1.) Creation of Customer Service Representative 2 (limited).

a. To accommodate certain specific requests by the field, Web-WEBT-PAX now has CS2 permission. This permission allows the user VIEW ONLY access to all CG Traveler’s Profiles and Travel History. Permissions will be granted by PPC Travel on a case by case basis for a specific purpose and duration. These permissions may only be granted to those individuals who have a CG WSIII and who have a valid Web-WEBT-PAX user account. These permissions will expire within one (1) year of the command signature on the CG7421A form.

b. When filling out the CG7421A form, ensure you are requesting all the permissions you will require to perform your duties. The latest form supersedes all previous forms and those permissions that are not included will be removed from the user role.

c. Once a member has been granted CS2 permissions, their Web-WEBT-PAX profile will look like the below screenshot.
d. User will log in as normal and change their view from Traveler to Customer Service.

![View: Traveler](image1) ![View: Customer Serv.](image2)

e. User will then go to the PROFILE and HISTORY drop down on the left side of the screen and select what they need to look up.

Profile and History »

g. In this example, user is going to look up Donald Duck’s history. Once History is selected, the following screen will appear. Type in the traveler's name or EMPID that you are looking up. Then click search for name. Ensure you have the correct traveler, and then click OK.

![Emp. ID:](image3) [SSN:](image4) [Last Name:](image5) [Search for Name](image6)

OK Cancel Help

h. The traveler history will show up in the ‘order number’ section. Find the TONO in question (either by typing it into the order number field and clicking FIND, or by scrolling down till you find it). Once the TONO is found, click on the DETAIL button to the left of the TONO. This will open up the TONO specific details on authorizations, advances, and settlements against that TONO. Find the specific document you wish to research and click Display to the left of the line.

![Order Number:](image7)

h. From the below screen, you can look at the amounts, dates, remarks and a summary of who ‘touched’ the claim. You may also review the document in detail by clicking View Request (this takes you into the claim as if you were looking at it as the traveler or AO) or you may print the 1351-2 (electronically signed) or the TVS that is associated with this specific document.
i. When you are finished with this document, simply click the DONE button and back your way back out to your main inbox. Repeat process as necessary.

2.) Unit Command Report Permissions.
   a. To accommodate certain specific requests by the field, Web-WEBT-PAX now has Unit Command Report permission. This permission allows the user to access specific reports that have been created by PPC to reduce the amount of ADHOC query requests. Examples of these reports include (but not limited to) OPFAC specific AO listing and OPFAC specific AO stats broke down by AO. These permissions may only be granted to those individuals who have a CG WSIII and who have a valid Web-WEBT-PAX user account. These permissions will expire within one (1) year of the command signature on the CG7421A form.
   b. When filling out the CG7421A form, ensure you are requesting all the permissions you will require to perform your duties. The latest form supersedes all previous forms and those permissions that are not included will be removed from the user role.
c. Once a member has been granted Unit Command permissions, their Web-WEBT-PAX profile will look like the below screenshot.

```
ID: 9999131
Name: DOO, SCOOBY, D

Personal Address Misc. Info T-PAX Info

Traveler Profile

Name: DOO
Surname: SCOOBY
Middle: D

DOO, SCOOBY

T-PAX Inbox

Profile and History > Create New > Tools > Help

Password Rates

Unit Command Reports

1111Q31KNG88000

Unit Command Report

Report Name

First Unit Cmd parameter: 

OK Cancel Help
```

d. User will log into Web-WEBT-PAX normally. Under TOOLS menu is Unit Command Reports.

```
Doo, Scooby

DOO, SCOOBY

[Reservations] [Regulations] [Currency]

Profile and History > Create New > Tools > Help

Password Rates

TOID

Unit Command Reports

1111Q31KNG88000

Unit Command Report

Report Name

First Unit Cmd parameter: 

OK Cancel Help
```

e. Select the name of the report you want to run and type in the required parameters of the query (e.g. OPFAC, start date, end date), then click OK to run the report. Ensure you ‘hover’ over the field to find out what ‘format’ the information needs to be in to successfully run the report (e.g. YYYY/MM/DD for date).
These reports will open an excel spreadsheet. This report WILL NOT contain any type of identification numbers. Columns may need to be expanded depending on the data the cells contain. If you do not know how to manipulate excel, see if someone in your office does. Below is an example of a unit AO listing followed by an AO stats report.

<table>
<thead>
<tr>
<th>OPFAC</th>
<th>RANKTITLE</th>
<th>TRAVLLNAME</th>
<th>TRAVLFNAME</th>
<th>TRAVLMIDINT</th>
</tr>
</thead>
<tbody>
<tr>
<td>7947400</td>
<td>E6</td>
<td>BREWER</td>
<td>COURTNEY</td>
<td>C</td>
</tr>
<tr>
<td>7947400</td>
<td>E7</td>
<td>COASTIE</td>
<td>JOANN</td>
<td>E</td>
</tr>
<tr>
<td>7947400</td>
<td>E5</td>
<td>COASTY</td>
<td>JOE</td>
<td></td>
</tr>
<tr>
<td>7947400</td>
<td>GS7</td>
<td>DUCK</td>
<td>DONALD</td>
<td></td>
</tr>
<tr>
<td>7947400</td>
<td>GS9</td>
<td>HANSER</td>
<td>PATRICIA</td>
<td></td>
</tr>
<tr>
<td>7947400</td>
<td>E5</td>
<td>LEJKOWSKI</td>
<td>KENNETH</td>
<td>F</td>
</tr>
<tr>
<td>7947400</td>
<td>GS10</td>
<td>LOOPHOLE</td>
<td>FINDA</td>
<td>N</td>
</tr>
<tr>
<td>7947400</td>
<td>E5</td>
<td>THUNDER</td>
<td>MOOD</td>
<td>Y</td>
</tr>
<tr>
<td>7947400</td>
<td>GS6</td>
<td>WEIK</td>
<td>DENISE</td>
<td>L</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AO_LASTNAME</th>
<th>AO_FIRSTNAME</th>
<th>NUMCLAIMS</th>
<th>TOTAMT</th>
</tr>
</thead>
<tbody>
<tr>
<td>BREWER</td>
<td>COURTNEY</td>
<td>1</td>
<td>190.83</td>
</tr>
<tr>
<td>HANSER</td>
<td>PATRICIA</td>
<td>2</td>
<td>1159.46</td>
</tr>
<tr>
<td>LEJKOWSKI</td>
<td>KENNETH</td>
<td>55</td>
<td>78066.68</td>
</tr>
<tr>
<td>WEIK</td>
<td>DENISE</td>
<td>40</td>
<td>76411.55</td>
</tr>
</tbody>
</table>

Once you have completed your report runs, simply click the CANCEL button on the report screen and it will bring you back to your WebT-PAX inbox.

3.) Single use of a TONO.

Coast Guard TONOs (Travel Order Numbers) are supposed to be unique to each individual person and trip. In the past, TONOs were being duplicated by different members due to some kind of clerical error. This upgrade will now prevent the duplication of TONOs among travelers. When you are at the below screen, it is important to ensure that TONOs are being entered into WebT-PAX correctly and validating before saving the order information. If the TONO is incorrect, simply make the adjustment in the TONO field prior to saving.
b. If you duplicate a TONO that already exists in the system you will receive the following pop up notification.

- System Notification
  Order number already exists.

  OK

c. If this happens, traveler/proxy/ASP must seek assistance from the TONO issuing authority to have a new TONO issued to the member. The person who used the TONO is not provided to the member. Unit must contact PPC with a customer service help ticket to request a TONO be researched to find out who may be using the TONO incorrectly. That individual will need an amendment to their orders (and a change in the TONO issuing authority’s accountability tracking) so that their TONO is valid.

4.) **Advance Remarks on Travel Voucher Summaries.**
   a. System generated remarks on Advance TVSs have been updated to the following information. It is important that members who receive advances have a copy of the TVS and are counseled on the information it contains.

   **SETTLEMENT OF THISADV SHALL BE MADE WITHIN 3 BUSINESS DAYS AFTER YOU HAVE COMPLETED YOUR TDY TVL OR FOR PCS 30 CALENDAR DAYS AFTER YOU HAVE ARRIVED AT YOUR NEW PDS. SUBMISSION OF THE TVL CLAIM(1351-2) UPON COMPLETION OF TVL IS REQUIRED, EVEN THOUGH THE AMT OF YOUR EXPENSES EQUALS OR EXCEEDS YOUR ADV. IF SETTLEMENT OF THE ADV IS NOT MADE WITHIN 30 DAYS AFTER THE LAST TVL DATE LISTED ON THE ORDER, A DEBT WILL BE BUILT TO RECOUP THE ENTIRE ADV AMT AND MAY BE DEDUCTED FROM YOUR REGULAR PAY.**

   b. PPC Travel office does not ‘close’ TONOs. If the TONO is a ‘no-cost’ order or if the orders are not executed, do not submit a travel claim to PPC for processing as it will be returned without action on PPC’s part. Notify the fund issuing authority so they may close the TONO out in FPD.

5.) **Civilian Pay Rank Structure corrected.** In previous versions of WebT-PAX, the civilian rank structure did not go high enough to fit the needs of Coast Guard members. This has now been resolved with this upgrade.
6.) **Advance Signature Proxy (ASP) ability to delete.**

a. Previously, if an ASP input an advance request on behalf of a member and something was wrong with it, the advance could not be deleted by the ASP. Only the traveler or PPC System Support could delete the request. Now, just like with a regular member, ASPs can delete the request prior to it being approved by the AO. Check the box next to the claim you wish to delete, click on the Delete button at the bottom of the page and then enter in your password for confirmation. The claim is then deleted.

b. If the TONO is invalid, you must submit a PPC Customer Service help ticket to request the TONO be deleted from the system. Please provide all necessary information regarding the reason so that the action can be taken expeditiously without delay due to contacting the ASP/AO or unit.