form (if member has dependents & desires to enroll them in the TRICARE Dental Plan)
2	Unit	Assists the member in completing the above and, immediately after review to confirm they are complete and correct, forwards them to the P&A Office.
3	P&A Office	<p>Within three business days of receipt of the DD-4 and forms from the unit, establishes and reviews the member’s CGMHRR/OMPF in iPERMS IAW References (a) and (b). Ensures Position Number, Department and Location information is received from the CG Recruiting Command.</p> <p>Submits the following DA transactions:</p> <ul style="list-style-type: none"> • Applicant Data, Hire Applicant and Contract Data using the Rehire Prior Service user guide. • Employee Tax Data Information using the Tax Withholdings user guide. • Payment Option Election using the Direct Deposit guide. • Family Members/Dependents (if applicable) using the Dependent Information guide. • Emergency Contacts. • Servicemembers’ Group Life Insurance (SGLI) Election and Family SGLI (FSGLI) Election (if applicable). • Entitlements. <p>Ensures that these transactions are input and approved prior to PPC’s published data entry cutoff dates.</p> <p>Forwards source documents including copies of CG-2005, CG-2025 and DD-4 to the SPO.</p>
NOTE:	<p>For members who are changing components of the CG with no break in service, the P&A Office must ensure that a separation transaction has been completed and approved in DA for the member PRIOR to transmitting accession (rehire) transactions.</p>	
4	SPO	Immediately upon receipt of documents, approves transactions in DA using Rehire Prior Service guide and notifies P&A Office of completion.
5	P&A Office	<p>Within two business days of notification, validates Job Data and starts entitlements, as applicable.</p> <p>Requests an Accessions Statement of Creditable Service (SOCS), when applicable. See the PPC SOCS webpage for guidance.</p>

		Notifies the SPO that entitlements are submitted in DA awaiting review and approval.
6	SPO	Within three business days, approves entitlements, as needed.
7	P&A Office	Within one business day of SPO approval, verifies pay calculations in DA.
8	P&A Office	Within two business days of pay calcs, uploads documents to iPERMS IAW Reference (a).
9	Member	<p>Completes the following:</p> <ul style="list-style-type: none"> • Enters emergency contacts into DA. • Validates SGLI and FSGLI coverage and enters beneficiaries into SOES. • Verifies that State Tax withholding is correct.

Table 3-2 Accession Process

Section C: Recalled Retired Members

C.1. Introduction This section describes the process for recalling retired members. The Commandant may direct that a retired member be recalled to Active Duty. The process to recall a retiree to Active Duty was not automated in DA. Contact PSC for questions about this topic.

C.2. Recall from Retirement Process Use this process to recall a retired member.

Step	Who Does It	What Happens
1	PSC	Identifies the need for a member's recall.
2	Member	Submits an official request for recall via CG memo.
3	PSC	<ul style="list-style-type: none"> • Panels the request for approval. • If approved, contacts the member and creates recall orders using the PCS module in DA. • Forwards a copy of the recall memo to PPC (RAS) to have retired pay suspended.
4	PPC (RAS)	Upon receipt of memo, suspends retired pay.
5	P&A Office	<ul style="list-style-type: none"> • Before processing the PCS orders, ensures the Retirement with Pay Job Data row was built for the retirement. A Retirement with Pay row MUST exist before processing the PCS recall orders. • Once built, processes the PCS recall orders and routes to the SPO for approval.
6	SPO	<ul style="list-style-type: none"> • Reviews and approves the PCS recall orders. • Verifies the Rehire Job Data row is built. • Starts other pays and entitlements.
7	PSC	<ul style="list-style-type: none"> • Upon completion of the Recall period, enters and approves a Separation Authority which will generate Resume Retirement orders in DA. • Forwards a copy of the Separation Authority to PPC for resumption of retired pay.
8	P&A Office	Enters Retirement orders and routes to the P&A Supervisor or Yeoman with By Direction Authority for approval using the Resuming Retirement Orders for a Recalled Retired (RET-1) Member user guide.

9	P&A Supervisor	Within three business days of receipt, approves the Retirement Order in DA.
10	PPC (RAS)	Removes suspension of retired pay.

Table 3-3 Recall from Retirement Process

Section D: Separation Processing Classification

D.1. Introduction This section describes the separation processing classification. Separations are classified as **Expedited** (must be processed in less than 30 days and require PPC (SEP) authorization) or **Routine** (can be processed in excess of 30 days).

- D.2. References**
- (a) [Military Separations, COMDTINST M1000.4 \(series\)](#)
 - (b) [Coast Guard Pay Manual, COMDTINST M7220.29 \(series\)](#)
 - (c) [Certificate of Release or Discharge from Active Duty, DD-214, COMDTINST 1900.4 \(series\)](#)
 - (d) [Personnel Vetting Program \(Security Clearance, Suitability and Credentialing\), COMDTINST 5520.12 \(series\)](#)

D.3. Separation Classification Use this process to determine the classification of separation:

If the Separation is	Use
Due to misconduct and unit CO desires rapid administrative action	Expedited
Not due to misconduct, but rapid administrative action is required	Expedited
NOTE:	<p style="text-align: center;">The unit CO/XO/Admin Officer must request immediate separation processing by contacting the PPC (SEP) Branch Chief at (866) 772-8724.</p>
For Reserve members dis-enrolling from a class “A” school, officer candidate school, or other training programs	Expedited
Due to unsatisfactory performance	Expedited
Due to unsuitability	Expedited
Due to physical disability	Expedited or Routine
Directed by PSC for urgent reasons	Expedited or Routine
Under normal circumstances	Routine

Table 3-4 Separation Classification

Section E: Request for Expedited Separation

E.1. Introduction This section explains the process for requesting an expedited separation. Expedited separations require up to 7 business days for processing after PSC approves the separation request (i.e., posts the orders on the airport terminal). Coordination between the unit command, P&A Office, SPO and PPC (SEP) is required to determine a feasible expedited separation date, due to the payroll cycle.

Expedited separations are often due to misconduct or unsatisfactory performance. If a separation is not due to misconduct or unsatisfactory performance (i.e., would normally be processed as a routine separation), but rapid administrative action is required, commands (CO/XO/Administrative Officers) may request expedited separation processing by contacting the PPC (SEP) Branch Chief at (866) 772-8724.

NOTE:

Requests to change the termination date of a PSC approved separation request to a later date must be made to PSC (EPM-1) for enlisted personnel or PSC (OPM-1) for officers.

E.2. Expedited Separation Process

Use this process to request an expedited separation:

Step	Who Does It	What Happens
1	PSC (EPM/OPM/RPM)	<ul style="list-style-type: none"> • Approves separation and generates separation request in DA. • Emails approved separation request to unit.
2	Unit	Immediately upon receipt of separation request, ensures member is physically qualified for separation. <ul style="list-style-type: none"> • Contacts PPC (SEP) Branch Chief if separation is <u>not</u> due to misconduct or unsatisfactory performance. • Notifies the P&A Office of request for expedited processing with requested separation date.
3	P&A Office	Immediately upon receipt of notification, sends expedited separation processing email to PPC (SEP) using the format shown in Figure 3-1.
NOTE:	<p>Email must be routed through and released by the P&A Office supervisor with “By direction” authority.</p>	

4	PPC (SEP)	Upon receipt of the email, amends separation request and notifies the P&A Office that the amendment is complete.
5	P&A Office	Immediately upon notification from PPC (SEP), processes separation IAW discharge procedures.

Table 3-5 Expedited Separation Process

**E.3. Email
Format for
Requesting
Expedited
Separations**

Use the following email format to request expedited separations.

From: P&A Supervisor with By Direction Authority
 To: PPC-PF-SEP@uscg.mil
 Cc: Unit POC
 Subject: REQUEST FOR EXPEDITED SEPARATION FOR (NAME/EMPLID) , USCG(R)

Ref (a): PSC (OPM/EPM) separation authorization approved YYYYMMDD

1. Requested Date of Separation: YYYYMMDD
2. PSC approved separation date: YYYYMMDD
3. SPD Code: XXXX

Note: The CO/XO/Admin Officer must call the PPC (SEP) Branch Chief if expedited separation is desired for a member whose SPD code **DOES NOT** end with one of the following two characters:
 FS, FU, JA, JB, JC, JD, JE, KA, KB, KD, KF, KK, KL, KM, KN, KQ, NC

4. List any pay adjustments not reflected in DA (reduction in rate, forfeiture, lost time). If there are no pending transactions, state "None".
5. P&A Office Point of Contact (name and phone number).

Figure 3-1 Email Format for Requesting Expedited Separations

Section F: Active Duty Separation Processing

F.1. Introduction This section explains separation processing (Release from Active Duty (RELAD), Discharge and Retirement) of Active Duty members. Separation processing depends on close communication between all participants. Timely processing of all DA data entry is essential to provide the member a smooth transition and to ensure separation payments are made consistent with applicable directives.

NOTE:

P&A Offices must ensure Career Sea Pay (CSP), Career Sea Pay Premium (CSPP), OCONUS COLA and Special Duty Pay (SDP) are manually stopped upon the member's departure from the unit IAW Reference (b).

- F.2. References**
- (a) [Military Separations, COMDTINST M1000.4 \(series\)](#)
 - (b) [Coast Guard Pay Manual, COMDTINST M7220.29 \(series\)](#)
 - (c) [Transition Assistance Program, COMDTINST 1900.2 \(series\)](#)
 - (d) [Certificate of Release or Discharge from Active Duty, DD-214, COMDTINST 1900.4 \(series\)](#)
 - (e) [Coast Guard Personal Property Transportation Manual, COMDTINST M4050.6](#)
 - (f) [Personnel Vetting Program \(Security Clearance, Suitability and Credentialing\), COMDTINST 5520.12 \(series\)](#)
 - (g) [Government Travel Charge Card \(GTCC\) Program Policies and Procedures, COMDTINST M4600.18 \(series\)](#)
 - (h) [Joint Travel Regulations \(JTR\)](#)
 - (i) [Coast Guard Military Human Resource Record \(CGMHRR\) System, COMDTINST 1080.10 \(series\)](#)
 - (j) [Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1 \(series\)](#)
 - (k) [Certificate of Release or Discharge from Active Duty, \(DD form 214/5 Series\), DoDI 1336.01](#)
 - (l) [PPC How to apply for you retired pay and survivor benefit plan guide & survivor benefit plan guide](#)
 - (m) [Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 \(series\)](#)

- (n) [Reserve Policy Manual, COMDTINST M1001.28 \(series\)](#)
- (o) [Transition of Service Members with Job Training Opportunities and Employment Skills COMDTINST M1040.7](#)

F.3. RELAD Process

Use this process to RELAD a member from Active Duty.

Step	Who Does It	What Happens
1	Member	<ul style="list-style-type: none"> • 12 months prior to Separation, or RELAD contact the Transition and Relocation Managers (TRM) to start the Transition Service Requirements IAW Reference (c) • If eligible and desired request Command approval for participation in SkillBridge Program IAW Reference (o)
NOTE:		<p>Participation in the SkillBridge Program is approved for up to 6months (180 days) prior to separation. Appropriate planning is key when using SkillBridge and leave prior to separation.</p>
2	Unit	<p>No later than six months prior to separation date, IAW Reference (a):</p> <ul style="list-style-type: none"> • Ensures member is physically qualified for separation. • Completes pre-discharge interview and documents on the appropriate CG-3307 (SEP-07 (series)). • Forwards SEP-07 to the P&A Office.
CAUTION:		<p>Officers with Reserve commissions in the grade of Commander and below, who have been non-selected one or more times on the Active Duty Promotion List (ADPL) or Reserve Component Manager (RCM) promotion list to the next higher grade and are scheduled for release from active duty must apply to the Reserve Officer Active Status Panel (ROASP) to be RELAD to SELRES or IRR. – see RPM-1 for more details.</p> <p>Officers who do not apply will be RELAD into the ISL</p>

3	P&A Office	<p>At least six months prior to separation date, notifies the PSC (EPM/OPM/RPM) assignment officer of member’s intention to RELAD.</p> <ul style="list-style-type: none"> For all members eligible/recommended for reenlistment: Notifies the CG Recruiting Command (CGRC) In Service Transfer Team (ISTT) (email: CGR-SMB-ISTT@uscg.mil. Phone: (703) 235-1731) of member’s preferences in regards to a Selected Reserve (SELRES) Unit or Individual Ready Reserve (IRR). Includes the member’s address and phone number following separation. For members who desire to affiliate with the CG Reserve or have a remaining military service obligation, counsels the member on their obligation and documents on the appropriate CG-3307 (AT-10 (series)). Forwards completed forms to CGRC. Members who affiliate with the SELRES component of the CG Reserve following RELAD, who are also on a published Active Duty SWE advancement eligibility list by their separation date, may submit a request through their CO/OIC to be placed on the current RSWE in effect, or the Reserve advancement eligibility list the following 1 January after their RELAD. Requests may be sent to CG PPC (ADV) via online trouble ticket or via email to PPC-DG-CustomerCare@uscg.mil. <table border="1" data-bbox="586 1167 1419 1883"> <thead> <tr> <th data-bbox="586 1167 797 1312">If the member’s RELAD is...</th> <th data-bbox="797 1167 1419 1312">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="586 1312 797 1514">1 Jan – 1 Jul</td> <td data-bbox="797 1312 1419 1514">Member will be placed on current published RSWE list. Member may participate in the upcoming October RSWE (if eligible) but cannot be placed on a future list if the member can sit for that exam.</td> </tr> <tr> <td data-bbox="586 1514 797 1883">2 Jul - 1 Sep</td> <td data-bbox="797 1514 1419 1883">Some members RELAD during this period when RSWE PDEs are validated each year. As such, DA may erroneously create an eligible Active Duty SWE PDE for members now in the Reserves. If this happens, notify PPC (ADV) so a manual correction can be done to reflect an eligible RSWE PDE. Member must work with their P&A Office to ensure it is corrected to reflect they are eligible for RSWE. <u>If not completed by 1 Sep,</u></td> </tr> </tbody> </table>	If the member’s RELAD is...	Then...	1 Jan – 1 Jul	Member will be placed on current published RSWE list. Member may participate in the upcoming October RSWE (if eligible) but cannot be placed on a future list if the member can sit for that exam.	2 Jul - 1 Sep	Some members RELAD during this period when RSWE PDEs are validated each year. As such, DA may erroneously create an eligible Active Duty SWE PDE for members now in the Reserves. If this happens, notify PPC (ADV) so a manual correction can be done to reflect an eligible RSWE PDE. Member must work with their P&A Office to ensure it is corrected to reflect they are eligible for RSWE. <u>If not completed by 1 Sep,</u>
If the member’s RELAD is...	Then...							
1 Jan – 1 Jul	Member will be placed on current published RSWE list. Member may participate in the upcoming October RSWE (if eligible) but cannot be placed on a future list if the member can sit for that exam.							
2 Jul - 1 Sep	Some members RELAD during this period when RSWE PDEs are validated each year. As such, DA may erroneously create an eligible Active Duty SWE PDE for members now in the Reserves. If this happens, notify PPC (ADV) so a manual correction can be done to reflect an eligible RSWE PDE. Member must work with their P&A Office to ensure it is corrected to reflect they are eligible for RSWE. <u>If not completed by 1 Sep,</u>							

			member will neither be eligible to sit for the October RSWE, nor eligible to transfer their Active-Duty SWE score to the October RSWE list once published. PPC (ADV) receives errors each year and counsels commands on their members' ineligibility to sit for the upcoming exam.
		2 Sep – 31 Dec	Member has the option to be placed either on the current RSWE list or on the future list to be effective 1 Jan of the following year. This is due to the member entering the SELRES after both the RSWE SED (1 Jul) and the RSWE PDE correction date.
NOTE:	<p>For all scenarios above, PPC (ADV) is responsible for recalculating their final multiple from their last Active Duty test, validating their eligibility for conduct, competencies, etc., and for placing the member accordingly on the corresponding RSWE list.</p>		
4	CGRC ISTT	Upon receipt of the notification, a CGRC ISTT representative will contact the member to discuss assignment options and answer questions about participation in the Reserves. If an agreement is reached on an assignment to a billet in the SELRES, CGRC ISTT will provide the member's servicing P&A Office with the Reserve Applicant Accession Worksheet (RAAW).	
5	P&A Office	<p>Within two business days of receipt of the RAAW:</p> <ul style="list-style-type: none"> • Counsels member on assignment to the Reserve component. • Completes CG-3307 entry (SEP-10); and • Documents on the appropriate CG-3307 (AT-10 (series)). 	
6	Unit	<p>Three months prior to RELAD date:</p> <ul style="list-style-type: none"> • Completes a follow-up interview. • Assists member with completing the Career Intentions Worksheet (CG-2045), PCS Departing/Separation Worksheet (CG-2000) and, if applicable, Pay Delivery Worksheet (CG-2015) and routes for signatures. • Forwards endorsed forms to P&A Office. 	
7	P&A Office	<ul style="list-style-type: none"> • Within five business days of receipt of forms, counsels member on separation travel entitlements IAW Reference (h). If applicable, enters Contract Data in DA to fulfill military service and Reserve component obligations using 	

		<p>the Reenlistments or Extensions & Re-Extensions user guide.</p> <ul style="list-style-type: none"> • Completes CG-3307 (SEP-07 (series))_entries, as appropriate. • Enters RELAD orders in DA using the RELAD AD to SELRES or IRR user guide. <ul style="list-style-type: none"> ➤ If member desires relocation at time of separation, inserts “Member plans to relocate at time of separation. Final home address will be (enter complete address and city, state/country)” in the order notes as line-item B. <p>or</p> <ul style="list-style-type: none"> ➤ If member does <u>not</u> desire relocation at time of separation, follows the procedures in Chapter 3, Section J of this publication. <ul style="list-style-type: none"> • Counsels member to update bank account info in DA (as appropriate) if member will be assigned to a drilling status after separation. • Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues. • If member is RELAD to drilling reservist then reduce GTCC limit to \$50.00 and inform GTCC Coordinator of member’s intent RELAD to a drilling SELRES so account can stay open and note can be added to of AD to RSV. • If member is RELAD to IRR then Notify GTCC Coordinator of member’s separation date, so account is closed IAW Reference (g).Routes orders to P&A Supervisor or Yeoman with By Direction Authority for review and approval.
8	P&A Supervisor	<p>Within three business days of receipt, verifies Separation Order and notifies P&A Tech of any corrections needed. If none, approves Separation Order in DA using the Approving a Separation Order user guide.</p>
NOTE:	<p>Monitor any member that travels to verify that any final balances are paid prior to account switch from AD to RSV or closure. Make sure that the members update any changes to their personal address, emails and phone numbers in CITI profile .</p>	

<p>NOTE:</p>	<p>The separation order shall be approved by the Data entry/approval cutoff date for the pay calendar of the member’s departure from the unit. Terminal leave must be entered on the separation order.</p>	
<p>NOTE:</p>	<p>Once the Separation Orders are approved, they will be picked up on the Orders Integration Process around 4-5 days (if possible) before their Separation date. This will build the termination job row and put the orders in a finished status.</p>	
<p>9</p>	<p>P&A Office</p>	<ul style="list-style-type: none"> • Within two business days of receiving approval on the Separation Orders, completes the DD-214 issuance process using the Separations Flow to the DD-214 user guide (using CGPSCINST 1900.1.B as reference). • Advises member to schedule an appointment with the servicing transportation office to arrange shipment of household goods, if applicable. • For RELAD to SELRES, instructs member to exchange Active Duty Common Access Card (CAC) and dependent ID cards for new ID cards at their nearest RAPIDS facility (https://idco.dmdc.osd.mil/idco/) upon date of separation. • Assists member with Continued Health Care Benefit Program (https://tricare.mil/Plans/SpecialPrograms/CHCBP) if desired. • Delivers DD-214 Worksheet copies (1) and (4), Separation Order and letter(s) to member IAW Reference (k). • Ensures all actions are completed in iPERMS prior to member’s separation IAW Reference (i) and ALSPO A/23.
<p>NOTE:</p>	<p>Premiums for SGLI/FSGLI coverage will continue to be deducted for members who affiliate with the SELRES. This can result in a significant debt if the member does not intend to perform regular monthly drills following RELAD. Members who desire to terminate/reduce coverage will be required to meet the “proof of good health” requirement if they desire to reinstate/increase coverage at a later date.</p>	
<p>NOTE:</p>	<p>Pay entitlements for a member who is being discharged will automatically be stopped on the effective date of separation. SPOs do not need to manually stop pay entitlements for a member who is separating, unless the entitlement is to stop on a day other than the date of separation or the member will be</p>	

	performing long-term Active Duty in the Reserve component immediately following the discharge.
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Table 3-6 RELAD Process

F.4. Active Duty Discharge Process Use this process to discharge a member from Active Duty.

Step	Who Does It	What Happens
1	Member	12 months prior but NLT 90 days prior to separation contact the Transition and Relocation Managers (TRM) to start the Transition Service Requirements IAW Reference (c)
2	Unit	Six months prior to separation date, IAW Reference (a): <ul style="list-style-type: none"> • Validates the member is approved for separation. • Completes pre-discharge interview and documents on the appropriate CG-3307 (SEP-07 (series)). • Forwards SEP-07 to the P&A Office.
3	P&A Office	Six months prior to separation date, ensures the SEP-07 is completed correctly IAW Reference (a). Completes the following (if applicable): <ul style="list-style-type: none"> • Requests expedited discharge following the procedures in section E.2 of this publication, if desired for PSC issued separation. • Completes CG-3307 entry (SEP-21) (Acknowledgement of Separation Pay & Recoupment from Retired Pay) entry for any member receiving Separation Pay and send a copy to PPC (SEP) via email to: PPC-PF-SEP@uscg.mil. • Completes a CG-3307 entry (SEP-27) (Other Than Honorable Discharge and VA Benefits) if member is being discharged under other than honorable conditions. • Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues.

NOTE:

Monitor any member that travels to verify that any final balances are paid prior to account closure. Suggest the member pay enough to cover the SATO fees that are billed after voucher creation. Any credits on the GTCC after account is closed will result in a refund to the member.
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NOTE:	<p>When completing the DD214 early, P&A computes amount payable for regular or Disability Severance, if member is authorized such pay IAW Reference (b). Otherwise, DA computes Separation Pay that is correctly entered on the Separation Request. PPC (SEP) computes Disability Severance Pay.</p>	
4	P&A Office	<p>No less than three months prior to separation date, enters DA Training using School Code 500650 if the member received Transition Assistance Program counseling IAW Reference (c). Completes the Service Member Pre-Separation/Transition Counseling and Career Readiness Standards eForm for Service Members Separating, Retiring, and Released from Active Duty (DD eForm 2648).</p>
5	Unit	<p>Three months prior to separation date:</p> <ul style="list-style-type: none"> • Completes a follow-up interview. • Assists member with completing CG-2045 and CG-2000 and routes for signatures. • Forwards endorsed forms to P&A Office.
6	P&A Office	<p>Within five business days of receipt of forms, counsels member on separation travel entitlements IAW Reference (h).</p> <ul style="list-style-type: none"> • Enters the Separation Order in DA using the Discharge – End of Enlistment user guide. <ul style="list-style-type: none"> ➤ If member desires relocation at time of separation, inserts “Member plans to relocate at time of separation. Final home address will be (enter complete address and city, state/country)” in the order notes as line-item B. or ➤ If member does <u>not</u> desire relocation at time of separation, follows the procedures in Chapter 3, Section J of this publication. • Prepares appropriate separation letter(s), as applicable, from this publication and completes CG-3307 (SEP-07 (series)) entries, as appropriate. • Forwards source documents, endorsed forms and Separation Order to the P&A Supervisor or Yeoman with By Direction Authority for review and approval.
7	P&A Supervisor	<p>Within three business days of receipt, verifies Separation Order and notifies P&A Tech of any corrections needed. If none, approves Separation Order in DA using the Approving a Separation Order user guide.</p>

<p>NOTE:</p>	<p>The separation order shall be approved when member departs on terminal leave, or no later than the data entry/approval cutoff date for the pay calendar of the member’s departure from the unit. Terminal leave must be entered on the separation order.</p>	
<p>8</p>	<p>P&A Office</p>	<p>Within two business days of approval of Separation Order, makes any corrections and resubmits to P&A Supervisor or Yeoman with By Direction Authority for approval (if needed).</p> <ul style="list-style-type: none"> • Carries out the DD214 issuance process using the DD214 process guide. • Advises the member to schedule an appointment with the servicing transportation office to arrange shipment of household goods (if applicable). • Verifies/enters final mailing address in DA and instructs member to update mailing address in DA following separation (if member relocates any time in the 18 months following separation). The mailing address in DA is used to mail the member’s IRS Form W2. • Counsels member on separation travel entitlements IAW Reference (d). Provides the member with original signed orders, travel claim form(s), instructions for completion and pre-addressed envelope to mail travel claims and original separation travel order to PPC (TVL). • Instructs the member on reenrollment in direct deposit after the effective date of separation. The member must complete the Online Electronic Funds Transfer Application Enrollment Form, CG-7302 (even if the member’s banking information does not change following separation) due to system purge of this info upon separation.
<p>NOTE:</p>	<p>Member should complete a CG-2015 if they want their last paycheck deposited to a different account after separation.</p>	
<p>9</p>	<p>Unit</p>	<ul style="list-style-type: none"> • Instructs the member to return CAC and dependent ID cards to the nearest Real-Time Automated Personnel Identification System (RAPIDS) facility (https://idco.dmdc.osd.mil/idco/) upon date of separation. <p>or</p> <ul style="list-style-type: none"> • If instructed by command, the unit collects these cards and returns them to the nearest RAPIDS facility upon date of separation IAW Reference (j).

		<ul style="list-style-type: none"> • Notifies GTCC Coordinator of member’s separation date, so account is closed IAW Reference (g). • Provides the member with the link to the Thrift Savings Plan (TSP) Withdrawal forms (https://www.tsp.gov/forms/?topics=Withdrawals-and-distributions) if they have a TSP account.
10	P&A Office	Ensures all actions are completed in iPERMS prior to member’s separation IAW Reference (i) and ALSPO A/23.
11	P&A Supervisor	14 business days prior to the member’s Terminal Begin Date, ensures that pay entitlements are accurate upon departure date (especially OCONUS to ensure manual stop has been entered) IAW Reference (b).
12	P&A Office	<p>Upon the member’s Terminal Begin Date:</p> <ul style="list-style-type: none"> • Uploads Official DD-214 copy (2) to iPERMS IAW Reference (i). • Destroys official copy (3), (5), (6), (7), and (8) as it is transmitted electronically from DA to the Veterans Administration, Department of Labor, and State Director of Veterans Affairs. • Gives member Official copy (1) and (4), IAW Reference (k). • Forwards Honorable Discharge Button (if applicable) to member.
NOTE:	<p>Pay entitlements for a member who is being discharged will automatically be stopped on the effective date of separation. SPOs do not need to manually stop pay entitlements for a member who is separating, unless the entitlement is to stop on a day other than the date of separation or the member will be performing long-term Active Duty in the Reserve component immediately following the discharge.</p>	

Table 3-7 Active Duty Discharge Process

F.5. Active Duty Retirement Process

Retirement transactions usually require a Separation Request initiated by PSC. The exception is a Reservist retiring at age 60, which may be initiated with just a Separation Order. Approved Retirement requests will be posted to the Airport Terminal under the member’s department ID. Use this process for Active Duty retirements.

NOTE:

P&A Office ensures forms are complete and correct at least 30 calendar days prior to member’s departure from the unit then forwards them to PPC (RAS) for processing.

Step	Who Does It	What Happens
1	Member	<ul style="list-style-type: none"> • Submits a request to PSC (EPM/OPM) IAW Reference (a). • As early as 24 months but NLT 1 year prior to retirement contact the Transition and Relocation Managers (TRM) to start the Transition Service Requirements IAW Reference (c) • If eligible and desired request participation in SkillBridge Program IAW Reference (o)
NOTE:		<p>Participation in the SkillBridge Program is approved for up to 6months (180 days) prior to separation. Appropriate planning is key when using SkillBridge and leave prior to separation.</p>
2	PSC (EPM/OPM)	Upon approval, issues orders containing the member’s effective retirement date, the laws governing the retirement and travel authorization.
3	Unit	<p>Upon receipt of orders:</p> <ul style="list-style-type: none"> • Ensures member is physically qualified for retirement, completes pre-discharge interview, and documents on the appropriate CG-3307 (SEP-07 (series)) IAW Reference (a). • Assists member with completing CG-2045 and CG-2000 and routes for signatures. • Submits request for retirement certificate to PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil. <p>See https://www.dcms.uscg.mil/ppc/sep/CertificateRequest/ for additional guidance and order template. Forwards endorsed forms and SEP-07 to P&A Office.</p>
4	P&A Office	<p>No later than 90 calendar days prior to retirement date:</p> <ul style="list-style-type: none"> • Provides the member with the PPC (RAS) Retirement Processing Package (http://www.dcms.uscg.mil/ppc/ras/) which contains information and links to forms and worksheets necessary to establish the member’s retired pay account. Counsels member in completing the following forms from that package: <ul style="list-style-type: none"> ➤ DD-2656, Data for Payment of Retired Personnel ➤ CG-7221, Retired Allotment Authorization Form (if starting new allotments), and copy of latest Pay Slip from DA (if continuing any allotments).

		<ul style="list-style-type: none"> ➤ Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues
	NOTE:	<p>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 V of the form, an SBP Spousal notification/concurrence letter (endorsed by spouse and notarized) is required. If the whereabouts of the spouse are unknown and the member elects not to participate in SBP, or to participate at less than maximum level, a signed statement by the member must be attached to the form.</p>
	NOTE:	<p>Monitor any member that travels to verify that any final balances are paid prior to account closure. Suggest the member pay enough to cover the SATO fees that are billed after voucher creation. Any credits on the GTCC after account is closed will result in a refund to the member.</p>
	WARNING:	<p><i>AUTOMATIC FULL COVERAGE in the Survivor Benefit Plan (SBP) is elected in the absence of a properly completed DD-2656.</i></p>
5	Member	<ul style="list-style-type: none"> • Scan and email completed DD-2656, Data for Payment of Retired Personnel to PPC-DG-CustomerCare@uscg.mil. Must be received by PPC (RAS) 90 days prior to retirement to prevent delay in payment. • Notifies Health Record Custodian to forward MED record as appropriate.
	CAUTION:	<p>Member’s failure to complete the required retirement processing paperwork and/or have not forwarded the required forms to the P&A Office timely may result in delay of payment.</p>
6	P&A Office	<ul style="list-style-type: none"> • At least 30 calendar days prior to member’s departure from the unit, ensures forms are complete and correct, then forwards them to PPC (RAS) for processing. Scans and e-mails a set to PPC-DG-CustomerCare@uscg.mil Immediately upon member forwarding forms to PPC (RAS),

		<p>follows the steps at https://www.dcms.uscg.mil/ppc/sep/CertificateRequest/ to request the member’s Retirement Certificate and Presidential Letter of Appreciation for Members Retiring With 30 or More Years of Service.</p> <p>At least 15 calendar days prior to the member’s retirement or departure on terminal leave:</p> <ul style="list-style-type: none"> • Ensures retirement certificate is received from PPC (SEP). If certificates are <u>not</u> received by this date, contacts PPC. Via Customer Care • Contacts PSC if the Presidential Letter of Appreciation for Members Retiring with more than 30 Years of Service has not been received. <p>Instructs member to exchange Active Duty CAC and dependent ID cards for new ID cards at the nearest RAPIDS facility (https://idco.dmdc.osd.mil/idco/) upon date of retirement.</p>
CAUTION:		<p>Failure to forward the required retirement processing paperwork to PPC (RAS) timely may result in delay of payment and being locked the Survivor Benefit Plan (SBP) for at least 24 months.</p>
7	P&A Office	<p>Within five business days of receipt of forms from the unit, enters Retirement Order and routes to P&A Supervisor or Yeoman with By Direction Authority for review and approval using the Retirement Orders user guide.</p> <ul style="list-style-type: none"> • Completes the DD-214 issuance process using the Separations Flow to the DD-214 user guide. • Advises member to schedule an appointment with the servicing transportation office to arrange shipment of household goods, if applicable. • Prepares appropriate retirement letter(s), as applicable, from this publication and completes CG-3307 (SEP-07 (series)) entries, as appropriate.
8	P&A Supervisor	<p>Within three business days of receipt, verifies Separation Order and notifies P&A Tech of any corrections needed. If none, approves Separation Order in DA using the Approving a Separation Order user guide.</p>
NOTE:		<p>Orders must be approved no later than the effective date of terminal leave. Retirements can be approved as soon as the order is created and audited.</p>

9	P&A Office	<ul style="list-style-type: none"> • Delivers DD-214 Worksheet copies (1) and (4), Retirement Order and letter(s) to member. • Provides the member with the link to the TSP Withdrawal forms (https://www.tsp.gov/forms/?topics=Withdrawals-and-distributions) if they have a TSP account. • Verifies/enters final mailing address, email address, and phone number in DA. Notifies member that, upon retirement, DA will continue to be available as Self Service for retirement functions. • Counsels member on retirement travel entitlements IAW Reference (d). Provides member with travel claim form(s), instructions for completion and pre-addressed envelope to mail travel claims and original separation travel order to PPC (TVL).
10	Unit	<ul style="list-style-type: none"> • Notifies GTCC Coordinator of member’s retirement date for account closure IAW Reference (g). • Forwards Unit PDR to P&A Office IAW Reference (i), if applicable.
11	P&A Supervisor	14 business days prior to the member’s Terminal Begin Date, ensures that pay entitlements are accurate upon departure date (especially OCONUS to ensure manual stop has been entered) IAW Reference (b).
12	P&A Office	<p>Upon the member’s Terminal Begin Date:</p> <ul style="list-style-type: none"> • Uploads Official DD-214 copy (2) to iPERMS IAW Reference (i). • Destroys official copy (3), (5), (6), (7), and (8) as it is transmitted electronically from DA to the Veterans Administration, Department of Labor, and State Director of Veterans Affairs. • Gives member official copy (1) and (4) IAW Reference (k). • Ensures all actions are completed in iPERMS prior to member’s separation IAW Reference (i) and ALSPO A/23.
NOTE:	<p>Pay entitlements for a member who is being discharged will automatically be stopped on the effective date of separation. SPOs do not need to manually stop pay entitlements for a member who is separating, unless the entitlement is to stop on a day other than the date of separation or the member will be performing long-term Active Duty in the Reserve component immediately following the discharge.</p>	

Table 3-8 Active Duty Retirement Process

Section G: Disability Retirements

G.1. Introduction This section explains the Disability Retirement process. Temporary and permanent disability retirements are approved under the physical disability evaluation systems and are processed as routine separations. The retirement date for members in this category will normally be 20 working days after the date of PSC's action. Active Duty allotments will be paid for the last month of Active Duty.

- G.2. References**
- (a) [Government Travel Charge Card \(GTCC\) Program Policies and Procedures, COMDTINST M4600.18 \(series\)](#)
 - (b) [Coast Guard Military Human Resource Record \(CGMHRR\) System, COMDTINST 1080.10 \(series\)](#)
 - (c) [Certificate of Release or Discharge from Active Duty, DD-214, COMDTINST 1900.4 \(series\)](#)
 - (d) [Military Separations, COMDTINST M1000.4 \(series\)](#)
 - (e) [Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1 \(series\)](#)
 - (f) [Coast Guard Pay Manual, COMDTINST M7220.29 \(series\)](#)
 - (g) [Certificate of Release or Discharge from Active Duty, \(DD form 214/5 Series\), DoDI 1336.01](#)
 - (h) [Transition Assistance Program, COMDTINST 1900.2 \(series\)](#)
 - (i) [Transition of Service Members with Job Training Opportunities and Employment Skills COMDTINST M1040.7](#)

G.3. Disability Retirement Process

Use this process for Temporary and Permanent Disability Retirements.

NOTE:

P&A Office ensures forms are complete and correct at least 30 calendar days prior to member's departure from the unit then forwards them to PPC (RAS) for processing.

Step	Who Does It	What Happens
1	PSC (EPM/OPM/ RPM)	Issues Separation Request in DA directing temporary or permanent disability retirement.
2	Member	<ul style="list-style-type: none"> • 2 years prior or as soon as notification is made contact the Transition and Relocation Managers (TRM) to start the Transition Service Requirements IAW Reference (h) • Notifies Health Record Custodian to forward MED record as appropriate. •
3	P&A Office	<p>Upon receipt of the request, immediately counsels member and assists them in completing the PCS Departing/Separation Worksheet (CG-2000) and the DD-2656.</p> <p>Ensures forms are complete and correct, then forwards them to PPC (RAS) for processing. Scans and e-mails a set to PPC-DG-CustomerCare@uscg.mil</p>
CAUTION:		<p>Failure to forward the required retirement processing paperwork to PPC (RAS) timely may result in delay of payment and being locked the Survivor Benefit Plan (SBP) for at least 24 months.</p>
WARNING:		<p><i>AUTOMATIC FULL COVERAGE in the Survivor Benefit Plan (SBP) is elected in the absence of a properly completed DD-2656.</i></p>
4	P&A Office	<ul style="list-style-type: none"> • Completes Separation Orders in DA using the Discharge with Separation Request user guide and routes to the P&A Supervisor or Yeoman with By Direction Authority for review and approval. <p style="margin-left: 40px;">➤ If member desires relocation at time of separation, inserts “Member plans to relocate at time of separation. Final home address will be (enter complete address and city, state/country)” in the order notes as line-item B.</p> <p style="margin-left: 40px;">or</p> <p style="margin-left: 40px;">➤ If member does <u>not</u> desire relocation at time of separation, follows the procedures in Chapter 3, Section J of this publication.</p>

		<ul style="list-style-type: none"> • Advises member to schedule an appointment with the servicing transportation office to arrange shipment of household goods, if applicable. • Completes the DD-214 using the Separations Flow to the DD-214 user guide, making sure to include the required data in block 18 (if applicable) relative to the payment of Disability Severance Pay, Lump Sum Readjustment Payment or Separation Pay (and SRB recoupment endorsement on the reverse, if applicable). • Provides the member with the link to the TSP Withdrawal forms (https://www.tsp.gov/forms/?topics=Withdrawals-and-distributions) if they have a TSP account. • Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues.
	NOTE:	<p>The mailing address information must be entered and verified in DA to facilitate the end of year mailing of the member’s IRS Form W-2.</p>
	NOTE:	<p>Monitor any members that travels to verify that any final balances are paid prior to account closure. Suggest the member pay enough to cover the TMC fees that are billed after voucher creation. Any credits on the GTCC after account is closed will result in a refund to the member.</p>
5	P&A Supervisor	Within three business days of receipt, verifies Separation Order and notifies P&A Tech of any corrections needed. If none, approves Separation Order in DA using the Approving a Separation Order user guide.
	NOTE:	<p>Orders must be approved no later than the effective date of terminal leave. Retirements can be approved as soon as the order is created and audited.</p>
6	PPC (SEP)	Runs Order Integration Process which finishes the Separation Order and calculates final Active Duty payment. PPC reviews pay account for accuracy. Payment is disbursed on the pay day following the separation/retirement date.

7	P&A Office	Before the member departs, delivers the DD-214 worksheet copies (1) and (4), Separation Orders and the standard separation letter (from Section 3-N of this publication) to the member.
8	Member	Visits the nearest RAPIDS facility for retired ID card. The nearest RAPIDS facility can be located at the following website: https://idco.dmdc.osd.mil/idco/ .
9	Unit	<ul style="list-style-type: none"> • Notifies GTCC Coordinator of member's retirement date for account closure IAW Reference (a). • Forwards Unit PDR to P&A Office IAW Reference (b), if applicable.
10	P&A Office	<ul style="list-style-type: none"> • Uploads Official DD-214 copy (2) in iPERMS IAW Reference (b). • Destroys official copy (3), (5), (6), (7), and (8) as it is transmitted electronically from DA to the Veterans Administration, Department of Labor, and State Director of Veterans Affairs. • Gives member official copy (1) and (4) IAW Reference (g). • Verifies/enters final mailing address, email address, and phone number in DA. Notifies member that, upon retirement, DA will continue to be available as Self Service for retirement functions. • Ensures all actions are completed in iPERMS prior to member's separation IAW Reference (b) and ALSPO A/23.

Table 3-9 Disability Retirement Process

Section H: Reserve Retirement Processing

H.1. Introduction This section explains the Reserve retirement process. Reserve retirements are processed by PPC (SEP). The two retirement categories are:

- Retirement with Pay (RET-1) for Reservists who complete 20 years of satisfactory service and have reached age 60, or who qualify for early retirement.
- Retirement Awaiting Pay (RET-2) for Reservists who have satisfied all requirements for RET-1, except reaching retirement age.

H.2. References

- (a) [Reserve Policy Manual, COMDTINST M1001.28 \(series\)](#)
- (b) [Reserve Duty Status and Participation, COMDTINST 1001.2 \(series\)](#)
- (c) [Government Travel Charge Card \(GTCC\) Program Policies and Procedures, COMDTINST M4600.18 \(series\)](#)
- (d) [Coast Guard Military Human Resource Record \(CGMHRR\) System, COMDTINST 1080.10 \(series\)](#)
- (e) [Transition Assistance Program, COMDTINST 1900.2 \(series\)](#)

H.3. Early RET-1 Eligibility A member of the Ready Reserve (SELRES and IRR) who **performs Active Duty under Title 10 (after 01/28/2008) or Title 14 (after 12/31/2011)** shall have their eligibility age for receipt of retired pay reduced below 60 years of age, but not less than 50 years of age IAW Reference (b).

H.4. Early RET-1 Process Use this process for requesting early RET-1.

NOTE: **P&A Office ensures forms are complete and correct at least 30 calendar days prior to member’s departure from the unit then forwards them to PPC (RAS) for processing.**

Step	Who Does It	What Happens
1	Member	<ul style="list-style-type: none"> • Submits a completed Reserve Retirement Transfer Request CG-2055A to the Unit requesting Early RET-1 calculations. Requests shall be submitted no more than one year before, but at least 100 days prior to, the requested retirement date to allow sufficient processing time.

		Eligible to reach out to the Transition and Relocation Managers (TRM) to start the Transition Service Requirements IAW Reference (e)
2	Unit	<ul style="list-style-type: none"> Verifies that all drills, Reserve points earned and orders have been processed in DA. Endorses Command Recommendation section of the CG-2055A and forwards to PSC (RPM-1).
3	PSC (RPM-1)	<ul style="list-style-type: none"> Reviews and, if approves, completes PSC (RPM-1) Recommendation section of the CG-2055A. Forwards a copy to PPC (ADV) via trouble ticket to PPC-DG-CustomerCare@uscg.mil.
4	PPC (ADV)	<ul style="list-style-type: none"> Verifies eligibility based on information in DA and calculates the date member is eligible to start drawing retired pay. Sends completed calculations back to PSC (RPM-1).
5	PSC (RPM-1)	<ul style="list-style-type: none"> Reviews the calculations and forwards the completed request to PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil for final processing. Notifies the member of their early retirement date.
6	Member	<ul style="list-style-type: none"> 90 days prior to retirement complete and send DD-2656, Data for Payment of Retired Personnel to PPC-DG-CustomerCare@uscg.mil. Must be received by PPC (RAS) 90 days prior to retirement to prevent delay in payment. Submits request for retirement certificate to PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil. See https://www.dcms.uscg.mil/ppc/sep/CertificateRequest/ for additional guidance and order template.
7	P&A Office	<p>90 Days Prior to retirement</p> <ul style="list-style-type: none"> Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues.
CAUTION:		<p>Member's failure to complete the DD-2656 and/or have not forwarded the required forms to PPC (RAS) Office timely may result in delay of payment.</p>

NOTE:	<p>If the member believes there is a discrepancy with the early retirement calculations, member must work with their P&A Office to contact PPC (ADV) via trouble ticket and provide supporting documents.</p>	
NOTE:	<p>Monitor any members that travels to verify that any final balances are paid prior to account closure. Suggest the member pay enough to cover the SATO fees that are billed after voucher creation. Any credits on the GTCC after account is closed will result in a refund to the member.</p>	
8	P&A Office	<ul style="list-style-type: none"> • Notifies GTCC Coordinator of member’s retirement date for account closure IAW Reference (c). • Provides the member with a Reserve Statement of Service for VA Benefits. • Ensures all actions are completed in iPERMS prior to member’s separation IAW Reference (d) and ALSPO A/23. • Reviews member’s CGMHRR in iPERMS. • Verifies/enters final mailing address, email address, and phone number in DA. Notifies member that, upon retirement, DA will continue to be available as Self Service for retirement functions. • Counsels member to work with Health Record Custodian to forward MED record as appropriate.
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Table 3-10 Early RET-1 Process

H.5. RET-1 Process

Use this process for requesting RET-1.

Step	Who Does It	What Happens
1	PPC (SEP)	Six months prior to the Reserve member reaching retirement age (usually age 60, if the member has 20 years of satisfactory service), sends “Information Concerning Retirement With Pay (RET-1)” letter and Reserve component Survivor Benefit package. 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 60.

	NOTE:	If it is determined that the member is not eligible for RET-1 status upon reaching age 60, the member will be separated. Age waivers to attain eligibility may be requested from, and granted by, PSC (RPM-1).
2	Member	90 days prior to retirement complete and send DD-2656 , Data for Payment of Retired Personnel to PPC-DG-CustomerCare@uscg.mil . Must be received by PPC (RAS) 90 days prior to retirement to prevent delay in payment.
	CAUTION:	Failure to forward the DD-2656 to PPC (RAS) timely may result in delay of payment.
	WARNING:	<i>AUTOMATIC FULL COVERAGE in the Survivor Benefit Plan (SBP) is elected in the absence of a properly completed DD-2656 (March 2022 or later).</i>
3	Unit	<p>Two months prior to the member’s retirement ceremony:</p> <ul style="list-style-type: none"> • Submits request for retirement certificate to PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil. • See https://www.dcms.uscg.mil/ppc/sep/CertificateRequest/ for additional guidance and order template. <p>Six weeks prior to the member’s retirement:</p> <ul style="list-style-type: none"> • Verifies that all drills, Reserve points earned and orders have been processed in DA. • Provides member with a Reserve Statement of Service for VA Benefits. • Notifies GTCC Coordinator of member’s retirement date for account closure IAW Reference (a).
4	P&A Office	<p>90 Days Prior to retirement</p> <ul style="list-style-type: none"> • Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues.
5	PPC (SEP)	<p>One month prior to retirement:</p> <ul style="list-style-type: none"> • Forwards the following to the member: <ul style="list-style-type: none"> ➤ Retirement Letter ➤ Final Points Statement

		<ul style="list-style-type: none"> ➤ Retirement Certificates (if applicable) • Approves retirement orders in DA.
	NOTE:	<p>Monitor any members that travels to verify that any final balances are paid prior to account closure. Suggest the member pay enough to cover the SATO fees that are billed after voucher creation. Any credits on the GTCC after account is closed will result in a refund to the member.</p>

Table 3-11 RET-1 Process

H.6. Voluntary RET-2 Process

Use this process for requesting RET-2 followed by RET-1 upon reaching retirement age. These steps apply only to those members who choose RET-2 status rather than continuing to drill.

Step	Who Does It	What Happens
1	PPC (SEP)	Upon the member reaching 20 years of service, sends “20 Year Letter” notifying the member of eligibility for RET-2 Retirement and Reserve Component Survivor Benefit Plan election forms.
2	Member	Within five business days of receiving the 20 Year Letter: <ul style="list-style-type: none"> • Requests transfer to RET-2 status by completing form CG-2055A. • Forwards form to unit CO.
	NOTE:	<p>Requests must be for a future date and no less than 100 days from submission date to provide sufficient processing time.</p>
3	Unit	Within two business days of receiving the completed form: <ul style="list-style-type: none"> • Verifies that all drills and orders have been processed in DA. • Endorses the CG-2055A and forwards to PSC (RPM-1). • Provides the member with a Reserve Statement of Service for VA Benefits. • Notifies GTCC Coordinator of member’s retirement date for account closure IAW Reference (a).
4	PSC (RPM-1)	Approves the CG-2055A and forwards to PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil .
5	PPC (SEP)	<ul style="list-style-type: none"> • Approves RET-2 transaction in DA.

		<ul style="list-style-type: none"> Forwards Reserve Retirement information package to member.
6	Unit/P&A Office	<ul style="list-style-type: none"> 90-30 Days Prior to retirement - Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues Instructs member to exchange CAC and dependent ID cards for new ID cards at the nearest RAPIDS facility (https://idco.dmdc.osd.mil/idco/) upon date of retirement. Verifies/enters final mailing address, email address, and phone number in DA. Notifies member that, upon retirement, DA will continue to be available as Self Service for retirement functions. Ensures all actions are completed in iPERMS prior to member’s separation IAW Reference (d) and ALSPO A/23.

Table 3-12 Voluntary RET-2 Process

H.7. Involuntary RET-2 Process Use this process to place a Reservist on Involuntary RET-2 status.

Step	Who Does It	What Happens
1	PPC (SEP)	Upon the member reaching 20 years of service, sends “20 Year Letter” notifying the member of eligibility for RET-2 Retirement and Reserve Component Survivor Benefit Plan election forms.
2	Member	Member fails to reenlist upon Expiration of Enlistment (EOE).
3	Unit	Immediately following member’s EOE: <ul style="list-style-type: none"> Notifies PSC (RPM-1) of member’s failure to reenlist. Verifies that all drills and orders have been processed in DA. Completes the CG-2055A (with “COMDTINST M1000.2, Chapter 1-E-8-h-2” referenced in the Reason block) and forwards to PSC (RPM-1).
4	PSC (RPM-1)	Notifies PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil of member’s failure to reenlist and authorizes member to be placed in RET-2 status.
5	PPC (SEP)	<ul style="list-style-type: none"> Approves RET-2 transaction in DA. Forwards Reserve Retirement information package to member.
6	Unit	<ul style="list-style-type: none"> Notifies GTCC Coordinator of member’s retirement date for account closure IAW Reference (c).

		<ul style="list-style-type: none"> • Forwards Unit PDR to P&A Office IAW Reference (d), if applicable. • Provides the member with a Reserve Statement of Service for VA Benefits.
7	P&A Office	<ul style="list-style-type: none"> • 90-30 Days Prior to retirement - Review Government Travel Credit Card (GTCC) account for status/indebtedness. Inform GTCC manager of outstanding issues • Ensures all actions are completed in iPERMS prior to member's separation IAW Reference (d) and ALSPO A/23. • Verifies/enters final mailing address, email address, and phone number in DA. Notifies member that, upon retirement, DA will continue to be available as Self Service for retirement functions.
8	SPO	Reviews member's CGMHRR in iPERMS. Notifies Health Record Custodian to forward MED PDR as appropriate.

Table 3-13 Involuntary RET-2 Process

Section I: Enlisted to Cadet Status Processing

I.1. Introduction

This section establishes the separation process for enlisted members being discharged to accept an appointment as a Cadet at the CG Academy. A unique transaction that requires special processing.

Members are issued two distinct sets of orders with Project, Organization, Expenditure Type, and Task (POET) accounting information:

- CG Academy orders for travel to the CG Academy from the last PDS
- Discharge orders for household goods movement and storage

The P&A Office shall ensure the member is properly counseled on which set of orders is to be used for travel, and which is used for household goods.

I.2. Enlisted to Cadet Process

Use the following checklist to process a separation for enlisted members accepting an appointment as a Cadet:

Step	Who Does It	What Happens
1	CG Academy Admissions	Issues appointment letter with travel authorization including POET accounting information.
2	Member	Within five business days of receipt of letter, advises Unit and P&A office of Academy acceptance and provides P&A office a copy of appointment letter.
3	P&A Office	Within two business days of receipt of the copy, follows procedures for routine processing of a Discharge using the Discharge with Separation Request user guide.
NOTE:	The discharge date is one day prior to date of reporting.	
4	SPO	Follows procedures for routine processing of a Discharge using the Discharge with Separation Request user guide.
5	CG Academy Cadet SPO	<ul style="list-style-type: none"> • Processes re-hire transaction upon member’s reporting to the Academy. • Ensures member completes travel claim using CG Academy orders.

Table 3-14 Enlisted to Cadet Process

Section J: Separation & Retirement POET Processing

J.1. Introduction This section provides the procedures for processing separation and retirement (SR) order POETs for members relocating, and not relocating, at time of separation.

J.2. References (a) [Military Separations, COMDTINST M1000.4 \(series\)](#)
(b) [Joint Travel Regulations \(JTR\)](#)

J.3. Discussion Separating and retiring members are generally entitled to a government paid move from their last PDS to their home of record or home of selection IAW Reference (b). The member must relocate in order to receive the authorized travel and transportation allowance.

To ensure accounting accuracy, DA no longer automatically issues a POET upon approval of the separation order for all SR orders. POETs must be requested as outlined in the procedures below.

NOTE: **If POET must be added ASAP (same day separation), contact PSC-BOPS-C at ARL-DG-M-PSC-BOPS-C@uscg.mil.**

J.4. Members Relocating at Separation Process Use this process to request SR travel POETs for members relocating at time of separation.

Step	Who Does It	What Happens
1	P&A Office	Upon receipt of completed CG-2045 , CG-2000 and PCS Entitlements Worksheet (CG-2003): <ul style="list-style-type: none"> • Reviews for accuracy and completeness. • Ensures member has definite plans to relocate upon separation.
NOTE:	The member should not request a POET “just in case” as there is a process in place to request a POET at a later time. (See member’s responsibility in the Section J.5. below).	
2	P&A Office	Within two business days of confirming that member is definitely going to relocate upon separation, emails tonomanagement@uscg.mil with the following information (multiple requests in one email are encouraged):

		A. Rank and Name B. EMPLID C. Orders Trans ID D. Type of orders (Separation or Retirement) E. From City, State to City, State (e.g., Miami, FL to Elko, NV)
3	DCMS-831	Within three business days, adds POET to the orders in DA.
4	P&A Office	Within two business days of addition, includes the “SRT” order note and edits (as appropriate) on the Separation or Retirement orders.

Table 3-15 Members Relocating at Separation Process

J.5. Members Not Relocating at Separation Process

Use this process for members not relocating at time of separation.

Step	Who Does It	What Happens
1	P&A Office	Upon receipt of completed CG-2045 , CG-2000 and CG-2003 : <ul style="list-style-type: none"> • Reviews for accuracy and completeness. • Advises member that if relocation is desired after receipt of travel orders, they must contact PSC-BOPS-C directly to request a POET. • In the order notes, inserts the following as line item B: “Member does not plan to relocate at time of separation. Member has been counseled on procedure for requesting a new POET from PSC-BOPS-C if their relocation plans change within the entitlement timeline.”
2	Member	If the member decides to relocate at a later date: <ul style="list-style-type: none"> • Member must ensure that their request for a new POET and relocation dates are within the original entitlement timeline. Requests for an extension must be submitted to CG-1332. • If completion of travel before the initial expiration date imposes a severe hardship on the separated/retired member and dependents, a one-year extension may be authorized/approved by Commandant (CG-1332). • The member must request a new POET in writing (no earlier than 90 days prior to the initial expiration date) via email to ARL-DG-M-CGPSC-BOPS-C@uscg.mil. The member must provide justification for the extension and include a copy of the separation or retirement order.

3	PSC-BOPS-C	If approved, sends the member an amendment to their orders containing the new POET accounting information. This does not constitute a change to their entitlement timeline.
4	Member	Within 30 calendar days after completion of travel, member must submit a travel claim, including any amendment to orders, IAW Reference (b).

Table 3-16 Members Not Relocating at Separation Process

Section K: Cancellation of Approved Separation Order

K.1. Introduction This section provides the procedures for cancelling an approved separation order.

- K.2. References**
- (a) [Cancelling a Separation Order User Guide](#)
 - (b) [Enlistments, Evaluations and Advancements, COMDTINST M1000.2 \(series\)](#)
 - (c) [Officer Accessions, Evaluations and Promotions, COMDTINST M1000.3 \(series\)](#)
 - (d) [Military Separations, COMDTINST M1000.4 \(series\)](#)

CAUTION:

When a situation requires a Separation Order to be completely cancelled, the process depends on how the order was initiated and the current status of the order. Use the Process chart in Reference (a) to determine which entities need to be involved with the cancellation.

K.3. Cancellation of Approved Separation Order Process Use this process for cancelling a separation order once approved in DA.

Step	Who Does It	What Happens
1	PSC (EPM/OPM/RP M)	<ul style="list-style-type: none"> • Cancels separation request in DA. Notifies P&A Office to cancel Separation Order. • Authorizes retention IAW Reference (b) for enlisted members or extends Officer expected Active Duty termination date IAW Reference (c). Notifies P&A Office of action.
2	P&A Office	<p>Within two business days of notification, initiates Cancel Order process in DA using the Cancelling a Separation Order user guide and submits to P&A Supervisor or Yeoman with By Direction Authority for approval.</p> <ul style="list-style-type: none"> • Select “Cancel Order and Funding” if no expenditure will be/has been recorded against the POET. • If an expenditure will be or has been recorded against the POET, select “Cancel Order.”

3	P&A Supervisor	Within three business days of receipt, approves cancelled Separation Order in DA using the Cancelling a Separation Order user guide and notifies the P&A Tech.
4	P&A Office	Within two business days of notification, enters the retention document in DA and routes to SPO for approval.
5	SPO	Within three business days of receipt, approves retention document in DA and notifies P&A Office.
6	P&A Office	Within two business days of approval, sends email notification to PPC (SEP) and PSC (BOPS-C) using the email format found in Figure 3-2.
7	PPC (SEP)	Upon receipt of the trouble ticket, ensures that the termination Job Data row is deleted. Notifies the P&A Office if member will require a special payment for non-receipt of pay.
8	P&A Office	Within two business days of notification: <ul style="list-style-type: none"> • Verifies entitlements and restarts, if necessary. • Routes entitlement and/or special payment for non-receipt of pay transactions (if applicable) to SPO for approval IAW this publication. • Notifies member of delay in pay, if applicable.
9	SPO	Within three business days of receipt, approves entitlement and special payment transactions, if applicable.

Table 3-17 Cancellation of Approved Separation Order Process

**K.4. Email
Format for
Cancelled
Separations**

Use this email format for cancelled separations.

From: P&A Office
To: PPC-DG-CustomerCare@uscg.mil; CGPSC-BOPS-C@uscg.mil
Cc: Unit POC
Subject: NOTIFICATION OF CANCELLED SEPARATION ORDER FOR _____ (NAME/EMPLID) _____, USCG(R)

Reference (A): PSC (OPM/EPM) Separation authorization of YYYYMMDD (if applicable)

1. Date of cancelled separation and date cancelled in DA: Member separation for YYYYMMDD cancelled in DA on YYYYMMDD.
2. Reason: (For example: Member retained for 3 months pending medical board/disciplinary action or Member reenlisted for XX years/extended for XX months.)
3. Order POET Accounting information.
4. New Expected Active Duty Termination Date.
5. P&A Office Point of Contact (name and phone number).

Figure 3-2 Email Format for Cancelled Separations

Section L: SELRES Separations

- L.1. **Introduction** This section describes the procedures for separating/discharging SELRES. This section *supplements* the procedures within this chapter as well as Chapter 10 (Reserve Activities) for SELRES members being RELAD from long-term Active Duty. Ensure the applicable procedures in both sections are also followed when separating a member from Active Duty.
-
- L.2. **Owner of Process** The Member, Supervisor, Reserve Force Readiness System (RFRS) or Full Time Support staff (FTS), P&A Office, SPO, Permanent Unit, PPC and PSC-Reserve Personnel Management (PSC-RPM) are responsible for this process.
-
- L.3. **References**
- (a) [Military Separations, COMDTINST M1000.4 \(series\)](#)
 - (b) [Transition Assistance Program, COMDTINST 1900.2 \(series\)](#)
 - (c) [Government Travel Charge Card \(GTCC\) Program Policies and Procedures, COMDTINST M4600.18 \(series\)](#)
 - (d) [Personnel Vetting Program \(Security Clearance, Suitability and Credentialing\), COMDTINST 5520.12 \(series\)](#)
 - (e) [Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1 \(series\)](#)
 - (f) [Coast Guard Military Human Resource Record \(CGMHRR\) System, COMDTINST 1080.10 \(series\)](#)
 - (g) [Reserve Duty Status and Participation, COMDTINST 1001.2 \(series\)](#)
 - (h) [Reserve Policy Manual, COMDTINST M1001.28 \(series\)](#)
-
- L.4. **Orders Integration Process** Once the Separation Orders are approved, they will be picked up on the Orders Integration Process around 4-5 days (if possible) before their Separation date. This will build the termination job row and put the orders in a finished status.
- NOTE:** All Separations will have a Separation Order that must be completed and approved before the transaction updates other records, such as JOB, Leave, Payroll, and the DD214.
-
- L.5. **Voluntary Separation Process** Use this process for a voluntary SELRES separation.

Step	Who Does It	What Happens
1	P&A Office	<p>Six months prior to separation date:</p> <ul style="list-style-type: none"> • Completes pre-discharge interview IAW Reference (a). • Provides Transition Assistance Program counseling IAW Reference (b) (only if member will RELAD from long-term orders). • Verifies Reservist does not have obligated service remaining (Run Obligated Service Report).
2	P&A Office	<p>Three months prior to separation date:</p> <ul style="list-style-type: none"> • Completes follow-up interview IAW Reference (a). • Assists member in completing CG-2045 and routes to Command for approval.
3	Unit	<p>Within two business days of receipt, approves the CG-2045 and forwards to the P&A Office for processing.</p>
4	P&A Office	<p>Within two business days of receipt of the approved form:</p> <ul style="list-style-type: none"> • Verifies that all drills and orders have been processed in DA. • Creates discharge orders in DA using the Discharge – End of Enlistment user guide. • Routes to P&A Supervisor or Yeoman with By Direction Authority for review and approval. • Notifies the PSC-RPM-2 assignment officer of member's anticipated date of separation.
5	P&A Supervisor	<p>Within three business days of receipt:</p> <ul style="list-style-type: none"> • Verifies Separation Order and notifies P&A Tech of any corrections needed. • If none, approves Separation Orders in DA using the Approving a Separation Order user guide.
6	P&A Office	<p>Within five business days prior to member's separation:</p> <ul style="list-style-type: none"> • Confirms all drills and orders have been processed in DA. • Provides the member with approved Separation Order and appropriate separation letter(s). • Forwards copy of approved Separation Order to Medical. • Issues Administrative Remarks CG-3307 (SEP-16), Discharge from USCGR inactive duty without immediate reenlistment. • Provides the member with the link to the TSP Withdrawal forms (https://www.tsp.gov/forms/?topics=Withdrawals-and-distributions) if they have a TSP account.

		<ul style="list-style-type: none"> • Completes appropriate Discharge Certificate from https://uscg.sharepoint-mil.us/:f:/r/sites/Yeoman610/Shared%20Documents/General/YNS%20Archives?csf=1&web=1&e=byKb9b and issues Honorable Discharge Button (if applicable) IAW Reference (a). • Provides the member with Reserve Statement of Service for VA Benefits. • Ensures all actions are completed in iPERMS prior to member’s separation IAW Reference (f) and ALSPO A/23.
	NOTE:	<p>Discharge certificates are limited distribution forms. Only SPOs and P&A Offices are authorized to possess the templates.</p>
7	Unit	<p>On day of separation:</p> <ul style="list-style-type: none"> • Notifies GTCC Coordinator of member’s separation for account closure IAW Reference (c). • Conducts Final Security Termination Briefing IAW Reference (d). • Collects the member’s Common Access Card and dependent ID cards. Returns them to the nearest RAPIDS facility (https://www.dmdc.osd.mil/rsl) for disposal IAW Reference (e). • Collects all government property issued to SELRES member, including any building keys, gear and portable computer. Updates safe combinations.
	NOTE:	<p>If SELRES members have remaining Military Service Obligation (MSO), verify with ID Card Manual, Reference (e) for proper issuance.</p>
	NOTE:	<p>Following separation, evidence of case review for separations (where PSC-RPM is the discharge authority) shall be retained at PSC for a minimum of three years.</p>
	NOTE:	<p>Pay entitlements for a member who is being discharged will automatically be stopped on the effective date of separation. SPOs do not need to manually stop pay entitlements for a member who is separating, unless the</p>

	<p>entitlement is to stop on a day other than the date of separation or the member will be performing long-term Active Duty in the Reserve component immediately following the discharge.</p>
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Table 3-18 Voluntary SELRES Separation Process

L.6. Involuntary Separation Process Use this process for an involuntary SELRES Separation.

Step	Who Does It	What Happens
1	PSC-RPM-1	Approves separation and generates separation request in DA. Forwards approved separation request to P&A Office.
2	P&A Office	<p>Within two business days of receipt of the approved request:</p> <ul style="list-style-type: none"> • Verifies that all drills and orders have been processed in DA. • Creates discharge orders in DA using the Discharge – End of Enlistment user guide. • Routes to P&A Supervisor or Yeoman with By Direction Authority for review and approval. • Notifies the PSC-RPM-2 assignment officer of member’s date of separation. • Notifies PPC (SEP) via trouble ticket to PPC-DG-CustomerCare@uscg.mil if member has a leave balance and separation is anything other than ‘honorable’ conditions.
3	P&A Supervisor	<p>Within three business days of receipt:</p> <ul style="list-style-type: none"> • Verifies Separation Order and notifies P&A Tech of any corrections needed. • If none, approves Separation Orders in DA using the Approving a Separation Order user guide.
4	P&A Office	<p>Within five business days prior to member’s separation:</p> <ul style="list-style-type: none"> • Confirms that all drills and orders have been processed in DA. • Provides the member with approved Separation Order and appropriate separation letter(s). • Forwards copy of approved Separation Order to Medical. • Issues Administrative Remarks CG-3307 (SEP-16), Discharge from USCGR inactive duty without immediate reenlistment.

		<ul style="list-style-type: none"> • Provides the member with the link to the TSP Withdrawal forms (https://www.tsp.gov/forms/?topics=Withdrawals-and-distributions) if they have a TSP account. • Completes appropriate Discharge Certificate from https://uscg.sharepoint-mil.us/:f:/r/sites/Yeoman610/Shared%20Documents/General/YNS%20Archives?csf=1&web=1&e=bvKb9b and issues Honorable Discharge Button (if applicable) IAW Reference (a). • Provides the member with Reserve Statement of Service for VA Benefits. • Ensures all actions are completed in iPERMS prior to member's separation IAW Reference (f) and ALSPO A/23.
	NOTE:	<p>Discharge certificates are limited distribution forms. Only SPOs and P&A Offices are authorized to possess the templates.</p>
5	Unit	<p>On day of separation:</p> <ul style="list-style-type: none"> • Notifies GTCC Coordinator of member's separation for account closure IAW Reference (c). • Conducts Final Security Termination Briefing IAW Reference (d). • Collects the member's Common Access Card and dependent ID cards. Returns them to the nearest RAPIDS facility (https://www.dmdc.osd.mil/rsl) for disposal IAW Reference (e). • Collects all government property issued to SELRES member, including any building keys, gear and portable computer. Updates safe combinations.
	NOTE:	<p>Pay entitlements for a member who is being discharged will automatically be stopped on the effective date of separation. SPOs do not need to manually stop pay entitlements for a member who is separating, unless the entitlement is to stop on a day other than the date of separation or the member will be performing long-term Active Duty in the Reserve component immediately following the discharge.</p>

Table 3-19 Involuntary SELRES Separation Process

Section M: Discharge of SELRES for Non-Participation

M.1. Introduction This section establishes the process to begin discharge proceedings for SELRES members in a non-participation status.

M.2. Owner of Process Non-participation requires the unit to take an active role in working and communicating with the immediate supervisor and P&A Office.
The Member, Supervisor, RFRS or FTS staff, P&A Office, SPO, Permanent Unit, PPC, and PSC-RPM are responsible for this process.

- M.3. References**
- (a) [Coast Guard Military Human Resource Record \(CGMHRR\) System, COMDTINST 1080.10 \(series\)](#)
 - (b) [Military Separations, COMDTINST M1000.4 \(series\)](#)
 - (c) [Reserve Policy Manual, COMDTINST M1001.28 \(series\)](#)
 - (d) [Identification Cards for Members of the Uniformed Services, Their Eligible Family Members, and Other Eligible Personnel, COMDTINST M5512.1 \(series\)](#)
 - (e) [Personnel Vetting Program \(Security Clearance, Suitability and Credentialing\), COMDTINST 5520.12 \(series\)](#)
 - (f) [Government Travel Charge Card \(GTCC\) Program Policies and Procedures, COMDTINST M4600.18 \(series\)](#)
 - (g) [Reserve Duty Status and Participation, COMDTINST 1001.2 \(series\)](#)

M.4. SELRES Discharge for Non-Participation Use this process to discharge a SELRES member for non-participation.

Step	Who Does It	What Happens
1	Supervisor	Unexcused absence (First Offense): <ul style="list-style-type: none"> • Within 3 business days, contacts SELRES member to discuss reason for missing drill(s). • Reviews DA for drilling status and evaluations to prevent continued non-performance. • Requests SELRES member appear to sign acknowledgement of failure to report for scheduled IDT.
NOTE:		If SELRES member is unavailable, sends correspondence and prepared Administrative Remarks Form (CG-3307), with Counselor for failure to report

		for scheduled IDT entry (RPM-01) via certified mail to last current address with return receipt and self-addressed stamped envelope for SELRES member to sign the acknowledgment of missed drill(s).
	NOTE:	<p>IAW Reference (g), excused drills include:</p> <ul style="list-style-type: none"> • Illness or injury of the Reservist • Serious or unusual hardship due to unforeseen emergency • Accident or illness of a family member requiring presence or other action by the Reservist • Death or imminent death of a member of the immediate family • At command discretion
	WARNING:	<p><i>If a Reservist is absent from a scheduled drill for any other reason than listed above, the absence must be recorded as unexcused in DA and shall not be rescheduled (e.g., if authorized 48 paid drills in a fiscal year and is reported as having an unexcused for a multiple IDT drill, then the number of authorized paid drills for the year is reduced to 46). Commands may grant an excused absence based on a Reservist's prompt notification and submission of adequate justification.</i></p>
2	SELRES member	Immediately contacts supervisor or unit Senior Enlisted Reserve Advisor (SERA) or the Command Chief to resolve non-participation issue and/or discuss options to change Reserve component.
3	Supervisor	Counsels SELRES member and proceeds with discharge, or transfer to IRR, as appropriate.
4	Supervisor/ SERA	<p>After third unexcused absence:</p> <ul style="list-style-type: none"> • Sends Non-participation Memo/Member Acknowledgment (Figure 3-3 and Figure 3-4) to current home address via certified mail with return receipt and self-addressed stamped envelope. • Notifies P&A Office to document procedure.
5	P&A Office	Documents procedure on form CG-3307 for record purposes and uploads to iPERMS IAW Reference (a).
6	Supervisor/ SERA	<p>After fifth unexcused absence:</p> <ul style="list-style-type: none"> • Contacts SELRES member to correct absenteeism.

		<ul style="list-style-type: none"> • Reviews DA for drilling status and evaluations to identify methods to prevent continued non-performance. • If SELRES member is unavailable, sends Non-participation Memo/Member Acknowledgement (Figure 3-3 and Figure 3-4) to current home address via certified mail with return receipt and self-addressed stamped envelope. • Notifies P&A to document procedure on form CG-3307 for record purposes.
	NOTE:	<p>The Commanding Officer is authorized to recommend discharge at any time during the probationary period if member is not making an effort to overcome the deficiency IAW Reference (b).</p>
7	P&A Office	Documents procedure on form CG-3307 for record purposes and uploads to iPERMS IAW Reference (a).
8	CO	<p>After ninth unexcused absence:</p> <ul style="list-style-type: none"> • Sends Discharge Memorandum/Member Acknowledgement (Figure 3-5 and Figure 3-6) by certified mail to member with stamped, self-addressed envelope and return receipt. • Notifies P&A to document procedure. • If member fails to respond, document and continue process for discharge.
9	P&A Office	Documents procedure on form CG-3307 for record purposes and uploads to iPERMS IAW Reference (a).
10	Unit/CO	<p>Within 30 days of second notification:</p> <ul style="list-style-type: none"> • Prepares Discharge Memorandum (Figure 3-7 or Figure 3-8) request for Honorable/Dishonorable Discharge to PSC (RPM). • Discharge package will include the following documentation: <ul style="list-style-type: none"> ➤ Notice of Intent to Recommend Discharge. ➤ Member Acknowledgement of Command Intent to Recommend Discharge. ➤ Copies of Return Receipt Request. • DA screen print indicating address and phone number of record. • Non-Participation Notice mailed to member (with failed delivery notation from USPS).

		<ul style="list-style-type: none"> • Statement of (Rate/Grade Name of member who attempted to contact) SELRES member with details related to failed response. • DA screen print indicating (XX) IDT drills and (XX) ADT days completed.
11	P&A Office	<ul style="list-style-type: none"> • Verifies SELRES member does not have service obligation remaining (Run Obligated Service Report). • Verifies with PPC (MAS) of possible bonus recoupment. • Completes DA transactions (DD214, Discharge or Retirement). • Notifies Health Record Custodian and uploads documents to iPERMS IAW Reference (a) and ALSPO A/23.
12	Unit	<ul style="list-style-type: none"> • Collects member’s Common Access Card and dependent ID cards; returns to the nearest Real-Time Automated Personnel Identification System facility for disposal IAW Reference (d). • Terminates Clearance with Security Manager IAW Reference (e). • Ensures Government Travel Charge Card account is terminated by the unit GTCC Coordinator IAW Reference (f). • Collects all government property issued to SELRES member, including any building keys, gear and miscellaneous items. Updates safe combinations.

Table 3-20 SELRES Discharge for Non-Participation Process

MEMORANDUM

From: <Initials & Surname of CO> Commanding Officer	Reply to Attn of:	Rate/Grade Name of POC POC Phone number
--	----------------------	--

To: <Rate/Grade MemberName>

Subj: NOTICE OF FAILURE TO PARTICIPATE
--

Ref: (a) Military Separations, COMDTINST M1000.4 (series) (b) Reserve Policy Manual, COMDTINST M1001.28 (series) (c) Reserve Duty Status and Participation Manual, COMDTINST M1001.2
--

1. You are hereby notified that you have failed to meet the minimum participation standards as outlined in Chapter 3-D of reference (c). Your deficient participation includes, but is not limited to failure to:

Edit this list as needed.

- perform more than <enter 43 (54 for deployable units)> IDT drills per year.
- perform 12 or more days of ADT drills per year.
- respond to Annual Screening Questionnaires between AUG and NOV at a minimum.

2. Records indicate you **have** completed your Military Service Obligation. Not participating while in a SELRES status is not an option. You should begin drilling or take action to be removed from the SELRES status, or your participation deficiency could result in corrective measures, which could include:

- An Honorable, General, or Bad Conduct Discharge.
- Arrest by civil authorities for failure to respond to orders, DD 553 Wanted by Armed Forces.
- Recoupment of any bonus funds you may have received.

3. Our goal is to provide opportunities to correct these deficiencies. Assistance includes providing other participation opportunities to assist you in meeting SELRES participation standards.

4. **Please contact <rate/grade/name of command POC at POC phone number> to discuss this matter.** In addition to calling, you *must* return the enclosed form stating your participation intentions. Please return the attached form no later than <date>. Failure to respond to this order will result in a participation failure and may be construed as your acknowledgement to be subject to disciplinary action.

#

Encl: (1) Member Acknowledgement of Failure to Participate Notice

Figure 3-3 Sample Memo 1 – Notice of Failure to Participate

MEMORANDUM

From: <Rate name of member with unsat participation> Reply to Attn of: _____
To: Commanding Officer, <Your unit name>
Subj: MEMBER ACKNOWLEDGEMENT OF FAILURE TO PARTICIPATE NOTICE
Ref: (a) <Your unit name> memo 1001 dtd date command signed failure to participate memo

1. **Acknowledgement:** (initial each):

_____ (initials)	I understand that I have failed to meet the required minimum participation standards as outlined in the Reserve Duty Status and Participation Manual, COMDTINST M1001.2, Chapter 3.D.
_____ (initials)	I understand that various disciplinary actions may be pursued and the possible implications of such actions.

2. **Member career desires:** (initial only one):

Or	_____ (initials)	I would like to continue in a SELRES status. I agree to meet the minimum participation standards as outlined in the Reserve Duty Status and Participation Manual, COMDTINST M1001.2, Chapter 3.D.
	_____ (initials)	I do not wish to participate. Please contact me to discuss my options. <i>(Provide address and phone numbers below)</i>

3. **Member signature:** (provide home address and phone number):

(Signature of member) (Date)

(Street)

(City, State, Zip Code)

(Area code and Phone Number)

Figure 3-4 Attachment to Memo 1 – Member Acknowledgement of Failure to Participate Notice

MEMORANDUM

From: <Initials & Surname of CO> Commanding Officer	Reply to <Rate/Grade Name of Attn of: POC POC Phone number>
--	--

To: <Rate/Grade Member Name>

Subj: NOTICE OF INTENT TO RECOMMEND DISCHARGE

Ref: (a) Reserve Duty Status and Participation Manual, COMDTINST M1001.2 (b) Military Separations, COMDTINST M1000.4 (series)
--

1. You are being notified that to discharge you from the U.S. Coast Guard Reserve has been initiated pursuant to the provisions of references (a) and (b). In your response to our efforts to correct your participation deficiencies, you made it clear that you had no intention of participation in the Coast Guard Reserve. Enclosure (1) is your statement to this effect.
2. Since you have fulfilled your service obligations, I will recommend to Coast Guard Personnel Service Center (PSC) that your discharge be characterized as Honorable as defined by reference (b), reason: Convenience of the Government in accordance with reference (b).
3. However, due to your failure to participate as required while in an Active Status, I will recommend an RE-3 re-enlistment code as describe by reference (b). An RE-3 re-enlistment code will hinder re-entry to the Coast Guard or any other military service.
4. It is within your rights to rebut this decision, by submitting a statement on your behalf to be included with my recommendation.
5. You have the right to present your case and appear in person before an administrative discharge board, if you so desire. Please contact <Your Command POC & phone number> if you wish to explore this option.
6. You must complete enclosure (2) to communicate your desire to PSC. Return the completed and signed memo to <Your Command POC> no later than <date>. If you do not return the memo by <date>, the discharge recommendation will proceed without your input. Failure to return the memo in a timely manner might also be construed as your consent to discharge.

#

Encl: (1) Rate/Grade MemberName Memo dtd date (Acknowledgement of Failure to Participate)
(2) Acknowledgement of Command recommendation to Discharge

Figure 3-5 Sample Memo 2 - Notice of Intent to Recommend Discharge

MEMORANDUM							
From: Rate name of member to be discharged	Reply to Attn of:						
To: Commanding Officer, Your unit name							
Subj: MEMBER ACKNOWLEDGEMENT OF COMMAND INTENT TO RECOMMEND DISCHARGE							
Ref: (a) Your unit name memo 1001 dtd date command signed notification memo							
<p>1. Acknowledgement of counseling (initial each):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; padding: 5px; text-align: center;"><i>(initials)</i></td> <td style="padding: 5px;">I understand why my command is recommending discharge as detailed in ref (a).</td> </tr> </table>		<i>(initials)</i>	I understand why my command is recommending discharge as detailed in ref (a).				
<i>(initials)</i>	I understand why my command is recommending discharge as detailed in ref (a).						
<p>2. Member statement: (initial <u>only one</u>):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; padding: 5px; text-align: center;">Or</td> <td style="width: 15%; padding: 5px; text-align: center;"><i>(initials)</i></td> <td style="padding: 5px;">I waive my right to make a statement on my behalf.</td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px; text-align: center;"><i>(initials)</i></td> <td style="padding: 5px;">I have attached a statement on my behalf.</td> </tr> </table>		Or	<i>(initials)</i>	I waive my right to make a statement on my behalf.		<i>(initials)</i>	I have attached a statement on my behalf.
Or	<i>(initials)</i>	I waive my right to make a statement on my behalf.					
	<i>(initials)</i>	I have attached a statement on my behalf.					
<p>3. Member desire: (initial <u>only one</u>):</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; padding: 5px; text-align: center;">Or</td> <td style="width: 15%; padding: 5px; text-align: center;"><i>(initials)</i></td> <td style="padding: 5px;">I do not object to being discharged from the United States Coast Guard Reserve.</td> </tr> <tr> <td style="padding: 5px;"></td> <td style="padding: 5px; text-align: center;"><i>(initials)</i></td> <td style="padding: 5px;">I object to being discharged from the United States Coast Guard Reserve</td> </tr> </table>		Or	<i>(initials)</i>	I do not object to being discharged from the United States Coast Guard Reserve.		<i>(initials)</i>	I object to being discharged from the United States Coast Guard Reserve
Or	<i>(initials)</i>	I do not object to being discharged from the United States Coast Guard Reserve.					
	<i>(initials)</i>	I object to being discharged from the United States Coast Guard Reserve					
<table style="width: 100%;"> <tr> <td style="width: 50%; border-top: 1px solid black; text-align: center;"><i>(signature of member)</i></td> <td style="width: 50%; border-top: 1px solid black; text-align: center;"><i>(date)</i></td> </tr> </table>		<i>(signature of member)</i>	<i>(date)</i>				
<i>(signature of member)</i>	<i>(date)</i>						

Figure 3-6 Attachment to Memo 2 – Mbr Acknowledgement of Command Intent to Recommend Discharge

MEMORANDUM

From:	<Initials & Surname of CO> Commanding Officer	Reply to Attn of:	<Rate/Grade Name of POC POC Phone number>
To:	CG PSC-rpm		
Subj:	RECOMMENDATION FOR DISCHARGE FOR <Rate/Grade Member Name> USCGR, <EMPLID>		
Ref:	(a) Reserve Duty Status and Participation Manual, COMDTINST M1001.2 (b) Military Separations, COMDTINST M1000.4 (series)		
	<p>1. I recommend <Rate/Grade Member Name> be discharged from the United States Coast Guard Reserve for failure to meet the minimum participation standards as outlined in Chapter 3-D of reference (a). <Rate/Grade Member Name> has overtly stated <he or she> has no intent to participate in Reserve activities. After corresponding with the member, it was determined that interventions would not return the member to a satisfactory participation status.</p> <p>2. Given the member has completed <his or her> military service obligation and overall service is satisfactory, an Honorable discharge is recommended as defined by reference (b), reason for Convenience of the Government defined by reference (b). An RE-3 re-enlistment code is recommended given the member's stated ambivalence toward meeting the terms of their current enlistment contract.</p> <p>3. I recommend <i>against</i> forgiving any Coast Guard debts the member may have.</p> <p>4. Enclosure (2) is my memo informing the member of my intent to recommend this discharge. Enclosure (3) is the member's acknowledgement of my intent. The member <is (or is not)> opposed to this action, and the member <chose (did not choose)> to make a statement on <his or her> behalf. <Enclosure (4) is the member's statement.></p> <p style="text-align: center;">#</p>		
Encl:	(1) Member Acknowledgement of Failure to Participate (2) Command Notice of Intent to Recommend Discharge (3) Member Acknowledgement of Command Intent to Recommend Discharge (4) Statement of Rate/Grade MemberName dtd date of statement		

Figure 3-7 Sample Memo 3 - Recommendation for Discharge - No MSO Remaining

MEMORANDUM

From:	<Initials & Surname of CO> Commanding Officer	Reply to Attn of:	<Rate/Grade Name of POC POC Phone number>
To:	CG PSC-rpm		
Subj:	RECOMMENDATION FOR DISCHARGE FOR <Rate/Grade Member Name> USCGR, <EMPLID>		
Ref:	(a) Reserve Duty Status and Participation Manual, COMDTINST M1001.2 (b) Military Separations, COMDTINST M1000.4 (series)		
	<p>1. I recommend <Rate/Grade Member Name> be discharged from the United States Coast Guard Reserve for failure to meet the minimum participation standards as outlined in Chapter 3-D of reference (a). <Rate/Grade Member Name> has overtly stated <he/she> has no intent to participate in Reserve activities. After corresponding with the member, it was determined <he/she> would not return to a satisfactory participation status.</p> <p>2. <Rate/Grade MemberName> demonstrated a repeated pattern of failure to meet participation requirements. These failures occurred despite assistance and counseling provided to help the member overcome deficiencies. The administrative remarks in Enclosure (1) detail the member's non-participation. A summary follows:</p> <ul style="list-style-type: none"> a. Failure to notify the Coast Guard of changes in address and phone number b. Failure to perform IDT and ADT drills. Enclosures (1) through (4) document this unsatisfactory participation. <p>3. Attempts to contact the member to correct these deficiencies have been unsuccessful, as a result, this discharge package is submitted without member involvement.</p> <p>4. In this case the member has <i>not</i> completed <his or her> military service obligation. An Honorable discharge is not warranted, and I recommend a General Discharge under Honorable Conditions as defined by reference (b). An RE-4 re-enlistment code is recommended to prevent re-entry into military service.</p> <p>5. I also recommend <i>against</i> forgiving any Coast Guard debts the member may have.</p> <p style="text-align: center;">#</p>		
Encl:	<ul style="list-style-type: none"> (1) Administrative Remarks (CG-3307) (2) Notice of Intent to Recommend Discharge (3) Member Acknowledgement of Command Intent to Recommend Discharge (4) Direct Access screen print indicating address and phone number of record (5) Non-Participation Notice mailed to member (with failed delivery notation from USPS) (6) Statement of Rate/Grade Name of your crew who tried to call Detailing Failed Phone Contact (7) Direct Access screen print indicating <XX> IDT drills and <XX> ADT drills 		

Figure 3-8 Sample Memo 4 - Recommendation for Discharge - MSO Not Completed

Section N: Standard Separation Letters

N.1. **Introduction** This section contains standard separation letters. Click [here](#) for the Microsoft Word version.

<p><i>Final Pay for All Separations</i></p>	1900
MEMORANDUM	
<p>From: M. R. Roberts CAPT CG GP Somewhere</p> <p>To: John P. Jones GMC Thru: B. M. Chief CG STA Anywhere</p> <p>Subj: FINAL PAY UPON SEPARATION</p>	
<p>1. The final payment provided to you upon your separation from active duty represents 100 percent of your final pay for the last pay period of active duty. This payment reflects pay due to you based on your P&A Office's transactions processed through Direct Access and a final pay review completed at the Coast Guard Pay and Personnel Center (PPC). There are many factors that affect final pay to include timeliness of transactions approved by your P&A and Payment Approving Office (PAO), debt amounts owed due to overpayment of pay and/or allowances and disposition of leave.</p> <p>2. Your final Payslip will show all transactions processed in Direct Access for the final pay period in which you separated from service, however, if your separation transaction was processed late, your Payslip may not indicate the correct amount of final pay due.</p> <p>3. Any amounts owed to the government will be deducted from your final pay at 100%. If the debt amount exceeds net pay due, PPC will initiate action to collect any remaining monies due.</p> <p>For members retired with pay, PPC will begin collection of the remaining amount owed from retired pay. You will be notified of this collection action via letter from PPC-RAS.</p> <p>For separated members, PPC will send collection action to the Coast Guard Finance Center. You will receive an Out of Service Debt letter from PPC-SEP with a summary detailing the overpayment and instructions on how to repay the remaining amount owed.</p> <p>4. Your final Payslip will be available through Direct Access Self Service for a period of 18 months following your separation from service.</p> <p>5. Your IRS form W-2 for the calendar year in which you separated will be made available to you through Direct Access Self Service no later than 31 January of the year following separation. Your IRS Form W-2 will be mailed to your final mailing address that you entered in Direct Access unless you gave consent to receive documents electronically. Electronic forms availability in Direct Access is HIGHLY encouraged because it reduces the potential of fraud and inadvertent spillage of Personally Identifiable Information (PII) due to possible loss of paper documents in the ground mail system.</p> <p>6. Please contact PPC's Customer Care Branch via email at ppc-dg-customer-care@uscg.mil or via phone at (866) 772-8724 with questions concerning your final pay, final travel claim settlement, or tax forms.</p>	
#	

Figure 3-9 Sample Memo 5 - Final Pay for All Separations

1900
15 March 2022**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 PPC (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 V of the Retired Pay Account Worksheet and Survivor benefit Election (DD Form 2656) in the presence of a notary public.
 - 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 DD Form 2656 (<https://www.dcms.uscg.mil/ppc/pd/forms/>) 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 Pay & Personnel Center, Retiree and Annuitant Services (RAS) at 1-800-PPCUSCG (800-772-8724) or (785-339-3415) are available to assist you and your spouse.

#

Figure 3-10 Sample Memo 6 - Survivor Benefit Plan Election Requirements

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 36 and 37 of DD Form 2656.

(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).

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 SBP 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.

Continued on next page

Figure 3-11 Sample Letter - Spousal Notification/Concurrence Letter pg. 1

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, which must be notarized if you concur with your spouse's election, 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, [Enter spouse's full name], [Enter "wife" or "husband"] of [Enter Retiree's Name, rank/rate and SSN] have been advised that my [Enter "husband" or "wife"] has made the following election under the Survivor Benefit Plan: [enter retiree's election--must be identical to the fourth paragraph of the above letter].

I do not consent to my spouse's election (Sign below and return this letter)

Spouse Signature: _____ Date _____

I hereby concur with the Survivor Benefit Plan election made by my spouse. I have received information that explains the options available and the effects of those options. I have signed this statement of my own free will. (Sign below in the presence of a notary public and return this letter)

Spouse Signature: _____ Date _____

Subscribed and Sworn to before me in County _____ State _____

On Month _____ Day _____, 20_____

NOTARY SEAL HERE

My Commission expires the _____ day _____, 20_____

Notary Public (Signature) _____

Figure 3-12 Sample Letter - Spousal Notification/Concurrence Letter pg. 2

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 (PSC-mr), Personnel Service Center, US Coast Guard Stop 7200, 2703 MARTIN LUTHER KING JR AVE SE WASHINGTON DC 20593-7200. 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-CG, 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 Pay & Personnel 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.

Continued on next page

Figure 3-13 Sample Memo 7 - Information Regarding Active Duty Separation Status pg. 1

Subj: INFORMATION REGARDING ACTIVE DUTY SEPARATION STATUS	1900 xx xxx 20xx
<p>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.</p>	
#	
Encl: (1) Travel Vouchers	

Figure 3-14 Sample Memo 7 - Information Regarding Active Duty Separation Status pg. 2

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
(b) Reserve Duty Status and Participation Manual, COMDTINST M1001.2

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 component. 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 per Section 3.B.1 of reference (b).

3. You have stated that your mailing address is: (**insert correct final address**)

4. Subsequent to this date, your new unit will be **Commander, Personnel Service Center (rpm-3), MS 7200, 2703 MARTIN LUTHER KING JR AVE SE, WASHINGTON DC 20593-7200**. 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 PSC-rpm-3 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. For more information on the IRR, visit: <https://www.dcms.uscg.mil/PSC/rpm/RPM-3/>

#

Copy: Member PDR

Figure 3-15 Sample Memo 8 - Release from Active Duty and Transfer to the IRR pg. 1

Include the following Order Note on the member's separation orders:

R35 Order Note

You are administratively assigned to CG-PSC-RPM-3 in the Individual Ready Reserve (IRR). While a member of the IRR you ARE obligated to:

- a. Answer official correspondence
- b. Complete the Annual Screening Questionnaire
- c. Promptly advise Commander (CG PSC-RPM) of changes to residence, phone number, email address, mailing address or other contact information, marital status, number of dependents, civilian education or employment and any physical condition or other factor that would affect the members immediate availability for active duty military service
- d. Meet the minimum training requirements for individual military service obligation or contractual agreement
- e. Maintain sea bag items
- f. Officers in the IRR must attain 50 points per anniversary year to remain in an active status
- g. Enlisted IRR members with 20 or more qualifying federal service towards a non-regular retirement are required to attain 50 points per anniversary year to remain in an active status
- h. Maintain weight standards (official weigh in not required)

Failure to comply with the above contractual obligations may result in discharge from the Coast Guard or transfer to the Standby Reserve, Inactive Status List (ISL).

Figure 3-16 Sample Memo 8 - Release from Active Duty and Transfer to the IRR pg. 2

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

Figure 3-17 Sample Letter - Reserve Civilian Employer Thank You Letter

U.S. Department of Homeland Security United States Coast Guard				1800	
MEMORANDUM					
From:		Reply to		Attn of:	
To: CGPPC-sep (via e-mail to: ppc-dg-customer-care@uscg.mil)					
Subj: RETIREMENT CERTIFICATE REQUEST					
Ref: (a) Personnel & Pay Procedures Manual, PPCINST M1000.2 (series), Chap 3-B					
1. The following information is submitted per reference (a).					
a.	Is this request for replacement certificates?	Yes/No If yes, explain.			
b.	Member's full name:	First Middle Last			
c.	Member's gender:	Male / Female			
d.	Member's employee ID number:	1234567			
e.	Member's Rate/Rank:	Yeoman First Class / Lieutenant Commander			
f.	Member's branch of service:	Active Duty / Reserve			
g.	Permanent Disability	Yes / No			
h.	Member's marital status:	Married / Single			
i.	Spouse's Name:	If married – First MI Last			
j.	Spouse's Gender:	If married – Male / Female			
k.	Relationship:	If married – Husband / Wife / Spouse			
l.	Date of retirement ceremony:	Enter date. Submit at least 60 days prior to this date.			
m.	Retirement date:	Enter date.			
n.	Retiree's total years in service:	Enter total years of service			
o.	Active Duty Base Date (ADBBD)	Enter Date.			
p.	Unit name:	Name of unit			
q.	Unit mailing address:	Full mailing address Including City, State, and zip code.			
r.	Unit point of contact (POC) name:	Enter the name of the POC			
s.	POC rank/rate/title:	Enter the POC's title			
t.	POC daytime telephone number:	Enter the POC's phone number with area code.			
u.	POC e-mail address:	First.m.last@uscg.mil			
v.	Comments/Requests:	Enter any additional information.			
#					

Figure 3-18 Sample Memo 9 - Request to PPC (SEP) for Active Duty Retirement Certificate

	Commander United States Coast Guard Unit	Unit Address City, State Zip Phone: ((000) 000-0000 1800
--	---	--

MEMORANDUM

From:	I.M. Last Name, RATE, EMPLID CG Unit
To:	CG PSC-epm-1 (for enlisted personnel)/CG-PSC-opm-1 (for officers)/ CG-PSC-rpm-1 (for reservists) (Submit via e-mail to HQS-SMB-CGPSC-EPM-1-Retirements@uscg.mil (AD enlisted), or HQS-SMB-CGPSC-RPM-1-Status@uscg.mil for (reservists))
Subj:	LETTER OF APPRECIATION FOR MILITARY/CIVILIAN RETIREE
Ref:	(a) Presidential Recognition on Retirement from Military Service, DoD Instruction 1348.34

1. Request for Presidential Retirement Letter of Appreciation for:

- a. **Name:** First MI. Last
- b. **Rank:** (Insert Rank/Rate Here)
- c. **Service:** U.S. Coast Guard
- d. **Years of Service:** ## years
- e. **Retirement Date:** DD Month YYYY
- f. **Ceremony Date:** DD Month YYYY
- g. **Home Address:**
 Street Address
 City, State, Zip Code
- h. **Unit Address:**
 U. S. Coast Guard
 Unit Name
 Street Address
 City, State, Zip Code
- i. **Disposition Instructions:** Mail to unit address or home address?
- j. **Attention:** RANK First MI. Last
- k. **POC:** RANK First MI. Last, (###) ###-####, First.MI.Last@uscg.mil

#

Figure 3-19 Sample Memo 10 - Request to PSC EPM-1/RPM-1 for 30 Year Presidential Letter of Appreciation

Commander United States Coast Guard Personnel Service Center	STOP 7200 2703 MARTIN LUTHER KING JR AVE SE WASHINGTON DC 20593-7200 Staff Symbol: CG PSC-opm-1 Phone: (703) 872-6432 Fax: (202) 493-1618 1800 12 March 2019
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MEMORANDUM FOR THE MILITARY ASSISTANT TO THE PRESIDENT THRU
 EXECUTIVE SECRETARY TO THE SECRETARY OF HOMELAND SECURITY

Subject: LETTER OF APPRECIATION FROM MILITARY/CIVILIAN RETIREE

Request for Presidential Retirement Letter of Appreciation for:

Name:

Rank:

Service: U.S. Coast Guard

Years of Service:

Retirement Date:

Ceremony Date:

Home Address:

Unit Address:

Disposition Instructions: Mail to unit address?

Attention:

POC:

Chief, Separations Branch OPM-1
 By Direction

Enclosure: Retirement Orders
 Email to: HQ-SMB-CGPSC-OPM-1-Separations@uscg.mil

Figure 3-20 Sample Memo 11 - Request to PSC OPM-1 for 30 Year Presidential Letter of Appreciation

Section O: Statement of Service Letter for Civilian Appointment

- O.1. Introduction** This section provides guidance on issuing a Statement of Service Letter for a member separating from Active Duty who is seeking a civilian appointment.
-
- O.2. References**
- (a) [ALCOAST 144/16](#)
 - (b) [Military Separations, COMDTINST M1000.4 \(series\)](#)
 - (c) [Email ALSPO E/16](#)
 - (d) COMDT (CG-1334) VOW Act Analysis, 23 Jan 2023
-
- O.3. Policy** The CG requires 120-day certification of availability from applicants for civilian appointments, who are planning to retire or separate from the military IAW Reference (a). Therefore, the CG should issue the Veterans Opportunity to Work (VOW) Act certification at earliest, 120 days before a member's approved separation or retirement date from Active Duty, not from the date of terminal leave IAW Reference (d).
-
- O.4. Purpose** A Statement of Service Letter (SOSL) is a written document certifying that the servicemember is expected to be discharged or released from Active Duty service under honorable conditions no later than 120 days from the date the letter is signed.
-
- O.5. SOSL Content** The SOSL must be on CG letterhead and include the following information:
- Military dates of service
 - Expected discharge or release date
 - Character of service
 - Military rank
 - Type of discharge
 - Date when terminal leave will begin
- The SOSL must be signed by, or by direction of the military members' military personnel offices, unit commanders or higher headquarters. The member must authorize release of the information.
-
- O.6. Process** Upon request of a member who is expected to separate from the CG within 120 days and who meets the criteria for discharge under honorable conditions as described in Reference (b), the unit CO/OIC issues the SOSL. The CO/OIC must first verify that the requesting member has an approved separation authorization on file from PSC before letter issuance.

Letters distributed without an approved separation authorization on file are explicitly unauthorized. See Figure 3-21 for a SOSL example/template.

O.7. Questions

Direct questions regarding the 120-day certification policy for CG military members via email to COMDT (CG-1331) at HQS-PolicyandStandards@uscg.mil.

**O.8. SOSL
Example/
Template**

Below is a recommended example. Use Unit stationary, in letter format, with SSIC 1070.


<p>U.S. Department of Homeland Security United States Coast Guard</p>		<p>Commanding Officer United States Coast Guard Unit Name</p>	<p>Address 1 Address 2 City, ST, Zip Staff Symbol: Phone: FAX:</p>
			<p>1070 March 9, 2016</p>
<p>Title Attn: Address 1 Address 2 City, ST, Zip</p>			
<p>Dear Sir or Madam:</p>			
<p>In compliance with 5 U.S.C. § 2108a, The Hire Heroes Act of 2011 (P.L. 112-56) this letter is to certify that (ENTER RANK/PAYGRADE & NAME) has served on Active Duty in the United States Coast Guard since March 1999, and is within 120 days from separation.</p>			
<p>(ENTER RANK/PAYGRADE & LAST NAME) is currently serving in accordance with Active Duty orders at (ENTER CURRENT UNIT & ADDRESS) since July 2014 and will separate from the United States Coast Guard on October 31, 2016.</p>			
<p>Full Name: (FIRST MI LAST) Rank/Rate: Lieutenant Pay Grade: O-3 Date of Birth: February 09, 1976 Active Duty Base Date: February 16, 2000 Separation Date: October 01, 2016 Terminal Leave Date: August 01, 2016 Character of Service: Honorable/General</p>			
<p>If you have any further questions contact me at the above number.</p>			
<p style="text-align: center;">Sincerely,</p>			
<p style="text-align: center;">A. B. SEA Chief Warrant Officer U. S. Coast Guard By direction</p>			
<p>I authorize the release of the above information.</p>			
<p style="text-align: center;">(FIRST MI, LAST), LT, USCG</p>			

Figure 3-21 SOSL Example/Template

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