



Rating Performance Qualification (RPQ) Standard

Yeoman YN3-YNCM

CG-RPQ-YN (MAY/2025)

Revision Date: AUG 2024

This pamphlet must be completed no later than 01FEB2025 to participate in the MAY 2025 SWE Active Duty service wide exam or 01AUG2025 to compete in the OCT 2025 Reserve service wide exam



**U.S. Coast Guard
Force Readiness Command
300 East Main St. Suite 1000
Norfolk, VA 23510-910**

**** If a member has completed a prior set of Rating Performance Qualifications (RPQs) and earned the competency code for the next highest paygrade, they are not required to complete a new set of RPQs. Members who have not earned the competency code are required to complete the most current packet required. If applicable, crosswalks are listed in each worksheet. ****

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YN Rating Training Advisory Council (RTAC)

Rating Force Master Chief: YNCM Seth Cockram

Rating Knowledge Manager: YNCS Ruslan Baute

Yeoman “A” School Chief: YNCM Kevin Farnady

Program Manager (s): CDR Jeton Devereaux

Chief Rating Knowledge Manager: MCPO Toni Tharpe

Training Manager: LCDR Erica Linnemann

Training Officer Representative: CDR Blake Leedy

Members Name: _____

Members EMPLID: _____

Section I: Record of Changes

Type of Change (RPQ, competency, reference)	Replace Pages	Effective SWE
Updated Section III- RPQ 4.2.6 Reinstated and Updated		MAY 2025
Updated Section III- RPQ 4.3.2 Reinstated and Updated		MAY 2025
Updated Section III- RPQ 4.3.3 Reinstated and Updated		MAY 2025
Updated Section III- RPQ 7.4.1 Updated Step 3 and Step 4		MAY 2025
Updated Section III- RPQ 5.1.1 Updated Step 7		MAY 2025
Updated Section V- Added reference (jj)		MAY 2025
Updated Section V- Added reference (ii)		MAY 2025

Members Name: _____

Members EMPLID: _____

Section II: Core Competency Requirements

[illegible]

Members Name: _____

Members EMPLID: _____

Section III: Performance Support Worksheets

Pay Grade: E4

Worksheet 1: Rating Performance Qualification (RPQ) 4.1.1

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.1

Performance: **REQUEST** a Statement of Creditable Service (SOCS), a Transcript of Sea Service (TOSS), and Statement of Creditable Sea Service (SOCSS).

Condition: Given a member requiring entry or correction of Creditable Service and source documentation.

Standard: Customer care ticket number is received, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	OBTAIN service member's Coast Guard Military Human Resource Record (CGMHRR)	(i)
.2	COMPLETE SOCS/SOCSS checklist(s)	(a) Ch. 6.J and K
.3	COUNSEL member on requesting an interim Pay Base Date (PBD) adjustment	(a) Ch. 6.J.9
.4	DRAFT an email to the Payment Approval Official (PAO) with the information needed to complete a trouble ticket	(a) Ch. 6.J and K
.5	SCAN and ATTACH supporting documents to the completed email	(a) Ch. 6.J and K
.6	SUBMIT email to a SPO E-6 or above for review and processing	(a) Ch. 6.J and K
.7	NOTIFY member that the request was submitted	(r)

Professional Development Coach signature of completion

Date

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Supplemental Support Material: RPQ's 4.1.8, 4.1.9, 4.1.11, 4.1.12, and 4.1.14 should be completed prior to completion of this RPQ to ensure knowledge of computations prior to requesting a SOCS, SOCSS or TOSS

Reference(s):

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 2: Rating Performance Qualification (RPQ) 4.1.2

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.2

Performance: PROCESS a change in dependency status in DA.

Condition: Given a member request or dependency change, source documentation, and access to Coast Guard Direct Access data system.

Standard: Transaction is recorded into the Coast Guard Direct Access (DA) data system and documentation is distributed to Coast Guard Military Human Resource Record (CGMHRR) System

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	OBTAIN source documentation	(r)
.2	ASSIST member in completing CG-2020	(a) Ch. 6.F
.3	ENTER changes into DA under “Dependent Data”	(a) Ch. 6.F (cc) Personal Data, Job Data, and Dependency Data
.4	ENTER changes into DA under “Personal Info” if change in marital status (when applicable)	(a) Ch. 6.F (cc) Personal Data, Job Data, and Dependency Data
.5	PRINT the BAH/Dependency Data Form	(a) Ch. 6.G (cc) Personal Data, Job Data, and Dependency Data
.6	OBTAIN service member signature on form	(cc) Personal Data, Job Data, and Dependency Data

Professional Development Coach signature of completion

Date

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Best practices: Ensure to update marital status in Direct Access under Personal Info when a member gets married or divorced.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 3: Rating Performance Qualification (RPQ) 4.1.3

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.3

Performance: **PROCESS** types of Basic Allowance for Housing Entitlements.

Condition: Given a member who may be eligible, access to a CG Standard Workstation, and member's source documentation.

Standard: Member's Basic Allowance for Housing entitlement is entered in the Coast Guard Direct Access (DA) data system with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	COLLECT source documentation from member	(b) Ch. 3
.2	VERIFY member eligibility	(b) Ch. 3.A thru G (bb) Ch. 26
.3	ENTER pay transaction in DA	(cc) SPO/P&A Allowances
.4	PRINT transaction screen	Step not testable
.5	FORWARD copy of transaction screen to Payment Approving Official (PAO)	Step not testable
.6	FILE source documentation in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(b) Coast Guard Pay Manual, COMDTINST M7220.29

(bb) DOD Financial Management Regulation Vol. 7A, DOD 7000.14R

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Best Practices: It is strongly recommended that you check the Pay Calculations Results in Direct Access the day after you submit pay transactions to ensure they process correctly.

Members Name: _____

Members EMPLID: _____

Worksheet 4: Rating Performance Qualification (RPQ) 4.1.4

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.4

Performance: PROCESS Subsistence Allowances

Condition: Given a member who may be eligible, access to a CG Standard Workstation, and member's source documentation.

Standard: Member's Subsistence Allowance is entered in the Coast Guard Direct Access (DA) data system with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	COLLECT source documentation from member	(b) Ch. 3.A
.2	VERIFY member eligibility	(b) Ch. 3.A
.3	ENTER pay transaction in DA	(cc) SPO/P&A Allowances
.4	PRINT transaction screen	Step not testable
.5	FORWARD copy of transaction screen to Payment Approving Official (PAO)	Step not testable
.6	FILE source documentation in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(b) Coast Guard Pay Manual, COMDTINST M7220.29

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Best Practices: It is strongly recommended checking the Pay Calculations Results in Direct Access the day after submitting pay transactions to ensure they process correctly.

Members Name: _____

Members EMPLID: _____

Worksheet 5: Rating Performance Qualification (RPQ) 4.1.5

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.5

Performance: **PROCESS** Family Separation Allowances (FSA)

Condition: Given a member who may be eligible, access to a CG Standard Workstation, and member's source documentation.

Standard: Member's FSA is entered in the Coast Guard Direct Access (DA) data system with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	COLLECT source documentation from member	(a) Ch. 8.E (b) Ch. 3.H
.2	VERIFY member's eligibility	(b) Ch. 3.H
.3	ENTER pay transaction in DA	(cc) SPO/P&A Allowances
.4	PRINT transaction screen	Step not testable
.5	FORWARD copy of transaction screen to Payment Approving Official (PAO)	Step not testable
.6	FILE source documentation in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(b) Coast Guard Pay Manual, COMDTINST M7220.29

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Best Practices: It is strongly recommended checking the Pay Calculations Results in Direct Access the day after submitting pay transactions to ensure they process correctly.

Members Name: _____

Members EMPLID: _____

Worksheet 6: Rating Performance Qualification (RPQ) 4.1.6

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.6

Performance: PROCESS Cost of Living Allowances (COLA) for CONUS and OCONUS

Condition: Given a member who may be eligible, access to a CG Standard Workstation, and member's source documentation.

Standard: Member's COLA is entered in the Coast Guard Direct Access (DA) data system with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	COLLECT source documentation from member	(b) Ch. 3 (bb) Ch. 67 and 68
.2	VERIFY member eligibility	(b) Ch. 3 (bb) Ch. 67 and 68
.3	ENTER pay transaction in DA	(cc) SPO/P&A Allowances
.4	PRINT transaction screen	Step not testable
.5	FORWARD copy of transaction screen to Payment Approving Official (PAO)	Step not testable
.6	FILE source documentation in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(b) Coast Guard Pay Manual, COMDTINST M7220.29

(bb) DOD Financial Management Regulation Vol 7A, DOD 7000.14R

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Best Practices: It is strongly recommended checking the Pay Calculations Results in Direct Access the day after submitting pay transactions to ensure they process correctly.

Members Name: _____

Members EMPLID: _____

Worksheet 7: Rating Performance Qualification (RPQ) 4.1.7

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.7

Performance: **PROCESS** Career Sea Pay (CSP), Career Sea Pay Premium (CSPP), Incentive and Special Pay Transactions

Condition: Given a member who may be eligible, access to a CG Standard Workstation, and member's source documentation.

Standard: Member's entitlements entered in the Coast Guard Direct Access (DA) data system with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	COLLECT source documentation from member	(b) Ch. 4
.2	VERIFY member eligibility	(b) Ch. 4
.3	ENTER pay transaction in DA	(cc) SPO/P&A Pay
.4	PRINT transaction screen	Step not testable
.5	FORWARD copy of transaction screen to Payment Approving Official (PAO)	Step not testable
.6	FILE source documentation in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(b) Coast Guard Pay Manual, COMDTINST M7220.29

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Best Practices: It is strongly recommended checking the Pay Calculations Results in Direct Access the day after submitting pay transactions to ensure they process correctly.

Members Name: _____

Members EMPLID: _____

Worksheet 8: Rating Performance Qualification (RPQ) 4.1.8

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.8

Performance: VERIFY Active Duty Base Date (ADBBD)

Condition: Given access to Coast Guard Direct Access (DA) data system, a member request, and/or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 8.M
.2	CALCULATE service computations	(a) Ch. 8.M.28 and 29
.3	VERIFY calculations	(a) Ch. 8.M.29
.4	ADVISE member based on information	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 9: Rating Performance Qualification (RPQ) 4.1.9

Rate: YN3

4.1 Pay and Personnel

Rating Performance Qualification (RPQ) 4.1.9

Performance: VERIFY Creditable Sea Duty (for advancement)

Condition: Given access to Coast Guard Direct Access (DA) data system, a member's request for determination of advancement eligibility, and/or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy and proper counseling is conducted.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 8.M (d) Ch. 3.A.16
.2	CALCULATE creditable sea service	(a) Ch. 8.M. 43 and 44 (d) Ch. 3.A.16
.3	VERIFY calculations	(a) Ch. 8.M.44
.4	ADVISE member on advancement eligibility in relation to required rating sea time for next pay grade	(d) Ch. 3.A.16 (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

(r) YN Customer Service Standards

Supplemental Support Material: This RPQ is different than 4.1.10, the performing member must be able to determine if a service member has the required Sea Duty to advance to the next paygrade.

Members Name: _____

Members EMPLID: _____

Worksheet 10: Rating Performance Qualification (RPQ) 4.1.10

Rate: YN3
4.1 Pay and Personnel
Rating Performance Qualification (RPQ) 4.1.10

Performance: **VERIFY** Creditable Sea Service.

Condition: Given access to Coast Guard Direct Access (DA) data system, a member request, and/ or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 8.M
.2	CALCULATE service computations	(a) Ch. 8.M.43 and 44
.3	VERIFY calculations	(a) Ch. 8.M.44
.4	ADVISE member based on information	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 11: Rating Performance Qualification (RPQ) 4.1.11

Rate: YN3
4.1 Pay and Personnel
Rating Performance Qualification (RPQ) 4.1.11

Performance: **VERIFY** Date of Rank.

Condition: Given access to Coast Guard Direct Access (DA) data system, a member request, and/ or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 8.M
.2	CALCULATE service computations	(a) Ch. 8.M.32 and 33
.3	VERIFY calculations	(a) Ch. 8.M.33
.4	ADVISE member based on information	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 12: Rating Performance Qualification (RPQ) 4.1.12

Rate: YN3
4.1 Pay and Personnel
Rating Performance Qualification (RPQ) 4.1.12

Performance: **VERIFY** Expiration of Enlistment (EOE).

Condition: Given access to and/ or an assigned task by a supervisor, a member request, and/or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 8.M
.2	CALCULATE service computations	(a) Ch. 8.M.37 and 38
.3	VERIFY calculations	(a) Ch. 8.M.38
.4	ADVISE member based on information	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 13: Rating Performance Qualification (RPQ) 4.1.13

Rate: YN3
4.1 Pay and Personnel
Rating Performance Qualification (RPQ) 4.1.13

Performance: **VERIFY** Good Conduct Award Eligibility.

Condition: Given access to Coast Guard Direct Access (DA) data system, a member request, and/or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	REVIEW requirements for active duty good conduct medal	(k) Ch. 5.A.1 and Encl: 11
.2	VERIFY the member meets eligibility for the active duty good conduct medal	(a) Ch. 8.M (d) Ch. 4 (k) Ch. 5.A.1 and Encl: 11
.3	INFORM the member of their eligibility	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(k) Coast Guard Military Medals and Awards Manual, COMDTINST M1650.25

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(d) Enlistments, Evaluations, and Advancements Manual, COMDTINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 14: Rating Performance Qualification (RPQ) 4.1.14

Rate: YN3
4.1 Pay and Personnel
Rating Performance Qualification (RPQ) 4.1.14

Performance: **VERIFY** Pay Base Date (PBD).

Condition: Given access to Coast Guard Direct Access (DA) data system, a member request, and/ or an assigned task by a supervisor.

Standard: Calculations are completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 8.M
.2	CALCULATE service computations	(a) Ch. 8.M.24 and 25
.3	VERIFY calculations	(a) Ch. 8.M.25
.4	ADVISE member based on information	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 15: Rating Performance Qualification (RPQ) 4.2.1

Rate: YN3 4.2 Travel and Transportation Rating Performance Qualification (RPQ) 4.2.1

Performance: PROCESS a Permanent Change of Station (PCS) event.

Condition: Given receipt of not ready for execution of PCS orders, SWIII, and access to Coast Guard Direct Access (DA) data system.

Standard: Orders are ready for auditor approval and with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Reference(s) / Relevant Text
.1	ACCESS DA profile of departing member	(cc) SPO/P&A Permanent Change of Station (PCS)
.2	COMPLETE the appropriate documentation	(a) Ch. 4.A
.3	VERIFY PCS calculations	(a) Ch. 4.A
.4	PREPARE PCS Departing Orders	(cc) SPO/P&A Permanent Change of Station (PCS)
.5	FORWARD printed PCS Departing Orders to Payment Authorizing Official (PAO) for approval	(a) Ch. 4.A
.6	ROUTE PCS Departing Endorsement for Payment Authorizing Official (PAO) approval in DA	(a) Ch. 4.A (cc) SPO/P&A Permanent Change of Station (PCS)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(cc) USCG Direct Access User Guides

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

PDC Information: Ensure member is aware of timeliness standards.

Members Name: _____

Members EMPLID: _____

Worksheet 16: Rating Performance Qualification (RPQ) 4.2.2

Rate: YN3
4.2 Travel and Transportation
Rating Performance Qualification (RPQ) 4.2.2

Performance: **VERIFY** duty assignment eligibility.

Condition: Given receipt of not ready for execution of PCS orders, SWIII, and access to Coast Guard Direct Access (DA) data system.

Standard: Eligibility status is verified and with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ACCESS DA profile of departing member	(cc) Person Profile
.2	CHECK members End of Enlistment	(a) Ch. 4.A (cc) Reports and Queries
.3	CHECK members compliance with USCG weight standards	(a) Ch. 4.A (cc) Person Profile (j) Ch. 2
.4	COMPLETE necessary documentation	(a) Ch. 4.E
.5	CERTIFY members eligibility	(a) Ch. 4.E

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(cc) USCG Direct Access User Guides

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(j) Body Composition Standards Program, COMDTINST M1020.8

PDC Information: Ensure member can provide eligibility requirements for different types of PCS assignments ex. OCONUS vs CONUS requirements.

Members Name: _____

Members EMPLID: _____

Worksheet 17: Rating Performance Qualification (RPQ) 4.2.3

Rate: YN3

4.2 Travel and Transportation

Rating Performance Qualification (RPQ) 4.2.3

Performance: CALCULATE mixed mode travel entitlements, Temporary Lodging Expense (TLE) and Temporary Lodging Allowance (TLA).

Condition: Given receipt of not ready for execution of PCS orders, SWIII, and access to Coast Guard Direct Access (DA) data system.

Standard: Eligibility status has been verified and calculations are completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GATHER data necessary to perform calculation	(a) Ch. 4.A (g) 0501 (x) 050105 and 090102
.2	CALCULATE entitlements (CG-2003)	(g) 0501
.3	VERIFY calculations	(g) 0501
.4	ENTER calculations in DA	(cc) SPO/P&A Permanent Change of Station (PCS)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(g) Joint Travel Regulations (JTR)

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(cc) USCG Direct Access User Guides

Best Practices: Using PCS Entitlements / Advances, TLE & Separation Leave Calculator

(<https://www.dcms.uscg.mil/ppc/news/Article/2093642/update-to-the-pcs-entitlements-advances-tle-and-separation-leave-calculator/>)

If there are no "New" orders in the airport terminal, member may use existing orders to complete RPQ.

Members Name: _____

Members EMPLID: _____

Worksheet 18: Rating Performance Qualification (RPQ) 4.2.4

Rate: YN3

4.2 Travel and Transportation Rating Performance Qualification (RPQ) 4.2.4

Performance: PREPARE a PCS travel advance in Travel Management Software.

Condition: Given receipt of not ready for execution of PCS orders, SWIII, and access to Coast Guard Direct Access (DA) data system and Travel Management Software

Standard: Member receives travel advances.

PDC Training Code: 2 – Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN PCS Departing Orders	(cc) SPO/P&A Permanent Change of Station (PCS)
.2	ACCESS member's profile in Travel Management Software	(a) Ch. 4.A
.3	ENTER advances	(a) Ch. 4.A
.4	SUBMIT travel advances for approval	(a) Ch. 4.A

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(cc) USCG Direct Access User Guides

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Best Practices: Using PCS Advances Calculator on PPC website: (<http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Pay-and-Personnel-Center-PPC/>)

Utilize the standard PCS entitlements notes from the CG HR data system. For a Reserve PCS transfer, see Ch. 5 of Ref. (h), Ch. 11 of Ref. (a) and the RPM website: (<http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Personnel-Service-Center-PSC/Reserve-Personnel-Management-PSC-RPM/>).

If there are no “New” orders in the airport terminal, member may use existing orders to complete RPQ.

Members Name: _____

Members EMPLID: _____

Worksheet 19: Rating Performance Qualification (RPQ) 4.2.5

Rate: YN3 4.2 Travel and Transportation Rating Performance Qualification (RPQ) 4.2.5

Performance: PROCESS a Permanent Change of Station (PCS) Reporting event in the Coast Guard Direct Access (DA) data system.

Condition: Given a member reporting to a unit and access to a CG Standard Workstation.

Standard: Transaction is completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ACCESS DA profile of reporting member	(cc) Reports
.2	COMPLETE the appropriate documentation	(a) Ch. 4.I
.3	ENTER PCS Reporting Endorsement in DA	(cc) SPO/P&A Permanent Change of Station (PCS)
.4	ROUTE PCS Reporting Endorsement for Payment Authorizing Official (PAO) approval in DA	(cc) SPO/P&A Permanent Change of Station (PCS)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(cc) USCG Direct Access User Guides

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 20: Rating Performance Qualification (RPQ) 4.2.6

Rate: YN3 4.2 Travel and Transportation Rating Performance Qualification (RPQ) 4.2.6

Performance: PROCESS a Temporary Duty (TDY) event.

Condition: Given a completed TDY travel request worksheet or ETS Authorization and access to CG HR Data System.

Standard: Orders are complete, claim is filed, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	DETERMINE type of TDY	(x) Ch. 3
.2	ADVISE member on travel entitlements and reimbursements	(a) Ch. 4.N and J (x) Ch. 3
.3	ADVISE member on pay entitlements affected by TDY	(a) Ch. 4.M
.4	COMPLETE TDY Departing Checklist	(a) Ch. 4.N.3
.5	COMPLETE TDY Return Checklist	(a) Ch. 4.N.5
.6	ASSIST member with completing and submitting TDY travel voucher through ETS	(a) Ch. 4.N (jj)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: No

Best Practices: Remind the member to update their contact information in CGPAAS/AWS before and after their TDY.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(jj) ETS User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 21: Rating Performance Qualification (RPQ) 4.3.1

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.1

Performance: PREPARE a properly formatted memorandum.

Condition: Given a SWIII, content, pertinent information, and the MS Word memorandum macro.

Standard: Memorandum is formatted properly, is free of spelling or grammatical errors and has the correct SSIC.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OPEN the Standard Memorandum template in MS Word	Step not testable
.2	VERIFY memorandum is correctly formatted (correct MS Word Template is used)	(h) Ch. A.2
.3	SELECT Standard Subject Identification Code (SSIC)	(h) Ch. A.2
.4	ENTER header information (sender salutation, SSIC, date, addressee lines, subject, and references)	(h) Ch. A.2
.5	ENTER body text	(h) Ch. A.2
.6	ENTER enclosures if applicable	(h) Ch. A.2
.7	ENTER copy lines, if applicable	(h) Ch. A.2
.8	VERIFY memo is free of spelling and grammatical error	(h) Ch. A.2

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(h) Correspondence Manual, COMDTINST M5216.4

PDC Information: Ensure the member creates a memorandum using the MS Word templates and does not use a previously formatted memo from the unit's electronic files.

Members Name: _____

Members EMPLID: _____

Worksheet 22: Rating Performance Qualification (RPQ) 4.3.2

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.2

Performance: REVIEW Official Military Personnel File (OMPF) for required documents upon member check-in.

Condition: Given a member newly reported in to the unit and access to Interactive Personnel Electronic Management Software (iPERMS)

Standard: Official Military Personnel File has the all the required documents and in compliance with Military Human Resource Record (CGMHRR) system.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN Record Manager (RM) role in iPERMS	(i)
.2	VERIFY correct documentation in iPERMS	(ii)
.3	VERIFY applicable key source documentation is complete	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: No

Reference(s):

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

(ii) CGMHRR Required Documents List

Members Name: _____

Members EMPLID: _____

Worksheet 23: Rating Performance Qualification (RPQ) 4.3.3

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.3

Performance: **UPDATE** Official Military Personnel File (OMPF) in compliance with Military Human Resource Record (CGMHRR) system.

Condition: Given access to Interactive Personnel Electronic Management Software (iPERMS) and assigned task by a supervisor.

Standard: Official Military Personnel File has the all the required documents and in compliance with Coast Guard Military Human Resource Record system.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN Scan Operator (SO) role in iPERMS	(i)
.2	IDENTIFY administrative errors in iPERMS	(i)
.3	SUBMIT documents into iPERMS	(i)
.4	CORRECT all other discrepancies in iPERMS	(i) (ii)

Professional Development Coach signature of completion

Date

Crosswalk: No

Reference(s):

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

(ii) CGMHRR Required Documents List

Members Name: _____

Members EMPLID: _____

Worksheet 24: Rating Performance Qualification (RPQ) 4.3.4

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.4

Performance: PREPARE Administrative Remarks on the appropriate CG-3307 template.

Condition: Given tasking from a supervisor, an authorized recordable personnel event or information, and access to CG SWIII.

Standard: Documentation is filed and distributed..

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ACCESS the CG-3307 templates on the PPC web site	(n)
.2	SELECT the correct CG-3307 template	(n)
.3	INSERT standard formatting information and all required content	(n)
.4	ENSURE correct spelling and grammar	(n)
.5	PRINT the completed CG-3307	(n)
.6	OBTAIN the appropriate signatures	(n)
.7	DISTRIBUTE CG-3307 appropriately	(n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

PDC Information: MBR should be able to articulate who is authorized to sign CG-3307 for different circumstances.

Best Practices: A complete list of CG-3307 templates can be found at PPC DCMS web page:

<https://www.dcms.uscg.mil/ppc/pd/page7/#list>

Members Name: _____

Members EMPLID: _____

Worksheet 25: Rating Performance Qualification (RPQ) 4.3.5

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.5

Performance: PROCESS a member's competencies data, honors and awards data, license and certificates data, and training data.

Condition: Given a computer and member's source documentation.

Standard: Member's data entered into the Coast Guard Direct Access (DA) data system with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	VERIFY source documentation	(a) Ch. 5.C and D
.2	RECORD competency data into DA	(a) Ch. 5.D (cc) Person Profile
.3	RECORD honors and award data into DA	(a) Ch. 5.D (cc) Person Profile
.4	RECORD license and certificates data into DA	(a) Ch. 5.C (cc) Person Profile
.5	RECORD training data into DA	(a) Ch. 5.C (cc) Person Profile

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

PDC Information: Member should be able to demonstrate adding an initial entry of a competency/award/license/certificate/training as well as a duplicate. Member should also be able to explain the importance of not overtyping a previous entry and the possible negative implications of doing so.

Members Name: _____

Members EMPLID: _____

Worksheet 26: Rating Performance Qualification (RPQ) 4.3.6

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.6

Performance: COUNSEL member on current policies and procedures for all types of leave and absences.

Condition: Given a request for information and access to the Coast Guard Direct Access (DA) data system.

Standard: Member's understands the policies and procedures in accordance with Yeoman customer service standards.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ACCESS the COMDTINST M1000.8, Military Assignments and Authorized Absences Manual	(c)
.2	ADVISE member on leave options and policies	(c) Ch. 2.A
.3	ADVISE member on documentation requirements	(c) Ch. 2.A
.4	DIRECT member to DA for self-service request for leave	(cc) Self-Service

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 27: Rating Performance Qualification (RPQ) 4.3.7

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.7

Performance: PROCESS an absence correction, absence request by proxy, and an Unauthorized Absence (UA) in in the Coast Guard Direct Access (DA) data system.

Condition: Given a source documentation and access to a CG Standard Workstation.

Standard: Transaction is entered into DA with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN source documentation	(c) Ch. 2.A.3
.2	ENTER transaction into DA	(cc) Self-Service for Commands and P&A Offices
.3	ROUTE transaction to the Approving Official (hh)	(cc) Self-Service for Commands and P&A Offices

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 28: Rating Performance Qualification (RPQ) 4.3.8

Rate: YN3

4.3 Administration

Rating Performance Qualification (RPQ) 4.3.8

Performance: ASSIST member with updating Designation of Beneficiaries (CG-2020D), Family Service members' Group Life Insurance (FSGLI), and Service members' Group Life Insurance (SGLI).

Condition: Given a member request and or assigned task by a supervisor.

Standard: Transaction completed with 100% accuracy and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	PROVIDE relevant instructions to member	CG-2020D, Page 3-5
.2	HELP member in completing designations	(a) Ch. 6.A, Ch. 6.B
.3	VERIFY signatures on election forms	(a) Ch. 6.A, Ch. 6.B
.4	DISTRIBUTE election forms for approval and filing	(a) Ch. 6.A, Ch. 6.B
.5	PRINT the BAH/Dependency Data Form	(a) Ch. 6.A
.6	OBTAIN service member signature on form	CG-2020D, Page 2
.7	FILE source documentation in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 29: Rating Performance Qualification (RPQ) 4.3.9

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.9

Performance: PREPARE an Advancement Certificate.

Condition: Given a need to generate a certificate, access to CG Standard Workstation, and certificate templates.

Standard: Advancement certificate is ready for presentation with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	DETERMINE member is eligible for Advancement per the Enlisted Personnel Advancement Announcement (EPAA) or CG-2030	(d) Ch. 3.A
.2	GATHER necessary information from Direct Access or CGMHRR	(d) Ch. 3.A (i)
.3	CREATE applicable advancement certificate	(a) Ch. 5.A
.4	PRINT certificate	(a) Ch. 5.A
.5	OBTAIN signature from authorizing official	(a) Ch. 5.A

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

References:

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

PDC Information: Member should be able to articulate when to use form CG-5530 vs. CG-216, who issues advancement certificates for service members advancing to paygrade E7 – E9 and what to do if it is not received by the date of advancement.

Members Name: _____

Members EMPLID: _____

Worksheet 30: Rating Performance Qualification (RPQ) 4.3.10

Rate: YN3

4.3 Administration

Rating Performance Qualification (RPQ) 4.3.10

Performance: PROCESS an Advancement Transaction in the Coast Guard Direct Access (DA) data system.

Condition: Given source documentation and access to CG Standard Workstation.

Standard: Advancement is completed in DA with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN source documentation	(a) Ch. 5.A
.2	ENTER Advancement Transaction in DA	(cc) SPO/P&A Advancements
.3	ROUTE the Advancement Transaction to the Payment Approving Official (PAO) in DA	(cc) SPO/P&A Advancements
.4	REVIEW pay calculation results in DA	(cc) SPO/P&A Pay

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 31: Rating Performance Qualification (RPQ) 4.3.11

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.11

Performance: PROCESS a Non-Judicial Punishment (NJP) or Courts Martial in the Coast Guard Direct Access (DA) data system.

Condition: Given source documentation and access to a CG Standard Workstation.

Standard: Non-Judicial Punishment (NJP) or Courts Martial entered into DA with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN source documentation	(a) Ch. 9.B
.2	VERIFY source documentation	(a) Ch. 9.B
.3	ENTER disciplinary transaction in DA	(cc) SPO/P&A Disciplinary Actions
.4	ROUTE the disciplinary transaction to the Payment Approving Official (PAO) in DA	(cc) SPO/P&A Disciplinary Actions
.5	FILE and DISTRIBUTE documents for inclusion in CGMHRR as required and Unit Punishment Log	(a) Ch. 9.B (i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 32: Rating Performance Qualification (RPQ) 4.3.12

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.12

Performance: PROCESS a Release from Active Duty (RELAD) in the Coast Guard Direct Access (DA) data system.

Condition: Given a member request and access to a CG Standard Workstation.

Standard: RELAD completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN all separation documents	(a) Ch. 3.F
.2	VERIFY all separation documents are completed with all required signatures	(a) Ch. 3.F
.3	ENTER RELAD transaction into DA	(cc) SPO/P&A Separations Transactions
.4	ROUTE RELAD transaction to Payment Approving Official (PAO) for approval and signature in DA	(cc) SPO/P&A Separations Transactions
.5	DRAFT DD-214 and forward for review	(cc) SPO/P&A Separations Transactions (q)
.6	REVIEW separation documents with member	(a) Ch. 3.F
.7	OBTAIN signatures for all separation documents	(a) Ch. 3.F
.8	DISTRIBUTE separation documentation as required	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

(q) Certificate of Release or Discharge from Active Duty, DD Form 214 CGPSCINST 1900.1

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 33: Rating Performance Qualification (RPQ) 4.3.13

Rate: YN3

4.3 Administration

Rating Performance Qualification (RPQ) 4.3.13

Performance: PROCESS a Discharge or a request for Temporary Separation (TEMPSEP) in the Coast Guard Direct Access (DA) data system.

Condition: Given a member request and access to a CG Standard Workstation.

Standard: Discharge completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN all separation documents	(a) Ch. 3.F
.2	VERIFY all separation documents are completed with all required signatures	(a) Ch. 3.F
.3	ENTER discharge transaction into DA	(cc) SPO/P&A Separations Transactions
.4	ROUTE discharge transaction to Payment Approving Official (PAO) for approval and signature in DA	(cc) SPO/P&A Separations Transactions
.5	DRAFT DD-214 and forward to for review	(cc) SPO/P&A Separations Transactions (q)
.6	REVIEW separation documents with member	(a) Ch. 3.F
.7	OBTAIN signatures for all separation documents	(a) Ch. 3.F
.8	DISTRIBUTE separation documentation as required	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

(q) Certificate of Release or Discharge from Active Duty, DD Form 214 CGPSCINST 1900.1

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.1

Members Name: _____

Members EMPLID: _____

Worksheet 34: Rating Performance Qualification (RPQ) 4.3.14

Rate: YN3
4.3 Administration

Rating Performance Qualification (RPQ) 4.3.14

Performance: **PROCESS** a Retirement in the Coast Guard Direct Access (DA) data system.

Condition: Given a member request and access to a CG Standard Workstation.

Standard: Retirement completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN all separation documents	(a) Ch. 3.F
.2	VERIFY all separation documents are completed with all required signatures	(a) Ch. 3.F
.3	ENTER retirement transaction into DA	(cc) SPO/P&A Separations Transactions
.4	ROUTE retirement transaction to Payment Approving Official (PAO) for approval and signature in DA	(cc) SPO/P&A Separations Transactions
.5	DRAFT DD-214 and forward to for review	(cc) SPO/P&A Separations Transactions (q)
.6	REVIEW separation documents with member	(a) Ch. 3.F
.7	OBTAIN signatures for all separation documents	(a) Ch. 3.F
.8	DISTRIBUTE separation documentation as required	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

(q) Certificate of Release or Discharge from Active Duty, DD Form 214 CGPSCINST 1900.1

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 35: Rating Performance Qualification (RPQ) 4.3.15

Rate: YN3

4.3 Administration

Rating Performance Qualification (RPQ) 4.3.15

Performance: **PROCESS** a Reenlistment in the Coast Guard Direct Access (DA) data system.

Condition: Given a member request and access to a CG Standard Workstation.

Standard: Reenlistment completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN Career Intentions worksheet (CG-2045)	(a) Ch. 7.A
.2	VERIFY member meets eligibility requirements	(a) Ch. 7.A
.3	DRAFT Administrative Remarks (CG-3307)	(a) Ch. 7.A (n)
.4	OBTAIN signatures on CG-3307s	(n)
.5	ENTER Reenlistment transaction in DA	(a) Ch. 7.A (cc) SPO/P&A Accessions, Reenlistments, and Extensions
.6	PRINT Reenlistment Contract (DD-4)	(cc) SPO/P&A Accessions, Reenlistments, and Extensions
.7	ROUTE Reenlistment transaction to Payment Approval Official (PAO)	(cc) SPO/P&A Accessions, Reenlistments, and Extensions
.8	FILE and DISTRIBUTE documents for inclusion in CGMHRR as required	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 36: Rating Performance Qualification (RPQ) 4.3.16

Rate: YN3

4.3 Administration

Rating Performance Qualification (RPQ) 4.3.16

Performance: **PROCESS** an Extension or Re-extension in the Coast Guard Direct Access Data System.

Condition: Given a member request and access to a CG Standard Workstation.

Standard: Extension or Re-extension is completed with 100% accuracy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	OBTAIN Career Intentions worksheet (CG-2045)	(a) Ch. 7.A
.2	VERIFY member meets eligibility requirements	(a) Ch. 7.A
.3	DRAFT Administrative Remarks (CG-3307)	(a) Ch. 7.A (n)
.4	OBTAIN signatures on CG-3307s	(n)
.5	ENTER Extension or Re-extension transaction in DA	(a) Ch. 7.A (cc) SPO/P&A Accessions, Reenlistment, and Extensions
.6	PRINT Extension or Re-extension Contract (DD-4)	(cc) SPO/P&A Accessions, Reenlistment, and Extensions
.7	ROUTE Extension or Re-extension transaction to Payment Approval Official (PAO)	(cc) SPO/P&A Accessions, Reenlistment, and Extensions
.8	FILE and DISTRIBUTE documents for inclusion in CGMHRR as required	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2015, 05/2017, 11/2017, 05/2018, 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Pay Grade: E5

Worksheet 1: Rating Performance Qualification (RPQ) 5.1.1**Rate: YN2****5.1 Pay and Personnel****Rating Performance Qualification (RPQ) 5.1.1****Performance: PROCESS** an accession (hire/rehire).**Condition:** Given a member who is entering active duty.**Standard:** Correctly enter member's information into DA and Yeoman customer service standards are followed.**PDC Training Code: 2 - Job Aid with Extensive Training**

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch. 3.B.3
.3	DETERMINE type of accession	(a) Ch. 3.A.2 (u) Ch. 5
.4	REVIEW accession procedure guide	(a) Ch. 3.B.3
.5	PROCESS accession transaction in Direct Access	(cc) SPO/P&A Accessions, Reenlistment, and Extensions
.6	FORWARD to Payment Approving Official (PAO), if applicable	(cc) SPO/P&A Accessions, Reenlistment, and Extensions
.7	VERIFY transaction appears on member's Pay Calcs	(cc) SPO/P&A Pay

Professional Development Coach signature of completion

Date**Supplementary Guidance****Crosswalk:** Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.**Reference(s):**

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(u) Performance, Training, and Education Manual COMDTINST M1500.10

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 2: Rating Performance Qualification (RPQ) 5.1.2

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.2

Performance: **VERIFY** member's advancement eligibility.

Condition: Given a member who may be eligible to advance to the next paygrade.

Standard: Verify whether the member meets the advancement requirements to the next paygrade.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY eligibility	(d) Ch. 3.A
.3	INFORM member of their advancement eligibility	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 3: Rating Performance Qualification (RPQ) 5.1.3

Rate: YN2

5.1 Pay and Personnel

Rating Performance Qualification (RPQ) 5.1.3

Performance: ASSIST member with a Housing Allowance Protection Worksheet (CG-2025A).

Condition: Given a member who may be eligible to receive BAH Protection access to the Coast Guard HR Data Systems.

Standard: Complete Housing Allowance Protection Worksheet (CG-2025A) and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(b) Ch. 3.C
.3	VERIFY eligibility	(b) Ch. 3.C
.4	COMPLETE Housing Allowance Protection Worksheet (CG-2025A)	CG-2025A
.5	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 4: Rating Performance Qualification (RPQ) 5.1.4

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.4

Performance: COUNSEL member on Cost of Living Allowances (CONUS/OCONUS).

Condition: Given a member who may be eligible to receive Cost of Living Allowances; access to the Coast Guard HR Data Systems.

Standard: Member receives Special Pay, Incentive Pay and/or Allowances and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(bb) Ch. 67 and 68
.3	VERIFY eligibility	(bb) Ch. 67 and 68
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(bb) DOD Financial Management Regulation Vol. 7A, DOD 7000.14R

Members Name: _____

Members EMPLID: _____

Worksheet 5: Rating Performance Qualification (RPQ) 5.1.5

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.5

Performance: COUNSEL member on policies and procedures for BAH/Dependency eligibility.

Condition: Given a member who may be eligible to receive Basic Allowance for Housing, access to the Coast Guard HR Data Systems.

Standard: Member receives BAH and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(b) Ch. 3
.3	VERIFY eligibility	(a) Ch. 6
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 6: Rating Performance Qualification (RPQ) 5.1.6

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.6

Performance: COUNSEL member on policies and procedures for Designation of Beneficiaries (CG-2020D).

Condition: Given a member who needs to designate, update or remove beneficiaries, access to the Coast Guard HR Data Systems.

Standard: Member completes Designation of Beneficiaries (CG-2020D) and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch. 6.A
.3	VERIFY eligibility	(a) Ch. 6.A
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 7: Rating Performance Qualification (RPQ) 5.1.7

Rate: YN2

5.1 Pay and Personnel

Rating Performance Qualification (RPQ) 5.1.7

Performance: COUNSEL member on policies and procedures for Life Insurance.

Condition: Given a member who elects, reduces, increases, or denies coverage.

Standard: Counsel a member on policies and procedures for Life Insurance and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY eligibility	(a) Ch. 6.B
.3	DIRECT them to Servicemembers' Group Life Insurance (SGLI) Online Enrollment System (SOES)	(a) Ch. 6.B
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 8: Rating Performance Qualification (RPQ) 5.1.8

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.8

Performance: COUNSEL member on policies and procedures for Uniform Allowances (clothing allowance).

Condition: Given a member who may be eligible to receive Uniform Allowances, access to the Coast Guard HR Data Systems.

Standard: Member receives Uniform Allowances and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(b) Ch. 3.I and J
.3	VERIFY eligibility	(b) Ch. 3.I and J
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 9: Rating Performance Qualification (RPQ) 5.1.9

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.9

Performance: COUNSEL member on policies and procedures of advance payments (BAH, OHA, Basic Pay).

Condition: Given a member who may be eligible to receive advance pay (BAH, OHA, Basic Pay), access to the Coast Guard HR Data Systems.

Standard: Member receives advance payment and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(b) Ch. 3 (bb) Ch. 26
.3	VERIFY eligibility	(b) Ch. 3 and 9 (bb) Ch. 26
.4	INFORM member of references and timelines	(r)
.5	COMPLETE advances worksheet CG-2010	CG-2010

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

(bb) DOD Financial Management Regulation, Volume 7A, DoD 7000.14-R

Members Name: _____

Members EMPLID: _____

Worksheet 10: Rating Performance Qualification (RPQ) 5.1.10

Rate: YN2

5.1 Pay and Personnel

Rating Performance Qualification (RPQ) 5.1.10

Performance: COUNSEL member on policies and procedures of Subsistence Allowances (SMR, BAS, BAS II).

Condition: Given a member who may be eligible to receive Subsistence Allowances (SMR, BAS, BAS II), access to the Coast Guard HR Data Systems.

Standard: Member receives Subsistence Allowances (SMR, BAS, BAS II) and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(b) Ch. 3.A
.3	VERIFY eligibility	(b) Ch. 3.A
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 11: Rating Performance Qualification (RPQ) 5.1.11

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.11

Performance: COUNSEL member on policies and procedures for a Reenlistment, Extension and Reextension of enlistment).

Condition: Given a member who may be eligible to reenlist, extend, or reextend, access to the Coast Guard HR Data Systems.

Standard: Member receives counseling on their retention eligibility and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch.7.A
.3	VERIFY member meets eligibility requirements for continued service	(d) Ch. 1.E
.4	INFORM member of references and timelines	(r)
.5	ADVISE member on leave balance options	(c) Ch. 2.A.20
.6	COMPLETE 3307 if applicable	(n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 12: Rating Performance Qualification (RPQ) 5.1.12

Rate: YN2

5.1 Pay and Personnel

Rating Performance Qualification (RPQ) 5.1.12

Performance: COUNSEL member on policies and procedures for Selective Reenlistment Bonus (SRB).

Condition: Given a member who may be eligible to receive Selective Reenlistment Bonus, access to the Coast Guard HR Data Systems.

Standard: Member receives counseling on SRB eligibility and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(p) Ch. 1.B
.3	REVIEW current SRB policy	(p) Ch. 1.B
.4	VERIFY eligibility	(p) Ch. 1.B.4
.5	INFORM member of policies and timelines	(r)
.6	COMPLETE SRB 3307 if applicable	(p) Ch. 1.B.11 and 12 (n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(p) Military Bonus Programs, COMDTINST M7220.2

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 13: Rating Performance Qualification (RPQ) 5.1.13

Rate: YN2
5.1 Pay and Personnel
Rating Performance Qualification (RPQ) 5.1.13

Performance: COUNSEL member on eligibility and procedures for Career Sea Pay and Career Sea Pay Premium.

Condition: Given a member who may be eligible to receive Career Sea Pay and Career Sea Pay Premium, access to the Coast Guard HR Data Systems.

Standard: Member receives Career Sea Pay or Career Sea Pay Premium and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(b) Ch. 4.B and C
.3	VERIFY eligibility	(b) Ch. 4.B and C
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 14: Rating Performance Qualification (RPQ) 5.2.1

Rate: YN2 5.2 Travel and Transportation Rating Performance Qualification (RPQ) 5.2.1

Performance: COUNSEL member on dependent travel to designated place (PCS).

Condition: Given a member who wants to PCS dependents to a designated place, access to the Coast Guard HR Data Systems.

Standard: Member receives counseling on the policies and procedures to PCS dependents to a designated place and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(x) 050814
.3	VERIFY eligibility	(x) 050814
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

Members Name: _____

Members EMPLID: _____

Worksheet 15: Rating Performance Qualification (RPQ) 5.2.2

Rate: YN2 5.2 Travel and Transportation Rating Performance Qualification (RPQ) 5.2.2

Performance: COUNSEL member on dislocation allowance (DLA).

Condition: Given a member who may be eligible to receive Dislocation Allowance, access to the Coast Guard HR Data Systems.

Standard: Member receives Dislocation Allowance and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(x) 0505 (g) 0505
.3	VERIFY eligibility	(x) 0505 (g) 0505
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(g) Joint Travel Regulations (JTR)

Members Name: _____

Members EMPLID: _____

Worksheet 16: Rating Performance Qualification (RPQ) 5.2.3

Rate: YN2 5.2 Travel and Transportation Rating Performance Qualification (RPQ) 5.2.3

Performance: COUNSEL member on Monetary Allowance in Lieu of Transportation (MALT) plus Per Diem entitlements.

Condition: Given a member eligible to travel via personally owned conveyance, access to the Coast Guard HR Data Systems.

Standard: Member receives counseling on the policies and procedures for MALT plus per diem and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(g) Ch. 3 and 5 (x) Ch. 5
.3	VERIFY eligibility	(g) Ch. 3 and 5 (x) Ch. 5
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(g) Joint Travel Regulations (JTR)

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

Members Name: _____

Members EMPLID: _____

Worksheet 17: Rating Performance Qualification (RPQ) 5.2.4

Rate: YN2 5.2 Travel and Transportation Rating Performance Qualification (RPQ) 5.2.4

Performance: COUNSEL member on OCONUS Permanent Change of Station (PCS) entitlements.

Condition: Given a member who is in receipt of OCONUS PCS orders, access to the Coast Guard HR Data Systems.

Standard: Member understands the policies and procedures required to PCS OCONUS and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch. 4.E
.3	COMPLETE PCS departing checklist	(a) Ch. 4.E
.4	COMPLETE PCS overseas checklist handbook	(t)
.5	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(t) PSCINST 1300

Members Name: _____

Members EMPLID: _____

Worksheet 18: Rating Performance Qualification (RPQ) 5.2.5

Rate: YN2 5.2 Travel and Transportation Rating Performance Qualification (RPQ) 5.2.5

Performance: COUNSEL member on CONUS Permanent Change of Station (PCS) entitlements.

Condition: Given a member who is in receipt of CONUS PCS orders, access to the Coast Guard HR Data Systems.

Standard: Member understands the policies and procedures required to PCS CONUS and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(x) Ch. 5 (g) Ch. 5
.3	COMPLETE PCS departing checklist	(a) Ch. 4.E
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(g) Joint Travel Regulations (JTR)

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 19: Rating Performance Qualification (RPQ) 5.2.6

Rate: YN2

5.2 Travel and Transportation

Rating Performance Qualification (RPQ) 5.2.6

Performance: COUNSEL member on Permanent Change of Station/Temporary Duty (PCS/TEM DU) travel entitlements to Class “A” Schools.

Condition: Given a member who is in receipt of PCS orders to Class “A” School, access to the Coast Guard HR Data Systems.

Standard: Member understands the policies and procedures required to PCS to Class “A” School and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch. 4.B
.3	COMPLETE PCS departing checklist	(a) Ch. 4.E
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 20: Rating Performance Qualification (RPQ) 5.2.7

Rate: YN2
5.2 Travel and Transportation
Rating Performance Qualification (RPQ) 5.2.7

Performance: COUNSEL member on Temporary Duty (TDY) travel entitlements.

Condition: Given a member who may be eligible to receive Special Pay, Incentive Pay, and/or Allowances, access to the Coast Guard HR Data Systems.

Standard: Given a member who is in receipt of TDY orders, access to the Coast Guard HR Data Systems.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	DETERMINE type of TDY	(a) Ch. 4 (x) Ch. 3 (g) Ch. 3
.3	ADVISE member on entitlements and reimbursements	(a) Ch. 4 (x) Ch. 3 (g) Ch. 3

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(g) Joint Travel Regulations (JTR)

Members Name: _____

Members EMPLID: _____

Worksheet 21: Rating Performance Qualification (RPQ) 5.2.8

Rate: YN2 5.2 Travel and Transportation Rating Performance Qualification (RPQ) 5.2.8

Performance: COUNSEL member on transportation entitlements (HHG's, SIT, NTS, UB, Progear, PPM, POV Shipment).

Condition: Under real or simulated conditions, given a request for information regarding transportation entitlement concerns, access to a SWIII and travel documents.

Standard: Member has the information about transportation entitlements and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	ESTABLISH transportation needs	(x) Ch. 3 and 5 (g) Ch. 3 and 5
.3	VERIFY member's transportation entitlements	(x) Ch. 3 and 5 (g) Ch. 3 and 5
.4	ADVISE member on possible options	(r)
.5	DIRECT member to available resources	(gg)
.6	PROVIDE information on claims process	(r) (a) Ch. 4

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(g) Joint Travel Regulations (JTR)

(gg) "It's Your Move" pamphlet

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 22: Rating Performance Qualification (RPQ) 5.3.1

Rate: YN2
5.3 Administration

Rating Performance Qualification (RPQ) 5.3.1

Performance: **FILE** unit correspondence files.

Condition: Given unit correspondence, access to the required forms and documentation, and a unit correspondence file job aid.

Standard: Unit correspondence files are in compliance with The Records & Information Management Program Roles and Responsibilities instruction.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	IDENTIFY if the product is record or non-record material	(m)
.2	IDENTIFY if the product must be retained temporarily or permanently.	(m)
.3	FILE record material	(m)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(m) Records & Information Management Program Roles and Responsibilities, COMDTINST 5212.12

Supplemental material: Check CG-611 Records Resource Center Share Point site for additional information:

<https://uscg.sharepoint-mil.us/sites/cg61/CG611/SitePages/Home.aspx>

Members Name: _____

Members EMPLID: _____

Worksheet 23: Rating Performance Qualification (RPQ) 5.3.2

Rate: YN2

5.3 Administration

Rating Performance Qualification (RPQ) 5.3.2

Performance: COUNSEL member on ID cards.

Condition: Given a member who may be eligible to receive an Armed Forces Active Duty, Selected Reserve (SELRES), and Civilian Common Access Card (CAC).

Standard: Member receives counseling on what card they are eligible for and what requirements are necessary while Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	DETERMINE type of service required	(v) Ch. 1
.3	VERIFY eligibility	(v) Ch. 2
.4	COLLECT required documentation	(v) Ch. 2
.5	INFORM member of their entitlement	(v) Ch. 2

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(v) Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and other Eligible Personnel, COMDTINST M5512.1

Members Name: _____

Members EMPLID: _____

Worksheet 24: Rating Performance Qualification (RPQ) 5.3.3

Rate: YN2
5.3 Administration

Rating Performance Qualification (RPQ) 5.3.3

Performance: COMPLETE disciplinary action (NJP, Courts Martial).

Condition: Given a member who received disciplinary action (NJP, Courts Martial).

Standard: Disciplinary action is properly processed in Direct Access and necessary documents are distributed accordingly.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	COLLECT source documentation	(a) Ch. 9.B
.2	ENTER transaction in DA	(a) Ch. 9.B (cc) SPO/P&A Disciplinary Actions
.3	COMPLETE an Enlisted Evaluation System Report in DA	(a) Ch. 9.B (cc) Enlisted Evaluation System (EES)
.4	FILE the original disciplinary paperwork in the unit punishment log	(a) Ch. 9.B
.5	ADJUST pay if applicable	(a) Ch. 9.B (cc) SPO/P&A Disciplinary Actions
.6	FORWARD pay transactions to Payment Approving Official (PAO), if applicable	(a) Ch. 9.B (cc) SPO/P&A Disciplinary Actions
.7	INITIATE report (CG-5588) to the CG Security Center	(a) Ch. 9.B

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 25: Rating Performance Qualification (RPQ) 5.3.4

Rate: YN2
5.3 Administration
Rating Performance Qualification (RPQ) 5.3.4

Performance: **PREPARE** an award for presentation.

Condition: Given an award that needs to be prepared.

Standard: Award is printed and made ready for presentation to the member.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(k) Ch. 1.G
.3	PRINT award	Step not testable
.4	ROUTE for signature	(k) Ch. 1.H
.5	PLACE award in presentation folder	(k) Ch. 1.J

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(k) Coast Guard Military Medals and Awards Manual COMDTINST M1650.25

Members Name: _____

Members EMPLID: _____

Worksheet 26: Rating Performance Qualification (RPQ) 5.3.5

Rate: YN2

5.3 Administration

Rating Performance Qualification (RPQ) 5.3.5

Performance: ASSIST member with updating Qualification to possess Firearms (DD-2760).

Condition: Given a member who is required to update their Qualification to possess Firearms (DD-2760).

Standard: Member accurately completes Qualification to possess Firearms (DD-2760) and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch. 6.M
.3	VERIFY eligibility	(a) Ch. 6.M
.4	READ Chapter 4 of Ref. (a) to ensure understanding of disclosure requirements in accordance with the Lautenberg Amendment	(a) Ch. 6.M
.5	COMPLETE Qualification to possess Firearms (DD-2760)	(a) Ch. 6.M
.6	FILE form in CGMHRR	(a) Ch. 6.M (i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 27: Rating Performance Qualification (RPQ) 5.3.6

Rate: YN2
5.3 Administration

Rating Performance Qualification (RPQ) 5.3.6

Performance: ASSIST member with travel claim (PCS/TDY).

Condition: Given a member completing PCS/TDY travel, access to the Coast Guard HR Data Systems.

Standard: Member completes travel claim and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	(a) Ch. 4.I
.3	INFORM member of references and timelines	(a) Ch. 4.I
.4	ASSIST member with travel claim	(a) Ch. 4.I
.5	FORWARD to Travel Authorizing Official (AO), if applicable	(a) Ch. 4.I

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 28: Rating Performance Qualification (RPQ) 5.3.7

Rate: YN2
5.3 Administration

Rating Performance Qualification (RPQ) 5.3.7

Performance: COUNSEL member on modifying Emergency Contact Data information.

Condition: Given a member with questions about their Emergency Contact Data, access to the Coast Guard HR Data Systems.

Standard: Member updates their Emergency Contact Data in Direct Access and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	PROVIDE member with the Direct Access user guide	(cc) Self-Service
.3	UPDATE Emergency Contact Data in Direct Access	(cc) Self-Service

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 29: Rating Performance Qualification (RPQ) 5.3.8

Rate: YN2
5.3 Administration

Rating Performance Qualification (RPQ) 5.3.8

Performance: DETERMINE a member's compliance with weight and body fat standards.

Condition: Under the supervision of a Senior Petty Officer and given a semi-annual, TDY, PCS, advancement, promotion, or command direction to weigh-in, authorized and calibrated height and weight scale, authorized springs-loaded tension tape, and a member requiring screening.

Standard: Member is screened, measurements are entered into CG HR Data Systems and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	PREPARE equipment and materials needed for screening	(j) Ch. 2
.2	GREET member	(r)
.3	VERIFY height and minimum/maximum allowable weight	(j) Ch. 2 and Encl: 1
.4	SCREEN member	(j) Ch. 2
.5	COMPARE measurements against CG standards	(j) Encl: 1 and 2
.6	RECORD results	(j) Ch. 2 (n)
.7	INPUT results in CG HR Data System	(cc) Self-Service for Commands and P&A Offices

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(j) Body Composition Standards Program, COMDTINST M1020.8

(r) YN Customer Service Standards

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 30: Rating Performance Qualification (RPQ) 5.3.9

Rate: YN2

5.3 Administration

Rating Performance Qualification (RPQ) 5.3.9

Performance: **RUN** various unit reports (Travel Charge Card, Member Weigh-in report, EER, Unit Roster).

Condition: Given the need to verify data, field admin user access to Direct Access, or access to CGBI, and a SWIII.

Standard: Ensure complete and accurate information is in each report.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	DETERMINE report parameters	(cc) Reports and Queries
.2	RUN report	(cc) Reports and Queries
.3	VERIFY report contains required information	(cc) Reports and Queries

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 31: Rating Performance Qualification (RPQ) 5.3.10

Rate: YN2
5.3 Administration
Rating Performance Qualification (RPQ) 5.3.10

Performance: PREPARE a leave carry-over request.

Condition: Given a member who may be eligible to carry over leave, access to the Coast Guard HR Data Systems.

Standard: Member successfully requests to carry over leave allowances and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY eligibility	(c) Ch. 2.A.15.b
.3	SUBMIT memo via chain of command to PPC (MAS)	(a) Ch. 6.Q
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 32: Rating Performance Qualification (RPQ) 5.3.11

Rate: YN2

5.3 Administration

Rating Performance Qualification (RPQ) 5.3.11

Performance: ASSIST member with a Government Travel Charge Card (GTCC) application.

Condition: Given a member who requires a Government Travel Charge Card (GTCC), access to the Coast Guard HR Data Systems.

Standard: Member completes basic GTCC application package and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY member requires Government Travel Charge Card	(y) Ch.1.A.2 & 4
.3	COMPLETE request memo endorsed by the command	(y) Ch. 1.E.4.c.2
.4	COMPLETE the bank cardholder agreement	(y) Ch. 1.E.4.c.2
.5	COMPLETE the GTCC training in the Learning Management System	(y) Ch. 1.E.4.c.1
.6	SUBMIT completed package to bank	Step not testable
.7	FILE application in CGMHRR	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(y) Government Travel Charge Card (GTCC) Program Policies and Procedures, COMDTINST M4600.18

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 33: Rating Performance Qualification (RPQ) 5.3.12

Rate: YN2

5.3 Administration

Rating Performance Qualification (RPQ) 5.3.12

Performance: ASSIST member in the request of an Official Military Personnel File (OMPF).

Condition: Given a member requesting access to their OMPF, access to the Coast Guard HR Data Systems

Standard: MBR gains access to their OMPF and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	REVIEW COMDTINST M1080.10	(i)
.3	ADVISE member on access, audit procedures, and correction requests of their OMPF	(i)
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 34: Rating Performance Qualification (RPQ) 5.4.1

Rate: YN2
5.4 Reserves

Rating Performance Qualification (RPQ) 5.4.1

Performance: **PROCESS** reserve orders in DA (DEMOB, MOB, ADT-AT/OTD, EAD, ADOS, IADT).

Condition: Under real or simulated conditions, given a supervisor-approved member request for reserve orders, CG SWIIL, and access to CG HR Data Systems.

Standard: Orders are ready for execution and member is in receipt of orders.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	REVIEW requirements for orders.	(a) Ch. 10 (ah) Ch. 2
.2	VERIFY the member meets eligibility for orders.	(a) Ch. 10 (ah) Ch. 2
.3	FORWARD the request to the funding source for accounting data.	(a) Ch. 10
.4	FORWARD the request to the authorizing official for signature approval once orders are returned from funding source.	(a) Ch. 10
.5	DISTRIBUTE the orders to the member.	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

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

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 35: Rating Performance Qualification (RPQ) 5.4.2

Rate: YN2
5.4 Reserves

Rating Performance Qualification (RPQ) 5.4.2

Performance: VERIFY reserve good conduct eligibility.

Condition: Given a member who may be eligible for a reserve good conduct medal.

Standard: Verify whether the member meets the requirements for the reserve good conduct medal and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	REVIEW requirements for reserve good conduct medal.	(k) Ch.5.A.1 and 2
.2	VERIFY the member meets eligibility for the reserve good conduct medal.	(k) Ch.5.A.2 (a) Ch. 8.M (d) Ch. 4
.3	INFORM the member of their eligibility	(w)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(k) Coast Guard Military Medals and Awards Manual, COMDTINST M1650.25

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(d) Enlistments, Evaluations, and Advancements Manual, COMDTINST M1000.2

(w) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 1: Rating Performance Qualification (RPQ) 6.1.1**Rate: YN1****6.1 Pay and Personnel****Rating Performance Qualification (RPQ) 6.1.1****Performance:** COUNSEL member on policies and procedures for maintaining Allotments.**Condition:** Given a request for information on allotments and access to CG HR Data Systems.**Standard:** Member understands the policies and procedures to start, stop, or change an allotment.**PDC Training Code: 2 - Job Aid with Extensive Training**

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	COMPLETE allotment checklist	(a) Ch.8.H.4
.3	ADVISE member on timelines and procedures, if needed	(r)

Professional Development Coach signature of completion

Date**Supplementary Guidance****Crosswalk:** Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.**Reference(s):**

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 2: Rating Performance Qualification (RPQ) 6.1.2

Rate: YN1

6.1 Pay and Personnel

Rating Performance Qualification (RPQ) 6.1.2

Performance: COUNSEL member on changing Direct Deposit information

Condition: Given a request for information on changing Direct Deposit and access to a SWIIL.

Standard: Member understands the policies and procedures to change their direct deposit.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT source documentation	CG-2015
.3	COMPLETE Pay Delivery Worksheet (CG-2015)	CG-2015
.4	INFORM member of references and timelines	(r)
.5	VERIFY pay is deposited into the correct account	(cc) SPO/P&A Pay

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 3: Rating Performance Qualification (RPQ) 6.1.3

Rate: YN1
6.1 Pay and Personnel
Rating Performance Qualification (RPQ) 6.1.3

Performance: COUNSEL member on pay and allowance variations

Condition: Given a member with questions about changes in their payslip.

Standard: Review member's Pay Calculation Results and identify changes.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	REVIEW member's Pay Calculation Results	(cc) SPO/P&A Pay
.3	REVIEW member's CGMHRR	(i)
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 4: Rating Performance Qualification (RPQ) 6.1.4

Rate: YN1

6.1 Pay and Personnel

Rating Performance Qualification (RPQ) 6.1.4

Performance: COUNSEL member on policies, procedures and payments of Critical Skills Retention Bonus (CSRB)

Condition: Member requests information about a Critical Skills Retention Bonus.

Standard: Member is informed of the policies and procedures to obtain a Critical Skills Retention Bonus (CSRB).

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	REVIEW current CSRB policy	(p) Ch.2.H and 3.F
.3	VERIFY members eligibility	(p) Ch.2.H and 3.F
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(p) Military Bonus Programs, COMDTINST M7220.2

Best Practices: Bonus amounts change annually. Ensure that the most current ALCOAST is available during the counseling session.

Members Name: _____

Members EMPLID: _____

Worksheet 5: Rating Performance Qualification (RPQ) 6.1.5

Rate: YN1
6.1 Pay and Personnel
Rating Performance Qualification (RPQ) 6.1.5

Performance: COUNSEL member on types of housing allowances.

Condition: Given direction by a supervisor or a member's request and access to a SWIII.

Standard: Member is informed of the policies and procedures for their housing allowance and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	REVIEW member's CGMHRR	(i)
.3	VERIFY members eligibility	(b) Ch. 3.B
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

(b) Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 6: Rating Performance Qualification (RPQ) 6.1.6

Rate: YN1
6.1 Pay and Personnel
Rating Performance Qualification (RPQ) 6.1.6

Performance: COUNSEL member on Incentive Pay entitlements (AvIP, AvB, DIFDEN, DIFOPS, etc).

Condition: Given a member who may be eligible to receive Incentive Pay; access to the Coast Guard HR Data Systems.

Standard: Member receives Incentive Pay and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	COLLECT source documentation	(b) Ch. 5
.3	VERIFY members eligibility	(b) Ch. 5
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Best Practices: Verify the latest rates and benefits on PPC website.

Members Name: _____

Members EMPLID: _____

Worksheet 7: Rating Performance Qualification (RPQ) 6.1.7

Rate: YN1

6.1 Pay and Personnel

Rating Performance Qualification (RPQ) 6.1.7

Performance: COUNSEL member on Special Pay, entitlements (FLPP, HF, IDP, RSPLTY Pay, SDP, etc).

Condition: Given a member who may be eligible to receive Special Pay; access to the Coast Guard HR Data Systems.

Standard: Member receives Special Pay and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	COLLECT source documentation	(b) Ch. 4
.3	VERIFY members eligibility	(b) Ch. 4
.4	INFORM member of references and timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Best Practices: Review the latest rates and benefits on PPC (mas) DCMS web site:

<https://www.dcms.uscg.mil/ppc/mas/rates/>

Members Name: _____

Members EMPLID: _____

Worksheet 8: Rating Performance Qualification (RPQ) 6.1.8

Rate: YN1

6.1 Pay and Personnel

Rating Performance Qualification (RPQ) 6.1.8

Performance: COUNSEL member on Family Separation Housing (FSH) allowance.

Condition: Given a member who may be eligible for Family Separation Housing.

Standard: Member understands the policies and procedures for their entitlement.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	DETERMINE member specific situation	(b) Ch. 3
.3	VERIFY eligibility	(b) Ch. 3
.4	INFORM member of their entitlement	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(b) Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 9: Rating Performance Qualification (RPQ) 6.2.1

Rate: YN1
6.2 Travel and Transportation
Rating Performance Qualification (RPQ) 6.2.1

Performance: COUNSEL member on Consecutive Overseas Tour (COT) entitlements

Condition: Given a member who served consecutive tours OCONUS.

Standard: Member understands the policies and procedures of their Consecutive Overseas Tour eligibility.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY the members eligibility	(g) Ch. 5
.3	INFORM member of policies, procedures, and timelines	(g) Ch. 5 (x) Ch. 5

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(g) Joint Travel Regulations

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

Members Name: _____

Members EMPLID: _____

Worksheet 10: Rating Performance Qualification (RPQ) 6.2.2

Rate: YN1 6.2 Travel and Transportation Rating Performance Qualification (RPQ) 6.2.2

Performance: COUNSEL member on Temporary Lodging Allowance (TLA).

Condition: Under real or simulated conditions, given a request for information regarding allowances, access to a SWIIR and travel documents.

Standard: Member understands the policies and procedures for TLA and YN customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	VERIFY member's entitlement to TLA	(x) Ch. 9 (bb) Ch. 68
.3	ADVISE member on possible options	(r)
.4	DIRECT member to available resources	Step not testable
.5	PROVIDE information on claims process	(x) Ch. 9 (bb) Ch. 68 (a) Ch. 4.J

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

(bb) DOD Financial Management Regulation, Volume 7A. DOD 7000.14-R

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Best Practices: Trainee should review the references, relay appropriate information to the member, and consult with their unit's transportation office if questions arise. Review message traffic for latest transportation regulation updates.

Members Name: _____

Members EMPLID: _____

Worksheet 11: Rating Performance Qualification (RPQ) 6.2.3

Rate: YN1 6.2 Travel and Transportation Rating Performance Qualification (RPQ) 6.2.3

Performance: COUNSEL member on Temporary Lodging Expense (TLE).

Condition: Under real or simulated conditions, given a request for information regarding allowances, access to a SWIII and travel documents.

Standard: Member understands the policies and procedures for TLE and YN customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	VERIFY member's entitlement to TLE	(g) Ch. 5
.3	ADVISE member on possible options	(g) Ch. 5
.4	DIRECT member to available resources	Step not testable
.5	PROVIDE information on claims process	(g) Ch. 5 (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(g) Joint Travel Regulations

Best Practices: Use the PCS Entitlements Worksheet CG-2003 as a guide while counseling members.

Members Name: _____

Members EMPLID: _____

Worksheet 12: Rating Performance Qualification (RPQ) 6.2.4

Rate: YN1 6.2 Travel and Transportation Rating Performance Qualification (RPQ) 6.2.4

Performance: COUNSEL member on Dependent Evacuation Orders.

Condition: Under real or simulated conditions, given a request for information regarding transportation entitlement concerns, access to a SWIII and travel documents.

Standard: Member understands the policies and procedures for Dependent Evacuation Orders and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	ESTABLISH transportation needs	(g) Ch. 6
.3	VERIFY member's transportation entitlements	(g) Ch. 6
.4	ADVISE member on possible options	(r)
.5	ADVISE member on possible options	Step not testable
.6	PROVIDE information on claims process	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(g) Joint Travel Regulations

Members Name: _____

Members EMPLID: _____

Worksheet 13: Rating Performance Qualification (RPQ) 6.2.5

Rate: YN1
6.2 Travel and Transportation
Rating Performance Qualification (RPQ) 6.2.5

Performance: **APPROVE** an Evacuation travel voucher.

Condition: Under real or simulated conditions, given a request for information regarding transportation entitlement concerns, access to a SWIII and travel documents.

Standard: Evacuation travel voucher is properly reviewed and approved, while Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	COLLECT necessary travel documents	(a) Ch. 2.H
.3	VERIFY travel was performed as directed on orders	(a) Ch. 2.H
.4	COMPLETE travel voucher	(a) Ch. 2.H

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 14: Rating Performance Qualification (RPQ) 6.2.6

Rate: YN1 6.2 Travel and Transportation Rating Performance Qualification (RPQ) 6.2.6

Performance: **PROCESS** an emergency leave travel request.

Condition: Under real or simulated conditions, given a member requesting emergency leave and access to CGHR Data Systems.

Standard: Orders are complete, the member is authorized to travel, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	ADVISE the member on policies for emergency leave	(c) Ch. 2.A (g) Ch. 4
.3	VERIFY the emergency	(c) Ch. 2.A.5.d
.4	DETERMINE the travel mode	(c) Ch. 2.A.7
.5	DRAFT the emergency leave orders	(c) Ch. 1.G.2.B
.6	ASSIST the member with travel arrangements	(c) Ch. 2.A (a) Ch. 4.O
.7	INFORM the member of references and timelines	(g) Ch. 4
.8	DISTRIBUTE document as required	Step not testable

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(g) Joint Travel Regulations

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 15: Rating Performance Qualification (RPQ) 6.3.1

Rate: YN1

6.3 Pay and Personnel

Rating Performance Qualification (RPQ) 6.3.1

Performance: DRAFT command email traffic.

Condition: Given a SWIII, content, pertinent information, and access to command email Shared Mailbox (SMB).

Standard: Command email is formatted properly, is free of spelling or grammatical errors, and has the correct addressees.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	REVIEW command email procedures	(ee)
.2	ACCESS command email Shared Mailbox (SMB)	(ee) Ch.2
.3	ENTER action addressees	(ee) Ch.3.A.1 and 3.B.2
.4	ENTER originating unit's command email SMB name	(ee) Ch. 3.B.2
.5	ENTER the body of email	(ee) Ch. 3.B.2
.6	REVIEW and digitally sign command email	(ee) Ch. 3.B.2

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(ee) Command Email Tactics, Techniques, and Procedures (TTP) CGTTP 6-01.5A

Members Name: _____

Members EMPLID: _____

Worksheet 16: Rating Performance Qualification (RPQ) 6.3.2

Rate: YN1
6.3 Pay and Personnel
Rating Performance Qualification (RPQ) 6.3.2

Performance: **PREPARE** an endorsement.

Condition: Given direction by a supervisor or a member's request; access to a SWIIL.

Standard: Document is formatted properly and is free of spelling or grammatical errors.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	DETERMINE the appropriate type of endorsement	(h) Ch. 2
.2	INPUT information in the "From," "To", and "Thru" blocks	(h) Appx C
.3	ENTER body of endorsement	(h) Appx C
.4	VERIFY endorsement is free of spelling and grammatical errors	(h) Ch. 1.A.4
.5	FORWARD endorsement for approval	(h) Ch. 2.C

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(h) Correspondence Manual, COMDTINST M5216.4

Members Name: _____

Members EMPLID: _____

Worksheet 17: Rating Performance Qualification (RPQ) 6.3.3

Rate: YN1
6.3 Pay and Personnel
Rating Performance Qualification (RPQ) 6.3.3

Performance: **PREPARE** a business letter.

Condition: Given direction by a supervisor or a member's request; access to a SWIIL.

Standard: Document is formatted properly, is free of spelling or grammatical errors, and has the correct SSIC.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	SELECT the correct MS Word Macro	Step not testable
.2	SELECT an SSIC applicable to the subject and scenario	(o) Sec 2, 4
.3	INPUT information into MS Word Macro	Step not testable
.4	INPUT the body of text	(h) Ch. 3
.5	INPUT header information for originator, if necessary	(h) Ch. 3
.6	VERIFY correspondence is free of spelling or grammatical errors	(h) Ch. 1.A.4
.7	FORWARD to originator for signature	Step not testable

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(o) Standard Subject Identification Code (SSIC) Manual, SECNAV M-5210.2

(h) Correspondence Manual, COMDTINST M5216.4

Members Name: _____

Members EMPLID: _____

Worksheet 18: Rating Performance Qualification (RPQ) 6.3.4

Rate: YN1

6.3 Pay and Personnel

Rating Performance Qualification (RPQ) 6.3.4

Performance: COUNSEL member on policies for obtaining an official passport or passport card.

Condition: Given a member with questions about the policies and procedures to apply for official passports or passport cards.

Standard: Determine the requirements for the member to submit a complete passport application package.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	REVIEW the Official Passport/Visa Checklist	(z) Appx C
.3	SELECT the proper passport application	(z) Appx C
.4	COLLECT source documentation	(z) Appx C
.5	REFER member to certified passport agent	Step not testable

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(z) Foreign Travel, eers and Visas, COMDTINST 5000.5G

Members Name: _____

Members EMPLID: _____

Worksheet 19: Rating Performance Qualification (RPQ) 6.3.5

Rate: YN1 6.3 Pay and Personnel Rating Performance Qualification (RPQ) 6.3.5

Performance: COUNSEL member on the change in rating process.

Condition: Under real or simulated conditions, given a member request for or service directed change in rating, access to CG HR Data Systems.

Standard: Policy is followed, required information for determination is included, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	REVIEW the CIR and lateral process job aid with the member	Step not testable
.3	ASSIST the member with the change in rating request documentation	(h) Ch. 2 (d) Ch. 3.A.11.c
.4	VERIFY the accuracy of information on the request package (test scores, TIS, TIG, obligated service, etc...)	(cc) Self-Service for Commands and P&A Offices
.5	OBTAIN a command endorsement	(d) Ch. 3
.6	INFORM the member to forward to approval authority	(d) Ch. 3.A.26

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(h) Correspondence Manual, COMDTINST M5216.4

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 20: Rating Performance Qualification (RPQ) 6.3.6

Rate: YN1
6.3 Pay and Personnel
Rating Performance Qualification (RPQ) 6.3.6

Performance: COUNSEL member on preparation of Record of Professional Development (CG-4082).

Condition: Given a member requesting consideration by selection boards, screening panels or assignment officers.

Standard: Update record to reflect the most current information and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	COLLECT supporting documentation	(u) Ch. 4.C
.3	COMPLETE record of professional development	(u) Ch. 4.C
.4	INFORM the member of timelines	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(u) Performance, Training, and Education Manual, COMDTINST M1500.10

Members Name: _____

Members EMPLID: _____

Worksheet 21: Rating Performance Qualification (RPQ) 6.4.1

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.1

Performance: COUNSEL member on policies and procedures for receiving reserve bonuses.

Condition: Given a member who may be eligible to receive reserve bonuses, access to the Coast Guard HR Data Systems.

Standard: Member receives counseling on reserve bonus eligibility and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	REVIEW current bonus policy	(p) Ch. 4
.3	VERIFY eligibility	(p) Ch. 4
.4	INFORM customer of policies and timelines	(r)
.5	COMPLETE 3307 if applicable	(n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(p) Military Bonus Programs, COMDTINST M7220.2

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 22: Rating Performance Qualification (RPQ) 6.4.2

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.2

Performance: COUNSEL a member on reserve participation standards.

Condition: Under real or simulated conditions, given authorizing source documents, access to CG HR Data Systems, and a member requiring information.

Standard: All information about the fulfillment of contractual and training requirements is explained and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	DETERMINE member's reserve pay category	(cc) Self-Service for Commands and P&A Offices (hh) Ch. 1.D
.3	STATE the reserve participation standards	(hh) Ch. 3.B and Appx A
.4	INFORM the member of timelines and waiver processes, if applicable	(hh) Ch. 3.B (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(cc) USCG Direct Access User Guides

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

Members Name: _____

Members EMPLID: _____

Worksheet 23: Rating Performance Qualification (RPQ) 6.4.3

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.3

Performance: VERIFY a member's reserve readiness status.

Condition: Under real or simulated conditions, given authorizing source documents, access to CG HR Data Systems, and a member requiring information and/or an assigned task by a supervisor.

Standard: All information about member's readiness status is obtained, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	OBTAIN a recall roster	(cc) Reports and Queries
.3	REVIEW members deployable status in CGBI	Step not testable
.4	ASSIST the member with submitting a reserve ASQ	(cc) Self-Service (hh) Ch. 3.C
.5	VERIFY the unit's reserve ASQ compliance	(cc) Self-Service for Commands and P&A Offices

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(cc) USCG Direct Access User Guides

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

Best Practices: Work with local dxr/sxr/DOL to run reports. A recall roster can be run from CGBI as well as Direct Access. Reserve specific DA User Guides can be found under "Reserve Activities User Guide", which take you to PPC web page for complete list of guides.

Members Name: _____

Members EMPLID: _____

Worksheet 24: Rating Performance Qualification (RPQ) 6.4.4

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.4

Performance: **ASSIST** a member with Change in Reserve Component Category (RCC) Form (IRR, ISL, ASL).

Condition: Under real or simulated conditions, given a member request for or service directed change in component; access to CG HR Data Systems.

Standard: Policy is followed, required information for determination is included, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	REVIEW Reserve Component Category requirements with member	(hh) Ch. 1
.3	INFORM the member to complete a Change in Reserve Component Category form CG-1001 with accompanying documentation	CG-1001
.4	VERIFY the accuracy of information on the request package	(hh) CG-1001
.5	OBTAIN a command endorsement	CG-1001
.6	INFORM the member to forward to approval authority	CG-1001

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

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

Members Name: _____

Members EMPLID: _____

Worksheet 25: Rating Performance Qualification (RPQ) 6.4.5

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.5

Performance: COUNSEL member on pay and allowances for Funeral Honor Duty (FHD), IDT Drills and Readiness Management Period (RMP).

Condition: Under real or simulated conditions, given a member performing inactive duty; access to CGHR Data Systems.

Standard: Member understands entitlements for inactive duty.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	DETERMINE the type of duty	(hh) Ch. 2.A
.3	VERIFY eligibility	(hh) Ch. 1
.4	INFORM the member of pay and allowances and timelines	(hh) Ch. 2.A (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

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

Members Name: _____

Members EMPLID: _____

Worksheet 26: Rating Performance Qualification (RPQ) 6.4.6

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.6

Performance: COUNSEL member on pay and allowances for Active Duty for Operational Support (ADOS) orders (Long/Short Term).

Condition: Given a member on Active Duty for Operational Support (ADOS) orders and access to CGHR Data Systems.

Standard: Member understands pay and allowances while on Active Duty for Operational Support and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	DETERMINE the type of duty	(hh) Ch. 2.B
.3	VERIFY eligibility	(hh) Ch. 1
.4	INFORM the member of pay and allowances and timelines	(hh) Ch. 2.A (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

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

Members Name: _____

Members EMPLID: _____

Worksheet 27: Rating Performance Qualification (RPQ) 6.4.7

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.7

Performance: COUNSEL member on travel and transportation entitlements for Reserve Orders (Extended Active Duty (EAD), Active Duty for Training (ADT), Initial Active Duty for Training (IADT), Long/Short Term ADOS, and RMP.

Condition: Under real or simulated conditions, given a member on Reserve Orders (Extended Active Duty (EAD), Active Duty for Training (ADT), Initial Active Duty for Training (IADT), Long/Short Term ADOS, and RMP, and access to CGHR Data Systems.

Standard: Orders are complete, the member is authorized to travel and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	ADVISE the member on policies for travel	(g) Ch. 3 and 5 (hh) Ch. 2.A.6 and 2.B.6
.3	VERIFY members eligibility	(hh) Ch. 1
.4	DETERMINE the travel mode	(g) Ch. 2
.5	ASSIST the member with travel arrangements	(a) Ch. 4.O
.6	INFORM the member of references and timelines	(a) Ch. 10

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(g) Joint Travel Regulations

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

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 28: Rating Performance Qualification (RPQ) 6.4.8

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.8

Performance: COUNSEL member on travel and transportation entitlements for a Demobilization.

Condition: Given a member returning from Involuntary Active Duty orders.

Standard: Member understands their travel and transportation entitlements and YN customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	ADVISE the member on policies for travel and transportation	(hh) Ch. 2.B (c) Ch. 1.G (g) Ch. 3 and 5
.3	VERIFY eligibility	(hh) Ch. 2.B
.4	DETERMINE the travel mode	(g) Ch. 2
.5	INFORM the member of references and timelines	(a) Ch. 10

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

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

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(g) Joint Travel Regulations

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 29: Rating Performance Qualification (RPQ) 6.4.9

Rate: YN1
6.4 Reserves

Rating Performance Qualification (RPQ) 6.4.9

Performance: COUNSEL member on travel and transportation entitlements for a Mobilization.

Condition: Under real or simulated conditions, given a member in receipt of mobilization orders and access to CGHR Data Systems.

Standard: Orders are complete, the member is authorized to travel and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET customer	(r)
.2	ADVISE the member on policies for travel and transportation	(hh) Ch. 2.B (c) Ch. 1.G (g) Ch. 3 and 5
.3	VERIFY eligibility	(hh) Ch. 2.B
.4	DETERMINE the travel mode	(g) Ch. 2
.5	INFORM the member of references and timelines	(a) Ch. 10

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

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

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(g) Joint Travel Regulations

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Pay Grade: E7

Worksheet 1: Rating Performance Qualification (RPQ) 7.1.1**Rate: YNC****7.1 Pay and Personnel****Rating Performance Qualification (RPQ) 7.1.1****Performance: REQUEST** a special payment.**Condition:** Given a member who has a pay error and access to a SWIII.**Standard:** Members request for special payment is completed.**PDC Training Code: 2 - Job Aid with Extensive Training**

Number	Steps	Relevant Text
.1	VERIFY that the member qualifies for special payment	(a) Ch. 8.B (b) Ch. 9.C
.2	COMPLETE request to PPC Customer Care	(a) Ch. 8.B
.3	FORWARD request for approval	(a) Ch. 8.B
.4	VERIFY member received special payment	(cc) SPO/P&A Pay (r)

Professional Development Coach signature of completion

Date**Supplementary Guidance****Crosswalk:** Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.**Reference(s):**

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(b) Coast Guard Pay Manual, COMDTINST M7220.29

(cc) USCG Direct Access User Guides

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 2: Rating Performance Qualification (RPQ) 7.1.2

Rate: YNC
7.1 Pay and Personnel
Rating Performance Qualification (RPQ) 7.1.2

Performance: COUNSEL member on Basic Needs Allowance (BNA).

Condition: Given member's eligibility to BNA and access to a SWIII.

Standard: Member understands the policies and procedures for their entitlement and CG-7431 is submitted properly with no errors.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY member's eligibility	(ff) Sec. 3.2
.3	COMPLETE CG-7431	(a) Ch. 8.E
.4	SEND completed CG-7431 to PPC (MAS)	(a) Ch. 8.E

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(ff) DoD Instruction 1341.15

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 3: Rating Performance Qualification (RPQ) 7.1.3

Rate: YNC
7.1 Pay and Personnel
Rating Performance Qualification (RPQ) 7.1.3

Performance: AUDIT payroll (verification report and PayCalcs).

Condition: Given a requirement to perform pay validation and access to CG HR Data Systems.

Standard: Member receives authorized pay and allowances.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ENTER CG HR Data System	(cc) Direct Access User Roles and Functions
.2	RUN "Payroll Verification Report"	(cc) Reports and Queries
.3	VERIFY existing data	(cc) Reports and Queries
.4	VERIFY recent transactions are reflected in statement	(cc) Reports and Queries
.5	IDENTIFY irregular postings	(cc) Reports and Queries
.6	DETERMINE corrective action for identified errors	(cc) SPO/P&A Pay (cc) SPO/P&A Pay Deductions (b)
.7	NOTIFY supervisor	(r)
.8	ADVISE member on pay and allowance variations, if needed	(r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

C Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(cc) USCG Direct Access User Guides

(b) Pay Manual, COMDTINST M7220.29

(r) YN Customer Service Standards

Members Name: _____

Members EMPLID: _____

Worksheet 4: Rating Performance Qualification (RPQ) 7.1.4

Rate: YNC
7.1 Pay and Personnel
Rating Performance Qualification (RPQ) 7.1.4

Performance: **ASSIST** a member with an indebtedness request (remission/waiver).

Condition: Under real or simulated conditions, given a member requesting assistance, with the completion of a waiver or remission of debt, access to CG HR Data Systems, and the member's CGMHRR

Standard: The waiver or remission request is forwarded to PPC (mas) with appropriate information and documentation, and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	VERIFY the overpayment	(cc) SPO/P&A Pay Deductions
.3	DETERMINE the need and eligibility for a waiver or remission	(b) Ch. 11
.4	ADVISE member on various types of overpayments	(a) Ch. 8.L (b) Ch. 11
.5	PROVIDE the member with instructions on how to complete the form with supporting documentation	(a) Ch. 8.L (r)
.6	ASSIST the command in completing the unit information section	(a) Ch. 8.L
.7	FORWARD the request for command endorsement	(a) Ch. 8.L
.8	SUBMIT completed package to PPC	(a) Ch. 8.L
.9	ADVISE member on timeline of entire process	(a) Ch. 8.L

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

- (r) YN Customer Service Standards
- (cc) USCG Direct Access User Guides
- (b) Coast Guard Pay Manual, COMDTINST M7220.29
- (a) Personnel and Pay Procedures Manual, PPCINST M1000.2

Members Name: _____

Members EMPLID: _____

Worksheet 5: Rating Performance Qualification (RPQ) 7.3.1

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.1

Performance: **VALIDATE** an “A” School request for member.

Condition: Given a member’s “A” School request and access to a SWIIL.

Standard: Ensure that member qualifies for “A” School.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	VERIFY members eligibility	(u) Ch. 7.E and Encl: 3
.2	COMPLETE “A” School Request	(cc) Self-Service
.3	ROUTE for supervisor approval	(cc) Self-Service
.4	SUBMIT “A” School Request to Command for approval	(cc) Self-Service for Commands and P&A Offices

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(u) Performance, Training, and Education Manual COMDTINST M1500.10

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 6: Rating Performance Qualification (RPQ) 7.3.2

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.2

Performance: FORMAT Coast Guard directives (Instructions, Notices and Unit SOPs).

Condition: Given direction by a supervisor or a member's request and access to a SWIII.

Standard: Directive is formatted properly and is free of spelling or grammatical errors.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	IDENTIFY the type of directive	(aa)
.2	REVIEW the formatting requirements	(aa)
.3	VERIFY the requirements for the directive are present	(aa)
.4	VERIFY directive is free of spelling and grammatical errors	Step not testable

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(aa) Publication of Directives: Commandant Instruction (CI), ALCOAST and ALCOAST Commandant Notices (ACN) COMDTINST 5215.6

Members Name: _____

Members EMPLID: _____

Worksheet 7: Rating Performance Qualification (RPQ) 7.3.3

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.3

Performance: **VERIFY** completion of unit's Enlisted Evaluations (reports/system).

Condition: Given direction by a supervisor or a member's request and access to a SWIII.

Standard: Run unit report and accurately determine the unit's status.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ENTER CGBI unit view	Step not testable
.2	GENERATE appropriate report	Step not testable
.3	IDENTIFY members requiring Enlisted Evaluation Reports	(d) Ch. 4.C
.4	NOTIFY supervisors of members requiring evaluation	Step not testable
.4	VERIFY that Enlisted Evaluations Reports have been marked final in CG HR Data System	(cc) Enlisted Evaluation System (EES)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

(cc) USCG Direct Access User Guides

Members Name: _____

Members EMPLID: _____

Worksheet 8: Rating Performance Qualification (RPQ) 7.3.4

Rate: YNC
7.3 Administration
Rating Performance Qualification (RPQ) 7.3.4

Performance: REMOVE member from advancement eligibility list.

Condition: Given direction by a supervisor or a member's request and access to a SWIII.

Standard: Documentation is formatted properly, and member is removed from advancement eligibility list.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	VERIFY member meets the criteria for removal	(d) Ch. 3.A.27.f and 5.K.7
.2	DRAFT removal message to PPC (ADV)	(dd)
.3	COMPLETE 3307 if applicable	(n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(d) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2

(dd) PSC Share Point site

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Best Practices: Use the involuntary withholding or removal from SWE List guide found at PSC EPM-1 Share Point Page.

Members Name: _____

Members EMPLID: _____

Worksheet 9: Rating Performance Qualification (RPQ) 7.3.5

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.5

Performance: ASSIST member with Humanitarian assignment (HUMS) request.

Condition: Given a member requesting a Humanitarian assignment.

Standard: Complete request package.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	ADVISE the member on the policy	(c) Ch. 1.B.11
.3	ASSIST the member on how to draft a memorandum and what the required enclosures are	(c) Ch. 1.B.11.g (h) Ch. 2 (r)
.4	ADVISE the member on command routing procedures	(c) Ch. 1.B.11.i (r)
.5	ASSIST the member in forwarding the completed request to the approval authority	(c) Ch. 1.B.11.i (r)
.6	PREPARE CG-3307 entry	(n) (c) Ch. 1.B.11.l
.7	PREPARE an extension or completion of HUMS report at the end of the initial period granted	(c) Ch. 1.B.11.j and 1.B.11.k

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(h) Correspondence Manual, COMDTINST M5216.4

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 10: Rating Performance Qualification (RPQ) 7.3.6

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.6

Performance: COMPLETE overseas entry approval request package (departing unit).

Condition: Given a member in receipt of PCS OCONUS orders.

Standard: Overseas entry approval package is completed and submitted while Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	REVIEW PCS Overseas Checklist	(t)
.3	COMPLETE overseas entry approval request package	(t)
.4	COUNSEL member on the procedures and timelines	(t) (r)
.5	COMPLETE appropriate CG-3307	(n)
.6	FORWARD completed package to entry approval point	(t)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(t) PSCINST 1300 (Screening For Overseas Duty)

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 11: Rating Performance Qualification (RPQ) 7.3.7

Rate: YNC 7.3 Administration Rating Performance Qualification (RPQ) 7.3.7

Performance: ASSIST member with assignment request (Unilateral and Mutual).

Condition: Under real or simulated conditions, given a member with a mutual exchange of station or unilateral transfer request, and access to CG HR Data Systems.

Standard: Member completes assignment request and ensure Yeoman customer service standards are followed and distribute.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	PROVIDE the member with the criteria and procedures to complete a written request	(r) (c) Ch. 1.B.10 (h) Ch. 2
.3	PROVIDE the member with their EER summary	(cc) Enlisted Evaluation System (EES)
.4	ADVISE the member on the routing procedures	(r) (c) Ch. 1.B.10.b
.5	DISTRIBUTE the approved package	(c) Ch. 1.B.10.c
.6	FILE a copy of the package	(i)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(c) Military Assignments and Authorized Absences, COMDTINST M1000.8

(h) Correspondence Manual, COMDTINST M5216.4

(cc) USCG Direct Access User Guides

(i) Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10

Members Name: _____

Members EMPLID: _____

Worksheet 12: Rating Performance Qualification (RPQ) 7.3.8

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.8

Performance: ASSIST a member with a Board of Correction of Military Record (BCMR) and a Personnel Records Review Board (PRRB) application.

Condition: Under real or simulated conditions, given a need to correct a discrepancy in a military record and access to CG HR Data Systems.

Standard: BCMR and PRRB requests are submitted I.A.W. Ref. COMDTINST 1070.1 and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the customer	(r)
.2	ADVISE the member on application requirements	(r) (l)
.3	DETERMINE eligibility and type of board	(l)
.4	SUBMIT the application with supporting documentation	(l)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(l) Correcting Military Records COMDTINST 1070.1

Best Practices: Questions concerning the validity of the request should be referred to legal counsel.

Members Name: _____

Members EMPLID: _____

Worksheet 13:

Worksheet 13: Rating Performance Qualification (RPQ) 7.3.9

Rate: YNC

7.3 Administration

Rating Performance Qualification (RPQ) 7.3.9

Performance: **VALIDATE** a Housing Allowance Protection Worksheet (CG-2025A).

Condition: Given a housing allowance protection worksheet (CG-2025A).

Standard: Form is completed without errors.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	COLLECT source documentation	(b) Ch. 3.C
.2	REVIEW policy	(b) Ch. 3.C
.3	AUDIT housing allowance protection worksheet	(b) Ch. 3.C

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(b) Coast Guard Pay Manual, COMDTINST M7220.29

Members Name: _____

Members EMPLID: _____

Worksheet 14: Rating Performance Qualification (RPQ) 7.3.10

Rate: YNC

7.3 Administration

Rating Performance Qualification (RPQ) 7.3.10

Performance: COUNSEL member on policies and procedures for separation (TEMPSEP, DISCHARGE, RELAD, RETIREMENT).

Condition: Given direction by a supervisor or a member's request and access to a SWIII.

Standard: Member is informed of the policies and procedures for separation (TEMPSEP, DISCHARGE, RELAD, RETIREMENT) and Yeoman customer service standards are followed.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	DETERMINE the appropriate type of separation	(e) Ch. 1 (s)
.3	COUNSEL member on policies and procedures	(a) Ch. 3.F
.4	COMPLETE 3307 if applicable	(n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(e) Military Separations COMDTINST, M1000.4

(s) Temporary Separations, COMDTINST M1040.6

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 15: Rating Performance Qualification (RPQ) 7.3.11

Rate: YNC
7.3 Administration
Rating Performance Qualification (RPQ) 7.3.11

Performance: COUNSEL member on High Year Tenure (HYT).

Condition: Given a member who may be eligible for High Year Tenure.

Standard: Member understands the policies and procedures for High Year Tenure.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	REVIEW the Enlisted High Year Tenure policy	(e) Ch. 3
.3	DETERMINE members eligibility	(e) Ch. 3
.4	INFORM member of options	(e) Ch. 3 (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(e) Military Separations COMDTINST, M1000.4

Members Name: _____

Members EMPLID: _____

Worksheet 16: Rating Performance Qualification (RPQ) 7.3.12

Rate: YNC

7.3 Administration

Rating Performance Qualification (RPQ) 7.3.12

Performance: **PREPARE** an Administrative Discharge recommendation.

Condition: Under real or simulated conditions, given a requirement to complete and Administrative Discharge, access to CG HR Data Systems, and a job aid.

Standard: Discharge package is complete and I.A.W. ref (e).

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ASSEMBLE the documentation	(e) Ch. 1.B
.2	DETERMINE the reason for discharge I.A.W. the EPM-1 Discharge Guide	(e) Ch. 1.B
.3	COMPLETE the discharge recommendation I.A.W. the appropriate administrative separation template	(dd)
.4	CHECK the discharge package for accuracy	(dd)
.5	FORWARD package for disposition	(dd)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(e) Military Separations COMDTINST, M1000.4

(dd) PSC Share Point site

Best Practices: Utilize the EPM-1 Share Point Page for guidance and discharge templates. List of Enclosures in the discharge templates can serve as a starting point in creating discharge packages.

Members Name: _____

Members EMPLID: _____

Worksheet 17: Rating Performance Qualification (RPQ) 7.3.13

Rate: YNC
7.3 Administration
Rating Performance Qualification (RPQ) 7.3.13

Performance: COUNSEL member on OCONUS early return of dependents.

Condition: Given a member who is requesting more information about an early return of dependents.

Standard: Member understands the policies and procedures for an early return of dependents.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	DETERMINE the members early return of dependents eligibility	(g) 050804
.3	COUNSEL member on the procedure and policy	(g) 050804 (x) 050804 (r)
.4	COMPLETE OCONUS Early Return of Dependents (ERD) request	(x) 050804

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(g) Joint Travel Regulations

(x) Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17

Members Name: _____

Members EMPLID: _____

Worksheet 18: Rating Performance Qualification (RPQ) 7.3.14

Rate: YNC
7.3 Administration

Rating Performance Qualification (RPQ) 7.3.14

Performance: **ASSIST** with disciplinary actions appeals (Courts-Martial investigation reports and NJP appeals).

Condition: Given a member requesting to appeal a disciplinary action.

Standard: Member successfully completes appeal package.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COUNSEL member on policies and procedures	(w) Ch. 2.U
.3	COLLECT supporting documentation	(w) Ch. 2.U.5
.4	ASSIST the member with appeal memo	(w) Ch. 2.U.5
.5	ROUTE for appeal memo for consideration	(w) Ch. 2.U.5

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(w) Military Justice Manual, COMDTINST M5810.1

Members Name: _____

Members EMPLID: _____

Worksheet 19: Rating Performance Qualification (RPQ) 7.3.15

Rate: YNC
7.3 Administration
Rating Performance Qualification (RPQ) 7.3.15

Performance: COUNSEL member on weight probation.

Condition: Given a member found to exceed the Coast Guard weight standards.

Standard: Enroll member in the weight program.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET the member	(r)
.2	VERIFY completion of SF-600 within 30 days of non-compliant weight screening	(j) Ch. 3.C.1.c
.3	ADVISE member of available services	Step not testable
.4	DETERMINE if member is eligible for probation	(j) Ch. 2.L
.5	COUNSEL member on probation requirements	(j) Ch. 3.D.5
.6	COMPLETE required 3307	(n)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(j) Body Composition Standards Program COMDTINST M1020.8

(n) Administrative Remarks, Form CG-3307, COMDTINST 1000.14

Members Name: _____

Members EMPLID: _____

Worksheet 20: Rating Performance Qualification (RPQ) 7.4.1

Rate: YNC

7.4 Reserves

Rating Performance Qualification (RPQ) 7.4.1

Performance: COUNSEL member on correcting discrepancies on a reserve point statement.

Condition: Given a member with a discrepancy on their reserve point statement.

Standard: Identify and correct the discrepancy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	COLLECT supporting documents	(a) Ch. 10.H (f) Ch. 8.M
.3	REVIEW members reserve point statement	(cc) Reserve Member Balances
.4	FORWARD to PPC Customer Care for corrections	(a) Ch. 10.H (f) Ch. 8.M
.5	INFORM member of timelines	(f) Ch. 8.M (r)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(f) Reserve Policy Manual, COMDTINST M1001.28

(cc) USCG Direct Access User Guides

Supplemental material: PPC (adv) Reserve Point Statement Page: <https://www.dcms.uscg.mil/ppc/adv/points/>

Members Name: _____

Members EMPLID: _____

Worksheet 21: Rating Performance Qualification (RPQ) 7.4.2

Rate: YNC

7.4 Reserves

Rating Performance Qualification (RPQ) 7.4.2

Performance: COUNSEL member on policies and procedures when requesting RET-1/RET-2 status.

Condition: Given a retirement eligible member requesting information under simulated conditions.

Standard: Member understands the policies and procedures when requesting RET-1/RET-2 status.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	GREET member	(r)
.2	VERIFY that the member meets the requirements to switch to RET-1 status	(f) Ch. 8.G
.3	COUNSEL member on the policy and procedures	(f) Ch. 8.G
.4	COMPLETE Reserve Retirement Transfer Request Form	(f) Ch. 8.G
.5	ROUTE for approval	(f) Ch. 8.G

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(r) YN Customer Service Standards

(f) Reserve Policy Manual, COMDTINST M1001.28

Members Name: _____

Members EMPLID: _____

Pay Grade: E8

Worksheet 1: Rating Performance Qualification (RPQ) 8.1.1**Rate: YNCS****8.1 Pay and Personnel****Rating Performance Qualification (RPQ) 8.1.1**

Performance: COUNSEL member on annuities and Premiums for Survivor Benefit Plans (SBP & RC-SBP).

Condition: Given real or simulated conditions, given a member requesting information to elect appropriate plan.

Standard: Member understands the policies and procedures when requesting RET-1/RET-2 status.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	SCHEDULE an appointment with member and/or their dependents.	Step not testable
.2	REVIEW decision factors	(z) Ch. 2.D
.3	PROVIDE answers to their questions.	(z) Ch. 2.D

Professional Development Coach signature of completion

Date**Supplementary Guidance**

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(z) Military Civil and Dependent Affairs, COMDTINST M1700.1

Members Name: _____

Members EMPLID: _____

Worksheet 2: Rating Performance Qualification (RPQ) 8.3.1

Rate: YNCS
8.3 Administration
Rating Performance Qualification (RPQ) 8.3.1

Performance: PROCESS an insurance claim (FSGLI, SGLI, and TSGLI).

Condition: Given a member who may be eligible to receive FSGLI, SGLI, and/or TSGLI, access to the Coast Guard HR Data systems, verification of supporting documents are available.

Standard: Member and/or dependents receive election entitlements.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	ASSEMBLE the documentation.	(hh)
.2	CHECK the package for accuracy.	(hh)
.3	FORWARD package for disposition.	(hh)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(hh) U.S. Department of Veterans Affairs website

Members Name: _____

Members EMPLID: _____

Worksheet 3: Rating Performance Qualification (RPQ) 8.3.2

Rate: YNCS
8.3 Administration
Rating Performance Qualification (RPQ) 8.3.2

Performance: **VALIDATE** unit's compliance with weight program.

Condition: Given the need to verify data, access to CGBI, and personnel needed on the report.

Standard: Ensure complete and accurate information is in this report, the unit is in compliance with Commandant Policy.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	REVIEW the policy.	(j)
.2	VERIFY required weigh-ins have been conducted by command.	(j) Ch. 2.A
.3	VERIFY required documentation is complete.	(j) Ch. 2 and 3.B
.4	IDENTIFY discrepancies.	(j)
.5	PRODUCE final report.	(j)

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(j) Body Composition Standards Program, COMDTINST M1020.8

Members Name: _____

Members EMPLID: _____

Worksheet 4: Rating Performance Qualification (RPQ) 8.3.3

Rate: YNCS
8.3 Administration
Rating Performance Qualification (RPQ) 8.3.3

Performance: DEVELOP SPO/P&A training plan.

Condition: Under real or simulated conditions, given a requirement to ensure proper training identified to meet current policy standards.

Standard: The unit is able to conduct requirement successfully.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	COLLECT data.	(u) Ch. 2.B
.2	IDENTIFY audience, time restraints, and materials required.	(u) Ch. 2.B
.3	DRAFT a plan for training and provide source documentation.	(u) Ch. 2.B
.4	PROVIDE training and collect feedback.	Step not testable

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(u) Performance, Training, and Education Manual, COMDTINST M1500.10

Best Practices: Recommend use of visual aids, such as Power Point to conduct the trainings in a conference room or training room depending on the size of the audience.

Members Name: _____

Members EMPLID: _____

Worksheet 1: Rating Performance Qualification (RPQ) 9.1.1

Rate: YNCM
9.1 Pay and Personnel
Rating Performance Qualification (RPQ) 9.1.1

Performance: **VALIDATE** payroll (verification report and Pay Calculation Results).

Condition: Given a requirement to perform pay validation and access to CG HR Data Systems.

Standard: Members receive authorized pay and allowances.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	COLLECT information to run report for appropriate audience.	(a) Ch. 11.C (cc) Reports and Queries
.2	CHECK for accuracy and identify inaccuracies.	(a) Ch. 11.C (b) Ch. 1
.3	DETERMINE corrective action if required.	(a) Ch. 11.C
.4	PROCESS corrective actions.	(a) Ch. 11.C
.5	PROVIDE status of verification report and pay scales.	(a) Ch. 11.C

Professional Development Coach signature of completion

Date**Supplementary Guidance**

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(a) Personnel and Pay Procedures Manual, PPCINST M1000.2

(cc) USCG Direct Access User Guides

(b) Coast Guard Pay Manual, COMDTINST M7220.29

Supplemental material: Pay and Personnel Center Military Accounts Branch:

<https://www.dcms.uscg.mil/ppc/mas/rates/#contents>

Members Name: _____

Members EMPLID: _____

Worksheet 2: Rating Performance Qualification (RPQ) 9.3.1

Rate: YNCM 9.3 Administration Rating Performance Qualification (RPQ) 9.3.1

Performance: OVERSEE execution of SPO/P&A training plan.

Condition: Under real or simulated conditions, given a requirement to ensure proper training identified to meet current policy standards.

Standard: The unit is able to conduct requirement successfully.

PDC Training Code: 2 - Job Aid with Extensive Training

Number	Steps	Relevant Text
.1	DETERMINE type of training plan required.	(u) Ch. 2.B
.2	IDENTIFY documentation required.	(u) Ch. 2.B
.3	IDENTIFY audience.	(u) Ch. 2.B
.4	FORMULATE timeline for training.	(u) Ch. 2.B
.5	EVALUATE training execution.	Step not testable

Professional Development Coach signature of completion

Date

Supplementary Guidance

Crosswalk: Yes (Rev. 05/2020) Satisfies the requirement of this RPQ.

Reference(s):

(u) Performance, Training, and Education Manual, COMDTINST M1500.10

Best Practices: Recommend use of visual aids, such as Power Point to conduct the trainings in a conference room or training room depending on the size of the audience.

Members Name: _____

Members EMPLID: _____

Section IV: Task Completion Page

Task Completion Page 1: E-4

Trainee				
Rate	First Name	Last Name	EMPLID	Unit

PDC Designation				
Rate	First Name	Last Name	Signature/Initials	Unit

Date: _____

(Rate & Name), _____ (EMPLID) _____ has satisfactorily completed or obtained deferrals for all Rating Performance Qualifications (RPQ) for the next paygrade.

(Printed name & signature of CO, OIC or Reviewer)

Members Name: _____

Members EMPLID: _____

Task Completion Page 2: E-5

Trainee				
Rate	First Name	Last Name	EMPLID	Unit

PDC Designation				
Rate	First Name	Last Name	Signature/Initials	Unit

Date: _____

(Rate & Name), _____ (EMPLID) _____ has satisfactorily completed or obtained deferrals for all Rating Performance Qualifications (RPQ) for the next paygrade.

(Printed name & signature of CO, OIC or Reviewer)

Members Name: _____

Members EMPLID: _____

Task Completion Page 3: E-6

Trainee				
Rate	First Name	Last Name	EMPLID	Unit

PDC Designation				
Rate	First Name	Last Name	Signature/Initials	Unit

Date: _____

(Rate & Name), _____ (EMPLID) _____ has satisfactorily completed or obtained deferrals for all Rating Performance Qualifications (RPQ) for the next paygrade.

(Printed name & signature of CO, OIC or Reviewer)

Members Name: _____

Members EMPLID: _____

Task Completion Page 4: E-7

Trainee				
Rate	First Name	Last Name	EMPLID	Unit

PDC Designation				
Rate	First Name	Last Name	Signature/Initials	Unit

Date: _____

(Rate & Name), _____ (EMPLID) _____ has satisfactorily completed or obtained deferrals for all Rating Performance Qualifications (RPQ) for the next paygrade.

(Printed name & signature of CO, OIC or Reviewer)

Members Name: _____

Members EMPLID: _____

Task Completion Page 5: E-8

Trainee				
Rate	First Name	Last Name	EMPLID	Unit
PDC Designation				
Rate	First Name	Last Name	Signature/Initials	Unit

Date: _____

(Rate & Name), _____ (EMPLID) _____ has satisfactorily completed or obtained deferrals for all Rating Performance Qualifications (RPQ) for the next paygrade.

(Printed name & signature of CO, OIC or Reviewer)

Members Name: _____

Members EMPLID: _____

Task Completion Page 6: E-9

Trainee				
Rate	First Name	Last Name	EMPLID	Unit
PDC Designation				
Rate	First Name	Last Name	Signature/Initials	Unit

Date: _____

(Rate & Name), _____ (EMPLID) _____ has satisfactorily completed or obtained deferrals for all Rating Performance Qualifications (RPQ) for the next paygrade.

Members Name: _____

Members EMPLID: _____

Section V: Master Reference List

***The most current reference version shall be used for completing RPQs and studying for the SWE.**

#	Title	Location
a.	Personnel and Pay Procedures Manual, PPCINST M1000.2	
b.	Pay Manual, COMDTINST M7220.29	
c.	Military Assignments and Authorized Absences, COMDTINST M1000.8	
d.	Enlistments, Evaluations, and Advancements, COMDTINST M1000.2	
e.	Military Separations COMDTINST, M1000.4	
f.	Reserve Policy Manual	
g.	Joint Travel Regulations (JTR)	
h.	Correspondence Manual, COMDTINST M5216.4	
i.	Coast Guard Military Human Resource Record (CGMHRR) System, COMDTINST 1080.10	
j.	Body Composition Standards Program COMDTINST M1020.8	
k.	Coast Guard Military Medals and Awards Manual, COMDTINST M1650.25	
l.	Correcting Military Records COMDTINST 1070.1	
m.	Records & Information Management Program Roles and Responsibilities, COMDTINST 5212.12	
n.	Administrative Remarks, Form CG-3307, COMDTINST 1000.14	
o.	Standard Subject Identification Code (SSIC) Manual, SECNAV M-5210.2	
p.	Military Bonus Programs, COMDTINST M7220.2	
q.	Certificate of Release or Discharge from Active Duty, DD Form 214 CGPSCINST 1900.1	
r.	YN Customer Service Standards	
s.	Temporary Separations, COMDTINST M1040.6	
t.	PSCINST 1300	
u.	Performance, Training, and Education Manual, COMDTINST M1500.10	
v.	Identification Cards for Members of the Uniformed Services, their Eligible Family Members, and other Eligible Personnel, COMDTINST M5512.1	
w.	Military Justice Manual, COMDTINST M5810.1	

Members Name: _____

Members EMPLID: _____

#	Title	Location
x.	Coast Guard Supplement to the Joint Federal Travel Regulations, COMDTINST M4600.17	
y.	Government Travel Charge Card (GTCC) Program Policies and Procedures, COMDTINST M4600.18	
z.	Foreign Travel, Passports and Visas, COMDTINST 5000.5G	
aa.	Publication of Directives: Commandant Instruction (CI), ALCOAST and ALCOAST Commandant Notices (ACN) COMDTINST 5215.6	
bb.	DOD Financial Management Regulation Vol. 7A, DOD 7000.14R	
cc.	USCG Direct Access User Guides	
dd.	PSC Share Point site	
ee.	Command Email Tactics, Techniques, and Procedures (TTP) CGTTP 6-01.5A	
ff.	DoD Instruction 1341.15	
gg.	“It’s Your Move” pamphlet	
hh.	U.S. Department of Veterans Affairs website	
ii.	CGMHRR Required Documents List	
jj.	ETS User Guides	
kk.		
ll.		
mm.		
nn.		
oo.		
pp.		
qq.		
rr.		
ss.		

Members Name: _____

Members EMPLID: _____

Section VI: Rating Glossary

Verb	Definition
ADVISE	To counsel; recommend.
ASSEMBLE	To fit the parts of an item together.
ASSIST	To give aid by participating in a task.
CHECK	To check for satisfactory condition, accuracy, safety, or performance.
COLLECT	To bring to an end and especially into a perfected state.
CROSSWALK	Tasks completed in previous versions of RPQ that meet/satisfy new performance requirements. Crosswalked RPQ's do not require the member to re-perform the task, and can be immediately signed off by PDC.
DEMONSTRATE	To show by reasoning; to explain using examples, experiments, or action.
DETERMINE	To settle or decide by choice of alternatives; to fix precisely.
DISTRIBUTE	To give out or deliver, especially to members of a group.
DRAFT	To draw a preliminary sketch, version, or plan of.
ESTABLISH	To bring into existence; to introduce as a permanent entity or procedure
FILE	To arrange in convenient order for preservation or reference.
FORWARD	To send onward.
GREET	To address with some form of salutation.
INFORM	To impart knowledge or information to.
INPUT	To provide information to or to enter information into a system.
NOTIFY	To inform, to warn, to make known, or to make notice of.
OBTAIN	To gain or attain
PREPARE	To put together; to make ready; to combine elements and produce a product.
PROCESS	To initiate a series of actions or operations leading to a particular end.
PROVIDE	To supply or make available.
RECORD	To set down as a means of preserving information; to document; to save information.
REQUEST	To ask for; to ask someone to do something.
REVIEW	To go over for the purpose of determining correctness or currency.

Members Name: _____

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Verb	Definition
SELECT	To choose from among others to meet specific standards or criteria.
SUBMIT	To send forward for approval.
UPDATE	To bring up to date or make current.
VALIDATE	To substantiate accuracy by comparison or investigation.
VERIFY	To confirm or establish the accuracy or truth of something.

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Appendix A: Trainee, Professional Development Coach (PDC), and Reviewer Guide

The Enlisted Rating Advancement Training System (ERATS) establishes advancement training requirements for each rating. ERATS has four major training components:

1. Rating Performance Qualification (RPQ) Standard
2. Enlisted Professional Military Education (EPME) Enlisted Performance Qualifications (EPQ)
3. Core Competency Requirements
4. Service Wide Examination (SWE)

Not all components are required for advancement to all pay grades. Often, specific requirements may change due to the needs of the service.

Rating Performance Qualification (RPQ) Standard

This document contains the rate specific performance requirements members must complete to be eligible for advancement. The ERATS Share Point Site https://uscg.sharepoint-mil.us/sites/erats_spo/EPME2, is the only authorized storage repository for the RPQ standards, and members shall only use booklets obtained from that site.

Section I: Record of Changes

Changes to the RPQ's performance, condition, standard, steps, and references. Changes listed in this part are effective for advancement purposes by the date indicated. If the RPQ is not already completed, members must complete the current version of the RPQ standard. Revisions do not require members to complete the RPQ again, but members are responsible for the most current information when studying for the SWE. Changes are typically announced twice a year in the ERATS semiannual ALCOAST in January and July.

Section II: Core Competency Requirements.

Some ratings require completion of core competencies for advancement at specific grades per M1000.2. These are listed in this section by pay grade along with their associated short code. The member (trainee) is responsible for ensuring all core competencies are certified by the CO/OIC or designated reviewer and entered in Direct Access (DA) or the applicable training management system. Directions for members needing to earn one or more core competencies can be found in the Coast Guard Competency Dictionary.

Section III: RPQ/EPQ Worksheets

The RPQ/EPQ worksheets contain the RPQ/EPQ and its components. Each RPQ/EPQ has the following elements:

Performance-The task that must be completed by the trainee. The task/enabling objective is the on-the-job performance of a particular rating. It is repeatable, measurable, and observable, with a distinct beginning and end.

Condition- A condition statement that explains what tools, environment, and circumstances the task must be performed under RPQs can only be simulated if "under real or simulated conditions" is stated in the condition.

Standard-Provides instructions for measurement of trainee performance. It may consist of time requirements, error tolerance rates/ratios or law and policy standards which must be adhered to for task completion. The standard defines what "Good Performance" looks like.

Steps-A table of actions that leads to overall task performance. The steps are smaller tasks that lead to the overall performance goal. Relevant Text: The section or chapter that must be read and understood to perform the task. If this column is blank, the trainee shall study the reference in its entirety.

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Reference- Guides for completing the performance. References come in many forms such as Commandant Instruction, manufacturer’s technical publications, videos, audio files or commercial textbooks. Service Wide Examination (SWE) questions can only be derived from references listed within the steps of the RPQ.

Supplemental Guidance- Provides additional instruction to the PDC and trainee on how to accomplish a particular task. Supplemental guidance includes the cross walking of previous RPQ’s, best practices, common errors, etc. Information in the Supplemental Guidance provides the performer and coach with information to assist in task completion.

PDC Training Code “1” - Train to Memory

The PDC shall demonstrate proper performance of the RPQ, and then provide enough opportunities for the member to practice the RPQ, under instruction, until they can perform it correctly without assistance, prompting or the use of any job or memory aids.

PDC Training Code “2” - Job Aid with Extensive Training

The PDC shall demonstrate proper performance of the RPQ using the job aid, and then provide enough opportunities for the member to practice the RPQ using the job aid under instruction, until they can perform it correctly and unassisted while using the job aid.

PDC Training Code “3” - Job Aid with Introductory Training

The PDC shall introduce the job aid(s) listed and demonstrate proper use of the job aid in performing the RPQ. The PDC shall then provide enough opportunities to practice the RPQ, under instruction, until they can perform it correctly and unassisted, while using job or memory aids.

PDC Training Code “4” - Job Aid

The PDC shall supply or direct the member to the job aid(s) listed, and then provide the member opportunities to practice the RPQ under instruction until he/she can perform it correctly and unassisted while using job aids.

Section IV. Task Completion Page

This page is used by the PDC and the RPQ Reviewer to temporarily record completion and certification of the RPQ Standard before entry into DA or the applicable training management system. Upon entry into DA or the appropriate training management system, this document shall be returned to the trainee for retention in their personal records.

Section V. Master Reference List (MRL)

The MRL is the authoritative list of references for each rating. Every reference required to complete an RPQ is listed and maintained by the Rating Knowledge Manager (RKM) within every ERATS Rating Share Point Page: https://uscg.sharepoint-mil.us/sites/erats_spo/ratingportalpages

Section VI. Rating Glossary

The rating glossary provides standard definitions for all verbs used in the RPQ and corresponding enabling objectives. Assignment of the Professional Development Coach (PDC)

Assignment of the Professional Development Coach

The Commanding Officer/Officer in Charge (CO/OIC) will assign the PDC. The PDC shall be at least one paygrade senior and in the same rating as the trainee. The RPQ Standard will denote exceptions to this requirement. If a PDC is not available at the trainee’s unit, the CO/OIC may assign one from another unit. Using a PDC from another unit is subject to the approval of both commands. The PDC shall provide instruction on the proper path of advancement, how to perform each task, and ensure compliance with the training

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standards. Eligibility for advancement is ultimately the trainee's responsibility. A designation memo is not required for a PDC.

Review the RPQ Standard with your PDC

Schedule a time to review the entire RPQ Standard with the PDC and discuss a plan for completing the training. Examine the RPQ Standard and the PDC training code for each task. Your training plan should also include a timetable for completion, time/opportunities for PDC instruction, and PDC expectations.

Trainee Guidelines:

- Complete tasks contained in the RPQ Standard under the supervision of your PDC
- When performing a task for sign-off, the trainee must perform to the RPQ standard under the supervision of the PDC.
- Before attempting the sign-off, the trainee shall read all pertinent references.
- The PDC shall demonstrate the performance of the task.
- The trainee shall perform the task under the direct supervision of the PDC.
- The PDC shall provide guidance and corrective instruction.
- The trainee shall perform the task for signoff unassisted by the PDC.
- The PDC may require the member to perform tasks several times before signing off the RPQ.

Note: If the trainee is unable to complete a task because the necessary resources or equipment are unavailable, then explore opportunities to go on a temporary duty assignment (TDY) where the task can be performed. The trainee may also seek deferral of the task from the CO/OIC. Task deferrals last only as long as the member is assigned to the unit where the task cannot be performed; it expires when the resources or equipment become available or upon transfer to a new unit. The trainee must perform the task to be eligible for further advancement even if the member already advanced beyond the pay grade of the deferred RPQ. Completed tasks are recorded in DA or the applicable training management system and certified by the CO/OIC or the RPQ Reviewer.

Core Competencies Required for Advancement

Some ratings require specific certifications before becoming eligible for advancement. These are noted in the core competency section of the RPQ Standard. Your PDC will assist you in obtaining the instructions and materials needed to secure these competencies. In many cases, you will complete a Performance Qualification Standard (PQS) and sit before a qualification board to obtain the competency.

Earn and Maintain Your Recommendation for Advancement

Chapter 3, Section A of the Enlisted Accessions, Evaluations, and Advancements Manual, COMDTINST M1000.2, contains specific policy and guidance on the advancement recommendation. It is the member's responsibility to consult with their supervisor immediately after reporting aboard a new unit and at regular intervals after that, on the requirements needed to maintain recommendation for advancement. Keeping lines of communication open will ensure there are no surprises when evaluations are done.

Review Your Personal Data Extract (PDE)

SWE eligibility requirements are noted on your PDE. Your PDE is issued by the Pay and Personnel Center Advancements Branch (PPC-ADV) and available in Direct Access. The PDC or Servicing Personnel Office can assist you with obtaining and understanding your PDE.

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Take the Service Wide Examination (SWE)

Test questions can only be derived from references listed in the RPQ and EPQ Standards or an approved question bank. Taking the SWE is the last part of the advancement process a member influences. You must be recommended for advancement by your CO/OIC, have served the required time in grade, completed the RPQ Standard, EPME tasks, and obtain any necessary core competencies. Once all the SWE tests are graded, an advancement eligibility list is published ranking members from first to last. Enlisted advancements are based on actual vacancies within a rating.

When an enlisted person leaves a vacancy through advancement or discharge, or when a new position is authorized, a vacancy is created, and someone will be advanced to fill it. When a new advancement eligibility list is published, it will generally have a cut noted on the list. Members above the cut are guaranteed advancement as long as they otherwise remain eligible, and are no longer required to sit for the next SWE.

Professional Development Coach (PDC) Instructions

Role of the PDC

The PDC's job is to support the trainee in their pursuit of advancement. Part of the responsibility of a Coast Guardsman is to prepare the next generation to take on the duties required for mission success. Training subordinates is one method of obtaining mastery within your career field. PDCs should allow adequate time for trainee interaction.

Supervisors are encouraged to set aside time during the workday to facilitate advancement training. It is also a good idea for PDCs to collaborate on scheduling to provide trainees with the opportunity to perform RPQs in a group environment.

A PDC should do the following:

Recommended for advancement. A member not recommended for advancement should concentrate efforts towards earning a recommendation for advancement versus serving as a PDC.

Possess the required qualifications for their current billet. Members currently training or certifying to fill their position need time to master job requirements and do not have adequate time to devote to teaching a subordinate. Therefore, it is best to have the member become qualified in their current position BEFORE taking on the role of the PDC.

Be physically able to perform the tasks required to demonstrate them to the trainee.

Be patient as the trainee strives to acquire the required skills and abilities for advancement.

Assignment of PDC

The PDC role is critical to the ERATS process. By signing off an RPQ, the PDC is confirming the trainee can perform the associated task under the listed condition and standard. Ideally, a trainee will have only one PDC while attempting qualification for advancement. However, circumstances may not allow this to be possible. PDCs should communicate with each other on the progress of the trainee. Also, all command authorized PDCs need to be recorded in Section IV of the RPQ Standard. It is highly recommended that commands develop a list of unit-approved PDCs.

Completion of tasks

Upon assignment as a PDC, trainees should schedule time to develop a training plan/schedule, and cover expectations. Reviewing the entire RPQ Standard with the trainee noting opportunities for performance is the preferred method to begin establishing the coaching and development of a training plan/schedule.

The RPQ process should be performed as follows:

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The trainee shall review the task and read associated references for each step.

The PDC shall demonstrate the performance of the task to the trainee.

The trainee shall describe the performance of the task to the PDC. The PDC may ask questions concerning the performance of the task as a method to assess the trainee's knowledge about performance of the task.

The trainee shall perform the task under the close supervision of the PDC if stated in the RPQ condition. The PDC may direct the trainee to complete the task several times before attempting sign-off.

When ready for signoff, the trainee shall perform the task unassisted and under real conditions (unless otherwise noted by the RPQ). The PDC should evaluate completion against the RPQ standard. A PDC cannot adjust the standard to make the task easier or harder to complete.

The Commanding Officer or RPQ Reviewer shall verify a candidate has completed the RPQs and authorize entry into DA by the unit's Personnel and Administration (P&A) entity.

CO/OIC/RPQ Reviewer Instructions

RPQ Reviewers

The RPQ Reviewer is the CO/OIC or designated representative and is responsible for ensuring the validity and integrity of ERATS at their unit. Before certifying a trainee within DA or the appropriate training management system, the reviewer should verify the RPQ Standard is complete and accurate. Consistent communication/consultation between the RPQ Reviewer and PDC is strongly encouraged and recommended.

Delegation of Authority

CO/OICs are designated as the RPQ Reviewer for their unit. CO/OICs may delegate the authority to certify completion of RPQs to subordinates so the unit's rating advancement training responsibilities can be properly executed. CO/OICs should designate the minimum number of RPQ Reviewers necessary to preserve the standardization and integrity of the system. RPQ Reviewers must possess the following attributes:

- One paygrade senior to the members they are certifying.
- Designated in writing. (a memo template is provided in appendix (b)).
- Assigned the RPQ Reviewer authority.
- An XO/XPO, unit training officer, or Gold or Silver Badge if they are certifying completion of RPQs for members of all ratings at their unit.
- The senior enlisted member of their rating. (May only certify for members of the same rating.)
- The Leading Chief Petty Officer (LCPO) at AIRSTAs if verifying AMT, AET, and AST. In cases where the CO/OIC is the same grade as the trainee, certification shall be performed at the next level in the chain of command.

Deferral of RPQ

Only COs/OICs (Personnel designated as Commanding Officers of Enlisted Personnel) may defer tasks when the necessary resources, excluding time, to complete the tasks are unavailable. Deferring an RPQ for the sole purpose of meeting the SWE terminal eligibility date is not authorized. RPQ deferrals expire upon a member's transfer or when resources become available to perform the task. Reasonable attempts to procure the resources or send the member TDY should be made before granting a deferral. If the CO/OIC is unsure of whether to grant a deferral, they should consult with the Rating Force Master Chief for guidance.

Members Name: _____

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Appendix B: Sample Designation Memo

U.S. Department of
Homeland Security

United States
Coast Guard



Commanding
Officer Your
unit

UNIT ADDRESS EXAMPLE:
300 East Main Street suite 1000
Norfolk, VA 23510
Phone: (757)628-4324
Fax: (757) 628-4337

5232
Date 20XX

MEMORANDUM

From: Commanding Officer Name

Reply to Attn of:

To: First Name MI. Last Name, Rate/Rank

Subj: APPOINTMENT AS RATING PERFORMANCE QUALIFICATION REVIEWER

Ref: (a) ALCOAST 577/11

1. In accordance with reference (a), you are hereby appointed as a Reviewer for the XX rating, grades E4 to E8.
2. As a reviewer, you are authorized to certify the completion of all rating-specific advancement requirements and approve members for the rating competency code. You shall familiarize yourself with and perform your duties in accordance with guidelines established on the CG-RPQ record and ensure all requirements are properly completed and recorded for SWE eligibility at the earliest opportunity. It is my expectation that you will ensure the quality and integrity of the advancement program.
3. This assignment will remain in effect until you transfer from this command.
4. Congratulations on your selection as an XX RPQ reviewer.

#

Copy: Member's CGMHRR

Members Name: _____

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