

RETIREE SERVICES PROGRAM



COMDTINST 1800.5I

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COMDTINST 1800.5I
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COMMANDANT INSTRUCTION 1800.5I

Subj: RETIREE SERVICES PROGRAM

- Ref:
- (a) 37 U.S.C. § 908(c) – Approval required for certain payments and awards.
 - (b) DHS Delegation No. 0160.1, Delegation to Organizational Elements, dated March 3, 2004
 - (c) Military Civil and Dependent Affairs, COMDTINST M1700.1 (series)
 - (d) 5 U.S.C. § 552a – Records maintained on individuals.
 - (e) Privacy Incident Response, Notification and Reporting Procedures for Personally Identifiable Information (PII), COMDTINST 5260.5 (series)
 - (f) Transition Assistance Program, COMDTINST 1900.2 (series)
 - (g) Military Separations, COMDTINST 1000.4 (series)
 - (h) Coast Guard Pay Manual, COMDTINST M7220.29 (series)
 - (i) DoD Financial Management Regulation (DoD FMR), DoD 7000.14R, Volume 7B, Chapters 42-58
 - (j) Military Personnel Casualties and Decedent Affairs, COMDTINST M1770.9 (series)
 - (k) Morale, Well-Being, and Recreation, COMDTINST 1710.13 (series)
 - (l) Legal Assistance Program, COMDTINST 5801.4 (series)

1. PURPOSE. This Instruction establishes and describes Coast Guard policy concerning the scope, responsibilities, organization, and administration of the Coast Guard retiree services program under the direction of the Deputy Commandant for Mission Support (DCMS).
2. ACTION. All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, and chief of headquarters staff elements must comply with the provisions of this Instruction.
3. AUTHORIZED RELEASE. Internet release is authorized.
4. DIRECTIVES AFFECTED. Coast Guard Retiree Services Program, COMDTINST 1800.5H, is cancelled.
5. DISCLAIMER. This policy guidance is not a substitute for applicable legal requirements, nor is it itself a rule. It is intended to provide administrative guidance for Coast Guard personnel and is not intended to, nor does it impose legally binding requirements on any party outside the Coast Guard.

6. DISCUSSION. The Coast Guard's core values of Honor, Respect, and Devotion to Duty impose on the Service and its members a responsibility to care for all members of the Coast Guard family. Coast Guard retirees are forever part of the Coast Guard family and appropriately are part of the "Long Blue Line." By tradition and law, retired Coast Guard members are individuals with a continuing military status. All retirees, including their family members and survivors, are entitled to certain rights, benefits, and privileges and are subject to responsibilities arising from these entitlements. Additionally, military retirees not on the Temporary Disability Retired List (TDRL) or Permanent Disability Retired List (PDRL) may be subject to recall. Retirees, as part of the total Coast Guard force, remain capable of making life-long contributions to Coast Guard missions. To ensure that retirees are given the opportunity to contribute, they should be kept apprised of changing programs, services, and policies. The retiree services program serves Coast Guard military retirees and eligible surviving family members by providing routine retiree support information, retiree benefits advice, and services, when needed. This Coast Guard retiree services program policy framework will provide the network and organizational structure to strengthen communications and mutually benefit the Coast Guard and the Coast Guard military retiree community.
 - a. The Coast Guard military retiree community, referred to as "CG Retiree Community" throughout this Instruction, is defined as all:
 - (1) Regular (active duty) and Reserve retired members (RET-2, RET-1), including those retired on the TDRL or PDRL.
 - (2) Retirees who waive military retired pay in favor of a combined military and federal civilian retirement.
 - (3) Surviving spouses and former spouses of retirees, regardless of receipt of Survivor Benefit Plan (SBP) annuities.
 - b. Coast Guard Auxiliarists and retired Coast Guard civilian and PHS/NOAA officers and family are encouraged to maintain social links with the CG Retiree Community.
 - c. Major Department of Defense (DoD) military installations provide a menu of services, programs, and information available to all military retirees. DoD Retirement Services Offices (RSOs) and Retiree Activities Offices (RAOs) offer myriad retiree services and sponsor retiree seminars and Retiree Appreciation Days (RADs).
7. SCOPE AND AUTHORITIES. Readers are encouraged to become familiar with the directives and publications that are noted throughout this Instruction.
8. MAJOR CHANGES. This Instruction revises the program's mission, identifies strategic objectives, and reduces administrative demands on the CG National Retiree Council (CGNRC) and Regional Retiree Councils (RRCs) – "volunteer" groups supporting the retiree services program. The CG Retiree Services Program Director is now the Assistant Commandant for Military Personnel (CG-1M).

9. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. The Office of Environmental Management, Commandant (CG-47) reviewed this Commandant Instruction and the general policies contained within and determined that this policy falls under the Department of Homeland Security (DHS) categorical exclusion A3. This Commandant Instruction will not result in any substantial change to existing environmental conditions or violation of any applicable federal, state, or local laws relating to the protection of the environment. It is the responsibility of the action proponent to evaluate all future specific actions resulting from this policy for compliance with the National Environmental Policy Act (NEPA), other applicable environmental requirements, and the U.S. Coast Guard Environmental Planning Policy, COMDTINST 5090.1 (series).
10. DISTRIBUTION. Electronic distribution in the Directives System Library. Intranet/Pixel Dashboard: Directives Pubs, and Forms - PowerApps (appsplatform.us). If Internet released: Commandant Instructions (uscg.mil), Coast Guard Forms (uscg.mil) .
11. RECORDS MANAGEMENT CONSIDERATIONS. Records created as a result of this Instruction, regardless of format or media, must be managed in accordance with Records & Information Management Program Roles and Responsibilities, COMDTINST 5212.12 (series) and the records retention schedule located on the Records Resource Center Microsoft SharePoint site at: <https://uscg.sharepoint-mil.us/sites/cg61/SitePages/CG-611-RIM.aspx> .
12. MISSION. The mission of the Retiree Services Program is to coordinate pre-retirement and retirement services, as described in this Instruction, with responsible policy, program, and technical authorities, the CGNRC/RRCs, and affinity groups.
13. STRATEGIC OBJECTIVES.
 - a. Transitioning Members. Ensure members retiring from the Coast Guard, and their family, are provided information and knowledge of the required pre-retirement counseling and transition assistance, facilitating a smooth transition to civilian life and connection with the CG Retiree Community.
 - b. Retiree Community. Ensure all members of the CG Retiree Community are:
 - (1) Made aware of and provided the rights, pay, benefits, privileges, and services to which they are entitled; made aware of their responsibilities; and kept informed on the Coast Guard and programs, policy, and other items of interest.
 - (2) Provided open lines of communication with the Coast Guard; offered opportunities to volunteer in support of the Coast Guard; recognized for volunteerism; and encouraged to *stay-connected* in a mutually beneficial, life-long relationship with the Coast Guard.
14. ORGANIZATION AND DUTIES. CG Retiree Services Program Organization is depicted in Appendix A.
 - a. Assistant Commandant for Military Personnel (CG-1M).

- (1) Serve as program director for the Retiree Services Program.
- (2) Serve as the Commandant's designated representative for processing Coast Guard military retiree requests (Regular and Reserve) to Department of State (DoS) for approval to accept Foreign Government Employment (FGE) and/or other foreign emoluments in accordance with References (a) through (c) and DoS direction.
- (3) Resource and implement an enterprise-wide retiree services program, including the appropriate level of personnel resources. Assign a program manager, responsible for management and support of the program, as detailed in the Position Description.
- (4) Coordinate program execution with the following technical authorities:
 - (a) Assistant Commandant for Health, Safety, and Work-Life (CG-1K)
 - (b) CG Personnel Service Center (PSC)
 - (c) CG Pay and Personnel Center (PPC)
 - (d) Judge Advocate General, acting through Legal and Defense Services (CG-LAD)
- (5) Coordinate field-level program execution at Bases and Training Centers with the Operational Logistics Command (LOGCOM) and Force Readiness Command (FC).
- (6) Serve as the Commandant's executive agent for the CGNRC, acting as principal point of contact to support the CGNRC and be accountable for accurate, timely exchange of information between the CGNRC co-chairs and the Commandant – with the following related duties and responsibilities:
 - (a) Communicate with the CGNRC on matters relating to the performance of or potential changes in the retiree services program in advance of acting.
 - (b) Develop/administer a formal process to solicit and select CGNRC co-chairs, one CG flag officer and one CG MCPO. Co-chairs will normally serve for a three year tenure, beginning in alternating years to maintain continuity of leadership. Arrange for the Commandant to recognize outgoing co-chairs and appoint new co-chairs during annual meetings of the CGNRC.
 - (c) Host and provide appropriate resources, logistics (e.g. space/equipment), and support for the CGNRC annual meeting, normally held in early August in Washington, D.C. Subject to funds availability, issue travel orders for CGNRC co-chairs, one representative from each Regional Retiree Council (RRC), and one representative from CG PPC to participate in the annual meeting.
 - (d) Submit the CGNRC's annual report, with endorsement, to CCG and facilitate the CGNRC Co-Chair's annual meeting with CCG, MCPOCG, DCMS and Commandant (CG-1M) to discuss the report, including Council priorities. Provide a formal response to the CGNRC addressing Council priorities and thanking the Council for their continued support of the Coast Guard and CG Retiree Community. Post the CGNRC annual report and Commandant (CG-1M) response on the retiree services program website.

- (e) Upon receipt of requests from sponsoring Coast Guard units, issue charter certificates establishing or extending the charters of RRCs. Coordinate with the CGNRC to ensure all areas where retirees reside are represented by an RRC.
 - (f) Provide support, including funding for a toll-free phone number, for the Coast Guard National Retiree Help Desk (NRHD), which is administered and operated by the CGNRC in support of the Coast Guard military retiree community.
- (7) Oversee retiree services program strategic communications including multi-channel communications needed to inform the Coast Guard and CG Retiree Community.
 - (8) Develop, publish, and maintain publications, as needed, to promote awareness of the Retiree Services Program and retiree services, information, tools, and resources. Administer the cooperative agreement between the Coast Guard and National Coast Guard Museum Association (NCGMA).
 - (9) Develop and maintain an internet website which provides the CG Retiree Community ease of access to relevant, timely retiree information, including links to helpful retiree resources and affinity groups/organizations.
 - (10) Partner with DoD Retiree Services/Councils in addressing retiree issues and sharing best practices.
 - (11) Maintain access to contact and other information for members of the CG Retiree Community in CG Direct Access (DA). Ensure personal information is treated in accordance with Reference (d) and any suspected or confirmed compromise is reported in accordance with Reference (e).
 - (12) Implement metrics/measures and report program performance, including planned improvements, to the Commandant with the CGNRC's annual report.
- b. Assistant Commandant for Health, Safety, and Work-Life (CG-1K).
 - (1) Coordinate execution of pre-retirement, transition, and retirement services policy, programs, and technical authority with the Health, Safety, and Work Life Service Center (HSWL SC).
 - (2) Ensure transition assistance program policy includes family transition support during pre-retirement, including pre-separation counseling, as described in Reference (f) and includes the Coast Guard Retiree Services Program.
 - (3) In collaboration with Commandant (CG-1M), establish work-life support policy, procedures and data reporting requirements that include the Retiree Services Program.
 - (4) Develop and provide technical guidance for the HSWL- Regional Practice field offices that includes program data collection requirements.
 - c. Health, Safety, and Work Life Service Center (HSWL SC). Provides Technical Direction and oversight to Coast Guard clinics and Work-Life staffs in the performance of daily operations, including guidance on how to:

- (1) Deliver required Health, Safety and Work-Life services to Coast Guard members, employees, retirees, and other authorized beneficiaries.
 - (2) Maintain complete and accurate Health Records for all active duty and reserve personnel within an assigned Area of Responsibility (AOR).
 - (3) Perform Physical Examinations (PE) and Periodic Health Assessments (PHA), including Pre-Retirement physical examinations, and review for accuracy and completeness prior to submission for approval, etc.
 - (4) Assist separating members in obtaining copies of their Service Treatment Record (STR) and STR Certification, DD-2963.
 - (5) Process/digitize STRs and make them accessible to the Department of Veterans Affairs (VA) for separating members and retirees.
 - (6) Manage Transition/Relocation Manager Program Services ensuring access and regional oversight.
- d. Coast Guard Personnel Service Center (PSC). Provide centralized personnel support services and expertise that exceed the individual unit responsibility and capacity including:
- (1) Develop and publish procedures concerning separations and retirements for all military personnel, in accordance with Reference (g).
 - (2) Execute the Coast Guard Casualty Matters Program, as described in Reference (j).
 - (3) Manage the GI Bill Program as the approving authority for the transfer of educational benefits and provide information on Department of Veteran Affairs educational benefits for Coast Guard eligible members.
 - (4) Manage the Coast Guard's ID card program using the DEERS/RAPIDS system.
- e. Coast Guard Pay and Personnel Center (PPC). Support enterprise-wide retiree services programs including, but not limited to:
- (1) Provide pre-retirement/transition information, and information regarding entitlements and other benefits to prospective retirees, retirees, and their dependents.
 - (2) Mail Retirement and Spousal Retirement Certificates for all Coast Guard retirees.
 - (3) Provide pay and personnel support services to USCG, USCGR, NOAA, and USPHS retirees and annuitants, and former spouses covered under the Uniformed Services Former Spouses' Protection Act (FSPA). Provide determinations of ID card eligibility for former spouse initial determinations, incapacitated children, parents, and parents-in-law.
 - (4) Manage Coast Guard Reserve RET-2 (Retired, Awaiting Pay) and RET-1 (Retired, With Pay) accounts and serve as the authority for transferring RET-2 to RET-1.

- f. Coast Guard Community Services Command (CSC). Promote retiree patronage of Coast Guard morale, well-being, and recreation (MWR) programs as described in Reference (k). Promote access to the Coast Guard Exchange System (CGX) and similar DoD services, to include AAFES, NEXCOM, and MCX.
- g. The Judge Advocate General, acting through Legal and Defense Services (CG-LAD). Support execution of the retiree services program by providing legal assistance, as described in Reference (l). Resources permitting, Coast Guard legal assistance attorneys will provide advice and counsel regarding personal legal issues involving family law, estate planning, advanced medical directives, consumer law, land-lord tenant relations, immigration, and many other topics.
- h. Operational Logistics Command (LOGCOM) and Force Readiness Command (FORCECOM). Direct Bases and Training Centers (TRACENs) to support the retiree services program, as described in this Instruction. Encourage Bases/TRACENs to sponsor at least one chartered RRC in their AOR. Bases and TRACENs may submit requests to establish or extend the charter of RRCs through LOGCOM or FORCECOM to the Assistant Commandant for Military Personnel (CG-1M), who will approve and issue charter certificates.
- i. BASE and TRACEN Commanding Officers. Support the Coast Guard retiree services program within their geographic area, as described in this Instruction.
 - (1) Designate an Active Duty Retiree Services Coordinator (ADRSC), as a collateral duty, to act as a liaison between the command and the local area Coast Guard military retiree community. Provide the name of the current ADRSC to the CG Retiree Services Program Manager (CG-1M13) by phone at: 202-475-5451.
 - (2) For BASES/TRACENs without a sponsored RRC, encourage area Coast Guard military retirees to form an RRC. Where there is interest, contact the CG Retiree Services Program Manager for guidance on chartering a RRC by phone at: 202-475-5451.
 - (4) Based on local retiree services demand, provide administrative resources to meet level of retiree services operational requirements. This will normally consist of a workstation with computer and telephone, office supplies, and printing and postal support. Volunteer access to Coast Guard computers/networks will be subject to the volunteer's eligibility for and issuance of a Volunteer Access Card (VOLAC).
 - (4) Active Duty Retiree Services Coordinators at units sponsoring chartered RRCs will:
 - (a) Coordinate the routine operation and support of the retiree services council volunteers as described in this Instruction, including close interaction and coordination with local and enterprise-wide stakeholders.
 - (b) Arrange for the regional retiree council co-chairs (and others as appropriate) to meet with the command cadre regularly and other unit representatives, as appropriate.
 - (c) Communicate relevant activities, outreach, and volunteer opportunities with the chartered regional retiree council co-chairs. Participation in regional retiree council meetings is highly recommended.

- j. CGNRC/RRCs. The CGNRC/RRCs are *volunteer* groups, providing *volunteer* support for the Retiree Services Program. Their organization/duties are tailored accordingly, minimizing formal direction and administrative demands and adaptive to the unique strengths, challenges, geography, makeup, and needs of each RRC and their constituents.
- (1) CGNRC Mission. The mission of the CGNRC is to: *Sustain an open line of communication between the Commandant and the CG Retiree Community through the Commandant's executive agent, the Assistant Commandant for Military Personnel (CG-1M)*.
- (2) CGNRC Membership.
- (a) Two co-chairs (one retired CG Flag Officer and one retired CG MCPO). The co-chairs will normally serve for a three-year term, beginning in alternating years to sustain continuity of leadership. Extensions and consecutive appointments may be coordinated between Commandant (CG-1M) and the co-chairs.
- (b) One designated representative of each chartered RRC (normally a co-chair).
- (c) At-large members, including a Coast Guard annuitant and CPOA senior representative, as agreed to between the CGNRC co-chairs and Commandant (CG-1M).
- (3) CGNRC Duties/Responsibilities.
- (a) CGNRC Co-Chairs – Coordinate planning/conduct of the CGNRC's annual meeting with the program manager. Prepare/submit the CGNRC's annual report to CCG, through Commandant (CG-1M), and meet with CCG, MCPOCG, DCMS, and Commandant (CG-1M) to discuss the report, including Council priorities. Maintain communications with the program manager and RRCs. Liaison between the CG Retiree Community and CG PPC on retiree issues within PPC's AOR. Provide articles for publication in The Long Blue Line. Liaison with DoD national retiree council co-chairs and participate, as needed, in annual meetings of the DoD national retiree councils.
- (b) Represent the respective components of the CG Retiree Community (e.g. Active Duty/Reserve retirees, annuitants, survivors, and former spouses) and keep Coast Guard senior leadership informed on issues of importance through Commandant (CG-1M).
- (c) Support two-way communication and a mutually beneficial relationship between the Coast Guard and CG Retiree Community.
- (d) Meet annually, normally in August in Washington, DC, but may be elsewhere. The meeting will include, but is not limited to the following items:
- i. Receive annual updates from CCG, MCPOCG, DCMS, CG-1M, Coast Guard technical authorities, and program partners/affinity groups addressing strategic priorities and issues of importance to the Coast Guard and CG Retiree

Community.

- ii. Update CG senior leadership on CGNRC activities (e. g. RRCs, National Retiree Help Desk), support for Coast Guard priorities (e. g. Recruiting), retiree issues, strategic initiatives, and Council priorities.
 - iii. Discuss RRC activities, *what's working well*, *opportunities for improvement*, initiatives, recommendations, and any needed support.
 - iv. Discuss retiree services program policy, performance (metrics/measures), opportunities for improvement, needed changes, top retiree issues, and Council priorities.
 - v. Outline the CGNRC's annual report, including retiree services program and retiree issues, initiatives, recommendations, and Council priorities.
- (4) RRCs. RRCs are chartered by Commandant (CG-1M), through sponsoring Coast Guard units, to: *Provide unselfish and faithful service in maintaining a strong liaison between the Service and the retiree community*. RRCs serve as a “bridge” between the Coast Guard and CG Retiree Community.
- (5) RRC Organization. RRCs are organized by Coast Guard Districts to ensure the entire CG Retiree Community is served in a seamless network of RRCs. RRCs are encouraged to support membership reflecting the CG Retiree Community, including retirees, annuitants, survivors, and former spouses. Coast Guard civilians, Auxiliarists, and PHS, NOAA, and DoD retirees are also encouraged to participate in RRCs.
- (6) RRC Duties/Responsibilities.
- (a) RRC Co-Chairs – RRCs will appoint two co-chairs (normally one retired senior officer and one retired senior enlisted). RRC co-chairs will help to coordinate and lead RRC activities, communicate with the sponsoring unit command, and represent the RRC at annual meetings of the CGNRC.
 - (b) Serve as a communication link between the Coast Guard and supported CG Retiree Community through sponsoring Coast Guard units. Sponsoring units should provide access to the necessary resources to support this communication link.
 - (c) RRCs are encouraged to meet regularly, virtually or in-person, and may wish to appoint members to manage/coordinate specific functions and activities.
 - (d) RRCs are encouraged to network with CGNRC co-chairs, other RRC co-chairs, and DoD RSOs/RAOs on retiree issues, activities, and initiatives.
 - (e) RRCs are encouraged to help retirees make lasting contributions to the Coast Guard (e. g. support recruiting efforts) and promote the “Coast Guard” in their local communities.

- (f) The Capital Area CG Retiree Council (CACGRC) began operating a virtual National Retiree Help Desk (NRHD) in 2006, responding to inquiries from the world-wide CG Retiree Community and connecting individuals with needed resources. The NRHD was formalized within the Retiree Services program in 2017, as requested by the CGNRC/CACGRC, and operates in accordance with NRHD SOP, with oversight by Commandant (CG-1M). NRHD activities are included in the CGNRC's Annual Report to CCG and their volunteer watchstanders are formally recognized by Commandant (CG-1M).

15. FORMS. None.

16. SECTION 508. This policy is created to adhere to accessibility guidelines and standards as promulgated by the U.S. Access Board with consideration of Information and Communications Technology (ICT) requirements. If accessibility modifications are needed for this artifact, please communicate with the Section 508 Program Management Office (PMO) at Section.508@uscg.mil. Concerns or complaints for non-compliance of policy and/or artifacts may be directed to the Section 508 PMO, the Civil Rights Directorate (<https://www.uscg.mil/Resources/Civil-Rights/>) for the Coast Guard, or to the U.S. Department of Homeland Security at accessibility@hq.dhs.gov.

17. REQUEST FOR CHANGES. Units and individuals may formally recommend changes via their chain of command using the Coast Guard memorandum to: HQS-SMB-PolicyandStandards@uscg.mil.

/PAUL F. THOMAS/
VADM, U. S. Coast Guard
Deputy Commandant for Mission Support

Appendix A. CG Retiree Services Program Network

CG Retiree Services Program Network¹

Judge Advocate General (CG-LAD)
Provide legal services in support of Retiree Services Program and retirees.

Operational Logistics Command (LOGCOM)
Oversee CG Bases in support of Active Duty Retiree Services and sponsored Regional Retiree Councils.

Force Readiness Command (FORCECOM)
Oversee CG TRACENs in support of Active Duty Retirees Services and sponsored Regional Retiree Councils.

CG Bases/TRACENs
Provide Active Duty Retiree Services and sponsor Regional Retiree Councils.

CG Internal Affinity Groups

- CGOA
- CWOA
- CPOA
- CG Spouses Associations

Director of Military Personnel (CG-1M)

- CG Retiree Services Program Director
- Commandant’s Executive Agent for CGNRC and Regional Retiree Councils

Retiree Services Program Manager
Administer the CG Retiree Services Program IAW CI 1800.5 (series)

CG National Retiree Council (CGNRC)
Sustain open and positive lines of communication between CCG and the CG military retiree community through CG-1M.

CG Regional Retiree Councils (RRCs)
Serve as a “bridge” between the CG active duty and retiree community in coordination with CG Units.

CG National Retiree Help Desk (NRHD)
Virtual watch-standers respond to & connect retirees with needed resources.

Office of Worklife (CG-1K1), HSWL SC

- Transition Assistance Program
- Retiree Medical, Pharmacy Services
- Liaison to Veterans Affairs

Personnel Service Center (PSC)

- Active/Reserve Separation
- Military Records (e.g. DD-214s)
- Casualty and Decedent Affairs

Pay and Personnel Center (PPC)

- Retiree & Annuitant Services

Servicing Personnel Offices (SPOs)

- Active/Reserve Separation

Unit Personnel and Admin (P&A)

- Active/Reserve Separation

Community Services Command (CSC)

- MWR/CG Exchange Services

-----**External Partners/Affinity Groups**-----

TRICARE

National Personnel Records Center

DoD Retirement Services

- HQ Program Offices
- Retiree Activities Office
- Retiree Councils

U.S. Veterans Affairs

State Veterans Affairs

Military Officers Association

Fleet Reserve Association

Veterans Services Organizations

The Military Coalition (TMC)

¹ CG-1M program components (highlighted in blue), CG technical authorities, partners, and affinity groups.