FEATURING THE PPC PROCEDURES & DEVELOPMENT STAFF
Top 10 Things You Should Know About Travel – TPAX!
WHAT IS TPAX?

TRAVEL PREPARATION AND EXAMINATION SYSTEM
WHAT IS TPAX?
WHAT ARE THE DIFFERENT TYPES OF TRAVEL?

- TEMPORARY DUTY
- PERMANENT CHANGE OF STATION
- INVITATIONAL
- EVACUATION
WHAT IS A TRAVEL AUTHORIZING OFFICIAL?

A Travel Authorizing Official (AO) is delegated to approve authorizations, settlements and advances in TPAX.
WHAT IS A PROXY?

prox•y(ˈprɒk si) n., pl. prov•ies.

1. the agency, function, or power of a person authorized to act as the deputy or substitute for another.
2. the person so authorized; substitute; agent.
3. a written authorization empowering another person to vote or act for the signer, as at a meeting of stockholders.

BASIC PROXY

FULL SIGNATURE PROXY
BASIC PROXY

Select Traveler

Emp. ID: [Input Field]
SSN: [Input Field]
Last Name: [Input Field]

Address-1: [Input Field]
Address-2: [Input Field]
City: [Input Field]
State/Country: [Input Field]
Zip Code: [Input Field]

Grade/Rank: [Input Field]
Organization: [Input Field]
DSSN: [Input Field]

[Search Button]
[OK Button]
[Cancel Button]
[Help Button]
Designating Full Signature Proxy

**Traveler Profile**

<table>
<thead>
<tr>
<th>ID:</th>
<th>9981045</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong></td>
<td>BEAR, COASTIE, T</td>
</tr>
</tbody>
</table>

**T-PAX Info**

**Personal**

**Address**

**T-PAX Info**

**Miscellaneous**

- **Unit:**
- **Cost Center:**
- **Lock Login:**

**Privileges**

- Authorizing Official
- Customer Service (Full)
- Customer Service (Limited)
- TPAX Administrator

**Expiration Dates**

**Additional Information**

- **Default AO:** COASTIE, JO ANN
- **Full Signature Proxy:** Click to select Sig. Proxy

**Note:** Required fields are marked with a red asterisk (*).
WHERE DO ORDERS COME FROM?

TRAINING QUOTA MANAGEMENT CENTER (TQC)

PERSONNEL SERVICE CENTER (PSC) EPM / OPM / RPM

UNIT TRAVEL REQUEST AUTHORIZATIONS
WHERE DO ORDERS COME FROM?

Employee

Profile

Tasks
- PCS eResumes
- My Airport Terminal Orders
- Emergency Contacts
- Home and Mailing Address
- Phone Numbers
- Allotments
- Direct Deposit
- Federal & State Tax Elections
- All Duty Report
- 9 More...

View
- My Profile
- Member Training Rating
- My Reserve Points Statement
- My Reserve Drills
- View My Payslips (AD/RSV)
- My Employee Reviews
- Employee Review Summary
- Off Comparison Scale Summary
- SWE PDE
- 5 More...
CAN I USE TPAX FOR PCS?

MILITARY CIVILIAN ADVANCES
CAN I USE TPAX FOR PCS?
CAN I USE TPAX FOR PCS?

**Note:** Required fields are marked with a red asterisk (*).
How do I make a claim for payment?

- TPAX Entry
- AO Approval
- Record Keeping
- Voucher Summary
- Payment Issuance
CLAIM PROCESS

Member files claim through mail or T-PAX
Must file 3 days after completion of travel

Approving official approves members claim
Within 2 days of receipt

Manual Mail claims

T-PAX claims
MANUAL CLAIM PROCESS

1. Manual Mail claims
   - Examiner enters info into WINIATS within 4 days of receipt but depends on workload
   - Auditor verifies info in WINIATS within 4 days after receipt but depends on workload

2. Correct and Complete
   - PAO sends to Fincen for disbursement (see T-PAX claims for timeframe of payment)

3. Incorrect or Incomplete
   - Claim sent back to member. Must be returned within 30 to avoid a debt
TPAX CLAIM PROCESS

T-PAX claims

Automatically entered into WINIATS

Goes to Fincen for disbursement

Check is mailed within 15 days to address on travel claim

EFT to members account within 10 days
CAN I ADD SOMETHING I FORGOT?

Changes can be made any time prior to approval.

Documents can be added at any time (before & after settlement).

After approval and payment, must submit a supplemental claim for something new.

Time restriction for supplemental claim.
# MAKING CHANGES

## Itinerary

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<th>Duty Day</th>
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- **Edit Delete**
- **Add Leg**
- **Accept Changes**
- **Cancel Changes**
- **Help**
## MAKING CHANGES

### Reimbursable Expenses

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<tr>
<th>Date</th>
<th>Description</th>
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<tr>
<td>1/11/2017</td>
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<td>25.00</td>
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<tr>
<td>1/11/2017</td>
<td>AIRFARE-TRAIN-BUS EXPENSE</td>
<td>250.00</td>
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</table>

*Was any airfare paid by a member's travel card. If paid by Government Account, do not enter the airfare*

[Add Expense]

[Accept Changes]

[Cancel Changes]

[Help]
ADDING DOCUMENTS

BEAR, COASTIE
TONO: 1117555AAA000000

Images and Receipts

Image or Receipt File Name
U:\bear\Travel\Scanned Receipts\Yorktown

Image description:
YKTWN-JAN17

Upload Image

Done
Help
SUPPLEMENTAL CLAIM

Settlement Request

Type of order: Normal
Covered from: 1/11/2017 to: 1/13/2017
Type of Settlement: Supplemental
Type of Partial: Not a Partial

Remit To

* Address 1: 444 SE QUINCY STREET
* Address 2: 
* City: TOPEKA
* Country/State: KS KANSAS
* Zip: 66683

Next | Manage Images | Receipts | SAVE | Cancel | Help
WHAT DOES THIS AUDIT NOTICE MEAN?

- ANYTHING OVER $2500.00 IS AUTOMATIC

- TRAVELER IS NOTIFIED VIA EMAIL

- FAILURE TO COMPLY = DEBT COLLECTION

- DOCUMENTS CAN BE UPLOADED / MAILED

- CAN OCCUR ANYTIME WITHIN 6 YRS, 3 MO
SAMPLE EMAIL

Travel Date: Start Date: 6/1/2015  End Date: 6/7/2015
UAO's Name: Joe Costie
Claim Number: 1111000001  Block Number: 15F11001

REQUEST FOR TPAX AUDIT

Please be advised that a recently submitted TPAX claim has been selected for audit.

DOCUMENTS ATTACHED TO THE TRAVEL CLAIM WITHIN TPAX MUST INCLUDE:

- COPY OF THE SIGNED ORDERS AUTHORIZATION EVEN IF ORDERS WERE APPROVED IN TPAX
- COPY OF ALL SIGNED AMENDMENTS
- COPY OF ALL PAID COMMERCIAL TRANSPORTATION RECEIPTS (This includes: Air, Rail, Bus, Ferry and Rental Car receipts)
- COPY OF ITEMIZED RECEIPT(S) FOR ALL LODGING
- COPY OF SIGNED LONG TERM LODGING AGREEMENT OR RENTAL AGREEMENT
- COPY OF RECEIPTS FOR ALL REIMBURSABLE EXPENSES OF $75 OR MORE

NOTE: CREDIT CARD STATEMENTS ARE NOT AUTHORIZED TO BE USED AS A VALID RECEIPT

If your claim does not have the appropriate documentation attached or PPC Travel needs clarification, you will receive an email notification in the form of a KICKBACK (return) Letter. You will have 30 calendar days to respond by attaching the necessary documents to this specific travel claim. Once the documentation has been attached in TPAX, please submit a customer service ticket with a subject of Audit Correction notifying PPC that the documents are now in the system. Failure to follow these instructions or to comply within the allotted time will result in a partial or complete recoupment of monies paid to you, creating a debt.
WHERE DO I FIND ALL THIS TRAVEL INFORMATION?

https://www.uscg.mil/ppc/tvl.asp
General Travel and Contact Information

- Travel Payment Status
- Claims Mailing Address
- Web TPAX Audit Process Overview
- Signatures on Travel Orders
- Rate Changes
- How to calculate "Cost of GTR"
- Lost Receipts or Original Orders?
- Calculators (Spreadsheets)
- Travel Frequently Asked Questions
2017 Known Issues

This is a running list of known issues and procedural highlights for the past six months.

USCG Pay and Personnel Center Travel and TPAX News
E-Mail Updates

Subscribers to this list will receive notices and information on Coast Guard travel policy and procedures. Subscribers will also be notified of both scheduled and unscheduled outages affecting the TPAX travel claim liquidation system. Additionally, subscribers will be updated when important information is posted to the Pay and Personnel Center's web site.

Click to subscribe
Web TPAX User Guides, Tutorials and Webinar Recordings

## Basic Web TPAX Information for All Users

Read these guides to learn how to log into Web TPAX for the first time, understand its features, and maintain your account.

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>PROCEDURE GUIDE (PDF)</th>
<th>TUTORIAL</th>
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</thead>
<tbody>
<tr>
<td>First Time Web TPAX User</td>
<td>11 Jan 2017</td>
<td>11 Feb 2017</td>
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<tr>
<td>Web TPAX Overview</td>
<td>11 Jan 2017</td>
<td>11 Feb 2017</td>
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<tr>
<td>Changing Passwords in Web TPAX</td>
<td>11 Jan 2017</td>
<td>11 Feb 2017</td>
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<tr>
<td>Updating your Profile in Web TPAX</td>
<td>19 Jan 2017</td>
<td>11 Feb 2017</td>
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<tr>
<td>Attaching and Viewing Documents in Web TPAX</td>
<td>19 Jan 2017</td>
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<tr>
<td>Printing a Travel Voucher Summary</td>
<td>07 Jan 2017</td>
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<td>Travel Audit Process Overview</td>
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<td>Verify the Status of a Claim</td>
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### Traveler

- Approving Official
- Proxy and Servicing Personnel Office (SPO)
## Temporary Duty (TDY) and Local Travel:

<table>
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<th>TOPIC</th>
<th>PROCEDURE GUIDE (PDF)</th>
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<td>Changing Lodging Rates</td>
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<td>Claims that Crossover Fiscal years.pdf</td>
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<td>Deducting Meals on a TDY Claim</td>
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<td>Local Travel Claim</td>
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<td>Reimbursable Expenses When no Travel is Performed (e.g. Trip canceled but fees for reservations incurred)</td>
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<td>Split Disbursement</td>
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<td>TDY Authorization</td>
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<td>TDY Settlement (Authorization Completed First)</td>
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<td>TDY Settlement (Authorization Not Completed First)</td>
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### Audits:

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<tbody>
<tr>
<td>Travel Audit Process Overview</td>
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### Permanent Change of Station (PCS):

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<tr>
<th>TOPIC</th>
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<th>TUTORIAL</th>
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<td>Currency Conversion for Travel Claims</td>
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<td>Split Disbursement</td>
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# Approving Official

## Web TPAX User Guides, Tutorials and Webinar Recordings

- Basic Web TPAX Information for All Users
- Traveler
- Approving Official

### Approving Official (AO) User Guides

<table>
<thead>
<tr>
<th>TOPIC</th>
<th>PROCEDURE GUIDE (PDF)</th>
<th>VIDEO TUTORIAL</th>
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<td>AO TPAX Inbox</td>
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<td>TDY Authorization Approval</td>
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<td>TDY Settlement Approval</td>
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<td>Travel AO Checklist for Post-Travel Pre-Payment Approval</td>
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Proxy and SPO

Web TPAX User Guides, Tutorials and Webinar Recordings

- Basic Web TPAX Information for All Users
- Traveler
- Approving Official
- Proxy and Servicing Personnel Office (SPO)

Proxy / Servicing Personnel Office (SPO) User Guides

<table>
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<tr>
<th>TOPIC</th>
<th>PROCEDURE GUIDE (PDF)</th>
<th>VIDEO TUTORIAL</th>
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<tr>
<td>Designating/Removing Full Signature Proxy</td>
<td>18 Jan 2017</td>
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<tr>
<td>Entering Authorizations or Settlements as Proxy or</td>
<td>02 Feb 2017</td>
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<tr>
<td>Full Signature Proxy</td>
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<tr>
<td>Requesting a PCS Travel Advance</td>
<td>14 Feb 2017</td>
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</tr>
</tbody>
</table>
Travel Approving Official Training and Designation Procedures

New Form
The TPAX/WINIATS USER ROLE DESIGNATION FORM CG-7421A (02/16) has been updated and published on our forms web page. This form now allows for electronic digital signatures. Simply e-mail the completed and digitally signed form to PPC-SMB-TpaxUserForms using the button on the form.

AO Memo Required
Effective immediately, all newly designated travel Authorizing/Approving Officials (AOs) MUST have the CG-7421A form and an AO designation Memo signed by the CO/OIC filed with PPC regardless of the type of claim they are approving. If a current form and designation memo is not on file, claims will not be processed and will be returned for valid AO signature. This written designation requirement will also apply to all AOs who need to submit a new CG-7421A form after 1 March 2016. This AO designation form MUST be electronically attached to the new CG-7421A form. You can locate this Authorizing/Approving Official Designation Memo at: www.uscg.mil/ppc/travel/AO_Designation_Memo.pdf.

AO Training

Travel Authorizing / Approving Official (AO) Course
The Travel AO Course is available in the Coast Guard Learning Management System (LMS) (CAC logon required).

AOs play a critical role in managing travel. They contribute to mission readiness by ensuring travel is necessary to meet the organization's mission requirements. AOs oversee the obligation of travel funds, authorize travel, ensure travelers abide by all travel regulations, and approve reimbursements for authorizing travel expenses. In this role, AOs function as Certifying Officers (COs) when approving most TPAX documents and are expected to safeguard taxpayer funds from misuse. Any approved payment found to be erroneous, may result in an AO being held personally liable for reimbursing the Government for the amount of the erroneous payment. This financial responsibility is called "pecuniary liability." To better prepare AOs and protect them from the consequences of erroneous payments, the Coast Guard developed a specialized training course for Authorizing / Approving Officials (AOs).

- The Course will teach new AOs to review, authorize, and sign T-PAX transactions and manually submitted travel documents.
- The estimated length is four hours.
- The Course can be found in the Human Resources catalog.
- The Course number is 100102.

If you are currently logged on with a CAC, you can enroll in the course now.
AO Designation

AO Training

AO Designation

Follow these steps for AO Designation

1. Complete the Travel Authorizing /Approving Official (AO) Course (see above). The AO Course isn't mandatory at this time. However, it will be soon. We encourage you to complete before assuming AO duties and responsibilities.
2. Complete the AO Designation Memo
3. Complete the TPAX/WINIATS USER ROLE DESIGNATION FORM CG-7421A (02/16)
4. Attach the AO Designation Memo to the CG-7421A and submit it to your supervisor using the e-mail button on the form.
Additional Travel Information and Resources

PPC Home Page

WEBTPAX Logon

Passports

PCS Travel Advance Procedures

Civilian PCS Claim Procedures

Evacuation Voucher Assistance

Invitation Travel Orders (ITOs)

Medical Specialty Care Travel

- Attendant Travel for Specialty Care Over 100 Miles Overview
- Travel Reimbursement for Specialty Care Over 100 Miles

Self Procured/DITY Move Information and Checklist

Contact PPC Customer Care

Contact PPC Web Content Manager
Travel Related Directives, Publications and Guides

References

- Joint Travel Regulations (JTR)
- Coast Guard Supplement to the JTR
- Civilian Employees - Federal Travel Regulation (FTR)
- Passports
- USCG Conference Guidance (CGPortal)
- Official Table of Distances
- Personnel and Pay Procedures Manual (3PM), PPCINST M1000.2 (series)
- DHS CFO Travel Pages
- DHS General Travel Policy and Approval Authority (PDF)
- DHS Local Travel Policy (PDF)

Forms & Worksheets

- Change/Update Your Direct Deposit Account for Travel Claim Payments (Online "Fast Start Form")
- DD Form 1351-2 Travel Voucher
- DD Form 1351-3 Statement of Actual Expenses
- Advances Worksheet (CG-2010)
- Req for Travel Advance (SF-1038)
- PCS Departing Worksheet
- PCS Reporting Worksheet
- BAH Rate Protection Worksheet
- TPAX/WINIATS User Access Authorization
- Approving Official (AO) Designation Memo
- TPAX Account for NON-CG Pers.
- More Forms & Worksheets
- Locate Forms used Coast Guard-wide, including DOD, SF, and DHS, available for reference, viewing, and use by the general public
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**February 2017**

What's New?

WHAT’S NEW?

- PPC Travel Website
- Tax Time
- DD214 Virtual Session
- SWE PDEs
- Career Sea Pay
- Contacting PPC
TOP 10 TUESDAY

Q & A
FEATURING THE PPC PROCEDURES & DEVELOPMENT STAFF

PPC-PF-PD@USCG.MIL