

U.S. Department of  
Homeland Security

United States  
Coast Guard



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# Military Bonus Programs

**COMDTINST M7220.2**

September 2011





Commandant  
United States Coast Guard

2100 2<sup>nd</sup> Street SW Stop 7801  
Washington, DC 20593-7801  
Staff Symbol: CG-1221  
Phone: (202) 475-5372  
Fax: (202) 475-5927  
Email: HQS-PolicyandStandards@uscg.mil

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COMMANDANT INSTRUCTION M7220.2

Subj: MILITARY BONUS PROGRAMS

- Ref:
- (a) Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)
  - (b) Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series)
  - (c) Coast Guard Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series)
  - (d) Personnel and Pay Procedures Manual, PPCINST M1000.2 (series)
  - (e) Military Personnel Data Records (PDR) System, COMDTINST M1080.10 (series)
  - (f) Military Separations, COMDTINST M1000.4 (series)
  - (g) Coast Guard Recruiting Manual, COMDTINST M1100.2 (series)
  - (h) Coast Guard Servicing Personnel Office Manual (SPO Manual) PPCINST M5232.3 (series)
  - (i) Reserve Policy Manual, COMDTINST M1001.28 (series)

1. PURPOSE. This Manual establishes Coast Guard policy and procedures concerning authorization for bonus payments for all enlisted and officer personnel.
2. ACTION. All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, and chiefs of headquarters staff elements shall comply with the provisions of this Manual. Internet release is authorized.
3. DIRECTIVES AFFECTED. Chapter 3 of the Personnel Manual, COMDTINST M1000.6 (series) is hereby cancelled. The Coast Guard Personnel Manual is being eliminated and reissued as a set of manuals (including this one) which will allow for more expedited review of updates and promulgation of policy changes.

DISTRIBUTION – SDL No. 159

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NON-STANDARD DISTRIBUTION:

4. DISCLAIMER. This document is intended to provide operational requirements for Coast Guard personnel and is not intended to nor does it impose legally-binding requirements on any party outside the Coast Guard.
5. PROCEDURES. No paper distribution will be made of this Manual. Official distribution will be via the Coast Guard Directives (CGDS) DVD. An electronic version will be located on the following Commandant (CG-612) web sites. Intranet: <http://cgweb.comdt.uscg.mil/CGDirectives/Welcome.htm>, Internet: <http://www.uscg.mil/directives/>, and CGPortal: <https://cgportal.uscg.mil/delivery/Satellite/CG612>.
6. BACKGROUND. This Manual promulgates bonus policy applicable to active and reserve personnel. These policies were previously contained in Chapter 3 of the Personnel Manual, COMDTINST M1000.6 (series). References to commands and Headquarters offices have been updated to reflect the current Coast Guard organizational structure. Changes to policy in previously issued ALCOAST messages have been incorporated as well as legislatively mandated changes. References to other elements of the legacy Personnel Manual have been updated to reflect the newly promulgated Manuals.
7. DISCUSSION. Citation of the word ‘article’ as used in this Manual is in general terms of reference, e.g. to denote paragraph or section, and is not citing CFR, USC, UCMJ, etc except where so noted.
8. RECORDS MANAGEMENT CONSIDERATIONS. This Manual has been evaluated for potential records management impacts. The development of this Manual has been thoroughly reviewed during the directives clearance process, and it has been determined there are no further records scheduling requirements, in accordance with Federal Records Act, 44 U.S.C. 3101 et seq., National Archives and Records Administration (NARA) requirements, and the Information and Life Cycle Management Manual, COMDTINST M5212.12 (series). This policy does not have any significant or substantial change to existing records management requirements.
9. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS.
  - a. The development of this Manual and the general policies contained within it have been thoroughly reviewed by the originating office in conjunction with the Office of Environmental Management, and are categorically excluded (CE) under current USCG CE # 33 from further environmental analysis, in accordance with Section 2.B.2. and Figure 2-1 of the National Environmental Policy Act Implementing Procedures and Policy for Considering Environmental Impacts, COMDTINST M16475.1 (series). Because this Manual contains guidance on, and provisions for, compliance with applicable environmental mandates, Coast Guard categorical exclusion #33 is appropriate.
  - b. This directive will not have any of the following: significant cumulative impacts on the human environment; substantial controversy or substantial change to existing environmental conditions; or inconsistencies with any Federal, State, or local laws or administrative determinations relating to the environment. All future specific actions resulting from the general policies in this Manual must be individually evaluated for compliance with the National Environmental Policy Act

(NEPA), Council on Environmental Policy NEPA regulations at 40 CFR Parts 1500-1508, DHS and Coast Guard NEPA policy, and compliance with all other environmental mandates.

10. **FORMS/REPORTS.** The forms referenced in this Manual are available in USCG Electronic Forms on the Standard Workstation or on the Internet: <http://www.uscg.mil/forms/>; CGPortal at <https://cgportal.uscg.mil/delivery/Satellite/uscg/References>; and Intranet at <http://cgweb.comdt.uscg.mil/CGForms>.

R. T. HEWITT /s/  
Assistant Commandant for Human Resources



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## CHAPTER 1 BONUSES APPLICABLE TO ENLISTED MEMBERS

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### 1.A. Enlistment Bonus (EB) Program

#### 1.A.1. General

The Enlistment Bonus (EB) program is an incentive to attract qualified personnel to critical skills or ratings to help meet the Coast Guard's recruiting goals. This program applies to new enlistments. The EB is authorized under Title 37 U.S.C. § 309 and governed by Administration of Enlistment Bonuses, Accession Bonuses for New Officer in Critical Skills, Selective Reenlistment Bonuses, and Critical Skills Retention Bonuses for Active Members, DoDI 1304.29.

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#### 1.A.2. Glossary of Terms

- a. Critical Rating. A rating that is understaffed, is projected to be understaffed in the future, or requires an inordinate amount of training to achieve rating strength. The shortages are the result of the Service's inability to attract and retain personnel in the rating.
- b. Non-Rate Bonus. EB authorized to new recruits without a guaranteed affiliation with a Class "A" school or "Striker" program.
- c. Obligated Service. All periods of military service covered by a signed agreement in the form of an Enlistment Contract between Coast Guard members and the U.S. Coast Guard in which members agree to serve for designated periods of time. In order to receive the EB, members must agree to enlist for at least four years of active duty in a skill determined as critical.
- d. Unearned Bonus. A portion of the EB already paid to a member who subsequently does not complete the service obligation.

Example: A member enlists for four years and receives a \$2,000 payment. If the member is subsequently discharged due to misconduct after serving only two years, the member has earned only two years' worth of the EB (\$1,000); the second two years' worth of EB (\$1,000) is unearned and may be recouped.

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#### 1.A.3. Policy

- a. Convening a Bonus Panel. As needs of the Service dictate, Commandant (CG-1221) will convene a panel to determine which ratings are critical, may be placed on the guaranteed Class "A" school list, and are designated eligible for an EB.
- b. Background. EBs are linked to a member's recruitment and affiliation with a critical rating by attending a guaranteed Class "A" school or participating in a guaranteed

“Striker” program in that rating or, for prior service personnel who already have the qualifying skill, agreeing to enlist in the designated rating for a minimum of four years. An additional amount may be offered for the member to accept an enlistment of six years. This program is not a substitute for a Selected Reenlistment Bonus (SRB). Former and current Coast Guard members (active or reserve) are not normally eligible for an EB, unless needs of the Service dictate otherwise.

- c. Affiliation Through a Striker Program. For those ratings for which there is no Class "A" school and an EB is established, a member may receive the bonus by affiliating upon reenlistment, or while at recruit training, with the rating through the “Striker” program established in Article 3.C. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series). In these cases, special arrangements shall be made by Commander (CG PSC-EPM) to assign members to appropriate commands with viable “Striker” program.
  - d. Non-Rate EB. A non-rate EB may be authorized to new recruits without a guaranteed affiliation with a Class “A” school or “Striker” program. Former and current Coast Guard members (active or reserve) are not normally eligible to receive a non-rate EB.
    - (1) Members who select the college fund at the time of enlistment are not eligible to receive a non-rate EB.
    - (2) Members who are authorized a non-rate EB upon enlisting and then affiliate with a critical rating while at recruit training will receive the larger of the two enlistment bonuses. For example, if a recruit receives a \$3,000 non-rate EB, then while at recruit training affiliates with a rating that is authorized an EB of \$2,000, that recruit would continue to receive the \$3,000 non-rate EB. However, if the recruit receives a non-rate EB of \$2,000, then affiliates with a rating that is authorized an EB of \$15,000, then the member would receive the \$15,000 EB.
  - e. Limitations on Receipt of Incentives. A member may receive only one of the following benefits or incentives:
    - (1) Coast Guard College Fund or
    - (2) EB Program.
  - f. Impact on Educational Benefits. Receiving an EB does not affect eligibility for educational benefits pursuant to the Montgomery G.I. Bill (MGIB).
  - g. Impact on Receipt of a Selective Reenlistment Bonus (SRB). A (SRB) may not be paid for the same period of service for which an EB is paid.
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#### 1.A.4. Eligibility Criteria

To qualify for the EB Program, members must:

- a. Meet standard enlistment qualification criteria;
  - b. Qualify for and agree to affiliate with a selected rating or designated critical skill and agree to serve an initial active duty enlistment for a minimum of 4 years;
  - c. Not participate in the Coast Guard College Fund. Once a member chooses to participate in the EB, he or she cannot change over to the College Fund.
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#### 1.A.5. Loss of Eligibility and Recoupment

- a. Amount of Recoupment. All paid but unearned bonuses, as defined by Article 1.A.2.d., of this Manual will be recouped on a prorated basis.
- b. Disenrollment from Basic Training. Members who are disenrolled from basic training lose their eligibility to receive the EB.
- c. Disenrollment from "A" School or Striker Program. Members who are disenrolled from the qualifying Class "A" school or assigned "Striker" program lose their eligibility to receive the bonus. EBs will not be recouped for members who are disenrolled under the conditions established in Article 1.A.5.f of this Manual or who do not acquire the skill due to unforeseen service actions (e.g., disestablishing the member's rating).
- d. Unqualified to Serve in Eligible Rating. Members lose their eligibility to receive EB payments on the date they are no longer qualified to serve in the rating for which the bonus was authorized. Additionally, all paid but unearned EBs shall be recouped on a prorated basis. A member will be considered not technically qualified to receive the bonus if:
  - (1) The member no longer serves in the rating for which the bonus was authorized;
  - (2) The member's rating designator is removed; or
  - (3) Current and future assignment in that military specialty is precluded.
- e. Recoupment Due to Member Fault. Unearned bonuses shall also be recouped if:
  - (1) The member is unable to perform the duties of the rating for which the bonus was paid due to injuries caused by his or her own misconduct;
  - (2) The member is unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to his or her fault; or

- (3) The member refuses to perform the duties of the rating for which the bonus was paid.
  - f. Discharge or Change in Rating. Members who are discharged or change ratings prior to completing the period of service for which they were paid an EB shall have a prorated share of all paid but unearned bonus recouped except:
    - (1) Members involuntarily discharged for the Convenience of the Government in connection with a reduction in force;
    - (2) Members who are separated or retired for physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct;
    - (3) Members who receive a dependency or hardship discharge;
    - (4) Members discharged early for the purpose of immediate reenlistment, provided they reenlist in the eligible rating and the reenlistment term is for a period longer than the obligated service remaining in the period for which an EB was paid. For example, if a member separates before his or her normal end of enlistment to immediately reenlist, the money will not be recouped if the member extends or reenlists for a period at least longer than the amount of time the member had remaining at separation; or
    - (5) Members are required to change ratings based on the needs of the Service.
  - g. Eligibility for Continued Bonus Payment in No-fault Situations. Personnel no longer classified or assigned to a general petty officer billet due to humanitarian reassignment, loss of security clearance not due to the member's fault, or injury or illness through no fault of their own will be entitled to their full bonus.
  - h. Weight Probation. Members placed on weight probation in accordance with reference (b), Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series), shall have any unpaid EB suspended until they comply with the Coast Guard's allowable weight standards.
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#### **1.A.6. Payment Procedures**

- a. Reference. The procedures to initiate payment of the EB are published in reference (c), Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series).
- b. General Payment Procedures. The EB will be paid as followed:
  - (1) For members eligible to receive the non-rate EB, the bonus will be paid in lump sum after successful completion of recruit training. (See Article 1.A.9. of this Manual and Annex T.1 Enlistment Bonus Agreement (Non-Rate Bonus), Form CG-

7220B.)

- (2) For non-prior service members, the bonus will be paid in lump sum after successful completion of Class "A" school. (See Article 1.A.9. of this Manual and Annex T Enlistment Bonus Agreement (Non-Prior Service with Guaranteed "A" School or Prior Service with Qualifying Skill), Form CG-7220A.)
  - (3) For prior service members who already have the qualifying skill, the bonus will be paid in lump sum upon reporting to their first unit assignment.
  - (4) For members entering a bonus-eligible rating through the "Striker" program, the entire bonus will be paid upon advancement to E-4. (See Article 1.A.9. of this Manual and Annex T.2 Enlistment Bonus Agreement (Striker Bonus), Form CG-7220C.)
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### **1.A.7. Recoupment Procedures**

- a. Reference. The procedures to initiate recoupment of the EB are published in reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), and reference (c), Servicing Personnel Office (SPO) Manual, PPCINST M5231.3 (series).
  - b. General Recoupment Procedures. When a member is no longer eligible for the EB, Commanding Officer (PPC) will recoup paid but unearned bonus portions based on the effective date documented by the member's command.
  - c. Recoupment Examples.
    - (1) A non-prior service member enlisted for 4 years (48 months) on 20 September 2000 for an "A" school, which has a \$15,000 bonus. On graduation from the "A" school on 1 August 2001, the member was paid \$15,000. The member served at his unit for three months and was discharged due to misconduct on 5 October 2001. Time not served is 2 years, 11 months and 15 days. The amount of EB recouped would be \$11,093.75 based on  $(\$15,000/48 \text{ months} = \$312.50 \text{ per month} \times 35 \text{ months}) + (\$312.50/30 \text{ days} = \$10.4166 \text{ per day} \times 15 \text{ days})$ .
    - (2) A prior service member enlisted for 4 years (48 months) on 20 October 2001 with a \$2,000 bonus. On entry, the member was paid a \$2,000 bonus. Member was separated from the service due to misconduct on 1 January 2002. Time not served is 3 years, 9 months and 19 days. The amount of EB recouped would be \$1,901.39 based on  $(\$2,000/48 \text{ mos} = \$41.6666 \text{ per month} \times 45 \text{ months}) + (41.6666/30 \text{ days} = \$1.3888 \text{ per day} \times 19 \text{ days})$ .
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### **1.A.8. Responsibilities**

- a. Commandant (CG-122):
  - (1) Oversee the EB Program, policy and resources;
  - (2) Promulgate and maintain a list of selected critical ratings eligible for EBs;
  - (3) As Service needs require, convene a panel to recommend the number of initial EB quotas that may be offered and associated bonus amounts. Upon approval of the panel's recommendations, provide a listing of authorized quotas and bonus amounts to Commanding Officer (CGRC), and other appropriate offices. Based on Service needs, Commandant (CG-1221) may take periodic adjustments to the initially recommended quota allocations and bonus amounts.
- b. Commandant (CG-1221): As needs of the Service require, review the list of ratings designated as critical for the purposes of this program and recommend which ratings should be considered by the EB Panel for addition to or deletion from the EB program.
- c. Commanding Officer, Pay and Personnel Center (PPC): Establish and maintain a system for paying and recouping EBs, and publish related procedures.
- d. Commander, Coast Guard Personnel Service Center:
  - (1) Apportion guaranteed "A" schools, including those for which an EB has been authorized by Commandant (CG-1221), based on the availability of Class "A" school quotas listed in the Convening Schedule for Coast Guard Class "A" and "C" Resident Exportable Training Courses, COMDTNOTE 1540. Commander (CG PSC-EPM) will balance the number of guaranteed Class "A" school quotas eligible for the EB program with the number of quotas available to personnel already on the school waiting lists. Commander (CG PSC-EPM) will publish and submit to Commanding Officer, Commanding Officer (CGRC) and Commandant (CG-12) quarterly allocations seven days before the end of each quarter and update as necessary.
  - (2) For members recruited into an eligible "Striker" program, upon graduation from recruit training, Commander (CG PSC-EPM) shall assign members PCS to an appropriate command with a viable "Striker" program in that rating. Also, Commander (CG PSC-EPM) will coordinate assignments as needed to ensure receiving commands have the capacity to accommodate Strikers within the established personnel allowance.
- e. Commanding Officer, Coast Guard Recruiting Command (CGRC):
  - (1) Design and execute a marketing plan for the EB Program as part of an overall

effort to accomplish Coast Guard recruiting missions and goals.

- (2) Ensure eligible members' enlistment contracts set forth the terms under which EBs may be paid and recouped by completing Annex T Enlistment Bonus Agreement (Non-Prior Service with Guarantee "A" School or Prior Service with Qualifying Skill), Form CG-7220A, for each recipient of an EB.
  - (3) Ensure a member enlisted under the EB program is not also enlisted under the College Fund incentive program.
  - (4) Provide by the fifth (5th) day of each month, a list of personnel recruited with an EB. Provide each recipient's name, social security number, enlistment and shipping date, rating affiliation (e.g. guaranteed Class "A" school, guaranteed "Striker" program, or prior service with qualifying skills), and other pertinent identifying data. If a guaranteed Class "A" school, provide course convening date to which assigned. The original report will be submitted to Commander (CG PSC-EPM) with copies to Commandant (CG-122), (CG-12), Commanding Officer (PPC-mas), TRACEN Cape May (apr) and TRACEN Yorktown (SPO).
  - (5) Recommend reallocation of funds budgeted for the EB program to meet changes to the ratings designated eligible to receive EBs.
- f. Servicing Personnel Offices (SPOs) at Training Center Cape May and Class "A" Schools shall ensure appropriate Direct Access entries are made to pay EBs.
- g. Commands receiving members under the EB as a guaranteed "Striker."
- (1) Ensure member satisfies all requirements of the "Striker" program in accordance with Article 3.C. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series). Members failing to make satisfactory progress may be disenrolled from the "Striker" program using standard criteria for unit "Striker" program administration and will not receive a bonus. However, this period may not exceed two years from the date member arrived at the unit.
  - (2) If the command disenrolls a member from the unit "Striker" program, a message report with relevant dates and basis of disenrollment must be sent to Commander (CG PSC-EPM) with copy to Commandant (CG-122),(CG-1221), and Commanding Officer (PPC-mas).
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### 1.A.9. Forms/Reports

The Enlistment Bonus Agreements (Annexes T, T.1 and T.2) document the eligibility criteria and conditions under which an EB is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS and as such, the form shall be attached to the Enlistment/Reenlistment Documents, Armed Forces of the United States, Form

COMDTINST M7220.2

DD-4, and retention and distribution shall be made in accordance with reference (e),  
Military Personnel Data Records (PDR) System, COMDTINST M1080.10 (series).

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## **1.B. Selective Reenlistment Bonus (SRB) Program**

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### **1.B.1. General**

- a. Background. The Selective Reenlistment Bonus (SRB) Program allows the Commandant to offer a reenlistment incentive to members who possess highly desired skills or are in eligible ratings, at certain specific points during their career. For the purpose of defining eligibility periods within the first 14 years of active service, three zones of consideration are established. Zone A is defined as the period from 17 months through 6 years of active service. Zone B is defined as the period from 6 through 10 years of active service. Zone C is defined as the period from 10 through 14 years of active service.
  - b. Objective. The objective of the SRB program is to provide an incentive to reenlist to those personnel in the Service who are serving in a skill or rating designated as critical by the Commandant.
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### **1.B.2. Glossary of Terms**

- a. Anniversary Date. The anniversary date is the date that exactly corresponds to the date the member came on active duty. For example, if the member came on active duty 10 July 1993 his or her 6th year anniversary date will be 10 July 1999. The exception to this would be for members with broken active service, in which case the Anniversary Date would have to be constructed using prior active service with current reenlistment date.
- b. Exactly 6/10/14 Years. For purposes of this program, a member is considered to have exactly 6, 10, or 14 years active duty on his 6th, 10th, or 14th year anniversary date.
- c. Within 3 Months Prior to EOE. The period within 3 months prior to end of enlistment is computed by backing off 3 months from the current end of enlistment (the date that will be entered as the date of separation on the DD Form 214) and adding one day. For example, if the current end of enlistment is 15 August, the period within 3 months prior to end of enlistment is from 16 May through 15 August.
- d. Within 3 Months After EOE. The period of 3 months after end of enlistment begins on the day following the date of separation (date of separation as noted on the DD Form 214) and ends with the day of the month 3 months later corresponding to the date of separation. For example, a member discharged 3 September 2001 may reenlist not later than 3 December 2001.
- e. Executed Extension. An Agreement to Extend Enlistment, Form CG-3301B, is executed when the member has signed it and is obligated, but it has not begun to run.
- f. Operative Date. The date an extension begins to run (the member is serving in the extension).

- g. Obligated Service. All periods of military service covered by signed agreements in the form of Enlistment Contracts, Reenlistment Contracts and/or Agreements to Extend Enlistment between Coast Guard members and the U. S. Coast Guard where members agree to serve for designated periods of time.
  - h. Additional Obligated Service. All periods of military service covered by Reenlistment Contracts or signed Agreements to Extend Enlistment that bind members and the Coast Guard to specified periods of time beyond any period for which the member has already obligated. For example, a member executes a 3-year extension to obligate for a PCS assignment. Subsequently, but prior to the extension's operative date, the member decides to reenlist for 4 years. Only 1 year is considered additional obligated service since the member was already obligated for 3 years under the extension. (See Article 1.B.5.f. of this Manual for exception.)
  - i. Unearned Bonus. SRB entitlement received for which no time has been served. For example, a member reenlists for 4 years and receives a lump sum payment of \$8,000. The member is subsequently discharged after serving 3 years. The member is only entitled to 3 years worth of entitlement (\$6,000). Any bonus payment received in excess of \$6,000 is considered unearned and shall be recouped.
  - j. Reenlistment.
    - (1) The enlistment of any person who has previously served in the regular Coast Guard shall be considered a reenlistment or,
    - (2) The enlistment of Coast Guard Reserve personnel who are serving on active duty and who have served on active duty of 12 months or more shall be considered a reenlistment.
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### **1.B.3. Written Agreements**

All personnel with 10 years or less active service who reenlist or extend for any period, however brief, shall be counseled on the SRB program. They shall sign an Administrative Remarks, Form CG-3307, service record entry outlining the effect that particular action has on their SRB entitlement. If necessary, commanding officers shall elaborate in the Administrative Remarks, Form CG-3307, entry to cover specific cases of questionable SRB eligibility. Consult reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), for detailed content and formatting requirements of the Administrative Remarks, Form CG-3307, entry.

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### **1.B.4. Criteria for Individual Member's Eligibility**

#### **1.B.4.a. Zone A Eligibility**

To receive a Zone A SRB, the member must meet the following criteria:

- (1) Reenlist not later than 3 months after discharge or release from active duty in a rating authorized an SRB multiple.
- (2) Have completed 17 months continuous active duty (including periods of active duty service for reserves) at any point in their military career. The 17 months continuous active duty need not have been completed immediately prior to the reenlistment or extension.
- (3) Have completed not more than 6 years active service on the date of reenlistment or the date on which the extension becomes operative.
- (4) Be serving in pay grade E-3 (with appropriate designator) or higher on active duty in a rating that is designated as eligible for an SRB multiple.
- (5) Reenlist or extend enlistment in the Regular Coast Guard for a period of at least 3 full years.
- (6) Have not previously received a Zone A SRB.
- (7) Attain eligibility prior to the termination of a multiple for that particular rating.
- (8) Meet any additional eligibility criteria the Commandant may prescribe.

**1.B.4.b. Zone B Eligibility**

To receive a Zone B SRB, the member must meet the following criteria:

- (1) Reenlist not later than 3 months after discharge or release from active duty in a rating authorized an SRB multiple.
- (2) Have completed 17 months continuous active duty (including periods of active duty service for reserves) at any point in their military career. The 17 months continuous active duty need not have been completed immediately prior to the reenlistment or extension.
- (3) Have completed at least 6 but not more than 10 years active service on the date of reenlistment or the operative date of the extension.
- (4) Be serving in pay grade E-5 or higher. Personnel who are changing rate, as approved by the Commandant, are eligible as an E-4 provided they were E-5 or higher immediately prior to changing rate.
- (5) Reenlist or extend enlistment in the Regular Coast Guard for a period of at least 3 full years, provided the reenlistment or extension, when added to existing active service, will provide a total active duty of no less than 10 years.

- (6) Have not previously received a Zone B SRB.
- (7) Attain eligibility prior to the termination of a multiple for that particular rating.
- (8) Meet any additional eligibility criteria the Commandant may prescribe.

**1.B.4.c. Zone C Eligibility**

To receive a Zone B SRB, the member must meet the following criteria:

- (1) Reenlist not later than 3 months after discharge or release from active duty in a rating authorized and SRB multiple.
  - (2) Have completed 17 months continuous active duty (including periods of active duty service for reserves) at any point in their military career. The 17 months continuous active duty need not have been completed immediately prior to the reenlistment or extension.
  - (3) Have completed at least 10 but not more than 14 years active service on the date of reenlistment or the date on which the extension of enlistment begins to run.
  - (4) Be serving in pay grade E-6 or higher.
  - (5) Reenlist or extend enlistment in the Regular Coast Guard for a period of at least 3 full years.
  - (6) Have not previously received a Zone C SRB.
  - (7) Attain eligibility prior to the termination of a multiple for that particular rating.
  - (8) Meet any additional eligibility criteria the Commandant may prescribe.
  - (9) Application criteria will be provided in the ALCOAST announcing the SRB.
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**1.B.5. Special Conditions**

- a. Members with Exactly 6 Years Active Duty. Members with exactly 6 years active duty on the date of reenlistment or operative date of extension will be entitled to the Zone A multiple in effect for their rating if they are otherwise eligible. If they have previously received a Zone A bonus or no Zone A bonus is designated, they are entitled to a Zone B bonus if one is in effect.
- b. Members with Exactly 10 Years Active Duty. Members with exactly 10 years active duty on the date of reenlistment or operative date of extension will be entitled to the Zone B multiple in effect for their rating if they are otherwise eligible. If they have previously received a Zone B bonus or no Zone B bonus is designated, they are

entitled to a Zone C bonus if one is in effect.

- c. Members with Exactly 14 Years Active Duty. Members with exactly 14 years active duty on the date of reenlistment or operative date of extension will be entitled to the Zone C multiple in effect for their rating if they are otherwise qualified.
- d. Establishing Eligibility for SRB. Only extensions/reenlistments of 3 years or longer may be used to establish eligibility for SRB. Specifically, two or more extensions may not be combined to establish SRB eligibility. Additionally, entitlement in the same Zone cannot be increased by future extensions. Qualified members "Lock into" SRB multiples and bonus ceilings that are in effect at the time an extension agreement is executed.
- e. Extending/Reenlisting More Than 3 Months Early. Under no circumstances will an individual be permitted to extend or re-extend their enlistment or reenlist more than 3 months early for SRB purposes alone. However, a member who must obligate service for some other reason (i.e., transfer, training, advancement, tuition assistance, or other obligations as required) may extend, re-extend, or reenlist for a period greater than the minimum required for the purpose of gaining entitlement to an SRB.
- f. Cancelling Extensions. Extensions previously executed by members may be canceled prior to their operative date for the purpose of executing a longer extension or reenlistment in accordance with Article 1.B.4.b. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series). Members should be informed that their SRB entitlement will be based only on newly acquired obligated service. For example, a member cancels a 3-year extension to reenlist for 6 years; the member will only be paid SRB entitlement for the additional 3 years of service. An exception to this rule is made for extensions of 2 years or less, or multiple extensions (each of which is 2 years or less in length), required of a member for transfer, training, advancement, or other obligations as required. These extensions may be canceled prior to their operation date for the purpose of immediate reenlistment or longer extension without any loss of SRB entitlement.
- g. Members in a Change in Rate Status. Members who are in a change in rate status will be eligible for the multiple in effect at the time the request for change in rate was approved by Commandant (CG-1221). Members shall sign an Administrative Remarks, Form CG-3307, entry stating that they are aware that they shall not receive any bonus entitlement for the new rate until they have reenlisted/extended and have attained the new rate. When the new rate is attained, all unearned SRB for the previously held rate will be recouped. Members authorized an SRB for their present rate will continue to receive annual installments until they attain their new rate.
- h. Impact on SRB Upon Selection to an Officer Procurement Program. Officer procurement programs are defined as those programs which, upon successful completion, will lead to an appointment as a chief warrant or commissioned officer in the Coast Guard. These programs include but are not limited to: Officer Candidate

School, physician's assistant programs, and acceptance of chief warrant officer and direct commissioning programs. Upon notification of a member's selection to enter into any officer procurement program, any request for accelerated or early payment of the remaining portion of SRB payments will not be approved. The following information applies to individuals entering officer procurement programs:

- (1) Members entering officer procurement programs who have reenlisted/extended for an SRB will have remaining installments suspended upon appointment in an officer procurement program (i.e., OCS, CWO appointment, etc.). The time spent in officer procurement program is creditable towards SRB payments. Members' SRB entitlement will terminate upon appointment.
  - (2) Members who do not successfully complete the officer procurement program and continue in an enlisted status in the same rate will have SRB installments resumed and are entitled to receive the SRB payments previously suspended.
  - (3) For those temporary commissioned officers who revert to enlisted status in their original rating, who still have time remaining on their contract, the time served as a commissioned officer shall not count toward SRB entitlement.
- i. Reenlisting Within 3 Months Prior to 6<sup>th</sup>, 10<sup>th</sup>, or 14<sup>th</sup> Year Active Service. Commanding officers are authorized to effect early discharge and reenlist members within 3 months prior to their 6th, 10th, or 14th year active service anniversary dates (not to be confused with the normal expiration of enlistment), for the purpose of qualifying for a Zone A, B, or C SRB. In such cases, SRB payments will be reduced by any portion of unserved service obligation. Commanding officers shall ensure that such personnel are fully qualified to receive an SRB and advise them that all periods of unserved obligated service will be deducted from their bonus entitlement. Any such discharges shall be under authority of Article 1.B.12. of reference (f), Military Separations, COMDTINST M1000.4 (series), indicating discharge for the purpose of immediate reenlistment at the Convenience of the Government.
  - j. Computing Total Active Duty. Tours of active duty in any U. S. Armed Forces (Regular or Reserve), including active duty for training, must be included in computing total active duty for the purpose of establishing SRB Zone eligibility. However, active duty for training periods may not be included in the computation of the 21 months continuous active duty.
  - k. Establishing SRB Multiple and Bonus Ceiling. Entitlement to SRB multiple and bonus ceiling is established on the actual date of reenlistment or the date the member executes an Agreement to Extend Enlistment by signing an Agreement to Extend Enlistment, Form CG-3301B. Entitlement to any Zone of SRB is established only on the date the member reenlists or the extension becomes operative. (Example: A member executes an extension agreement on 15 June 2001, with the extension becoming effective 15 November 2001. The member initially entered the Coast Guard on 15 November 1995. The member will be entitled to a Zone B SRB on 15

November 2001 based on the SRB multiples that were effective on 15 June 2001.)

- l. Non-Rated Members without Rating Designator. Non-rated members without rating designators shall not be authorized to execute an Agreement to Extend Enlistment under any circumstance for the purpose of receiving an SRB multiple.
  - m. Impact of Unexecuted Service Obligation on SRB. All Periods of unexecuted service obligation, except for a member discharged no more than 7 days early because expiration of enlistment falls on a Friday, Saturday, Sunday, or holiday or per the provisions of Article 1.B.5.f.. above, will be deducted from SRB computation.
  - n. Notification of SRB Ceilings. Changes to the SRB ceilings will be published in the same ALCOASTs which announce changes to SRB multiples.
  - o. Members Separating from Service. Members eligible to reenlist, but who opt to be separated will be advised in writing that should they later elect to reenlist, they must do so within 3 months after discharge to be eligible for an SRB. (Provided that on the date of reenlistment the rating has a multiple listed in the current ALCOAST.)
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### **1.B.6. Change in Multiples**

When a rating multiple is designated for increase, reduction, or termination, an effective date of the change shall be promulgated by ALCOAST at least 30 days in advance. All Agreements to Extend Enlistments signed before the effective date of the change will be at the old multiple level. All agreements made on or after the effective date of the change will be at the new level. Members desiring to extend their enlistments or reenlist early to take advantage of a higher bonus multiple may do so within the provisions of this chapter and/or Articles 1.B.2. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), and 1.B.7. of reference (f), Military Separations, COMDTINST M1000.4 (series).

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### **1.B.7. Amount of Payment**

- a. Computation. Computation of SRB payments is based on the rate of basic pay as of the day immediately preceding reenlistment or the date immediately preceding the date the extension becomes operative. Bonus payments will be computed by taking the authorized SRB multiple, multiplying it by the member's monthly basic pay and multiplying the result by the number of months of newly obligated service and dividing this figure by 12. Shown as an equation, this would be:

$\frac{\text{SRB multiple} \times \text{monthly basic pay} \times \text{months newly obligated service}}{12}$
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- b. Computing Fractions of a Month. When computing the additional obligated service

for which SRB can be paid, a fraction of a month will be rounded up to the whole month. For example, members discharged 2 months and 10 days prior to the expiration of their enlistment, for the purpose of immediate reenlistment, will have their SRB payment reduced by 3 months. An exception to this rule, however, is members who are discharged no more than 7 days early because their period of active obligated service expires on a Friday, Saturday, Sunday, or holiday. In such cases, members will be considered to have completed the full enlistment for SRB computation.

- c. Unexecuted Portion of Active Duty Orders. Any unexecuted portion of active duty orders for Coast Guard Reservists who request and are granted authority for discharge from the Coast Guard Reserve for the purpose of immediate reenlistment in the Regular Coast Guard, while serving on active duty, is considered previously obligated service for the purpose of SRB Bonus computation.
  - d. Service Beyond 16 Years Active Duty. Bonuses will not be paid for any service beyond 16 years total active duty.
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### **1.B.8. Method of Payment**

- a. Type of Payment. Bonuses may be paid either as a lump sum or in installments. If the bonus is paid in installments, the initial payment shall be 50 percent of the total bonus amount and the remainder paid in equal annual installments, on the anniversary date, as determined by the length of the extension or reenlistment.
  - b. Accelerated SRB Payments. Commanding officers are authorized to approve requests of deserving individuals for accelerated SRB payments. An accelerated payment is defined as an early payment of the next SRB installment, prior to the normal anniversary date, but in the same fiscal year in which the installment payment is due.
  - c. Requests for Lump Sum Payments. Commandant (CG-1221) is the approving official for lump sum payment of SRB. Lump sum approvals will be granted when a Coast Guard member experiences a severe financial hardship not attributable to financial irresponsibility. The member should submit a request with a financial statement listing all income and expenses (a copy of the CG Mutual Assistance form should be used). The request shall be forwarded via the chain of command to Commandant (CG-1221) for determination.
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### **1.B.9. Termination of Bonus Entitlement and Recoupment**

- a. Members Discharged Prior to Completion of Service. Members who are discharged prior to completing the period of service for which they were paid an SRB shall have all paid but unearned bonus recouped with the exception of:

(1) Members who are involuntarily discharged for reason of Convenience of the

Government in connection with a reduction in force.

- (2) Members who are separated or retired by reason of physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct.
  - (3) Members who receive a hardship discharge.
- b. Discharged Early for the Purpose of Immediate Reenlistment. A member paid any reenlistment bonus who is discharged early for the purpose of immediate reenlistment is not required to refund the unearned portion of the bonus provided the term of the reenlistment is for a greater period than the obligated service remaining to be served. If the member is currently receiving a Zone A SRB and if the new reenlistment/extension is authorized a Zone B SRB, the member will continue to receive their annual installments of their Zone A bonus. They will receive Zone B bonus only for the additional obligated service.
- c. Members No Longer Qualified or Serving in an SRB Rating or Skill. Members will be ineligible for continued SRB payment when they are no longer qualified in or serving in the rating or skill for which the SRB was authorized except, members who are assigned out of specialty as needs of the Service dictate. Additionally, all unearned SRB shall be recouped.
- (1) A member will be considered not technically qualified in the bonus rating when:
    - (a) The member is no longer serving in the rating or skill for which the bonus was authorized. If the bonus was paid for a critical skill, member must maintain the skill's qualification code in order to be technically qualified.
    - (b) The member's rating designator is removed.
    - (c) Current and future assignment in that military specialty is precluded for any reason within the member's control.
  - (2) Additionally, unearned bonuses shall be recouped when:
    - (a) The member is unable to perform the duties of the rating or skill for which the bonus was paid as a result of injuries caused by their own misconduct, as established through existing line of duty determination procedures.
    - (b) The member is unable to perform the duties of the rating or skill for which the bonus was paid as a result of a loss of security clearance due to their own misconduct.
    - (c) The member refuses to perform the duties of the rating or skill for which the bonus was paid.

- d. Subsequent Entitlement to SRB. When no longer classified or assigned in the bonus specialty for any of the following reasons, the member shall be entitled to his/her full SRB:
    - (1) Humanitarian reassignment to other duties.
    - (2) Loss of security clearance through no fault of the member.
    - (3) Injury, illness, or other impairment not the result of the member's own misconduct.
    - (4) Commandant-directed change in rating: Members paid an SRB shall continue to serve in the rating or skill which qualified them for the bonus unless the Commandant expressly directs a change in rating (i.e., Joint Rating Review).
  - e. Impact on SRB Upon Commission or Selection to Chief Warrant Officer Appointment. Recoupment of unearned bonus is not required if the member is separated to permit acceptance of, or entry into, a program leading to a commission or chief warrant appointment in the same or another Service.
  - f. Member's Death. In case of death, the remaining payments will be included in the final settlement of unpaid pay and allowances.
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#### **1.B.10. Suspension of Bonus Entitlement**

Members who fail to comply with reference (b), Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series), shall have SRB installments suspended until the member is in compliance with weight standards.

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#### **1.B.11. Required Administrative Remarks, Form CG-3307, Entries for SRBs**

- a. Mandatory Entries. Administrative Remarks, Form CG-3307, entries are required to document SRB counseling on the following occasions:
  - (1) within 3 months prior to their end of enlistment or anytime the member reenlists or extends their enlistment or
  - (2) within 3 months prior to their 6 or 10 year active duty anniversary date.
- b. Content of Mandatory Entries. Consult reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series) for detailed content and formatting requirements of the Administrative Remarks, Form CG-3307, entry. The following minimum information must be included in all entries for SRB purpose:
  - (1) The number of years and/or months the member is eligible to extend/re-extend or reenlist, the number of months/years of newly obligated service, and the

applicable SRB ALCOAST.

- (2) The following statement: "I have reviewed Article 1.B.13. of Military Bonus Programs, COMDTINST M7220.2 (series) entitled "Frequently Asked SRB Questions and Answers."
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### **1.B.12. Forms/Reports**

The required Administrative Remarks, Form CG-3307, document the eligibility criteria and conditions under which an SRB is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS and as such, retention and distribution shall be made in accordance with reference (e), Military Personnel Data Records (PDR) System, COMDTINST M1080.10 (series).

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### **1.B.13. Frequently Asked SRB Questions and Answers**

- Q1. What is an SRB?  
 A1. The acronym SRB stands for Selective Reenlistment Bonus. This Bonus is a cash payment which the Coast Guard uses as an incentive to retain members in specialties experiencing personnel shortages.
- Q2. What is the purpose of the SRB program?  
 A2. Its purpose is to provide a monetary incentive for members in certain specified ratings or skills designated by the Commandant. In determining which ratings or skills should be eligible for an SRB, the Commandant considers such criteria as whether the rating or skill is understaffed, future staffing projections, and the amount of training required to achieve the rating or skill. These ratings or skills are designated as "critical." The Commandant reevaluates which ratings or skills are critical approximately every 6 months and publishes the results in an ALCOAST message.
- Q3. How many times can I receive an SRB?  
 A3. There are three Zones in the SRB program; Zone A, Zone B, and Zone C. A member can receive one bonus per zone, per career.
- Q4. How can I become eligible for a Zone A SRB?  
 A4. The Zone A SRB is paid to petty officers and designated E-3s serving in critical ratings or skills who extend their enlistment or reenlist for a minimum of 3 years. Ratings or skills deemed critical for the purpose of assigning an SRB multiple are announced in SRB ALCOAST. Members must have completed 17 months continuous active duty (including extended active duty as a Reserve) at any point in their military career. The 17 months continuous active duty need not have been completed immediately prior to the reenlistment or extension. Members must have completed not more than 6 years active service on the date of reenlistment or the date on which the extension becomes operative. Sorry, only one Zone A SRB to a customer!

- Q5. How can I become eligible for a Zone B SRB?  
A5. The Zone B SRB is paid only to petty officers second class and above (or E-4s who have been approved to change rate from E-5) serving in critical ratings or skills who extend their enlistment or reenlist for a minimum of 3 years. Ratings or skills deemed critical for the purpose of assigning an SRB multiple are announced in SRB ALCOAST. They must have at least 6 years but not more than 10 years active service at the time of reenlistment or the date their extension becomes operative. Again, they must have completed at least 17 months continuous active service at any point in their military career. Only one Zone B SRB to a customer also!
- Q6. You mean I can get both a Zone A and B SRB?  
A6. That's correct. Receiving a Zone A SRB does not disqualify you from receiving a Zone B SRB at a later period in your career.
- Q7. And now can I get a Zone C SRB?  
A7. The Coast Guard has not yet implemented a Zone C SRB; however, if staffing levels warrant them, the Commandant could order a Zone C SRB at any time. A Zone C SRB would be payable only to petty officers first class and above serving in critical ratings or skills who extend their enlistment or reenlist for a minimum of 3 years. They must have at least 10 years but no more than 14 years active service at the time of reenlistment or the date their extension becomes operative. The 17 months continuous active service provision still applies.
- Q8. What if I get out of the Coast Guard and later decide to reenlist. Can I still get an SRB?  
A8. Only if you have been out for 3 months or less and meet the requirements previously discussed.
- Q9. Okay, now that I know how I can get an SRB, how much money will I get? How is the SRB calculated?  
A9. The amount of money you will receive depends on just how critical your rating or skill is. Each rating is assigned a multiple ranging from zero to eight. A multiple of six or higher means that the rating is extremely critical. The higher your multiple, the more money you are eligible to receive. Here's how SRBs are computed:

Step 1: Write down your SRB Zone multiple. Your unit yeoman, career counselor, or career information specialist can provide you with this information.

Step 2: Write down the number of months for which you are going to reenlist or extend your enlistment. (Reminder: this number must be at least 36 months.) Now, subtract from this amount any time which will be remaining on your enlistment at the time you will reenlist or your extension will go into effect. Any fraction of a month is rounded up to a full month. For example, if on the date you are going to reenlist for 4 years you will still have 2 months, 5 days remaining on your current enlistment, your SRB will be based only on 45 months newly obligated service. Multiply the number obtained in step 1 by this result.

Step 3: Multiply the number obtained at the conclusion of step 2 by what your monthly base pay will be on the date you reenlist or your extension of enlistment will go into effect. Remember, if you are going to reenlist on the date on which you will have exactly 4 years service (active and inactive combined) you will receive "over 3" pay, not "over 4."

Step 4: Divide the number obtained at the end of step 3 by 12. The result is the gross amount of SRB to which you will be entitled assuming it does not exceed the ceiling announced in the current SRB ALCOAST. Also remember Uncle Sam takes a percentage of this back for taxes.

Q10. Sounds easy enough, but can you give me an example?

A10. Sure. Let's say the date is 10 October 2001, you're an EM2 who enlisted for 4 years on 10 January 1998, and want to reenlist for 4 years on 10 December 2001. You've completed at least 17 months continuous service and you have not exceeded 6 years active service. The period of time for which you want to reenlist (4 years) exceeds the minimum 3-year requirement. So far so good! Time to check with the ship's office or SPO to find out if EM has a Zone A SRB multiple greater than zero. The yeoman informs you you're in luck ... time to count the bucks!

Step 1: Multiple of 2.

Step 2: 48 minus 1 equals 47. 47 times 2 equals 94.

Step 3: 1500.60 times 94 equals 141,056.40

Step 4: 141,056.40 divided by 12 equals \$11,754.70. AMOUNT OF ZONE A SRB ENTITLED: \$11,754.70

Q11. Sounds great! But why is it again that my SRB in the above example is only based on 47 months service and not 48?

A11. Because you did not serve 1 month of your 4-year enlistment, this 1 month was deducted from your SRB computation. Let me also add that if you entered an agreement to extend your enlistment and did not serve out that extension prior to reenlisting, the unserved portion of that extension would also be deducted from your SRB computation. For instance, let's say you were required to extend your enlistment for 28 months to attend Class "A" School. Any portion of that 28-month extension which you did not serve would be subtracted from your SRB computation. However, there is an exception. If you were required to extend your enlistment for 2 years or less to receive PCS orders, attend training, meet the obligated service requirement for advancement, for tuition assistance, or other obligations as required, the extension may be canceled prior to the date the extension actually begins to run and will not be subtracted from your SRB computation. Please note in this example, the operative date of this 28 month extension is 01/10/2002. This means you must cancel that extension within 3 months of 01/09/2002 and extend or reenlist for a greater amount of time.

Q12. Sounds fair enough. I guess I can't expect the Government to pay me for obligating for a

- period of service which I have already agreed to serve. Now, when do I get my money?
- A12. Under current policy, you will receive 50 percent of your SRB on the payday after your reenlistment/extension documents have been processed by Commander (CG PSC). The remaining 50 percent will be paid in equal annual installments, on your anniversary date, over the term of your new enlistment. If you have a severe financial hardship, the Commandant may approve a lump sum payment. Your commanding officer is authorized to grant you an accelerated SRB payment during the fiscal year in which it is due. For instance, if you have an SRB installment due on 12 July 2002, your commanding officer is authorized to pay it to you anytime during the period 1 October 2001 - 12 July 2002. Payment policies are subject to change! Check with your ship's office or SPO to find out what the Commandant's current payment policy is.
- Q13. What happens to my SRB payments if I am discharged prior to completing my term of enlistment for which I received an SRB?
- A13. With the exception of medical discharges, hardship discharges, and members discharged involuntarily for Convenience of the Government in connection with a Reduction in Force (RIF), those members who are allowed or required to depart the Service prior to serving out their term of enlistment will be required to pay back all SRB monies which they did not earn. For example, a member who received a \$9,000 SRB for a 6-year reenlistment and was discharged for misconduct after completing only 2 years (one third) of his/her contract would forfeit \$6,000 (two-thirds) of his/her SRB. Any money already paid to him/her in excess of the \$3,000 which he/she actually earned will be recouped by the U. S. Government.
- Q14. What happens if I am appointed a warrant officer or I am accepted into a commissioning program (i.e., OCS, Physician Assistant Training)?
- A14. Upon entering OCS or other training program to become an officer, or upon accepting a commission (warrant officer), you will lose all entitlement to future payments, but will be allowed to keep the money you have already been paid.
- Q15. Is there anything else I should know about the SRB program?
- A15. Yes, there are several important points of which you should be aware. They are:
1. Be informed of all ALCOASTs published concerning SRBs. The ALCOASTs state the rating and skills in which SRB multiples are assigned, as well as listing the maximum amount of SRB payable for any rating or skill. Contact your personnel office to view or copy the latest ALCOAST on the subject.
  2. If eligible, you may reenlist for a Zone A or B SRB within 3 months prior to the date on which you will have 6 or 10 years active service respectively, regardless of the amount of time remaining on your current enlistment. Remember, however, that the amount of time remaining on your current enlistment will be deducted from your SRB computation.
  3. When coming up on your end of enlistment, carefully consider the advantages/disadvantages of reenlisting vice extending. Say you signed a 6 year

extension and 4 years later you receive transfer orders and there is a multiple for your rating, had you reenlisted for 6 years vice extending for 6 years you could now sign an extension and lock into the multiple without loss of benefits. However, since you extended you must now reenlist and the remaining 2 years will be deducted from your SRB payments. Since you were already obligated this is not considered additional obligated service.

4. If the Coast Guard ever requires you to extend your enlistment, you may extend for a longer period than the minimum required. For example, let's say you are required to extend your enlistment for 24 months to receive PCS orders overseas. You may elect to extend for a period of at least 36 months to receive an SRB. NOTE: You may not extend your enlistment more than 3 months prior to your normal expiration of enlistment date for the sole purpose of qualifying for an SRB unless the Coast Guard requires you to extend.
  5. Changes in rating may positively or negatively affect your SRB eligibility. Seek SRB counseling prior to requesting a change in rating.
- Q16. Should I always reenlist or extend for the maximum period eligible?
- A16. Not necessarily. Let's say that in your first 4-year enlistment you were required to extend for 18 months to attend Class "A" School. After serving out this 5 and 1/2 years, it's time to reenlist. If you reenlist for 4 years, you will have 9 and 1/2 years total active service when that enlistment expires and still be eligible for a Zone B SRB because you will not have more than 10 years total active service. However, if you had reenlisted for 5 years, you would have 10 and 1/2 years service at the end of your enlistment and thus ineligible for a Zone B SRB. **BE CAREFUL! IT'S ULTIMATELY YOUR DECISION HOW LONG YOU WILL REENLIST OR EXTEND FOR. CONSIDER ALL YOUR ALTERNATIVES AND SEEK GUIDANCE IF YOU HAVE ANY QUESTIONS.**
- Q17. If I am in an indefinite enlistment, what do I do if a Zone C SRB is announced?
- A17. If a Zone C SRB is announced, the announcing ALCOAST will contain application criteria for the SRB.
- Q18. What if I discover that I failed to receive an SRB due to an administrative error or incorrect counseling from my command representative?
- A18. You may call or write to the Board for Correction of Military Records (BCMR) in Washington, DC to request an application form and pamphlet describing the Board process. If you are able to convince the Board that there was a counseling error made and that you suffered an injustice, the Board may grant you appropriate relief. The BCMR's address is:

DHS Office of the General Counsel  
 Board for Correction of Military Records, Mailstop #485  
 245 Murray Lane  
 Washington, DC 20528  
 Phone: (202) 447-4099

## **1.C. Critical Skills Training Bonus (CSTB) Program**

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### **1.C.1. General**

The Critical Skills Training Bonus (CSTB) program is an incentive to attract qualified personnel to critical skills or ratings. This program applies to all non-rated field personnel. The CSTB is authorized under Title 14 U.S.C. § 374. The combination of payments under the Enlistment Bonus (EB) and CSTB programs may not exceed \$20,000, by law.

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### **1.C.2. Glossary of Terms**

- a. Active Duty Service Commitment (ADSC). The ADSC is the number of years or fraction of years a member agrees to obligate service in order to earn a CSTB entitlement.
  - b. Critical Rating. A rating that is understaffed, is projected to be understaffed in the future, or requires an inordinate amount of training to achieve rating strength. The shortages are the result of the Service's inability to attract and retain personnel in the rating.
  - c. Obligated Service. All periods of military service covered by a signed agreement in the form of an enlistment contract or an extension agreement between a Coast Guard member and the U. S. Coast Guard, in which the member agrees to serve for a designated period of time.
  - d. Unearned Bonus. A portion of the CSTB already paid to a member who subsequently does not complete the service obligation.
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### **1.C.3. Policy**

- a. Convening of Bonus Panel. As needs of the Service dictate, Commandant (CG-122) will convene a panel to determine which critical ratings are designated eligible for a CSTB. The results of this panel's deliberations will be announced to the field via ALCOAST.
  - b. Member's Affiliation with a Critical Rating. These bonuses are linked to a member's affiliation with a critical rating by graduating from Class "A" school or advancing to E-4 through a striker program in that rating. This program is not a substitute for a Selected Reenlistment Bonus (SRB).
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### **1.C.4. Eligibility Criteria**

- a. Eligibility. To qualify for the CSTB Program, members must:

- (1) Graduate from Class “A” school or advance to E-4 through a striker program.
  - (2) Agree to obligate service to meet the minimum ADSC in effect.
- b. Members Attending Class “A” School. Prior to departing their permanent unit, members who will be attending Class “A” school must complete and sign a Critical Skills Training Bonus (CSTB) Agreement, Form CG-7220D. The original shall be placed in the member’s PDR and a copy given to the member. This document is proof of enrollment in the CSTB Program and will be used by the Training Center SPO to initiate bonus payment procedures upon graduation.
  - c. Members Enrolled in a Striker Program. Members who will earn a CSTB through a striker program must complete and sign a Critical Skills Training Bonus (CSTB) Agreement, Form CG-7220D, prior to beginning the program. The original shall be placed in the member’s PDR and a copy given to the member. Once a member is recommended for advancement under the striker program and placed on a striker eligibility list, in accordance with Article 3.C. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), PPC (mas) should be notified and a copy of the CSTB Agreement form faxed to them.
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### **1.C.5. Loss of Eligibility and Recoupment**

- a. Bonus will not be Recouped. Paid bonuses will not be recouped from members who are no longer eligible to serve in the rating for which the bonus was paid due to unforeseen Service actions (e.g., disestablishment of the rating).
- b. Recoupment of Paid Bonuses. All paid but unearned bonuses may be recouped. A member will be considered not technically qualified to receive the bonus if:
  - (1) The member no longer serves in the rating for which the bonus was authorized.
  - (2) The member's rating designator is removed.
  - (3) Current and future assignment in that specialty is precluded.
- c. Recoupment Due to Fault of Member. Unearned bonuses shall also be recouped if:
  - (1) The member is unable to perform the duties of the rating for which the bonus was paid due to injuries caused by misconduct.
  - (2) The member is unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to fault.
  - (3) The member refuses to perform the duties of the rating for which the bonus was paid.

- d. Exceptions to Recoupment. Members who are discharged or change ratings prior to completing the period of service for which they were paid a CSTB shall have all unearned bonus payments recouped, except when:
- (1) Involuntarily discharged for Convenience of the Government in connection with a reduction in force.
  - (2) Separated or retired for physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct.
  - (3) Discharged due to dependency or hardship.
  - (4) Discharged early for the purpose of immediate reenlistment, provided they reenlist in the eligible rating and the reenlistment term is for a period longer than the obligated service remaining in the period for which the CSTB was paid.
  - (5) Required to change ratings based on the needs of the Service.
  - (6) Personnel unable to perform duties that require a security clearance or who are assigned to a general petty officer billet due to humanitarian reassignment, loss of security clearance due to no fault, injury, or illness through no fault of their own, will be entitled to their full bonus.
- e. Impact When Placed on Weight Probation. Personnel placed on weight probation in accordance with reference (b), Coast Guard Weight and Body Fat Standards Program Manual, COMDTINST M1020.8 (series), shall have payment of the CSTB held in abeyance until they comply with weight standards.
- f. Date of Recoupment. When a member is no longer eligible for the CSTB, PPC (mas) will recoup the unearned bonus portion based on the effective date documented by the member's command.
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### **1.C.6. Payment Procedures**

The CSTB will be paid as follows:

- a. Upon Completion of "A" School. The bonus will be paid in lump sum upon successful completion of Class "A" school.
  - b. Upon Completion of Striker Program. The bonus will be paid in lump sum to members who advance to E-4 upon successful completion of a striker program.
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### **1.C.7. Responsibilities**

- a. Commandant (CG-122). Commandant (CG-122) shall:

- (1) Oversee the CSTB Program, policy, and resources.
  - (2) Promulgate and maintain a list of selected critical ratings eligible for the bonuses.
  - (3) As Service needs require, convene a panel to consider the number of CSTB quotas that are necessary to fill critical needs along with associated bonus amounts. Based on Service needs, Commandant (CG-1221) may make periodic adjustments throughout the year to the recommended quota allocations and bonus amounts.
- b. Commandant (CG-12A). Commandant (CG-12A) shall review the list of ratings designated as critical for the purposes of this program and recommend which ratings should be considered by the CSTB panel for addition to or deletion from the CSTB Program.
  - c. Commanding Officer (PPC-mas). Commanding Officer (PPC-mas) shall establish and maintain a system for paying and recouping bonuses. The payment and recoupment procedures are available to read in the on-line guide for Direct Access.
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#### **1.C.8. Forms/Reports**

The Critical Skills Training Bonus (CSTB) Agreement, Form CG-7220D, documents the eligibility criteria and conditions under which the CSTB is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS and as such, the original shall be retained in the member's SPO PDR and a copy shall be sent to Commander (CG PSC-PSD-MR) for electronic imaging into the Electronically Imaged (EI) PDR.

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## **CHAPTER 2 BONUSES APPLICABLE TO OFFICERS**

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### **2.A. Officer Accession Bonus (OAB) Program**

#### **2.A.1. General**

- a. Purpose. The Officer Accession Bonus (OAB) program is an incentive to attract qualified applicants who possess designated critical skills into officer accession programs. This program applies to new officer accessions. The OAB is authorized under Title 37 U.S.C. § 324.
  - b. Convening a Panel. As needs of the Service dictate, Commandant (CG-12) will convene a panel to identify officer skills that should be designated as critical. Title 37 U.S.C. § 324 authorizes the Commandant to establish a monetary bonus for personnel who execute a written agreement to accept a commission as an officer, and serve on active duty in a designated critical officer skill for the period specified in that agreement.
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#### **2.A.2. Glossary of Terms**

- a. Critical Officer Skill. A skill may be designated as a critical officer skill, for the purpose of this chapter, if it meets the following:
  - (1) In order to meet the mission requirements of the Service, it is critical for the Coast Guard to have a sufficient number of officers who are qualified in that skill; and
  - (2) In order to mitigate a current or projected significant shortage of personnel in the Coast Guard who are qualified in that skill, it is critical to access into the Service in sufficient numbers persons who are qualified in that skill or are to be trained in that skill.
- b. Active Duty Service Commitment (ADSC). The ADSC is the number of years a person agrees to obligate service on an Officer Accession Bonus (OAB) agreement.
- c. Anniversary Date. The anniversary date is the date that exactly corresponds to the date a person enters on active duty to begin serving the term designated by their OAB agreement. For example, if the person's first day on active duty on a four year OAB agreement is 10 July 2003, his/her year anniversary dates for bonus purposes would be 10 July 2004, 10 July 2005, 10 July 2006, and 10 July 2007.
- d. Unearned Bonus. An Officer Accession Bonus paid to a member who has not served the active duty time.

EXAMPLE: A member contracts to serve four years on an OAB agreement earning him/her a total OAB of \$40,000 (\$10,000 for each year agreed to serve). One

hundred percent (\$40,000) of the OAB is paid upon successful completion of the Direct Commission Officer program or graduation from Officer Candidate School. If the member is subsequently separated after serving only one year, the member has earned only one year's worth of the OAB (\$10,000); the remaining portion that was paid in advance (\$30,000), is unearned and may be recouped.

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**2.A.3. Maximum Bonus Amount**

The maximum bonus amount for which a member can be paid an Officer Accession Bonus is \$60,000. A panel of officers convened by Commandant (CG-12) will determine the amount of bonus to be awarded a particular critical officer skill.

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**2.A.4. Maximum Term for Bonus Purposes**

The maximum number of years for which an Officer Accession Bonus may be contracted is five years.

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**2.A.5. Method of Payment**

Members will receive lump sum payment of their OAB on the payday after successful completion of the Direct Commission Officer program or graduation of Officer

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Candidate School.

**2.A.6. Relationship to Other Entitlements**

An Officer Accession Bonus paid under this chapter is in addition to any other pay and allowances that a member is entitled to receive. An individual may not receive an Officer Accession Bonus under this chapter for the same period of service agreed to upon by any other accession bonus program.

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**2.A.7. Eligibility Criteria**

To qualify for an Officer Accession Bonus, a member must:

- (a) Qualification Criteria. Meet standard qualification criteria for either a direct commission program or enrollment in officer candidate school, as detailed in reference (g), Coast Guard Recruiting Manual, COMDTINST M1100.2 (series).
- (b) Qualify and Affiliate with Skill. Qualify for and agree to affiliate with an officer skill that has been determined by Commandant (CG-12) to be critical.
- (c) Service Obligation. Agree to serve a minimum of three years active duty in association with duties involved in a critical officer skill. This three-year period may run concurrent with obligated service required by either a direct commission program

or by enrollment in officer candidate school.

Note: The OAB program is not currently available to Coast Guard active duty or reserve enlisted members seeking an officer appointment.

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## **2.A.8. Recoupment for Failure to Commence or Complete Active Duty Service Commitment (ADSC)**

- a. Reasons for Recoupment. Any unearned portion of an OAB will be recouped if an individual who, after having received lump sum payment of the accession bonus entitled to them by an Officer Accession Bonus agreement,
    - (1) fails to accept a commission as an officer,
    - (2) fails to commence or complete the total period of active duty service specified in the OAB agreement, or
    - (3) commences flight school prior to completion of the OAB service agreement obligation.
  - b. Waivers. The Coast Guard may waive, in whole or in part, the recoupment of any unearned OAB on a case-by-case basis if it is determined that recoupment would be against equity and good conscience or would be contrary to the best interests of the United States.
  - c. General Recoupment Procedures. When a member is no longer eligible for the Officer Accession Bonus, Commanding Officer (PPC) will recoup paid but unearned bonus portions based on the effective date documented by the member's command.
  - d. Officer Accession Bonus Recoupment Calculations. Recoupment calculations will be based on the Defense Finance and Accounting Services accounting method. Calculations are based on 360-day years, 30-day months. The initial daily rate is based on the lump sum payment divided by 360 days, divided by the number of contractual years. The total amount of recoupment will be based on the daily rate multiplied by the total number of days of unearned OAB based on a 30-day month. For example, calculations for a member who received an lump sum payment of \$21,000 and then was separated 3 months prior to fulfilling a 3 year contractual requirement, would be as follows:  $\$21,000(\text{lump payment})/360(\text{DFAS year}/3 \text{ years})$  gives a daily rate of \$19.44. Convert 3 MOS to 90 days and then multiplied by the daily rate:  $\$19.44 \times 90 = \$1,749.60$ . The member would be required to pay back \$1,749.60.
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## **2.A.9. Responsibilities**

- a. Commandant (CG-122).

- (1) Oversee the Officer Accession Bonus Program policy and resources;
  - (2) Promulgate and maintain a list of selected critical ratings eligible for an Officer Accession Bonus;
  - (3) As directed by Commandant (CG-12), convene a panel of officers to determine the following:
    - (a) Critical officer skill that may be offered an OAB,
    - (b) OAB amounts, and
    - (c) Length of OAB agreements.
- b. Commanding Officer (PPC). Establish and maintain a system for paying and recouping Officer Accession Bonuses and publishes these procedures in reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), and reference (h), Coast Guard Servicing Personnel Office Manual (SPO Manual) PPCINST M5232.3 (series).
- c. Commanding Officer, Coast Guard Recruiting Command (CGRC).
- (1) Design and execute a marketing plan for the Coast Guard Officer Accession Bonus (OAB) Program as part of an overall effort to accomplish Coast Guard recruiting missions and goals;
  - (2) Ensure eligible members' Officer Accession Bonus agreements set forth the terms under which this bonus may be paid and recouped by completing the OAB agreement for each recipient of an Officer Accession Bonus.
  - (3) Provide by the fifth (5th) day of each month, a list of personnel accessed with an Officer Accession Bonus. Provide each recipient's name, social security number, accession and shipping date, including the critical officer skill, and other pertinent identifying data. The original report will be submitted to Commander (CG PSC-OPM) with copies to Commandant (CG-122), (CG-12A), Commanding Officer (PPC-mas) and Superintendent Academy (SPO) if applicable.
  - (4) Recommend reallocation of funds budgeted for the OAB program to meet changes to the critical officer skills designated eligible to receive OABs.
- d. Servicing Personnel Offices (SPOs). Ensure appropriate entries are made in accordance with reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), and reference (h), Coast Guard Servicing Personnel Office Manual (SPO Manual) PPCINST M5232.3 (series), to pay Officer Accession Bonuses to eligible members and to recoup OAB payments on loss of eligibility.
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**2.A.10. Forms/Reports**

The Officer Accession Bonus (OAB) Agreement, Form CG-7220F, documents the eligibility criteria and conditions under which the OAB is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS and as such, the original shall be retained in the member's SPO PDR and a copy shall be sent to Commander (CG PSC-PSD-MR) for electronic imaging into the Electronically Imaged (EI) PDR.

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## CHAPTER 3 BONUSES APPLICABLE TO OFFICER AND ENLISTED MEMBERS

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### 3.A. Critical Skills Retention Bonus (CSRB) Program

#### 3.A.1. General

- a. Use. The Critical Skills Retention Bonus (CSRB) program is to be used as an incentive to encourage the retention of officer and enlisted members in designated critical skills. The CSRB is authorized under Title 37 U.S.C. § 323.
  - b. Designation of Critical Skills. As needs of the Service dictate, Commandant (CG-12) will convene a panel to identify enlisted, chief warrant officer and officer skills that should be designated as critical. The panel results will be forwarded to the Secretary of Homeland Security. Per Title 37 U.S.C. § 323, the Secretary of Homeland Security shall notify Congress, in advance, of each military skill to be designated by the Secretary as critical for purposes of receiving a Critical Skills Retention Bonus. Congressional notification must be submitted at least 90 days before any CSRB is offered. Also, it shall include a discussion of the necessity for the bonus, the amount and method of payment of the bonus, and the retention results that the bonus is expected to achieve.
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#### 3.A.2. Glossary of Terms

- a. Active Duty Service Commitment (ADSC). The ADSC is the number of years a member agrees to obligate service on a Critical Skills Retention Bonus Agreement (CSRBA). The member's new estimated date of separation (DOS) can be calculated by adding the ADSC to the effective date of the member's Critical Skills Retention Bonus Agreement.
- b. Anniversary Date. The anniversary date is the date that exactly corresponds to the effective date of the CSRBA, reenlistment contract or agreement to extend enlistment. For example, if the member reenlisted for 4 years on 10 July 2000 his/her year anniversary dates for bonus purposes would be 10 July 2001, 10 July 2002, 10 July 2003, and 10 July 2004.
- c. Effective Date. The effective date for enlisted members will normally be the date the member reenlists or the operative date of the member's agreement to extend their enlistment contract, or as otherwise directed in the notifying ALCOAST. For officers and eligible enlisted personnel currently serving on an indefinite reenlistment contact, the effective date will be announced in the notifying ALCOAST.
- d. Eligibility Window. The Critical Skills Retention Bonus is authorized for eligible personnel who will complete their obligated service (end of enlistment, obligated service for receipt of training, etc.) within the eligibility window announced in the

notifying ALCOAST.

- e. Executed Extension. An Agreement to Extend Enlistment, Form CG-3301B is executed when it has been signed, but the member has not started serving on it.
  - f. Obligated Service. Obligated service includes all service obligations for initial entry or continued retention in the Coast Guard (Academy, OCS, DCA, Enlistment/Reenlistment Contract, Extension Agreement, etc.) and obligated service for receipt of training (post graduate school, flight training, Class “A” or “C” schools, etc.). This does not include obligated service for permanent change of station (PCS) or obligated service incurred through promotion/advancement. Requests for current obligated service determinations should be sent to Commandant (CG-122).
  - g. Operative Date. The date an extension begins to run (the member is serving in the extension).
  - h. Critical Skills Retention Bonus (CSRB) Agreement, Form CG-7220E. A written agreement between a member and the Coast Guard in which the member agrees to remain on active duty for a specific period of time. In return, the member receives a Critical Skills Retention Bonus contingent upon meeting all other prerequisites.
  - i. Critical Skills Retention Bonus Agreement Submission Date. The required submission date for the Critical Skills Retention Bonus Agreement will be announced in the notifying ALCOAST.
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### **3.A.3. Types of Contractual Agreements**

- a. Critical Skills Retention Bonus Agreement (CSRBA). The following personnel should execute a Critical Skills Retention Bonus Agreement:
    - (1) Eligible officers.
    - (2) Eligible enlisted personnel currently serving on an indefinite reenlistment contract.
  - b. Reenlistment Contract or Agreement to Extend Enlistment. Enlisted personnel who are not serving on an indefinite reenlistment contract.
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### **3.A.4. Maximum Bonus Amount**

- a. Maximum Dollar Amount Per Bonus. The maximum bonus amount for officer and enlisted specialties designated as critical will be announced in the notifying ALCOAST.
- b. Number of Bonus Authorized Per Career. A member may receive more than one bonus during his or her career, provided:

- (1) A bonus is being offered or authorized.
  - (2) Member's specialty is designated as critical.
  - (3) Member reenlists, extends or submits a Critical Skills Retention Bonus Agreement.
- c. Maximum Career Dollar Amount. A member may not receive more than a total of \$200,000 throughout that member's career.
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### **3.A.5. Method of Payment**

- a. Dates Paid. A Critical Skills Retention Bonus will be paid in equal annual installments. Annual installments will be paid on the payday after the anniversary date of the effective date of the Critical Skills Retention Bonus Agreement, reenlistment contract or extension operative date.
  - b. Amounts Paid. The amount of these payments will be announced in the notifying ALCOAST and determined by:
    - (1) The amount of Critical Skills Retention Bonus offered for the critical military skill for which the member currently serves; and,
    - (2) The number of additional years active service member agrees to serve as a result of the CSRBA, reenlistment contract or agreement to extend enlistment.
  - c. Accelerated CSRBA Payments. Commanding officers are authorized to approve requests of deserving individuals for accelerated CSRBA payments. An accelerated payment is defined as an early payment of the next CSRBA installment, prior to the normal anniversary date, but in the same fiscal year in which the installment payment is due.
  - d. Lump Sum and Multiple Accelerated CSRBA Payments. Lump sum or accelerated CSRBA payments of two or more installments will not normally be approved. However, when a Coast Guard member experiences a severe financial hardship not attributable to financial irresponsibility, he or she may request such payment. Requests shall be forwarded via the chain of command to Commandant (CG-1221) for determination and must include a financial statement listing all income and expenses (a copy of the CG Mutual Assistance form should be used).
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### **3.A.6. Special Conditions**

- a. Canceling Extensions. Extensions previously executed by members may be canceled prior to their operative date for the purpose of executing a longer extension or reenlistment (See Article 1.B.6. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series)). Members should be informed

that their CSRB entitlement will be based only on newly acquired obligated service. For example, a member cancels a 3-year extension to reenlist for 6 years, the member will only be paid a CSRB entitlement for the additional 3 years of service. An exception to this rule is made for extensions of 2 years or less, or multiple extensions (each of which is 2 years or less in length), required of a member for transfer, training and advancement. These extensions may be canceled prior to their operative date for the purpose of immediate reenlistment or longer extension without any loss of CSRB entitlement.

- b. Change in Rating. Members who have changed their rating to an eligible rating are not entitled to receive a CSRB until:

- (1) They have reenlisted; or
- (2) They have completed at least two years in the new rating if serving on indefinite reenlistment.

Note: To receive a bonus, the member's effective date of reenlistment/extension and the effective date of CSRB Agreement must be within the eligibility window announced in the notifying ALCOAST.

- c. Officer Procurement Programs. Officer procurement programs are defined as those programs which upon successful completion will lead to an appointment as a chief warrant or commissioned officer in the Coast Guard. These programs include but are not limited to: Officer Candidate School, physician's assistant programs, and acceptance of chief warrant officer and direct commissioning programs. Upon notification of a member's selection to enter into any officer procurement program, any request for accelerated or early payment of the remaining portion of CSRB payments will not be approved. The following information applies to individuals entering officer procurement programs:

- (1) Suspension of Remaining Installments. Members entering officer procurement programs who have reenlisted/extended for a CSRB will have remaining installments suspended upon notification that they will be entering an officer procurement program, unless the officer specialty has been designated as critical. Chief warrant officers that are above the cutoff will have remaining installments suspended upon publication of the eligibility list, unless the chief warrant officer specialty has been designated as critical.
- (2) Creditable Time for Bonus Purposes. The time spent in officer procurement program (i.e., OCS) is creditable towards CSRB payment. Members' CSRB entitlement will terminate upon appointment as Chief Warrant Officer or commissioned officer. Members will be retroactively paid from the date of CSRB suspension up to the date prior to their appointment.
- (3) Eligibility for an Officer CSRB. Enlisted members are not authorized to receive

an officer CSRB until they have completed the obligated service for training associated with the specific officer procurement program (i.e., OCS). The member will become eligible for a CSRB, if one is in effect, upon completion of the obligated service.

- (4) Non-Completion of an Officer Procurement Program. Members who do not successfully complete the officer procurement program and continue in an enlisted status in the same rate will have CSRB installments resumed. They are entitled to receive the CSRB payments previously suspended.
  - (5) Temporary Commissioned Officers that Revert to Enlisted Status. Temporary commissioned officers that revert to enlisted status in their original rating, which still have time remaining on their contract are entitled to CSRB. However, the time served, as a commissioned officer shall not count toward CSRB entitlement.
  - (6) Non-Rated Members. Non-rated members without rating designators shall not be authorized to execute an Agreement to Extend Enlistment under any circumstance for the purpose of receiving a CSRB multiple.
  - (7) Unexecuted Service Obligation. All periods of unexecuted service obligation, except for a member discharged no more than 7 days early because expiration of enlistment falls on a Friday, Saturday, Sunday, or holiday will be deducted from CSRB computation.
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### **3.A.7. Relationship to Other Entitlements**

A Critical Skills Retention Bonus paid under this chapter is in addition to any other pay and allowances to which a member is entitled.

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### **3.A.8. Determining Eligibility**

- a. Designated in a Critical Military Skill. As of the effective date of the Critical Skills Retention Bonus Agreement, reenlistment contract or agreement to extend enlistment, the member must be designated or previously designated in a critical military skill. (Note: An agreement to extend enlistment must become effective within the eligibility window announced in the notifying ALCOAST.)
- b. Active Duty Service Commitment. Member must have no current obligated active duty service commitment other than obligated service for permanent change of station orders (PCS) or promotion/advancement.
- c. Minimum Total Active Duty Service. Member must have no fewer than 4 years of total active duty as of the effective date of the CSRBA, reenlistment contract or agreement to extend enlistment.
- d. Maximum Total Active Duty Service. Member must have fewer than 25 years, 00

months, and 00 days total active service by the end of the completion of the CSRBA, reenlistment contract or agreement to extend enlistment.

- e. Retired Recall Status. Officers and enlisted members serving in a retired recall status are not eligible.
  - f. Reserve Members. A Reserve member serving on an extended active duty contract is not eligible.
  - g. Additional Information. Additional eligibility criteria may be published in the notifying ALCOASTs.
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### **3.A.9. Conditions of the CSRB Agreement, Reenlistment Contract or Agreement to Extend Enlistment**

- a. Duration of Contract. Once a Critical Skills Retention Bonus Agreement, reenlistment contract or agreement to extend enlistment is signed, it will remain in force until it expires. Members may request a new CSRBA, reenlistment contract or agreement to extend enlistment, for bonus purposes, upon expiration of their existing agreement provided a Critical Skills Retention Bonus is being offered and the members meet the eligibility requirements. (Note: Per Section 1.B. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series), the total of all extensions of an enlistment may not exceed six years.)
  - b. Limitations to Contract. A Critical Skills Retention Bonus Agreement, reenlistment contract or agreement to extend enlistment does not guarantee that a member will remain on active duty indefinitely if earlier administrative separation or retirement is appropriate.
  - c. Involuntary Separation. The Coast Guard can also initiate involuntary separation for cause under reference (f), Military Separations, COMDTINST M1000.4 (series), earlier than the date of separation established by the Critical Skills Retention Bonus (CSRB) Agreement, Form CG-7220E, reenlistment contract or agreement to extend enlistment. Any unearned portions of the CSRB will be recouped on a pro rata basis.
  - d. Request to Change Date of Separation. When a Critical Skills Retention Bonus for a member is suspended or terminated as described in this chapter, Commander (CG PSC) will not automatically adjust the date of separation that was established by the Critical Skills Retention Bonus Agreement's ADSC, reenlistment contract or agreement to extend enlistment. A member whose CSRB eligibility ends may submit a request, with supporting material, to change the date of separation to either Commander (CG PSC-OPM) or (CG PSC-EPM), whichever is appropriate.
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### 3.A.10. Applying for the Critical Skill Retention Bonus

- a. Applicant Responsibilities.
  - (1) Review the contents of this chapter and the notifying ALCOAST prior to signing the Critical Skills Retention Bonus (CSRBA) Agreement, Form CG-7220E, reenlistment contract, or agreement to extend enlistment;
  - (2) Complete, sign, date, and forward the Critical Skills Retention Bonus (CSRBA) Agreement, Form CG-7220E, to the designated command representative;
  - (3) Keep a copy of the signed agreement for record purposes;
  - (4) If not eligible to use the CSRBA, then execute a reenlistment contract or agreement to extend per Article 1.B. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series).
- b. Command Counseling Responsibilities. Commanding Officers will designate a command representative who will counsel all eligible officers and enlisted members concerning CSRBA eligibility. The counseling session should be a one-on-one meeting between the eligible member and the designated command representative, outlining the needs of the Coast Guard and how the CSRBA fits into the overall critical skill retention effort.
- c. Designated Command Representative Responsibilities.
  - (1) Ensure the applicant is aware of the CSRBA submission deadline and eligibility window (to be announced in the notifying ALCOAST), payment authorization and the ADSC associated with accepting the desired CSRBA option;
  - (2) Ensure the applicant fully understands the implications of the agreement;
  - (3) Explain that any unearned portions of CSRBA will be recouped on a pro-rata basis for all conditions listed in this chapter, including separation after declining selective continuation;
  - (4) Explain that eligible members with an approved date of separation (DOS) must request withdrawal of the DOS prior to or upon submission of their CSRBA application. Members will not receive CSRBA payments if the DOS withdrawal request is disapproved.
- d. Command Representative Responsibilities. If member agrees to accept a Critical Skills Retention Bonus, Designated Command Representative must complete the following:
  - (1) Ensure the CSRBA, reenlistment contract or agreement to extend enlistment has

been properly completed;

- (2) Ensure the applicant and his/her commanding officer or command designee sign the CSRBA, reenlistment contract, or agreement to extend enlistment;
  - (3) Critical Skills Retention Bonus Agreement Distribution. Make three copies of the original and distribute as follows: Give a copy of the CSRBA to the applicant, mail/telefax a copy to Commanding Officer (PPC-mas) (FAX 785-339-3760) for processing, forward a copy to Commander (CG PSC-OPM) or (CG PSC-EPM), as appropriate, and forward original to (CG PSC-PSD), for inclusion in the member's service record;
  - (4) Reenlistment Contract or Agreement to Extend Enlistment. Distribute as outlined in existing policy governing these agreements.
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### **3.A.11. Disapproving Bonus Payments**

- a. Reasons for Disapproval of Bonus Payments. Commanding Officers shall disapprove CSRBA payments for members who:
  - (1) Are waiting Involuntary Separation for Cause.
  - (2) Are waiting or undergoing investigation into military or civilian offense that could result in a documented record of substantiated misconduct or substandard duty performance.
  - (3) Have a documented record of substandard performance or conduct that renders them poor candidates for retention.
  - (4) Have a documented record of skills and performance that makes them ineffective for rated duty.
- b. Distribution of Critical Skills Retention Bonus Agreement. Disapprovals will be forwarded to Commanding Officer (PPC-mas), info Commandant (CG-122), Commander (CG PSC-OPM) or (CG PSC-EPM), and (CG PSC-PSD) by the most expeditious means.
- c. Refusing Reenlistment of Extension and Report of Such Action. Reenlistment Contract or Agreement to Extend Enlistment. The enlisting officer may refuse to reenlist or extend a person when he/she has become cognizant of any valid objection to the person's reenlistment or extension by reason of circumstances not known at the time of discharge, or which have arisen since discharge. In each such case a full report thereof will be made to the Commander (CG PSC-EPM-1) or (CG PSC-RPM) for final decision. (See Article 1.A.10. of reference (a), Enlisted Accessions, Evaluations, and Advancements, COMDTINST M1000.2 (series))

- d. Reapplying for a CSRB. If any of the above listed conditions change, the member may reapply for a CSRB.
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### **3.A.12. Terminating or Recouping Critical Skills Retention Bonus**

- a. Reasons for Termination. Terminate CSRB payments when a member:
- (1) Is dismissed or discharged for cause.
  - (2) Separates after declining selective continuation.
  - (3) Voluntarily retires or separates before finishing the ADSC.
  - (4) Separates after non-selection for promotion or selected by a Reduction in Force (RIF) board.
- b. Reasons for Recoupment. Recoup CSRB payments from the member under the following conditions:
- (1) If the reason for failure to complete service is a result of the member voluntarily terminating their critical skills status, then future anniversary payments are not paid and any unearned portions of the bonus is recouped.
  - (2) If the reason for failure to complete service is voluntary and the effective date of the disqualification or separation is after the next anniversary payment, then the next scheduled payment is prorated to the separation date. Future anniversary payments are not paid and any unearned portion of the bonus is recouped. Note: Includes members who separate under early release programs, decline to continue serving or are released for training in other competitive career categories.
  - (3) If the reason for failure to complete service is voluntary and the effective date of the disqualification or separation is after the most recent but before the next anniversary payment, then the next scheduled payment is not paid, future anniversary payments are not paid, and any unearned portion of the bonus is recouped. Note: Includes members who separate under early release programs, decline to continue serving, or are released for training in other competitive career categories.
  - (4) If the reason for failure to complete service is involuntary and the effective date of the disqualification or separation is after the next anniversary payment then the next scheduled payment is prorated for the remaining service, future anniversary payments are not paid, and any unearned portion of the bonus is not recouped. Note: Includes disability retirements or separations and separation due to non-selection for promotion or RIF actions.
  - (5) If the reason for failure to complete service is involuntary and the effective date of

the disqualification or separation is after the most recent but before the next anniversary payment then the next scheduled payment is not paid, future anniversary payments are not paid, and any unearned portion of the bonus is not recouped. Note: Includes disability retirements or separations and separation due to non-selection for promotion or RIF actions.

- (6) If the reason for failure to complete service is involuntary and the effective date of the disqualification or separation is after the next anniversary payment then the next scheduled payment is not paid, future anniversary payments are not paid, and any unearned portion of the bonus is recouped. Note: Includes separation for cause; loss of qualification; and administrative disqualification.
  - (7) If the reason for failure to complete service is involuntary and the effective date of the disqualification or separation is after the most recent but before the next anniversary payment then the next scheduled payment is not paid, future anniversary payments are not paid, and any unearned portion of the bonus is recouped. Note: Includes separation for cause; loss of qualification; and administrative disqualification.
  - (8) In case of death, the remaining payments will be included in the final settlement of unpaid pay and allowances.
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### **3.A.13. Critical Skills Retention Bonus Recoupment Calculations**

Recoupment calculations will be based on the Defense Finance and Accounting Services accounting method. Calculations are based on 360-day years, 30-day months. The initial daily rate is based on the yearly rate divided by a "DFAS" year (360) days. The total amount of recoupment will be based on the daily rate multiplied by the total number of days of unearned RB based on a 30-day month. For example, calculations for a member who received an advance annual payment of \$21,000 and then was separated 3 months prior to fulfilling the requirement for the annual payment would be as follows:  $\$21,000(\text{annual rate})/360(\text{DFAS year})$  gives a daily rate of \$58.33. Convert 3 MOS to 90 days and then multiplied by the daily rate:  $\$58.33 \times 90 = \$5,249.70$ . The member would be required to pay back \$5,249.70.

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### **3.A.14. Forms/Reports**

The Critical Skills Retention Bonus (CSRB) Agreement, Form CG-7220E, documents the eligibility criteria and conditions under which the CSRB is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS and as such, the original shall be retained in the member's SPO PDR and a copy shall be sent to Commander (CG PSC-PSD-MR) for electronic imaging into the Electronically Imaged (EI) PDR.

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## CHAPTER 4 BONUSES APPLICABLE TO SELECTED RESERVE (SELRES)

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### 4.A. General

SELRES Enlisted Bonus Programs (SEBP) are incentives to encourage the recruitment, proficiency and retention of individuals in designated ratings or units in the SELRES. The SEBP is authorized in 37 U.S.C. § 308b, 308c, and 308i. The authority to execute payment of all bonus programs described in this section is subject to authorization in law and appropriation of funds.

#### 4.A.1. Glossary of Terms

- a. Initial Active Duty for Training (IADT). A term used to identify the basic training or the equivalent each military member must complete on initial entry in the Coast Guard, as required by 10 U.S.C. § 671 and § 12301, to qualify for deployment on land outside the U. S. and its territories and possessions.
  - b. Military Service Obligation (MSO). The total required service each person who initially becomes a member of the Coast Guard shall serve, unless sooner discharged. The MSO for any person whose initial entry into a military service is on or after 1 June 1984 is eight years from date of enlistment.
  - c. Secondary School Graduate. For SEBP purposes, this term includes recipients of
    - (1) a high school diploma issued from the school where the individual is credited with completion of 12-year or grade day program requirements;
    - (2) a secondary school diploma awarded for completing an adult education diploma issued by a state or by a secondary or post-secondary educational institute;
    - (3) a diploma or certificate of General Education Development (GED) or other test-based high school equivalency diploma; and,
    - (4) a secondary school diploma or certificate typically awarded by a state, based on certification by a parent or guardian that an individual has completed secondary school at home.
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#### 4.A.2. Responsibilities

- a. Commandant (CG-131).
  - (1) establishes SEBP policy and manages Reserve bonus programs;
  - (2) determines bonus-eligible ratings and units;

- (3) specifies implementation of available SEBP incentives at least annually;
  - (4) monitors accessions and losses to evaluate program effectiveness;
  - (5) evaluates funding and policy changes, as necessary, to meet current and future staffing requirements; and,
  - (6) considers requests for waivers, other than waiver of effective dates for eligibility and situations outside strict policy guidelines.
- b. Servicing District (DXR/DOG).
- (1) consider bonus obligations when assigning SEBP participants, insofar as certain unit assignments may lead to all or part of a bonus being recouped;
  - (2) monitor Ready Reservists' participation and SEBP recipients' eligibility, and recommend bonus termination to Commanding Officer (PPC-mas), when necessary.
- c. Pay and Personnel Center.
- (1) pays bonuses to SEBP participants;
  - (2) terminates and recoups bonuses from personnel who fail to comply with their SEBP agreements; and,
  - (3) tracks and provides SEBP participation, termination, and recoupment data to Commandant (CG-131).
- d. Servicing Personnel Offices.
- (1) verify members' completed bonus agreements; and,
  - (2) forward applicable SEBP documents to Commanding Officer (PPC-mas) in a timely manner.
- e. Units.
- (1) monitor members' participation and SEBP eligibility,
  - (2) process, verify correctness, and forward SEBP documents to servicing SPO, and
  - (3) Notify Commanding Officer (PPC) when member is eligible for termination of bonus per Article 4.C.3. of this Manual.
- f. Recruiting Offices. Recruiting Offices process, verify correctness, and forward SEBP

documents to servicing SPO (Training Center Cape May for RP and RK Program accessions, who attend eight-week basic training; assigned unit's servicing SPO for all others, including those who attend two-week Reserve Enlisted Basic Indoctrination). See Chapter 3 of reference (g), Coast Guard Recruiting Manual, COMDTINST M1100.2 (series), for descriptions of the different Reserve accession programs.

g. Members. Members must:

- (1) ensure they fully understand SEBP obligations when accepting and requesting assignments, the result of which may lead to all or part of a bonus being recouped per Article 4.C.3. of this Manual;
  - (2) verify that all bonus documents they sign are correct and complete; and,
  - (3) submit written requests for subsequent bonus payments, if applicable, to Commanding Officer (PPC-mas), through the chain of command.
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#### **4.A.3. Maximum Bonus Amounts**

The maximum amounts for bonus categories are prescribed in 37 U.S.C., Chapter 5. Commandant (CG-13) will provide a listing of authorized bonus amounts to Commanding Officer, Coast Guard Recruiting Command, and other appropriate offices, at least annually, and may authorize lesser dollar amounts than those prescribed by law, depending on legislative authority, budget, and program needs. In order to lock into a bonus level or amount, members must execute a bonus agreement and meet all eligibility requirements. Requests to waive effective dates for eligibility will not be considered.

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## **4.B. Selected Reserve (SELRES) Enlisted Bonus Programs (SEBP)**

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### **4.B.1. SELRES Affiliation Bonus Program**

#### **4.B.1.a. Authority**

37 U.S.C. § 308c authorizes a bonus for eligible personnel leaving active duty who affiliate with the SELRES. Members who receive an affiliation bonus are not barred from later being paid a reenlistment or extension bonus under 4.B.4. of this manual. Members discharged under the temporary separation policy who affiliate with the SELRES and meet the eligibility criteria below are also authorized to receive this incentive (see Article 1.F. of reference (f), Military Separations, COMDTINST M1000.4 (series)). SEBP participants who return to active duty under the temporary separation policy may be subject to partial recoupment of any unearned bonus. (See Article 4.C.3. of this Manual.)

#### **4.B.1.b. Eligibility**

To be eligible to receive a bonus for SELRES affiliation a person:

- (1) must be released from active duty (RELAD) under honorable conditions from the Coast Guard or another military service;
- (2) must be eligible for reenlistment or for extension of his or her active duty;
- (3) must not have previously received an affiliation bonus for service in the SELRES;
- (4) must have satisfactorily completed his or her term of enlistment or period of obligated active duty service, or have 180 days or less remaining on his or her active duty obligation;
- (5) must affiliate with the SELRES within six months of RELAD date, for a minimum of three years in the rating or unit for which the bonus was authorized unless authorized to change to another bonus eligible rating or unit;
- (6) must not already have a mandatory SELRES obligation at the time of RELAD; and,
- (7) must execute a written agreement (see Enclosure (6) of reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2(series)).

#### **4.B.1.c. Amount and Payment Method**

The amount of the bonus shall be prescribed annually by Commandant (CG-13) in accordance with Article 4.A.3. of this Manual. The bonus will be paid in an initial payment of one-half of the total bonus amount. Members must submit a written request to Commanding Officer (PPC-mas) via their chain of command for the remainder of the

bonus amount one year after the date of the initial payment in accordance with Article 4.C.1. of this Manual.

#### **4.B.1.d. Application**

- (1) Servicing SPO. Prepare or review completed Report of Separation from Active Duty, DD Form 214, orders to a SELRES assignment, and the appropriate Administrative Remarks, CG-3307, entry. The Administrative Remarks, Form CG-3307, entry shall be faxed to Commanding Officer (PPC-mas).
  - (2) Commanding Officer (PPC-mas). Upon receipt of the Administrative Remarks, CG-3307, entry and at such time as the documents are processed by the pay system, make bonus payments as directed in Article 4.B.1.c. of this Manual.
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### **4.B.2. SELRES Enlistment Bonus Program**

#### **4.B.2.a. Authority**

37 U.S.C. § 308c authorizes a bonus to eligible personnel who enlist in the SELRES in an eligible rating.

#### **4.B.2.b. Eligibility**

To be eligible to receive a SELRES enlistment bonus a person must enlist in the Coast Guard Reserve via the RX, RA, RP or RK accession program and:

- (1) Must be a graduate of a secondary school;
- (2) Must have never previously served in an armed force;
- (3) Must be assigned to a bonus eligible rating or unit at the time of enlistment, and must agree to serve in the SELRES for not less than six years in the rating or at the unit for which the bonus was authorized, unless authorized to change to another bonus eligible rating or unit; and,
- (4) Must execute a written agreement in the form of an Administrative Remarks, Form CG-3307, entry. Consult reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), for detailed content and formatting requirements of the Administrative Remarks, Form CG-3307, entry. The following minimum information must be included in all entries for SELRES enlistment bonus purposes:
  - (a) The SELRES enlistment bonus level, the number of months/years of newly obligated service, and dollar amount authorized.
  - (b) The rate or unit the EB is based upon.

- (c) The following statement: “I hereby acknowledge I have read and fully understand the contents and explanation of Article 4.B.2.b. of Military Bonus Programs, COMDTINST M7220.2 (series). I have also been counseled on the opportunity to contribute my SELRES enlistment bonus payment to the Thrift Savings Plan.”

**4.B.2.c. Amount and Payment Method**

The amount of bonus shall be prescribed annually by Commandant (CG-13) in accordance with Article 4.A.3. of this Manual. The bonus will be paid in an initial payment of one-half of the total bonus amount upon completion of IADT. Members must submit a written request to Commanding Officer (PPC-mas) via their chain of command for the remainder of the bonus amount one year after receipt of the initial payment in accordance with Article 4.C.1. of this Manual. Completion of IADT is defined as:

<b>Accession Program</b>	<b>IADT Completion</b>
RX	Completion of Reserve Enlisted Basic Indoctrination (REBI)
RP and RK	Completion of eight-week basic training and “A” School

**4.B.2.d. Application**

- (1) Recruiting Office. Prepare or review completed enlisted application, Enlistment/Reenlistment Document (DD Form 4), to include a completed Statement of Understanding (SOU); Record of Military Processing (DD Form 1966); and Administrative Remarks, Form CG-3307, entry. Obtain assignment to a SELRES position from the Servicing District (DXR/DOG) and forward aforementioned documents to Training Center Cape May Recruit SPO for enlistees under the RP and RK programs, and to the assigned unit’s servicing SPO for enlistees under the RX and RA program.
  - (2) Servicing Personnel Office. Report the enlistment and position assignment to the personnel and pay system and fax the following documents to Commanding Officer (PPC-mas): Administrative Remarks, Form CG-3307, entry and Statement of Understanding (SOU) for Coast Guard Reserve [RX/RP/RK/RA] Program.
  - (3) Commanding Officer (PPC-mas). Upon receipt of the Administrative Remarks, Form CG-3307, entry and SOU, verify completion of IADT, and make the initial bonus payment. The single subsequent payment is made upon member’s request at least one year after initial payment is made.
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### **4.B.3. SELRES Prior Service Enlistment Bonus Program**

#### **4.B.3.a. Authority**

37 U.S.C. § 308i authorizes a bonus for eligible prior service personnel who enlist in the SELRES in an eligible rating.

#### **4.B.3.b. Eligibility**

To be eligible to receive a SELRES prior service enlistment bonus a person must enlist in the Coast Guard Reserve via the RQ accession program, and:

- (1) Must enlist for three to five years in the SELRES to qualify for the three-year bonus or six to eight years in the SELRES to qualify for the six-year bonus;
- (2) Must have less than 14 years total prior service on the date of enlistment, and members must have received an honorable discharge at or after conclusion of the eight-year military service obligation (MSO) (total prior service at the date of enlistment is the total active and inactive service, regardless of branch, computed from Pay Base Date; inactive service covers all periods of inactive duty served under a qualifying enlistment);
- (3) Must not have previously received a six-year bonus or more than one three-year bonus for enlistment, reenlistment, or extension in any Reserve component (a member who received a bonus for a previous three-year period is ineligible for a six-year bonus);
- (4) Must hold a bonus-eligible rating or be assigned to a bonus-eligible unit at the time of enlistment, and must agree to serve in the SELRES in the same rating or unit for which the bonus was authorized unless authorized to change to another bonus-eligible rating or unit; and
- (5) Must execute a written agreement in the form of an Administrative Remarks, Form CG-3307, entry. Consult reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), for detailed content and formatting requirements of the Administrative Remarks, Form CG-3307, entry. The following minimum information must be included in all entries for SELRES prior service enlistment bonus purposes:
  - (a) The SELRES prior service bonus level, the number of months/years of newly obligated service, and the dollar amount authorized.
  - (b) The rate or unit the SELRES prior service enlistment bonus is based upon.
  - (c) The following statement: "I hereby acknowledge I have read and fully understand the contents and explanation of Article 4.B.3.b. of Military Bonus Programs,

COMDTINST M7220.2 (series). I have also been counseled on the opportunity to contribute my SELRES prior service enlistment bonus payment to the Thrift Savings Plan.”

Note: Payment of the prior service enlistment bonus is prohibited unless the rating associated with the position the member will occupy correlates to a rating or military occupational specialty in which the member successfully served during his or her previous military service.

(6) Members who have not completed the eight-year MSO may enlist up to 90 days prior to their normal expiration of enlistment. In cases of early enlistment, the term of the new contract will begin on the date of enlistment.

#### **4.B.3.c. Amount and Payment Method**

The amount of bonus shall be prescribed annually by Commandant (CG-13) in accordance with Article 4.A.3. of this Manual. The bonus will be paid in an initial payment of one-half of the total bonus amount. Members must submit a written request to Commanding Officer (PPC-mas) via their chain of command for the remainder of the bonus amount one year after the date of the initial payment in accordance with Article 4.C.1. of this Manual.

#### **4.B.3.d. Application**

- (1) Recruiting Office. Prepare or review completed enlisted application, Report of Separation from Active Duty (DD Form 214); Enlistment/Reenlistment Document (DD Form 4), to include a completed SOU; Record of Military Processing (DD Form 1966); and Administrative Remarks, Form CG-3307, entry. Verify members have completed their eight-year MSO and have less than 14 total years prior service, and obtain assignment to a SELRES position from the Servicing District (DXR/DOG). Forward the aforementioned documents to the servicing SPO.
  - (2) SPO. Report the enlistment and position assignment to the personnel and pay system and fax the following documents to Commanding Officer (PPC-mas): Administrative Remarks, Form CG-3307, entry and SOU for Coast Guard Reserve RQ Program.
  - (3) Commanding Officer (PPC-mas). Upon receipt of the Administrative Remarks, Form CG-3307, entry and SOU, and at such time as the enlistment documents are processed by the pay system, make the initial bonus payment. The single subsequent payment is made upon member’s written request one year after the initial payment is made.
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### **4.B.4. SELRES Reenlistment/Extension Bonus Program**

#### **4.B.4.a. Authority**

37 U.S.C. § 308b authorizes a bonus for eligible personnel who reenlist or voluntarily

extend in the SELRES in eligible ratings or units.

#### **4.B.4.b. Eligibility**

To be eligible to receive a bonus for SELRES reenlistment or extension, a person:

- (1) Pay Grade. Must be in pay grades E-4 through E-9 (members authorized to pursue a lateral change in rating and assigned a training rating indicator are ineligible for SEBP incentives until the lateral change is complete, the time authorized for change expires, or the authorization to prepare for a change in rating is withdrawn);
- (2) Obligated Service. Must reenlist or extend for three to five years in the SELRES to qualify for the three-year bonus or six to eight years in the SELRES to qualify for the six-year bonus;
- (3) Maximum Length of Service. Must have less than 14 years total Length of Service (LOS) at the time of reenlistment or extension (LOS is the total active and inactive service, regardless of branch computed from Pay Base Date);
- (4) Impact of Prior Bonuses Paid. Must not have previously received a six-year bonus or more than one three-year bonus for enlistment, reenlistment, or extension in any Reserve component (a member who received a bonus for a previous three-year period is ineligible for a six-year bonus; to receive a second three-year bonus a member must enter into the subsequent reenlistment or extension for three years, not later than the date on which the enlistment or extension for which the first bonus was paid would expire, and the designated rating or unit must still be bonus-eligible);
- (5) Bonus-Eligible Rating/Unit. Must hold a bonus-eligible rating or be assigned to a bonus-eligible unit at the time of reenlistment or extension, and must agree to serve in the SELRES in the same rating or unit for which the bonus was authorized unless authorized to change to another bonus-eligible rating or unit; and
- (6) Written Agreement. Must execute a written agreement in the form of an Administrative Remarks, Form CG-3307, entry. Consult reference (d), Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), for detailed content and formatting requirements of the Administrative Remarks, Form CG-3307, entry. The following minimum information must be included in all entries for SELRES enlistment bonus purposes:
  - (a) The SELRES reenlistment/extension bonus level, the number of months/years of newly obligated service, and dollar amount authorized.
  - (b) The rate or unit the reenlistment/extension bonus is based upon.
  - (c) The following statement: "I hereby acknowledge I have read and fully understand the contents and explanation of Article 4.B.4.b. of Military Bonus Programs,

COMDTINST M7220.2 (series). I have also been counseled on the opportunity to contribute my SELRES reenlistment/extension bonus payment to the Thrift Savings Plan.”

- (7) Early Reenlistment. Members who have not completed the eight-year MSO may (7) enlist up to 90 days prior to their normal expiration of enlistment (EOE). In cases of early reenlistment, the term of the new contract will begin on the date of reenlistment or extension.

#### **4.B.4.c. Amount and Payment Method**

The amount of bonus shall be prescribed annually by Commandant (CG-13) in accordance with Article 4.A.3. of this Manual. The bonus will be paid in an initial payment of one-half of the total bonus amount. Members must submit a written request to Commanding Officer (PPC-mas) via their chain of command for the remainder of the bonus amount one year after the date of the initial payment in accordance with Article 4.C.1. of this Manual.

#### **4.B.4.d. Application**

- (1) Unit Commanding Officers. Prepare or review completed enlistment or reenlistment documents or Agreement to Extend Enlistment, Form CG-3301B, and the appropriate Administrative Remarks, Form CG-3307, entry. Verify assignment to a bonus-eligible SELRES assignment and distribute aforementioned documents accordingly.
- (2) SPO. Report the enlistment/reenlistment or extension to the pay system and fax the Administrative Remarks, Form CG-3307, entry to Commanding Officer (PPC-mas).
- (3) Commanding Officer (PPC-mas). Upon receipt of the Administrative Remarks, Form CG-3307, entry and at such time as the enlistment/reenlistment or extension documents are processed by the pay system, make the initial bonus payment. The single subsequent payment is made upon member’s request, one year after the enlistment/reenlistment or extension date.

#### **4.B.4.e. Forms/Reports**

The required Administrative Remarks, Form CG-3307, document the eligibility criteria and conditions under which a SELRES is paid. It is the source document that is used to implement pay actions through PMIS/JUMPS and as such, retention and distribution shall be made in accordance with reference (e), Military Personnel Data Records (PDR) System, COMDTINST M1080.10 (series).

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## 4.C. Subsequent Payments

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### 4.C.1. Requesting Subsequent Payments

Members shall submit a written request for the subsequent SEBP payments described above in a memorandum to the Pay and Personnel Center in the following format:

<p>From: Member, EMPLID</p> <p>To: CG PPC (mas)</p> <p>Thru: (1) Member's Commanding Officer (2) Servicing District (DXR/DOG)</p> <p>Subj: REQUEST FOR SEBP PAYMENT</p> <p>Ref: (a) Military Bonus Programs, COMDTINST M7220.2 (series), Ch 4</p> <p>1. In accordance with reference (a), I request the second installment of my [insert bonus type] bonus. I am satisfactorily participating in the SELRES and am not otherwise disqualified for this bonus payment.</p>
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### 4.C.2. Special Conditions

#### 4.C.2.a. Relief from Termination

- (1) Relocating to a New Unit. Reservists who move from one location to another are entitled to continue receiving bonus payments provided they remain in the SELRES and are assigned to a bonus-eligible rating or unit, as appropriate. However, a member who fails to join an eligible unit or be assigned to a qualifying SELRES assignment within six months will be terminated from program eligibility. In the case of a member who is assigned to a bonus-eligible position within six months, the period between assignments must be added to the member's original bonus obligation.
- (2) Change in Rating. An SEBP participant whose rating is changed at the convenience of the government or whose bonus-eligible unit is deactivated, relocated, reorganized, or converted is entitled to continue receiving bonus payments provided he or she continues to be otherwise eligible and is not separated from the SELRES.
- (3) Involuntary Recall to Active Duty. An SEBP participant involuntarily recalled to active duty is entitled to continue receiving bonus payments provided he or she continues to otherwise be eligible.
- (4) Requests to Commander (CG PSC-RPM). A member who voluntarily ends training

or serving in his or her bonus eligible rating may request Commander (CG PSC-RPM) approve continued bonus entitlement. However, SEBP participants authorized to pursue a lateral change in rating to a non-bonus eligible rating shall not continue bonus entitlement.

**4.C.2.b. Non-Availability**

- (1) Authorized Non-Availability Period. Members of the Ready Reserve may be authorized a period of non-availability, not to exceed two years, due to temporary physical disqualification, extreme personal or community hardship, designation as key employees, or other qualifying reason (see reference (i), Reserve Policy Manual, COMDTINST M1001.28 (series)). These members are temporarily transferred to the Active Status List (ASL), Standby Reserve.
- (2) Suspension of Bonus Payment Due to Non-Availability. SEBP participants shall have their bonuses suspended and are ineligible to receive further incentive payments during a period of non-availability. Following a period of non-availability and return to the rating or unit for which the bonus was authorized, members may receive their total bonus entitlement if they extend their original term of service in the SELRES to serve the full contract period. Entitlement to subsequent payments shall resume on the adjusted anniversary date of satisfactory service. The anniversary date shall be adjusted for the period of non-availability. Failure to meet reinstatement criteria shall result in termination and recoupment of the SEBP.

**4.C.2.c. Authorized Absence**

Authorized absence from scheduled Inactive Duty Training (IDT) does not jeopardize bonus entitlement, except to the extent members fail to attend the minimum number of IDT drills. See requirements in reference (i), Reserve Policy Manual, COMDTINST M1001.28 (series).

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**4.C.3. Termination**

- a. Pro-Rated Recoupment Upon Termination of Bonus. When entitlement to an incentive is terminated, members shall receive no further bonus payments, except for service performed before the termination date. Unless otherwise noted, the effective date of termination is the date the disqualifying event or action occurs. For the reasons below, the Government will recoup a prorated amount of bonus paid, unless granted relief authorized in Article 4.C.2. of this Manual.
  - (1) Unsatisfactory Participation. Unsatisfactory participation in the SELRES during the entire period of service, according to the written agreement, as defined in reference (i), Reserve Policy Manual, COMDTINST M1001.28 (series). The effective date of termination is the date Commanding Officer (PPC-mas) is notified by the Servicing District (DXR/DOG) that a SEBP recipient is an unsatisfactory participant.

- (2) Separation or Termination from the SELRES. Separation or termination from the SELRES for any reason, other than reduction in force, death, injury, illness, or other impairment not due to own misconduct. Separation or termination includes, but is not limited to:
- (a) active duty enlistment,
  - (b) acceptance of an extended active duty contract,
  - (c) return to active duty under the temporary separation policy,
  - (d) transfer to the IRR, unless the transfer is effected after completion of the SELRES obligation for which the bonus was paid, and
  - (e) the result of action directed by higher authority.
- (3) Voluntary Transfer to a Non-Bonus Eligible Unit. If a member is transferred due to advancement, bonus termination and recoupment will not be initiated if the member has served at least one-half of the service obligations.
- (4) Failure to Meet Contractual Obligation. Failure to extend the contracted term of service or meet reinstatement criteria following a period of non-availability.
- (5) Appointment as an Officer. Acceptance of appointment as a commissioned officer or commissioned warrant officer in the Coast Guard Reserve if the member has served less than one year since the initial payment date.
- b. Service Obligation Requirement. Termination from an incentive or any refund made by an SEBP participant shall not annul any period of Reserve service obligation.
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#### **4.C.4. Calculation of Recoupment**

- a. Calculating Overpayment. Commanding Officer (PPC-mas) determines overpayment or payment owed by subtracting a member's earned bonus from the total bonus paid to date (initial and subsequent payments). If the total bonus amount paid is greater than the earned bonus, the Government shall recoup that overpayment. If the total bonus amount paid is less than the earned bonus, the amount owed shall be paid to the member in the final installment.
- b. Rate of Calculation. A member's earned bonus is calculated on a total monthly and daily rate. The monthly rate is calculated by dividing the total bonus authorized by the number of months of obligated service; divide the monthly rate by 30 to determine the daily rate.

**EXAMPLE:** A member enlisted in the Coast Guard Reserve on 23 March 1999 for six

years and was authorized a \$5,000 bonus. She agreed to serve at a Naval Coastal Warfare Unit. The member received an initial payment of \$2,500 and a single subsequent payment of \$2,500 on 23 March 2000. The member was discharged on 1 September 2001 due to unsatisfactory participation.

Bonus monthly rate is \$69.45 (\$5,000 ÷ 72 months)  
 Bonus daily rate is \$2.32 (\$69.45 ÷ 30 days)

First, calculate member's earned bonus:

**01 08 30** (day prior to discharge date)  
**99 03 23** (enlistment date/bonus eligibility date)  
**02 05 07**  
      + 1 (inclusive day)  
**02 05 08** (length of satisfactory service for bonus)

29 mos × \$69.45 (monthly rate) = **\$2,014.05**  
 8 days × \$2.32 (daily rate) = **+ \$18.56**  
**\$2,032.61** (earned bonus)

Next, calculate overpayment or payment owed by subtracting earned bonus from the total bonus paid to date (initial and subsequent payments):

**\$5,000.00** (bonus paid)  
 - **\$2,032.61** (earned bonus)  
**\$2,967.39** (overpayment to be recouped)

**EXAMPLE:** A Coast Guard ET2 is released from active duty and affiliates with the Coast Guard Reserve on 14 January 2002. The member agreed to serve in the SELRES for 26 months and was authorized a \$1,300 bonus. He received an initial lump sum payment of \$650 on 14 January 2002. On 7 November 2003 the member commenced voluntary Extended Active Duty.

Bonus monthly rate is \$50 (\$1,300 ÷ 26 months)  
 Bonus daily rate is \$1.66 (\$50 ÷ 30 days)

First, calculate member's earned bonus:

**03 11 06** (day before EAD commenced)  
**02 01 14** (SELRES affiliation date/bonus eligibility date)  
**01 09 22**  
      + 1 (inclusive day)  
**01 09 23** (length of satisfactory service for bonus)

21 mos × \$50(monthly rate) = **\$1,050.00**  
 23 days × \$1.66 (daily rate) = **+ \$38.18**

**\$1,088.18** (earned bonus)

Next, calculate overpayment or payment owed by subtracting earned bonus from the total bonus paid to date (initial and subsequent payments):

**\$650.00** (bonus paid)  
- **\$1,088.18** (earned bonus)  
**-\$438.18** (earned bonus owed member)

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