# Top 10 Things You Should Know About Travel – TPAX!

# WHAT IS TPAX?

**10**

**TRAVEL PREPARATION AND EXAMINATION SYSTEM**



**Web TPAX Login**

User ID:

Password:

Auto Login

Forgot my Password

Using IE version 11 and acting as IE version 11.          Last Build: September 7, 2016 (6.21.5)

# WHAT IS TPAX?

# WHAT ARE THE DIFFERENT TYPES OF TRAVEL?

**TEMPORARY DUTY**

**PERMANENT CHANGE OF STATION**
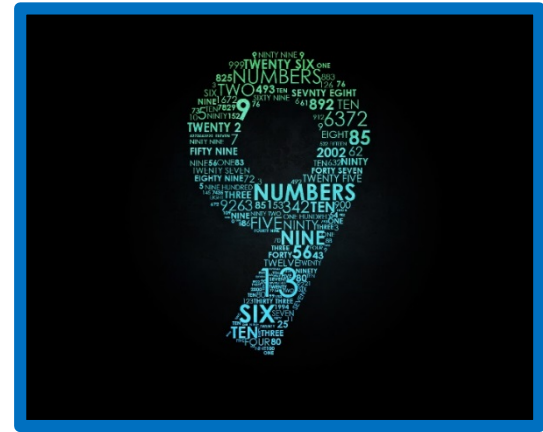
**INVITATIONAL**

**EVACUATION**

Normal
Doc Type 13
Invitational
PCS
Local

# 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.* **prox•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:

SSN:

Last Name:

[ Search ]

Address-1:

Address-2:                     Grade/Rank:

City:                          Organization:

State/Country:                 DSSN:

Zip Code:

[ OK ]    [ Cancel ]    [ Help ]

# Designating Full Signature Proxy



| BEAR, COASTIE | **Traveler Profile** | View: Traveler |

**ID:** 9981045  \***Name:** BEAR , COASTIE   T

| Personal | Address | **T-PAX Info** |

**Miscellaneous**

Unit: [ ]

Cost Center [ ]   ☐ Lock Login

**Privileges**          **Expiration Dates**

☐ Authorizing Official [ ]

☐ Customer Service (Full) [ ]

☐ Customer Service (Limited) [ ]

☐ TPAX Administrator [ ]

**Expiration Dates**

☐ Adv. Signature Proxy [ ]

☐ Unit Command [ ]

**Additional Information**        **Expiration Dates**

Default AO:   COASTIE, JO ANN

Full Signature Proxy:   Click to select Sig. Proxy.   [ ]

**Note:** Required fields are marked with a red asterisk (\*).

| Back | Next | | Save | Cancel | Help |

# 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?

5

MILITARY

CIVILIAN

ADVANCES

# CAN I USE TPAX FOR PCS?



**BEAR, COASTIE**                  **Traveler Profile**                  View:    Traveler

ID: 9981045    * Name:    Last: BEAR  ,  First: COASTIE    Middle: T

**Personal**    Address    T-PAX Info

* Employee Status:    Member
* Grade/Rank:    E4
Salutation:
Position/Title:                              Reg_Region:
Known Traveler Num:                          Emp_Class:
Security Clearance:    Confidential          Emp_Cat:
* Secondary Status:    None                  Emp_Sub_Cat:
Credit Card Status:    Holder of Govt. Credit Card
Credit Card Num:    ****************
Service:    Coast Guard
* Organization:    7947400

Back    Next    **Note:** Required fields are marked with a red asterisk (*).    Save    Cancel    Help

# CAN I USE TPAX FOR PCS?

**BEAR, COASTIE**                    **Traveler Profile**                    View:    Traveler

ID:  9981045    * **Name:**    Last: BEAR ,    First: COASTIE    Middle: T

| **Personal** | Address | Misc. Info | T-PAX Info |

* Employee Status:    Employee ▾

* Grade/Rank:    GS7 ▾

Salutation:    MRS.

Position/Title:    [          ]    Reg_Region:    [          ]

Known Traveler Num:    [          ]    Emp_Class:    [          ]

Security Clearance:    Unknown ▾    Emp_Cat:    [          ]

* Secondary Status:    None ▾    Emp_Sub_Cat:    [          ]

Credit Card Status:    Holder of Govt. Credit Card ▾    [          ]

Credit Card Num:    ****************

Service:    Coast Guard ▾

* Organization:    7947400

[ Back ]    [ Next ]    **Note:** Required fields are marked with a red asterisk (*).    [ Save ]    [ Cancel ]    [ Help ]
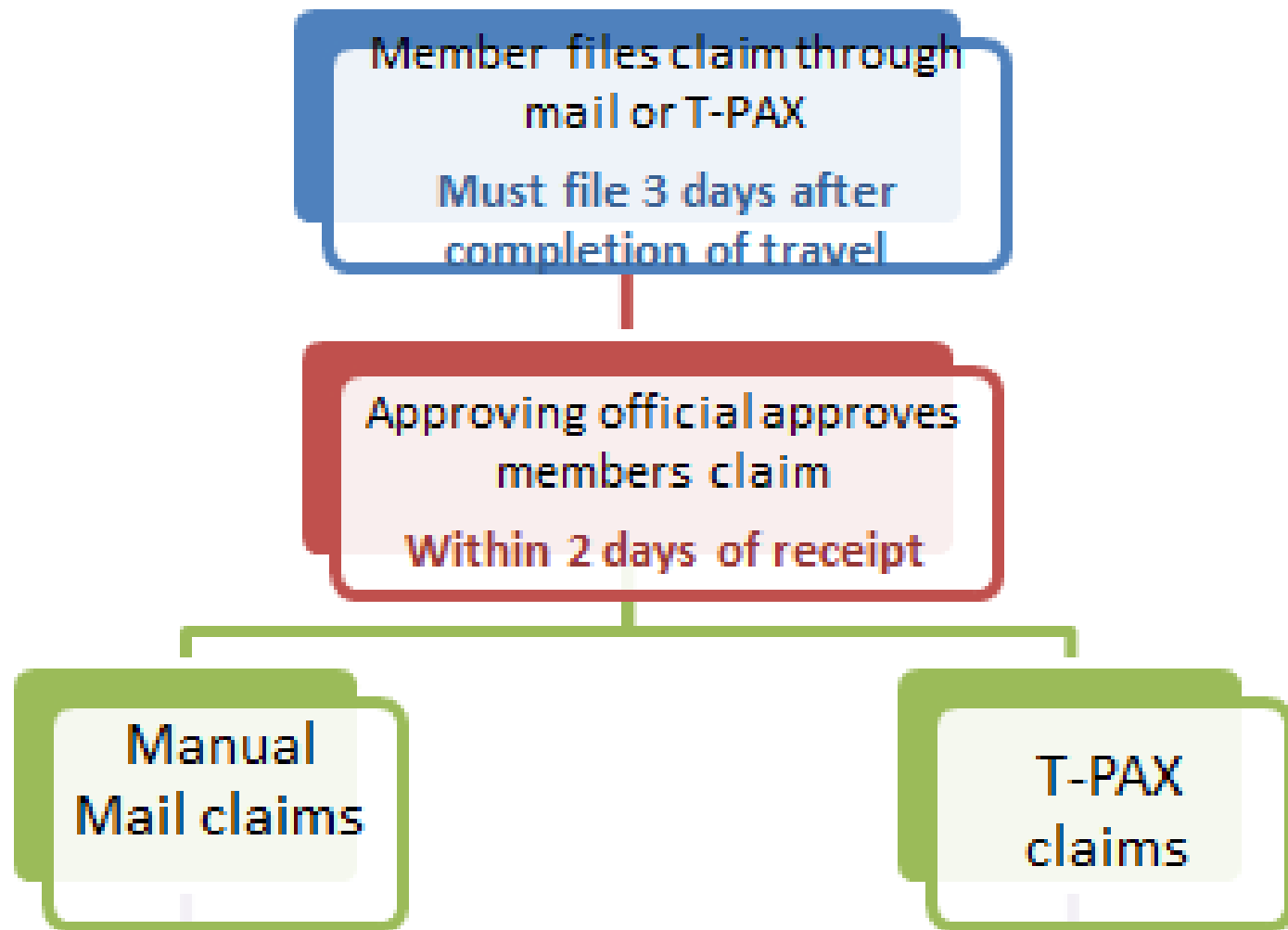
# #4

# 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

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

Correct and Complete

Incorrect or Incomplete

PAO sends to Fincen for disbursement (see T-PAX claims for timeframe of payment)

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
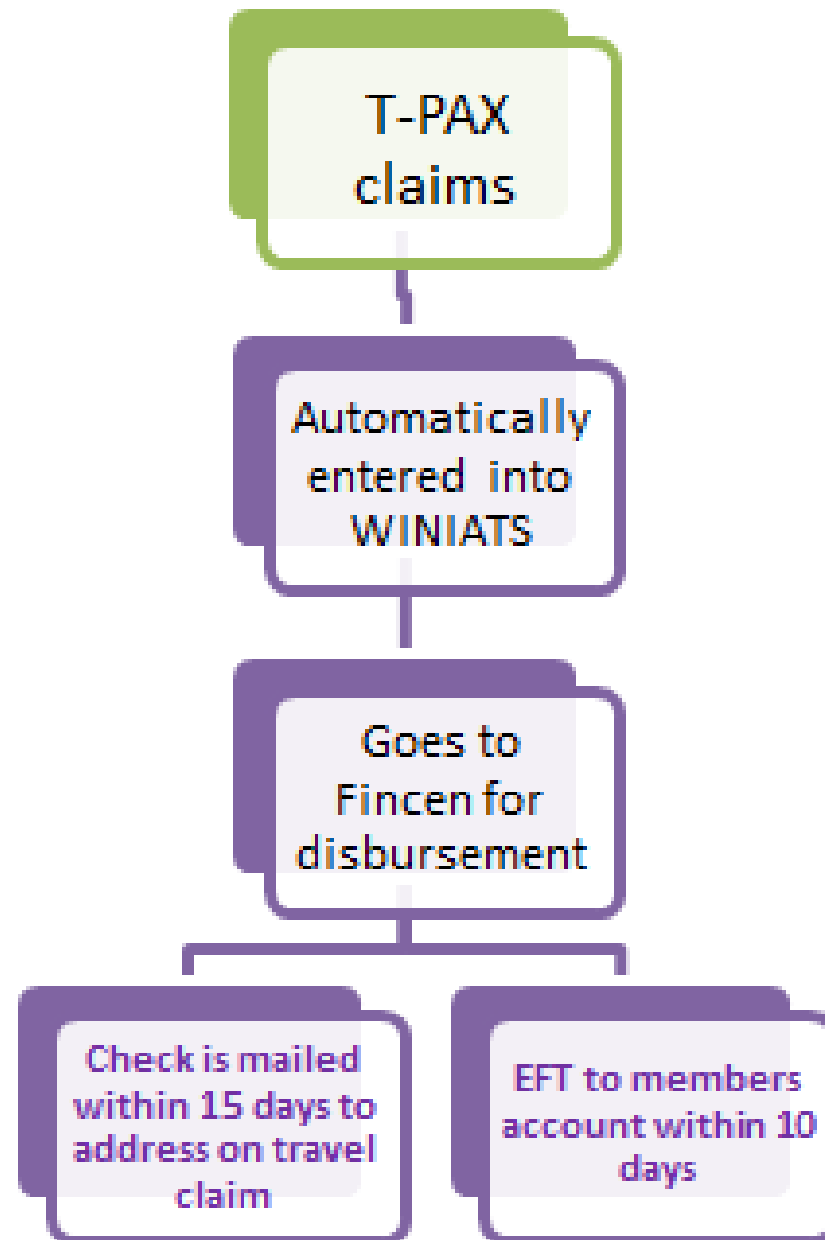
# CAN I ADD SOMETHING I FORGOT?

**3**

*forgotten something?*

**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

**BEAR, COASTIE**
**TONO: 1117555AAA000000**

### Itinerary

View:    Traveler

| Date | | Location | Trans Reason | Duty Day | IDL | Local? Method | Lodging | Meals | AE% | Lodging | Taxes | Miles | | |
|------|------|----------|--------------|----------|-----|---------------|---------|-------|-----|---------|-------|-------|---|---|
| 1/4/2017 1/4/2017 | DEP ARR | 66683 Topeka, KS, Shawnee Kansas City Intl Airport, MO, Platte | PA AT | ☑ ☐ | | ☑ LDP | | | 0 | 0.00 | 0.00 | 0 | Edit Insert | Del |
| 1/4/2017 1/4/2017 | DEP ARR | Kansas City Intl Airport, MO, Platte Yorktown CG Reserve Trng Cntr, VA, York | CP TD | ☐ ☑ | | ☐ LDP | GQ1 | GM | 0 | 0.00 | 0.00 | 0 | Edit Insert | Del |
| 1/5/2017 1/5/2017 | DEP ARR | Yorktown CG Reserve Trng Cntr, VA, York Kansas City Intl Airport, MO, Platte | CP AT | ☐ ☐ | | ☐ LDP | | | 0 | 0.00 | 0.00 | 0 | Edit Insert | Del |
| 1/5/2017 1/5/2017 | DEP ARR | Kansas City Intl Airport, MO, Platte 66683 Topeka, KS, Shawnee | PA MC | ☐ ☐ | | ☐ | NLG | | 0 | 0.00 | 0.00 | 74 | Edit Insert | Del |

[ Add Leg ]

[ Accept Changes ]    [ Cancel Changes ]    [ Help ]

# MAKING CHANGES



**BEAR, COASTIE**
**TONO: 1117222BBB000000**

**View:    Traveler**

## Reimbursable Expenses

| Date | Description | Claimed | Split | | |
|------|-------------|---------|-------|------|--------|
| 1/11/2017 | SATO-CTO-TMC SVC PROC FEE | 25.00 | ✓ | Edit | Delete |
| 1/11/2017 | AIRFARE-TRAIN-BUS EXPENSE | 250.00 | ☐ | Edit | Delete |

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**

View: **Traveler**

Image or Receipt File Name

U:\bear\Travel\Scanned Receipts\Yorktown     Browse...

Image description:

YKTWN-JAN17

**Upload Image**

YKTWN-JAN17

**Done**     **Help**

# SUPPLEMENTAL CLAIM

BEAR, COASTIE
TONO: 1117222BBB000000

**Settlement Request**

View: Traveler

| | |
|---|---|
| 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 | Transactions | Entitlements | Computations | Financial | Remarks |
|---|---|---|---|---|---|

\* 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
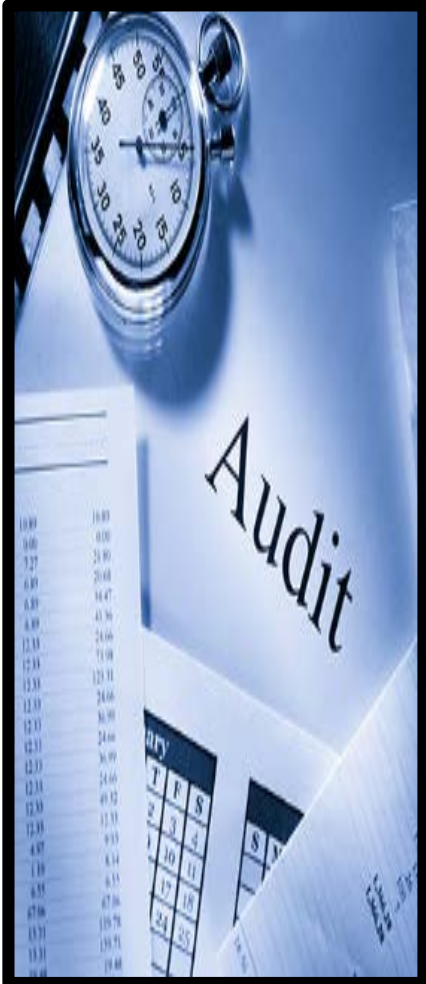
- ✓ **TRAVELER IS NOTIFIED VIA EMAIL**

- ✓ **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 Coastie

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 you 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?
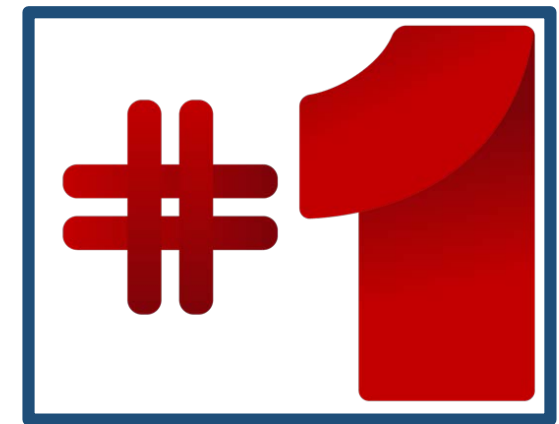
**https://www.uscg.mil/ppc/tvl.asp**

# GENERAL INFORMATION

# KNOWN ISSUES



| News | General Information | Known Issues | E-Learning | AO Designation | Other Resources | Forms/Pubs |

## 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

# E-Learning – Basic Information

## 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.

| TOPIC | PROCEDURE GUIDE (PDF) | TUTORIAL |
|---|---|---|
| First Time Web TPAX User | 11 Jan 2017 | 11 Feb 2017 |
| Web TPAX Overview | 11 Jan 2017 | 11 Feb 2017 |
| Changing Passwords in Web TPAX | 11 Jan 2017 | 11 Feb 2017 |
| Updating your Profile in Web TPAX | 19 Jan 2017 | 11 Feb 2017 |
| Attaching and Viewing Documents in Web TPAX | 19 Jan 2017 | |
| Printing a Travel Voucher Summary | 07 Jan 2017 | |
| Travel Audit Process Overview | 10 Jan 2017 | |
| Verify the Status of a Claim | 14 Feb 2017 | |

▸ Traveler

▸ Approving Official

▸ Proxy and Servicing Personnel Office (SPO)

# Traveler

## Web TPAX User Guides, Tutorials and Webinar Recordings

▸ Basic Web TPAX Information for All Users

▾ Traveler

### Temporary Duty (TDY) and Local Travel:

| TOPIC | PROCEDURE GUIDE (PDF) | TUTORIAL |
|---|---|---|
| Actual Expense for Lodging (AELP) | 25 Jan 2017 | |
| Changing Lodging Rates | 31 Jan 2017 | |
| Claims that Crossover Fiscal years.pdf | 13 Jan 2017 | |
| Constructive Cost of a GTR | 13 Feb 2017 | |
| Currency Conversion for Travel Claims | 13 Jan 2017 | |
| Deducting Meals on a TDY Claim | 02 Feb 2017 | |
| Local Travel Claim | 25 Jan 2017 | |
| Reimbursable Expenses When no Travel is Performed (e.g. Trip canceled but fees for reservations incurred) | 14 Feb 2017 | |
| Split Disbursement | 25 Jan 2017 | |
| TDY Authorization | 30 Jan 2017 | |
| TDY Settlement (Authorization Completed First) | 30 Jan 2017 | |
| TDY Settlement (Authorization Not Completed First) | 30 Jan 2017 | |
| TDY Supplemental Settlement | 01 Feb 2017 | |

### Audits:

| TOPIC | PROCEDURE GUIDE (PDF) | TUTORIAL |
|---|---|---|
| Travel Audit Process Overview | 10 Jan 2017 | |

### Permanent Change of Station (PCS):

| TOPIC | PROCEDURE GUIDE (PDF) | VIDEO TUTORIAL |
|---|---|---|
| Currency Conversion for Travel Claims | 13 Jan 2017 | |
| Split Disbursement | 25 Jan 2017 | |

# Approving Official



Web TPAX User Guides, Tutorials and Webinar Recordings

| | News | General Information | Known Issues | E-Learning | AO Designation | Other Resources | Forms/Pubs |

▶ Basic Web TPAX Information for All Users

▶ Traveler

▼ Approving Official

## Approving Official (AO) User Guides

| TOPIC | PROCEDURE GUIDE (PDF) | VIDEO TUTORIAL |
|---|---|---|
| AO TPAX Inbox | 02 Feb 2017 | |
| TDY Authorization Approval | 13 Feb 2017 | |
| TDY Settlement Approval | 29 Jan 2017 | |
| Travel AO Checklist for Post-Travel Pre-Payment Approval | 13 Feb 2017 | N/A |

# Proxy and SPO



| News | General Information | Known Issues | E-Learning | AO Designation | Other Resources | Forms/Pubs |

## 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

| TOPIC | PROCEDURE GUIDE (PDF) | VIDEO TUTORIAL |
|---|---|---|
| Designating/Removing Full Signature Proxy | 18 Jan 2017 | |
| Entering Authorizations or Settlements as Proxy or Full Signature Proxy | 02 Feb 2017 | |
| Requesting a PCS Travel Advance | 14 Feb 2017 | |
| | | |

# AO Training

## 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 AO's 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.

**CG LEARNING MANAGEMENT SYSTEM**
⊝⊝⊝ formerly Learning Portal

# 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.

# Other Resources

| News | General Information | Known Issues | E-Learning | AO Designation | Other Resources | Forms/Pubs |
|------|--------------------|--------------|------------|----------------|-----------------|------------|

## 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](#)

# Forms/Publications

## 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

February 2017

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------|---------|-----------|----------|--------|----------|
|  |  |  | 1 | 2 | 3 | 4 |
| 5 | 6 |  |  |  |  | 11 |
| 12 | 13 |  |  |  |  | 18 |
| 19 | 20 |  |  | 24 | 25 |  |
| 26 | 27 | 28 | Notes: |  |  |  |

WHAT'S NEW?

https://www.uscg.mil/ppc/pd.asp

February 2017 Calendar Template available from www.quickcalendartemplate.com

WHAT'S NEW?

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

TOP10 TUESDAY

PPC-PF-PD@USCG.MIL

FEATURING THE PPC PROCEDURES & DEVELOPMENT STAFF