eFinance Workspace

eFinance User Guide

Version 1.1

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Issues can be addressed to:

eFinance PMO, SAF/FMF (AFFSO)
1940 Allbrook Drive, Wright-Patterson AFB, OH 45433

AFFSO Customer Service at DSN 787-3117/COMM 937-257-3117

saf.fmpaffso.customerservice@us.af.mil or eFinance PMO fmp.affso@us.af.mil

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Revision Sheet

Revision	Date	Brief Summary of Changes
1	November 2016	Initial release
2	March 2017	The following sections have been updated: • Section 1.2 • Section 1.3 • Section 4.1

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Chapter 1 Introduction

The eFinance Workspace (eFinance) is an application that assists Active Duty and Reserve Air Force members with the paperless submission of PCS-related documents, military pay documents, and non-DTS TDY vouchers. In addition, Civilians can also use the application to submit non-DTS TDY vouchers.

1.1 eFinance Overview

The eFinance main screen provides access to all of the functions in eFinance, which include the capability to do the following:

- View Inbox
- Create Packages
- Create Forms
- Perform administrative functions

The main screen also includes links to the User Profile and the Help, and displays Alerts.

Note:

The Inbox content will display different information based on the user's assigned role (see Section 1.3 Roles).

1.2 Access eFinance

eFinance is a web-based application. Users can access the application via their web browser.

Go to https://efinanceworkspace.wpafb.af.mil in your web browser.

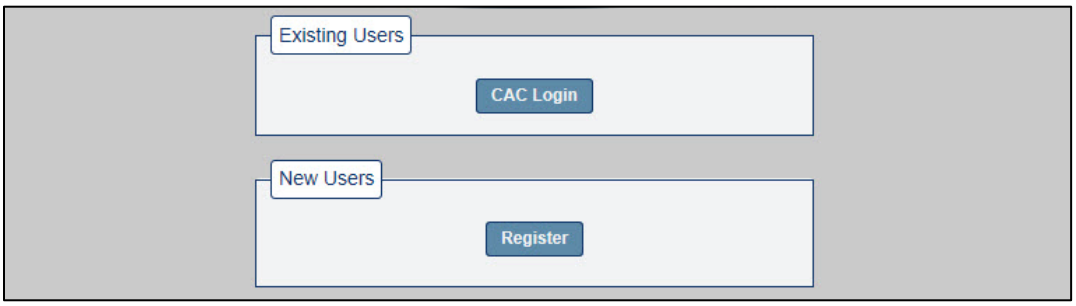
Or

Go to the AF portal and click the eFinance Workspace link under Finance & Travel in Quick Links, select Applications A-Z from the Applications menu, or use the search field to search for eFinance Workspace.

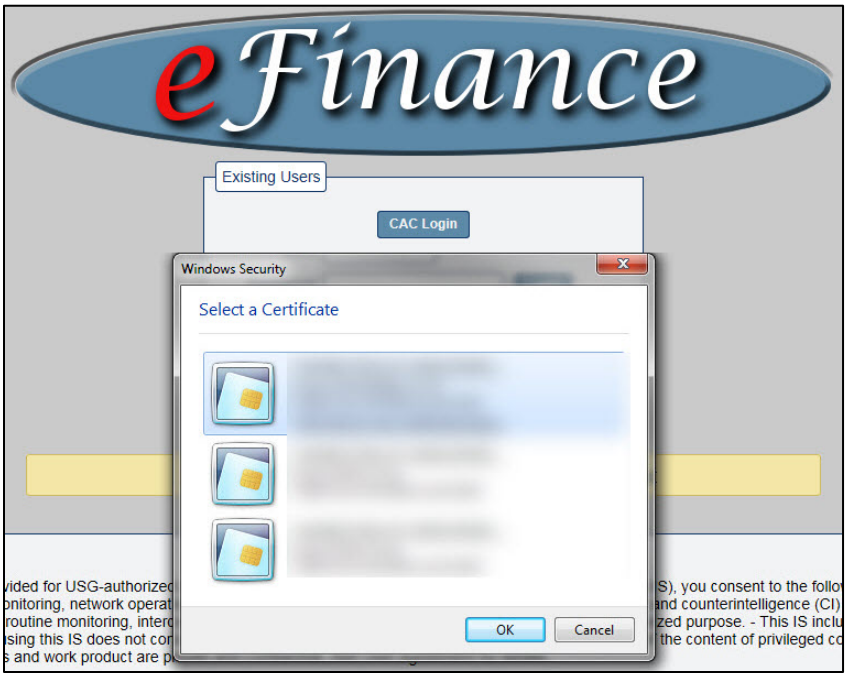
1.3 Log In to eFinance

Users need a CAC to log in to eFinance.

1. Do one of the following:
   - Existing users: click the CAC login button.
   - New users: click the Register button.



2. Select a certificate and click OK.



If you are an existing user the Inbox displays. If you are a new user the Create New Account screen displays; continue to step 3.

3. Complete the following mandatory fields: First Name, Last Name, Email Address, Service Type, PayGrade Type, Base, and Unit.
4. Click the Create Account button. The Manage your Profile screen displays (see Chapter 2: User Profile for additional information).

1.4 Roles

There are several roles available in eFinance. Users can request a role via their User Profile. Each role provides users with the ability to perform the following functions:

- Global Admin (GA): Perform all Admin functions found on the admin menu. This role is applicable to eFinance PMO personnel only.
- FSO: Complete packages and perform limited Admin functions including creating base-level briefings, assigning housing and read-only roles as well as assigning a Commander to a unit. The FSO can also search AF wide for users. This role is applicable to Financial Services Personnel only.
- Help Desk: Assign orphaned faxes to users' packages. This role is applicable to eFinance PMO personnel only.
- Commander: Complete and approve commander-specific forms in a package.
- Housing: Complete and approve housing-specific forms in a package.
- Read-Only Base: View all packages for a base. If active duty (AF, ANG, or Reserve) can also create and submit his or her own packages.
- Read-Only Unit: View all packages for a unit (on a base). If active duty (AF, ANG, or Reserve) can also create and submit his or her own packages.
- Read-Only AF: Search for all packages and forms AF wide. If active duty (AF, ANG, or Reserve) can also create and submit his or her own packages. This role is applicable to MAJCOM personnel only

1.5 Symbols

The following table includes descriptions of the icons used in eFinance.

Icon	Purpose	Icon	Purpose
	Provides additional information about a field on a screen	*	Required field
	Downloads an attached file		Removes documents from the form and places them in the Unassigned Documents list
	Adds additional files		Changes the name of the file
	Rotates a file 180 degrees (applies to image files only)		Denotes that user has not yet opened the form/required documents screen
	Denotes that the form/required documents screen has been opened but the items have not been completed		Denotes that the form/documents have been completed and saved
SSN must be exactly nine digits.	Lists errors and/or denotes when form screen is complete and saved		

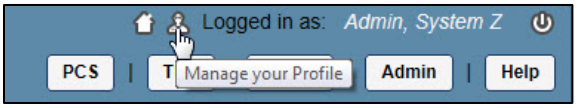
Chapter 2 User Profile

After creating an eFinance account (see Section 1.2 Access eFinance), the user will be directed to the Profile screen. eFinance pulls information from the user's profile when creating forms and packages. Users need to ensure that they update their profile before creating a form or package.

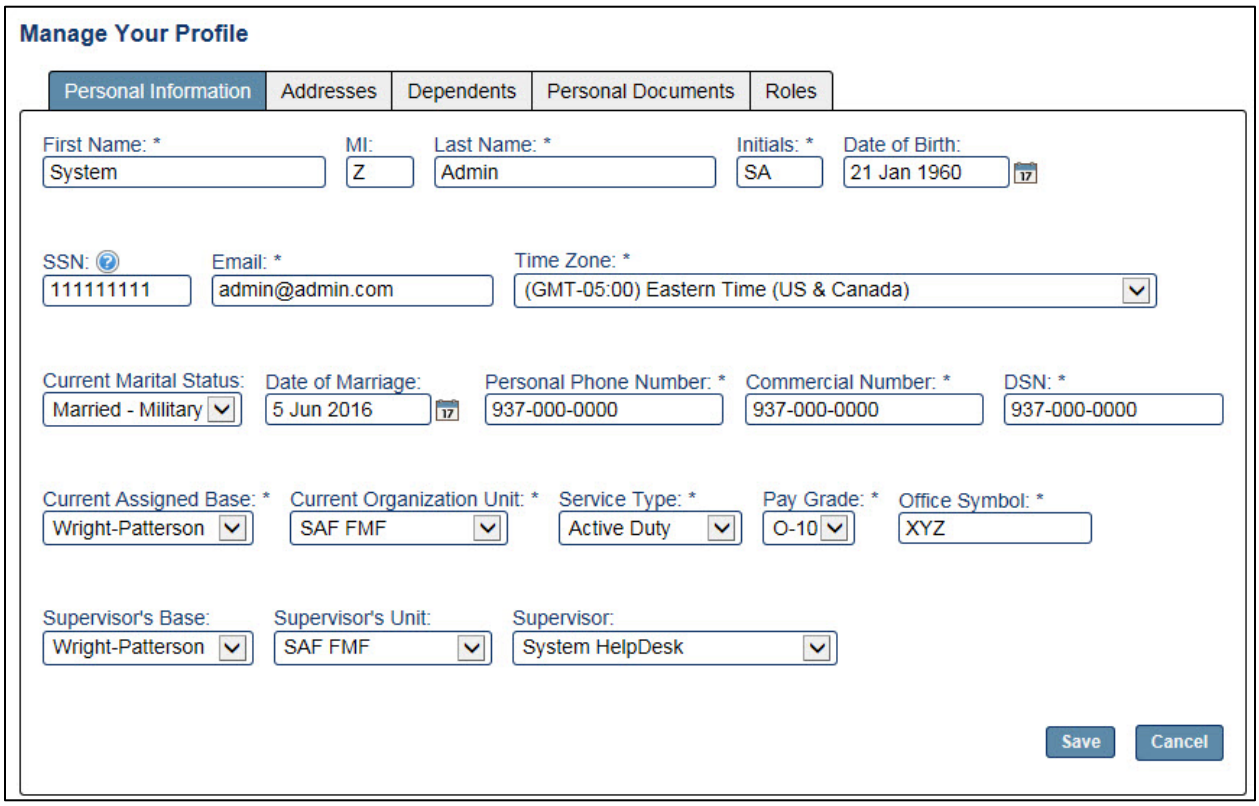
Note

See Appendix B: User Profile Field Descriptions for a description of each User profile field.

1. In the eFinance header, click the Manage Your Profile icon.



The Manage Your Profile screen displays.



2. On the Personal Information tab, complete all applicable fields.
3. Click Save to save your changes or Cancel to discard changes and go back to the Inbox.

2.1 Addresses Tab

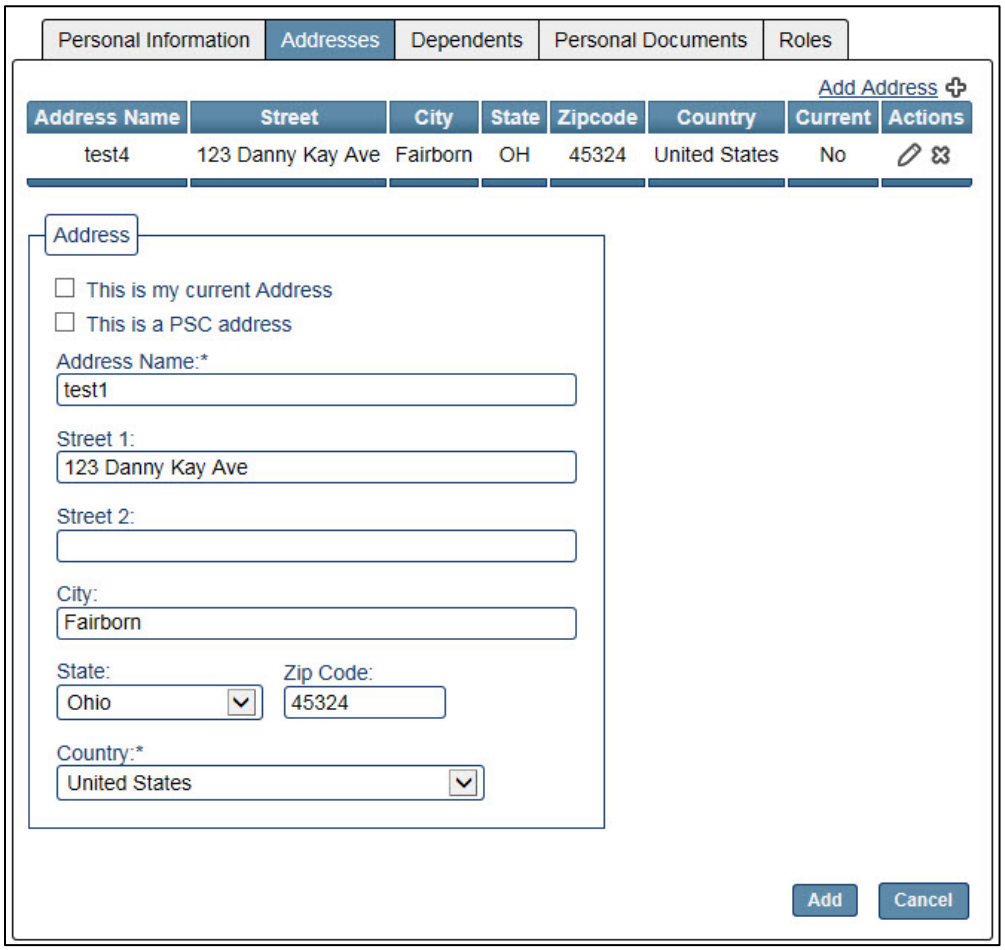
The Addresses tab enables users to add, edit, or delete, an address.

Note

eFinance will pull the current address into all forms requiring a current address.

2.1.1 Add Address

1. On the Manage Your Profile screen, click the Addresses Tab.
2. Click the Add Address link. The Address section opens below the current addresses.



3. Complete the following fields:
   a. Check the This is My Current Address checkbox to denote an address as current.
   b. Enter an Address name.
   c. Enter the street, city, state, zip code, and Country.

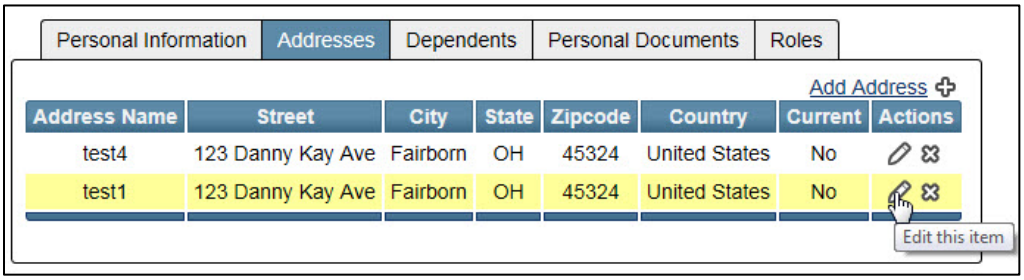
Or

   a. Check the This is a PSC Address checkbox to enter a PSC address.
   b. Enter an Address Name.
   c. Enter the PSC Number.
   d. Enter the Box Number.
   e. Enter the City, State and zip code.
4. Click Add to add the new address or Cancel to discard the changes.

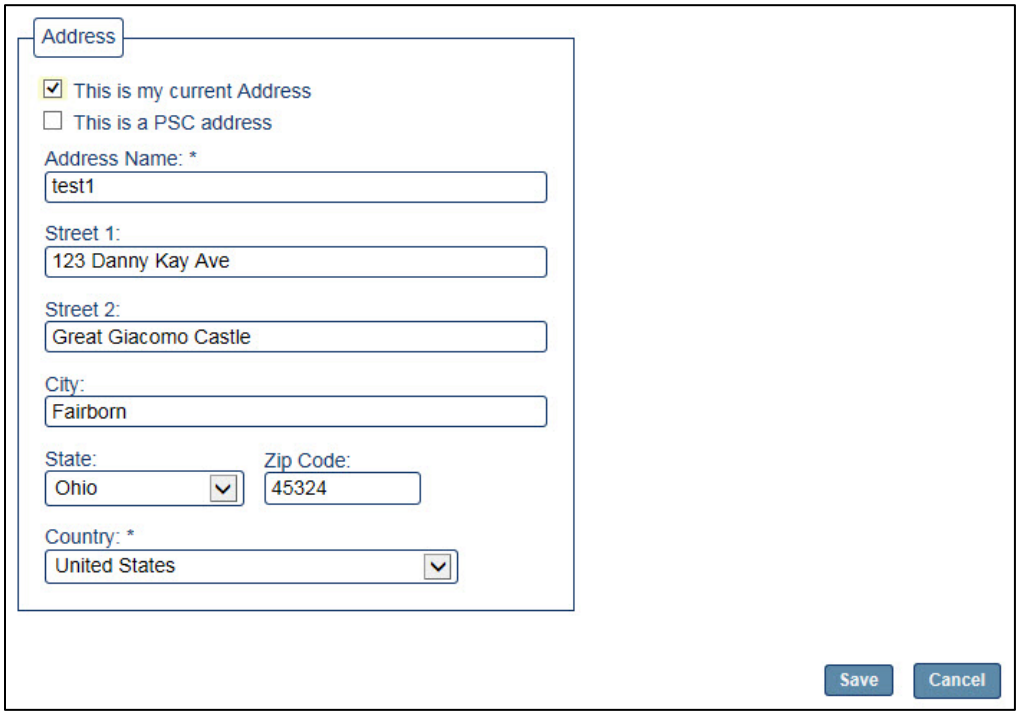
2.1.2 Edit Address

1. On the Manage Your Profile screen, click the Addresses Tab.

2. Click the Edit this Item icon.



The Address section opens below the current address.



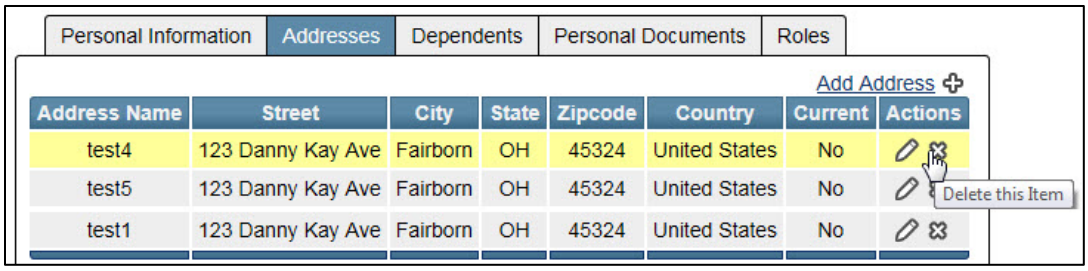
3. Make the desired changes to one or more of the following fields:
   a. Check or uncheck the This is My Current Address checkbox to denote an address as current.
   b. Edit the Address name.
   c. Edit the street, city, state, zip code, and Country.

Or

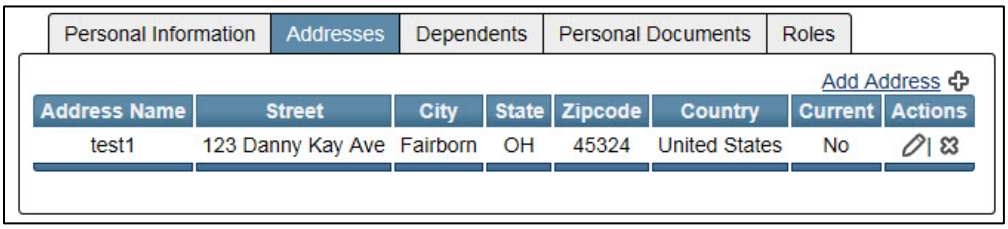
   a. Check or uncheck the This is a PSC Address checkbox to edit a PSC address.
   b. Edit the Address Name.
   c. Edit the PSC Number.
   d. Edit the Box Number.
   e. Edit the city, State and zip code.
4. Click Save to save the updated address or cancel to discard the changes.

2.1.3 Delete Address

1. On the Manage Your Profile screen, click the Addresses Tab.
2. Click the Delete this Item icon in the Actions table next to an address. A dialog box displays with the statement "Are you sure you want to delete this item?"



3. Click OK to delete. The address no longer displays in the list of addresses. Click Cancel to keep the address in the list.

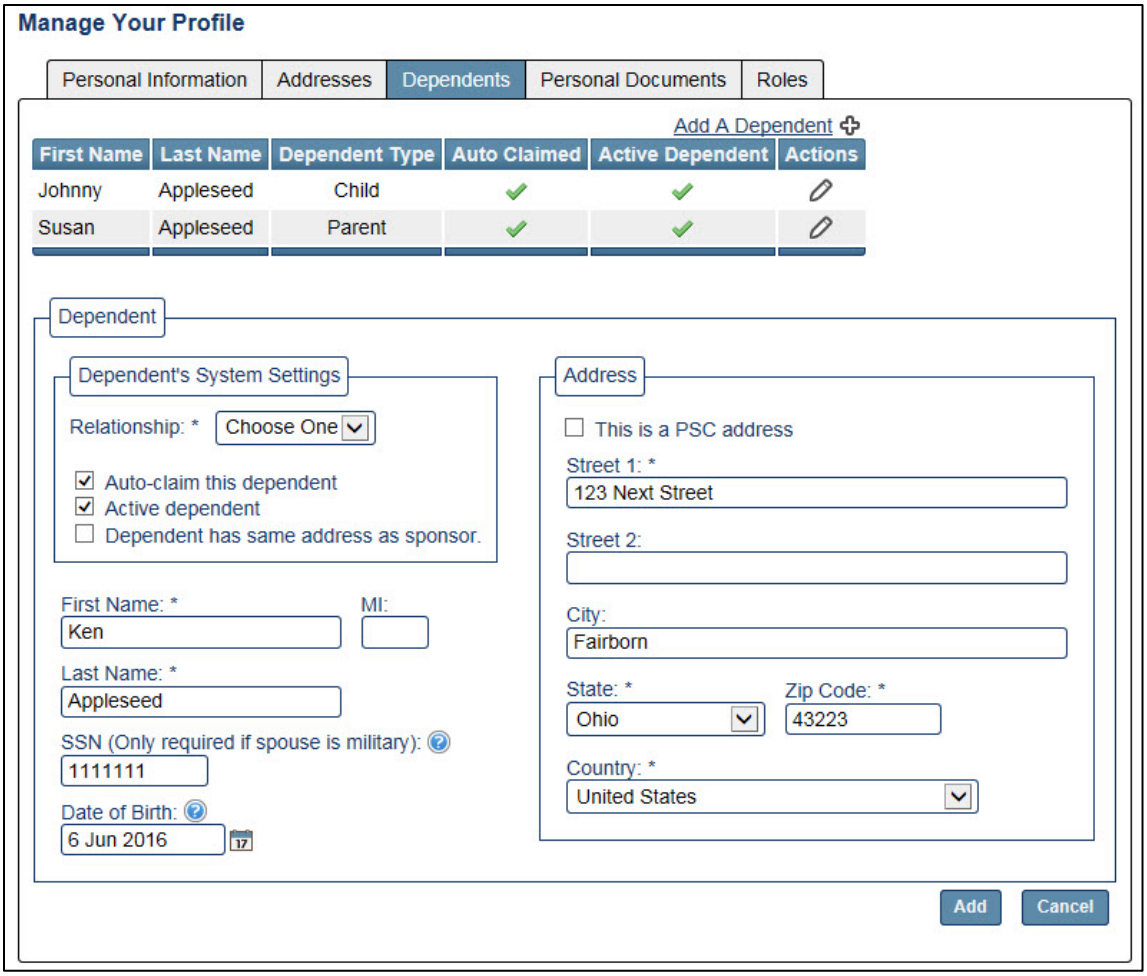


2.2 Dependents

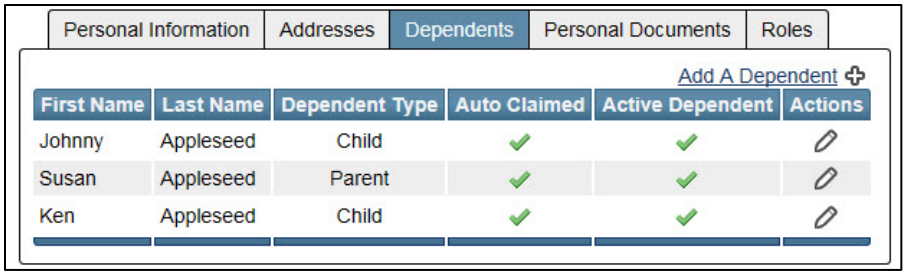
The Dependents tab enables users to add or edit a dependent.

2.2.1 Add Dependent

1. On the Manage Your Profile screen, click the Dependent's tab.
2. Click the Add a Dependent link. The Dependent screen displays below the list of dependents.

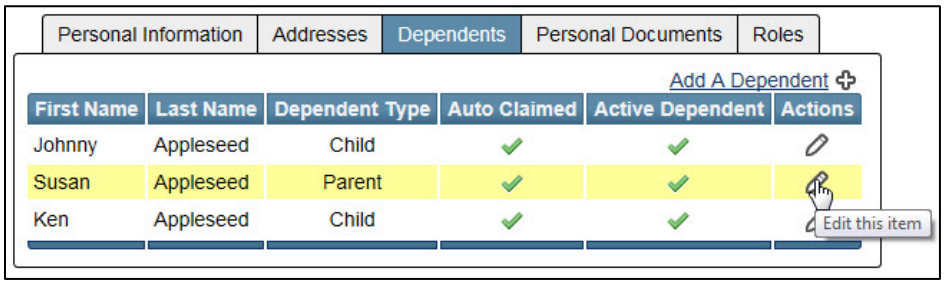


3. Complete the following fields:
   a. Dependent's System Settings: Select the dependents relationship from the Relationship dropdown and click the checkbox next to one or more of the following:
      - Auto-claim this dependent: automatically lists dependents on all forms that list dependents
      - Active dependent: if dependent is not active the dependent will not be available in forms
      - Dependent has same address as sponsor
   b. Enter First Name, MI, Last Name, SSN, and Date of Birth.
   c. If the Same Address as Sponsor checkbox is not checked, enter the Dependent's address. Select the This is a PSC address checkbox to enter a PSC address.
4. Click Add to add the Dependent to the list. Click Cancel to discard changes.



2.2.2 Edit Dependent

1. On the Manage Your Profile screen, click the Dependent's tab.
2. Click the Edit this Item link in the Actions column.



The Dependent screen displays below the list of dependents.

3. Complete the following fields:
   a. Dependent's System Settings: Edit the dependents relationship from the Relationship dropdown and click the checkbox next to one or more of the following:
      - Auto-claim this dependent: automatically lists dependents on all forms that list dependents
      - Active dependent: if dependent is not active the dependent will not be available in forms
      - Dependent has same address as sponsor
   b. Edit First Name, MI, Last Name, SSN, and Date of Birth.
   c. If Dependent Has Same Address as Sponsor is not checked, enter the Dependent's address. Select the This is a PSC Address checkbox to enter a PSC address.
4. Click Save to save the changes or click Cancel to discard the changes.

2.3 Personal Documents

The Personal Documents tab enables users to upload files and attach them when creating a package and/or a form.

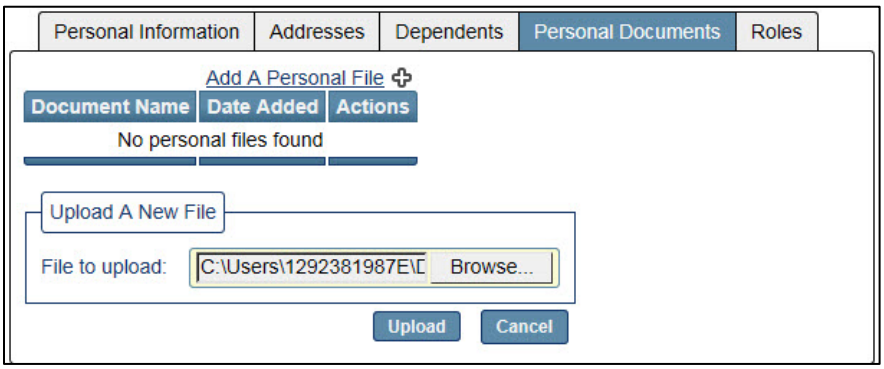
Note

The documents and images must be one of the following file types: PDF, PNG, BMP, JPG, GIF, or TIF.

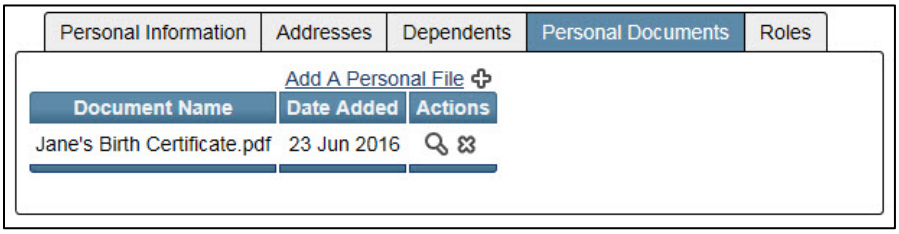
2.3.1 Upload a Personal Document

1. On the Manage Your Profile screen, click the Personal Documents tab.
2. Click the Add a Personal File link to open the Upload a New File section.

3. Click the Browse button and select a file to upload.

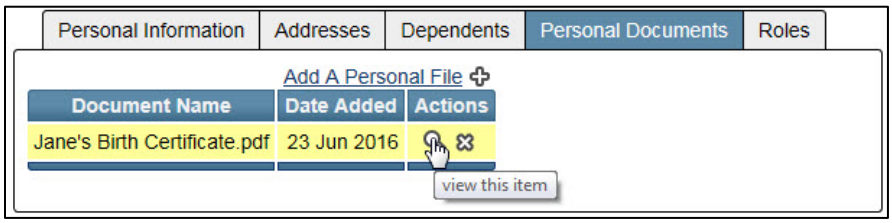


4. Click the Upload button. The uploaded document is added to the table.



2.3.2 Download a Personal Document

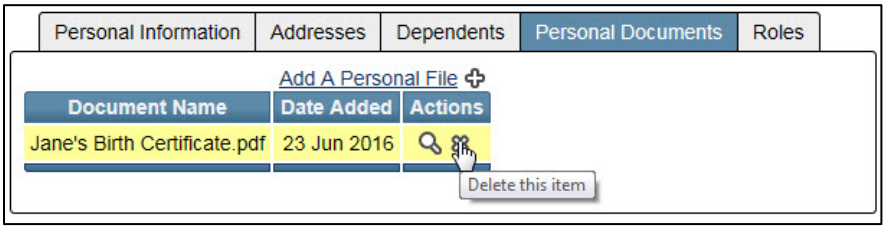
1. On the Manage Your Profile screen, click the Personal Documents tab.
2. Click the View this Item icon in the Actions column next to a document.



3. Click Open to open the document, Save to save the document, or Cancel to go back to the documents list.

2.3.3 Delete a Personal Document

1. On the Manage Your Profile screen, click the Personal Documents tab.
2. Click the Delete this Item icon in the Actions column next to a document. A dialog box displays with the statement “Are you sure you want to delete this item?”



3. Click OK to delete the file or Cancel to keep the file.

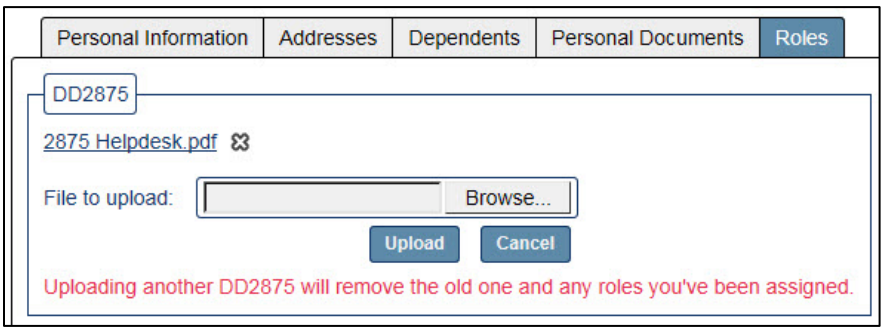
2.4 Roles

The Roles tab enables users to request a role and upload a DD2875. The Audit table provides a list of changes.

2.4.1 Upload DD2875

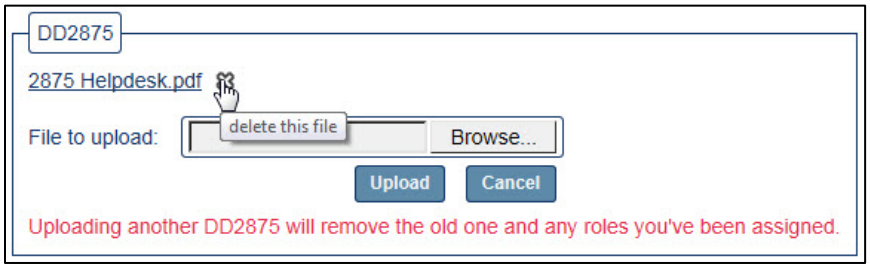
All roles except the Users role require a DD2875.

1. On the Manage Your Profile screen, click the Roles tab.
2. Click the Browse button and browse to a document.
3. Click the Upload button to upload the file.



2.4.2 Delete DD2875

1. On the Manage Your Profile screen, click the Roles tab.



2. Click the Delete icon to delete the DD2875.

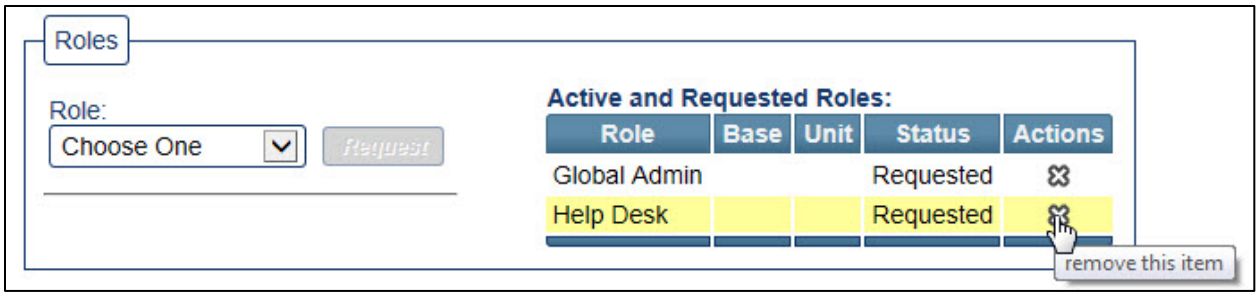
2.4.3 Request a Role

1. On the Manage Your Profile screen, click the Roles tab.
2. In the Roles section, select a role from the Role dropdown list.

3. Click the Request button. The Role will display in the Active and Requested Roles table.

2.4.4 Delete a Role

1. On the Manage Your Profile screen, click the Roles tab.
2. In the Roles section, click the Remove this Item icon in the Actions column next to a role. A dialog box displays with the statement "Are you sure you want to remove this role?"



3. Click OK to delete the role.

Chapter 3 eFinance Inbox

For users without an approving role, the Inbox screen contains items that are currently being worked or in the process of being completed. For users with an approving role the Inbox screen has two tables, Items to Approve and Your Items along with a search feature. The Items to Approve table contains items submitted by users that require approval. The Your Items table has items that are currently being worked or in the process of being completed.

Note:

See Section 1.3. Roles for additional information.

3.1 Inbox Items

Inbox items are visible to users once he or she signs in to eFinance. The following information is included in the Inbox for users with (Your Items table) and without approving roles:

- Type: Item type.
- Package/Form Name: Name of the item.
- Status: Status of the item: Pending FSO Approval, In Work, Pending Commander Approval, Pending Housing Approval, Pending AO Approval, Pending Supervisor Approval, rejected, or Completed.
- Date Created: Date the item was created.
- Date Updated: Date the item was updated.
- Date Submitted: Date the item was submitted.
- Travel Order #: Travel order number listed on the travel order.
- Action: edit, delete, view, or download an archived item.

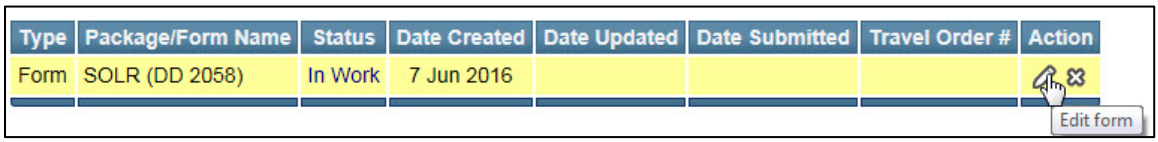
For users with an approving role there is an Items to Approve table with the following information:

- Type: Item type.
- Package/Form Name: Name of the item.
- Member: Name of the member who submitted the form or package
- Date Updated: Date the item was updated.
- Date Submitted: Date the item was submitted.
- Travel Order #: Travel order number listed on the travel order.
- Action: view

3.2 Edit Inbox Item

Users can open an existing form or package from their inbox.

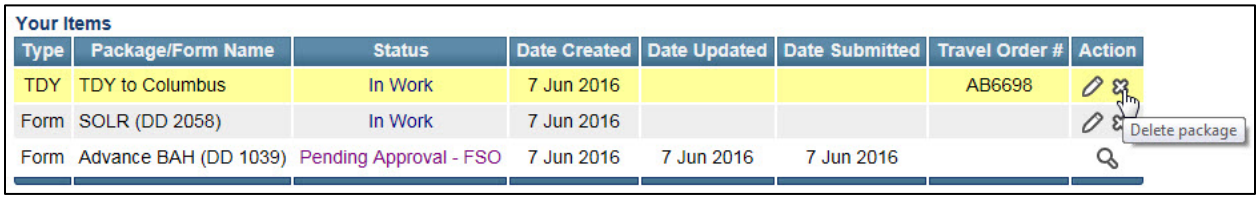
In the Action column, select the Edit Package/Form icon next to an item to edit the selected form or package.



3.3 Delete Inbox Item

Users can delete an existing package/form not submitted for approval.

1. Select the Delete Package/Form icon next to an item.

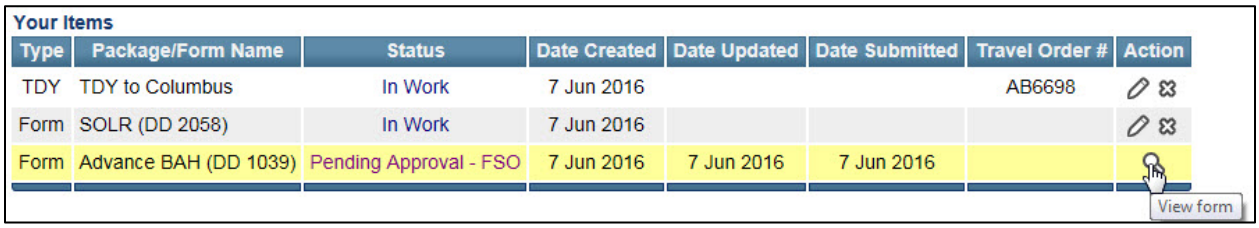


2. A dialog box displays with the statement "Are you sure you want to delete this package/form?" Click OK.

3.4 View Inbox Item

Users can view a package or form that is in the pending approval status.

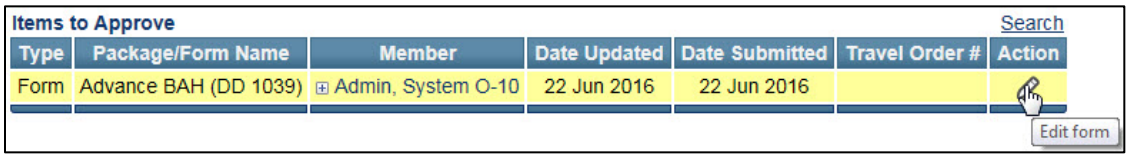
Select the View Package/Form icon next to an item to open the form or package screen.



3.5 Items to Approve

Users with an approving role can select a package or form to approve from the Items to Approve table, which lists all packages and forms that require approval for that AO.

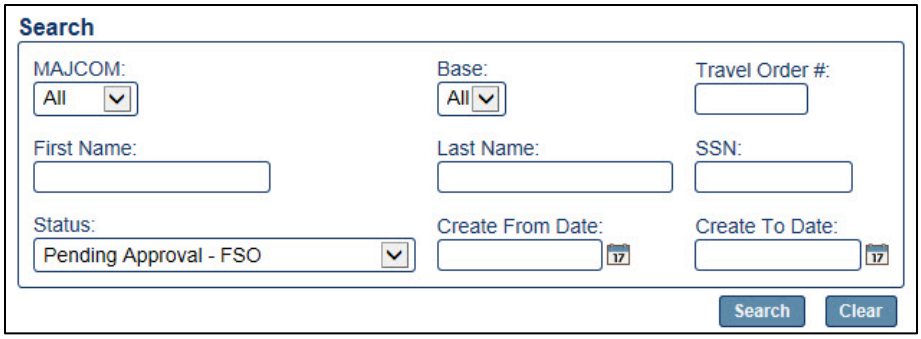
Click the Edit Package/Form Icon to open the package or form.



3.6 Search Items

The Search screen enables users with approval and read-only roles to search items. Users with the Commander and Housing role can search for items pending their approval. FSOs can search for any packages for any base, either Pending FSO Approval or Completed. FSOs can see other bases' packages; they can only edit their own base's packages. Users with the Read-Only role can search for all statuses. Users with the AF role can search for any package; Base and Unit are restricted to the base or unit to which the role is assigned.

1. Click the Search link above the Items to Approve table.
2. Enter or select from dropdown one or more of the following criteria: MAJCOM, Base Travel Order#, First Name, Last Name, SSN, Status, Create from Date, and Create to Date.

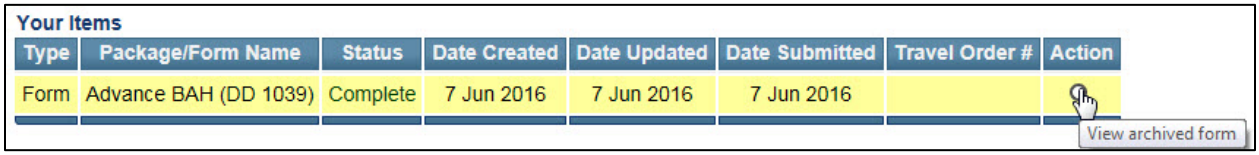


3. Click Search. The results of the search display in the Search results table.

3.7 View Archived Item

Once a package or form is approved, users can view the package. No additional changes can be made to the form or package.

1. Select the View Archived Package/Form icon next to an item.



2. Click Save to save the package or form.

Chapter 4 Create Packages

The create package feature enables users to create PCS, TDY, and Custom packages. After the user creates a package, he or she proceeds to the package screen. This screen navigates users through all of the information needed to complete a package including briefings, required information, required forms, and required documents.

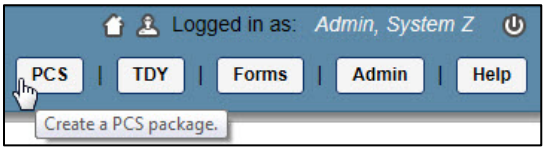
Notes:

- Reservists and Air National Guard members are only able to create a TDY package.
- Users need to update their profile before creating a package.

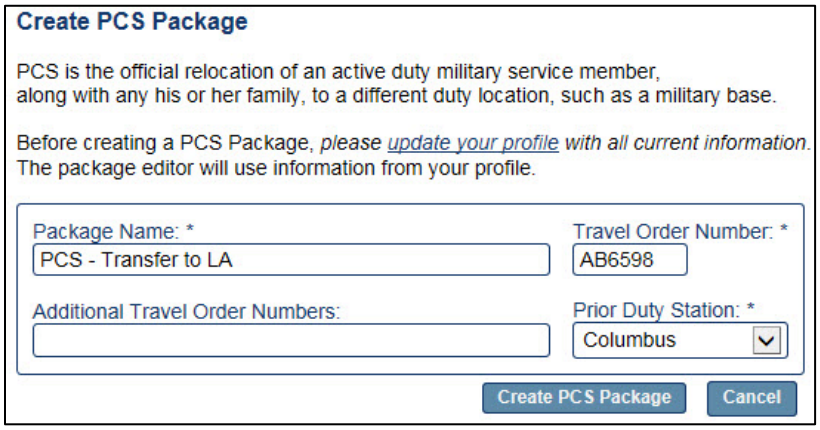
4.1 Create PCS Package

The PCS Package screen enables users to create a PCS package, which includes the required forms and documents. PCS is the official relocation of an active duty military service member, and any family members that reside in the same location, to an alternate duty location.

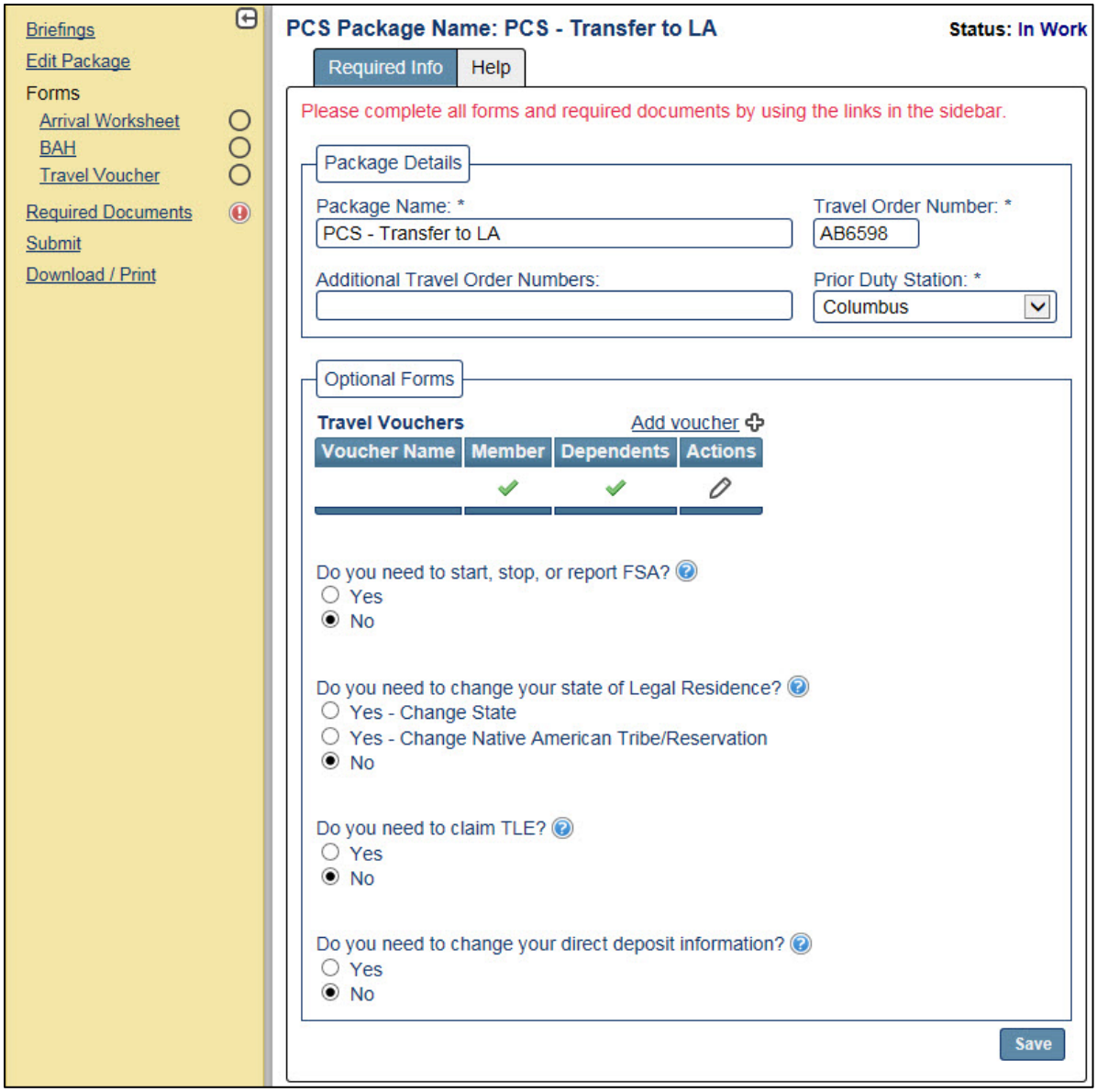
1. Select the PCS link in the header to open the Create PCS Package screen.



2. Complete the following fields:
   - Package Name: Assign a package name.
   - Travel Order Number: Enter the Travel Order number of the package (must use AANNNN format).
   - Prior Duty Station: Select the duty station from which you were previously assigned.
   - (Optional) Complete the Additional Travel Order Numbers Field.
3. Click the Create PCS Package button. Click Cancel to go back to the main screen.



The package opens in the Package screen.



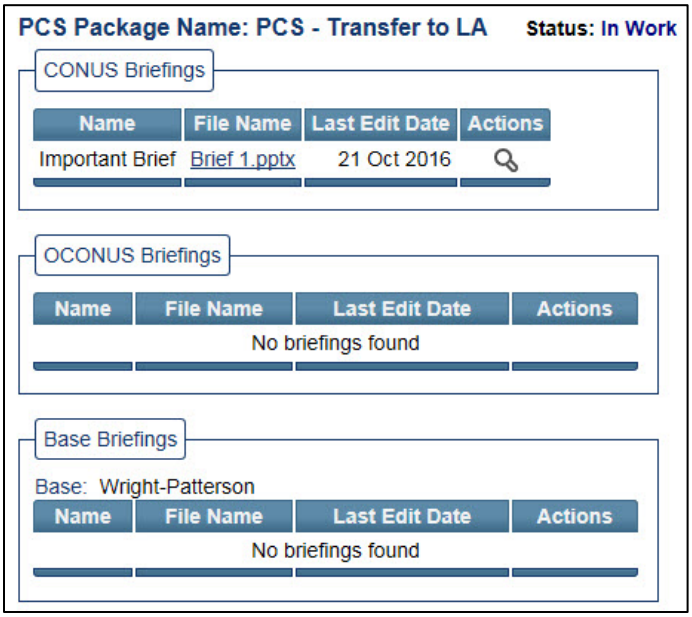
4. To complete the package, click the links in the sidebar. Each link opens a screen that requires additional information to complete the package. The following sections provide detailed information about each sidebar link:
   - Section 4.1.1 PCS Package Briefings
   - Section 4.1.2 PCS Edit Package
   - Section 4.1.3 PCS Package Forms
   - Section 4.1.4 PCS Package Required Documents
   - Section 4.1.5 Submit PCS Package

4.1.1 PCS Package Briefings

The Briefings screen provides the user with briefing information for the new base that they are relocating to and any general briefing for CONUS/OCONUS travel. This screen includes any briefing information

uploaded by the FSO. Any briefings uploaded by a GA displays under CONUS Briefing or OCONUS briefing if it is an overseas PCS.

1. On the PCS Package screen, click the Briefings link in the sidebar to open the Briefing screen.

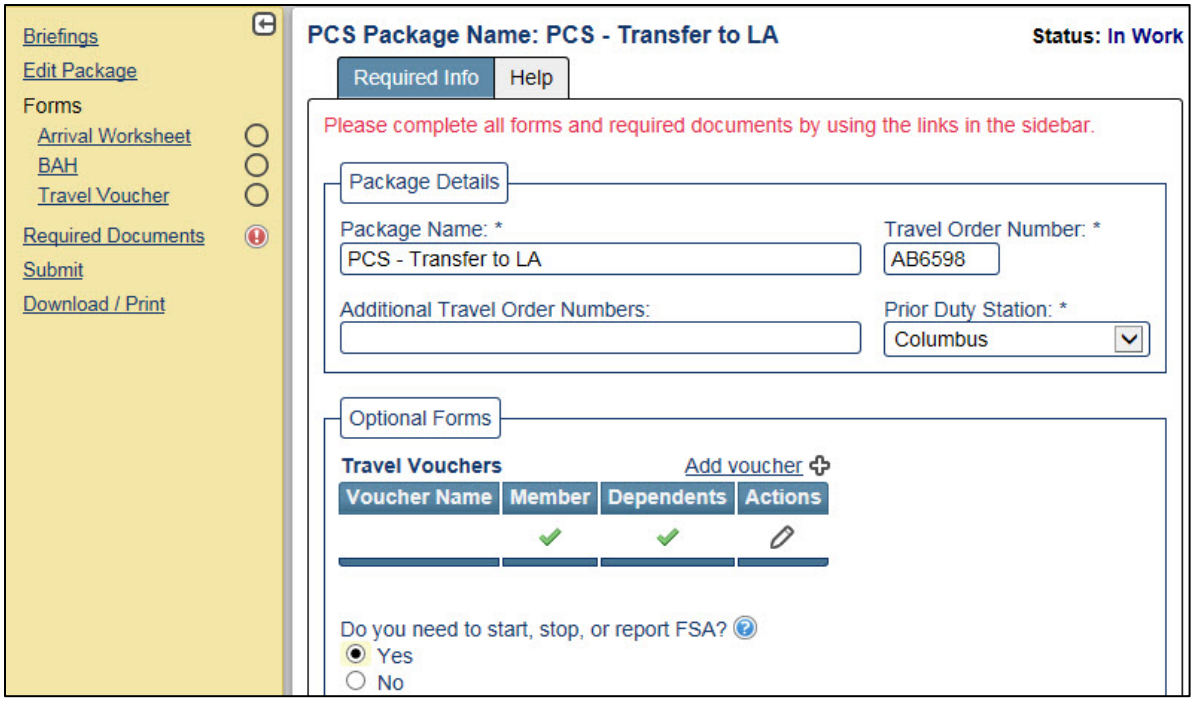


2. If there are any briefings, click the file name or click the View icon to download the briefing.

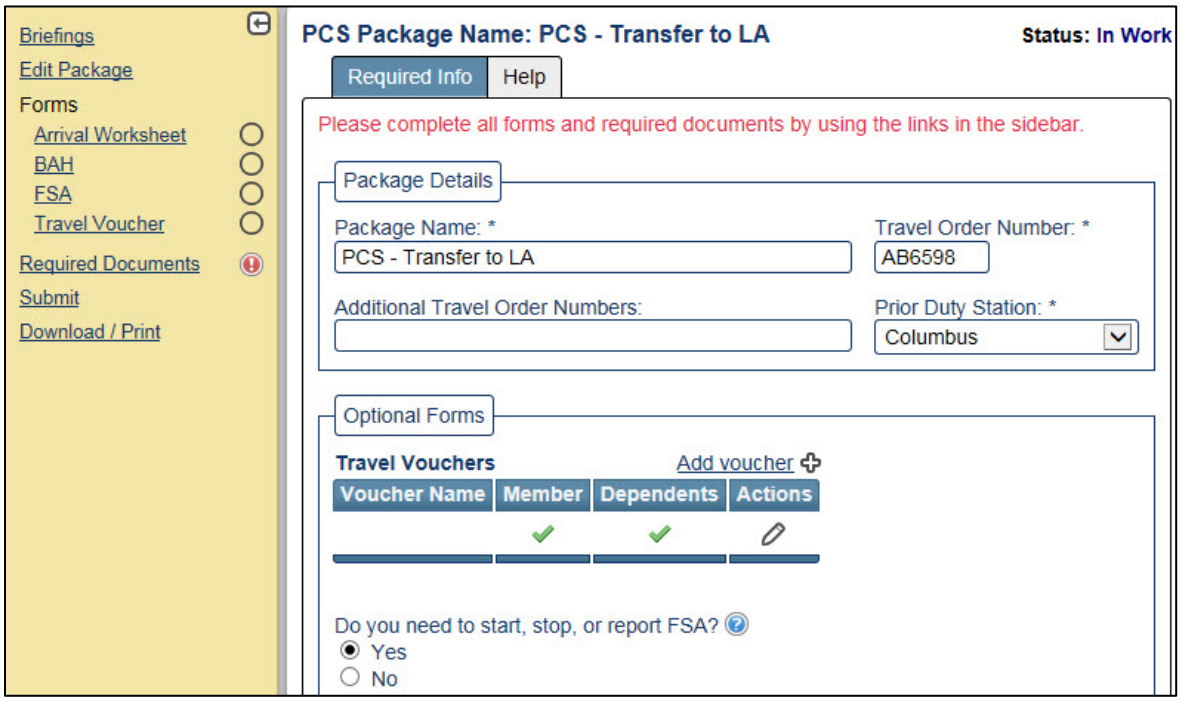
4.1.2 PCS Package Edit Package

The Required Information tab is the default tab on the Package screen. It enables users to edit package details and add forms to a package.

1. On the PCS Package screen, click the Edit Package link in the sidebar.
2. If applicable, in the Package details section, edit information as needed.
3. (Optional) To attach a voucher for a dependent who traveled separately, in the Optional Forms section, click the Add Voucher link to add a travel voucher. To choose another optional form select Yes next to one or more forms.



4. Click Save to save the package. If you added a form, it will display in the sidebar under the Forms title.



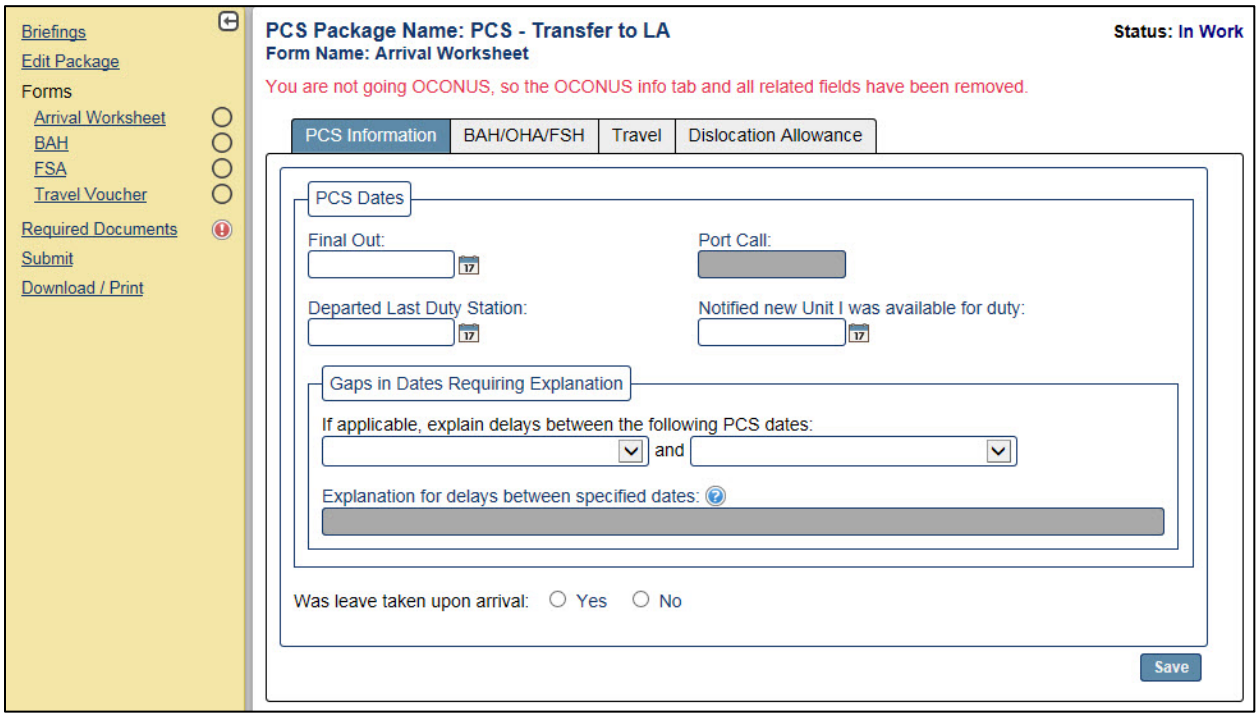
4.1.3 PCS Package Forms

The sidebar includes a list of required forms and forms that the user has added to the package. Each form name is a link to the form. The user will need to complete all forms to complete the package.

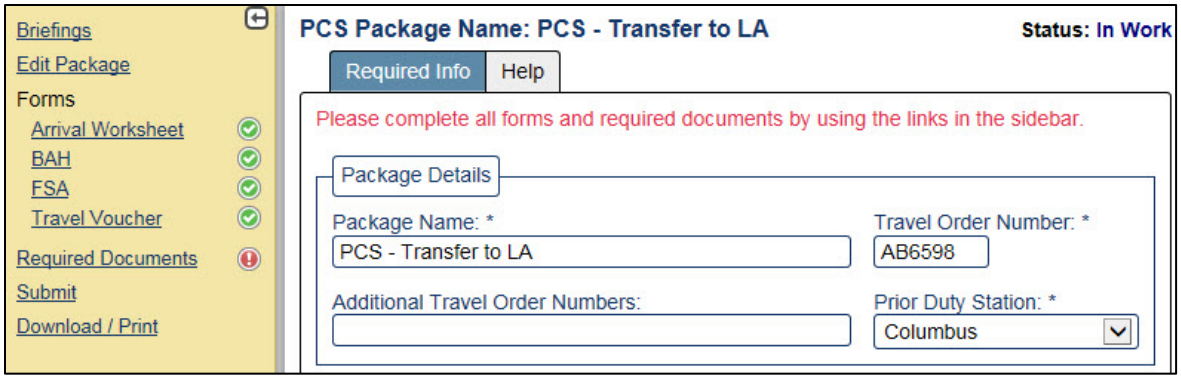
Note

The Arrival Worksheet form must be completed before completing other forms.

1. On the PCS Package screen, click the Arrival Worksheet link. Complete all fields on all tabs. Appendix A: Form Field Descriptions provides a description of each form field and Chapter 5 Create Forms provides additional information about forms.



2. Click the Save button to save the form. Click Cancel to discard changes.
3. Complete and save all forms listed in the sidebar. The Forms links will have one of three symbols next to the name.
   - The circle means that the user has not yet opened the form.
   - The red exclamation mark means the user has opened the form but not completed it.
   - The green checkmark means that the form is complete and saved.



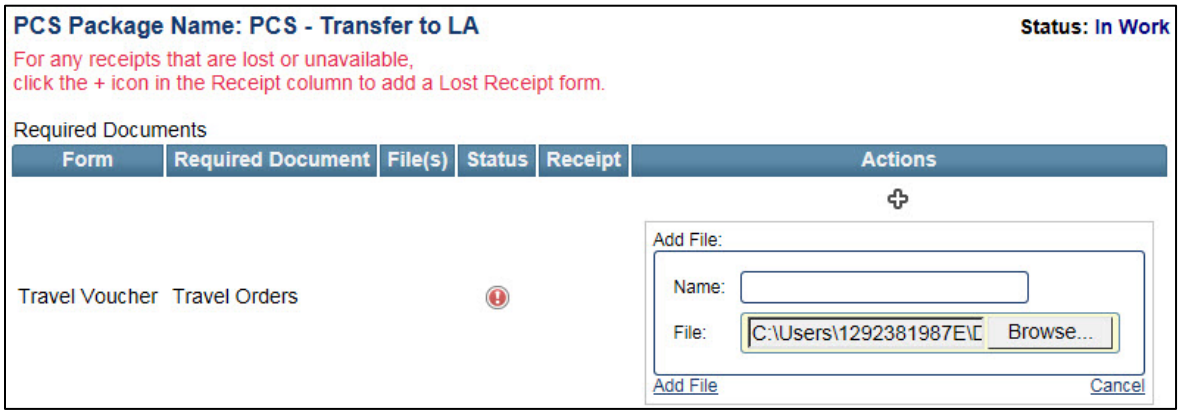
Note:

If the form has any errors, a list of the errors will display in a yellow box at the top of the screen.

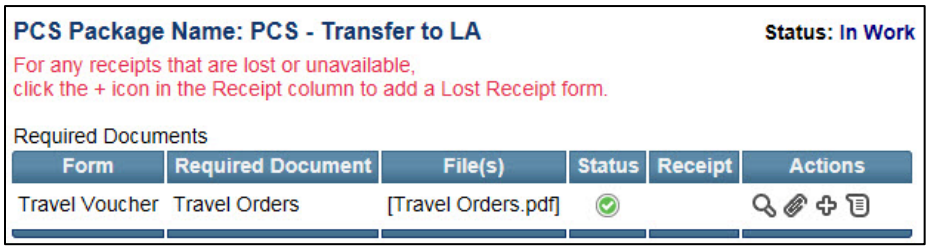
4.1.4 PCS Package Required Documents

On the Required Documents screen, users can attach documents required to complete a form as well as other documents needed to complete the package. There will be a red exclamation point next to the required documents link in the sidebar if the package has any required documents that have not been uploaded. The Required Documents table has a list of the forms and the documents that the form requires.

1. On the PCS Package screen, click the Required Documents link in the sidebar to open the Required Documents screen.
2. In the Required Documents Table, select the ✚ Add icon in the Actions column to add a document:
   a. (Optional) Enter a File Name in the Name field.
   b. Click the Browse button to browse to the file.



   c. Click Add File to add the file to the form and change the status to a checkmark.



Note

The + icon displays in the receipt column when a form that requires a receipt is attached to the package.

3. (Optional) After you successfully add a file, the Actions column for the form displays five icons that enable you to perform the following functions:
   - Click the View/Download File icon to download the attached file and view it.
   - Click the Un-assign Files icon to remove documents from the form and place them in the Unassigned Documents list.
   - Click the Add Another File icon to add additional files to the form.
   - Click the Rename File icon to change the name of the file.
   - Click the Rotate file icon to rotate a file 180 degrees (applies to image files only)

   Note

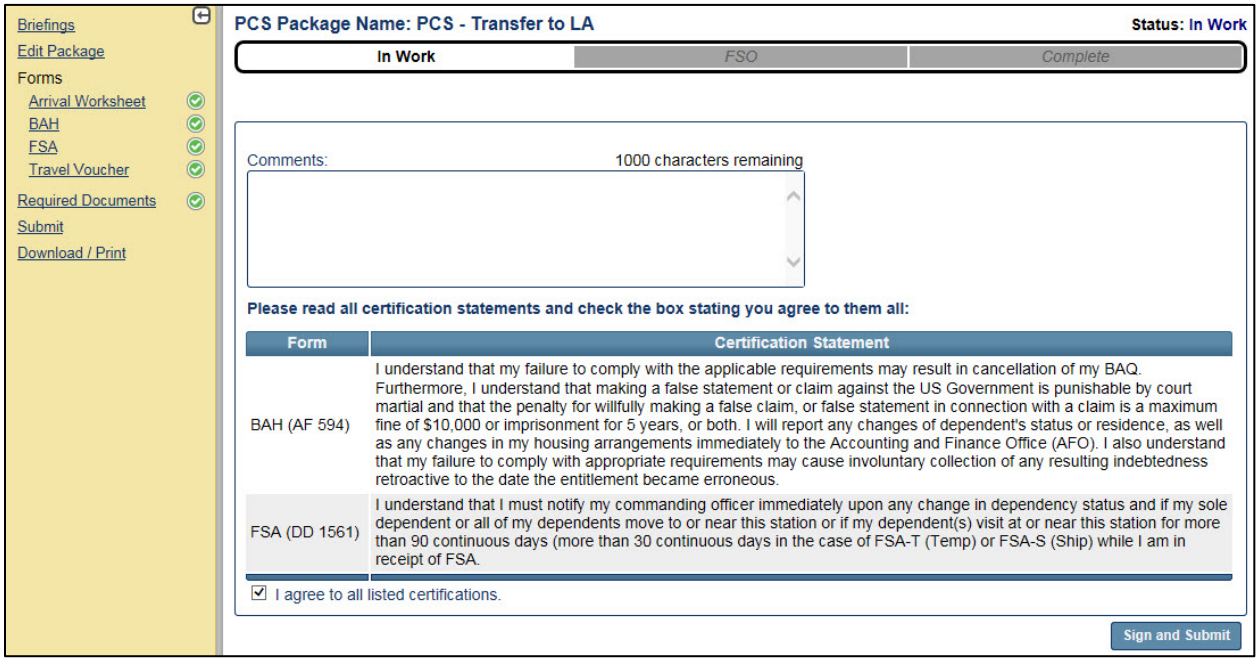
   The documents and images must be one of the following file types: PDF, PNG, BMP, JPG, GIF, or TIF.

4. (Optional) Attach Package Level, Unassigned, or Personal files and Fax documents. See Chapter 6 Attach Additional Documents to Package or Form for more information.

4.1.5 Submit PCS Package

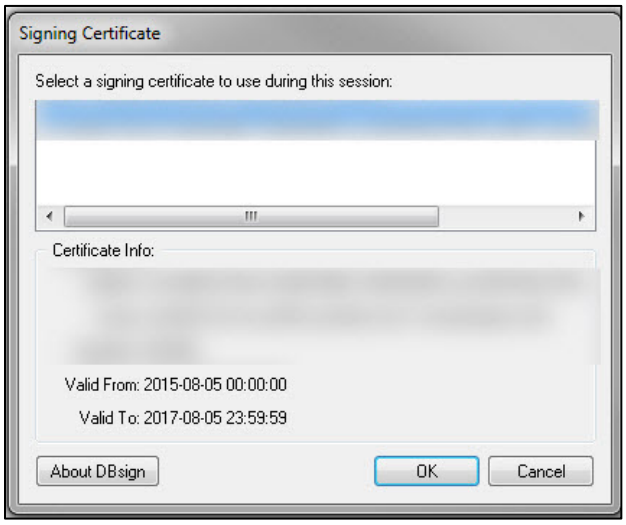
Once the package is complete, denoted by a green checkmark next to all forms and the required documents link, the package can be submitted.

1. Click the Submit link in the sidebar. The package status at the top of the screen is In Work.



2. Enter comments in the Comments field if applicable.

3. Check the “I agree to all listed certifications” checkbox and click the Sign and Submit button.
4. A dialog opens with the statement “Are you sure you want to sign and submit this package?” Click OK to continue. The DBSign dialog displays (it may take time to load).
5. Select a certificate and click OK.



The package is sent to the FSO for approval. See Chapter 7 Package and Form Approval Process for additional information.

Note

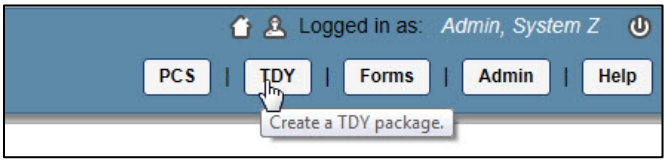
Users can check the status of the package in their inbox (see Chapter 3 eFinance Inbox).

After the package has been submitted, a work history table displays that lists the date of the action, the user that performed the action, and the event. Any remarks put in by any approving official will be in the remarks column.

4.2 Create TDY Package

The TDY Package screen enables users to create a TDY package, which includes the required forms and documents. TDY is a Temporary Duty assignment that is not your regularly assigned workplace.

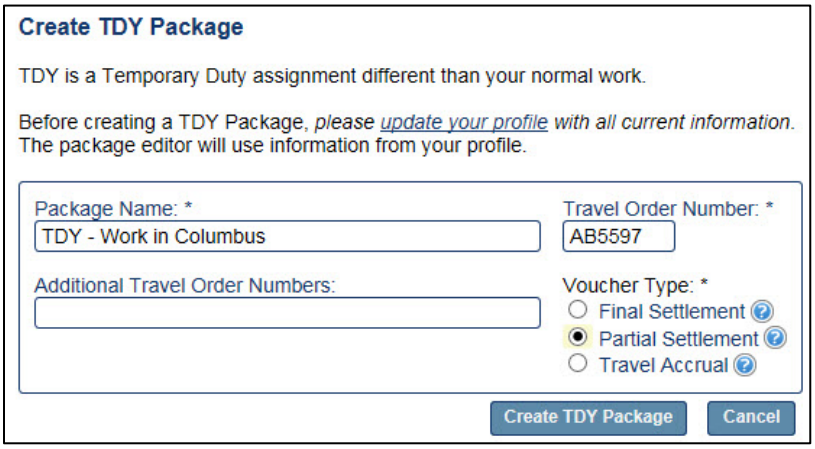
1. Select the TDY link in the header to open the Create TDY Package screen.



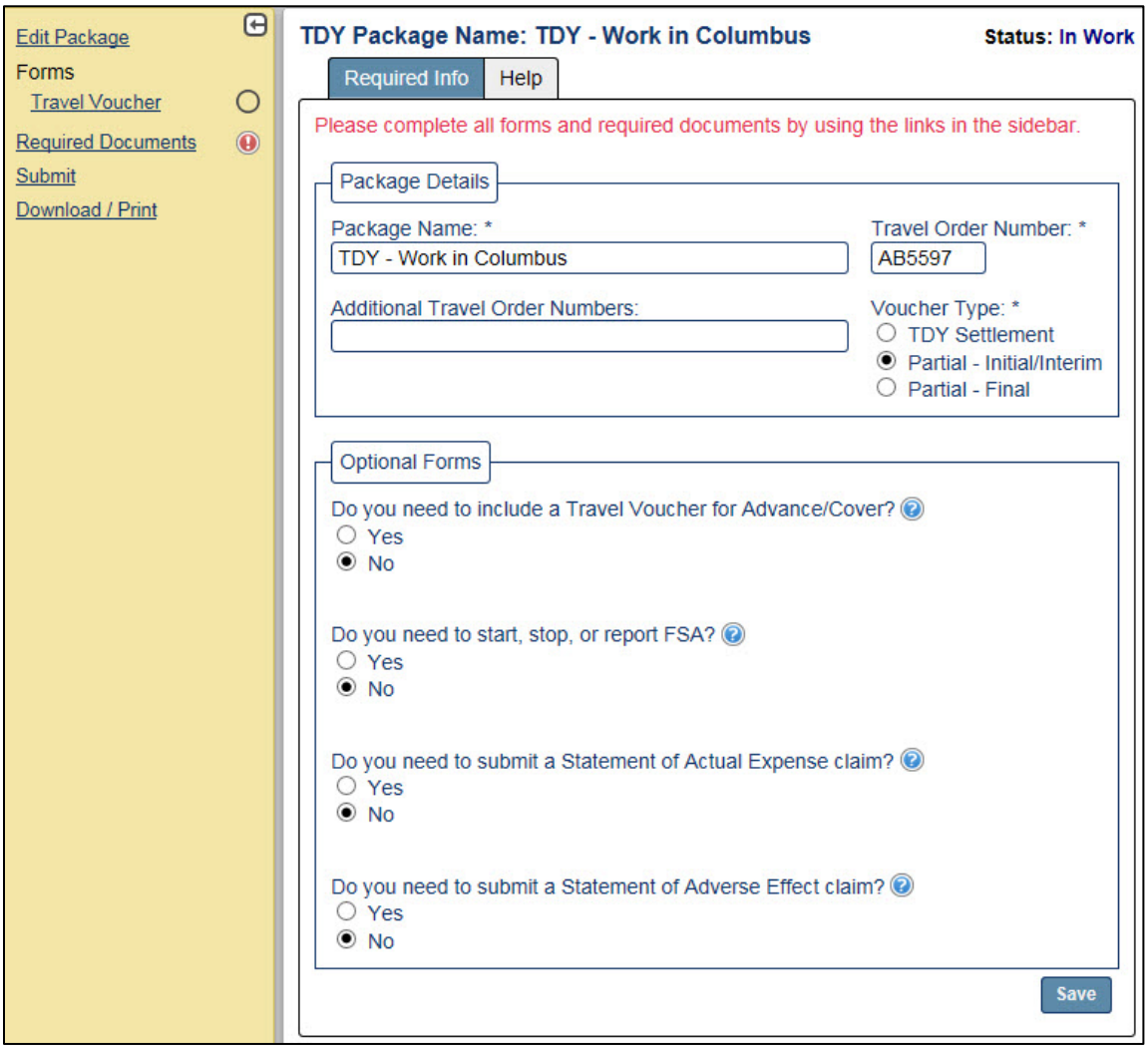
2. Complete the following fields:
   - Package Name: Assign a package name.
   - Travel Order Number: Enter the Travel Order number of the package.
   - (Optional) Complete the Additional Travel Order Numbers Field.
3. Choose a voucher type:
   - Final Settlement
   - Partial Settlement

- Travel Accrual

4. Click the Create TDY Package button.



The package opens in the Package screen.

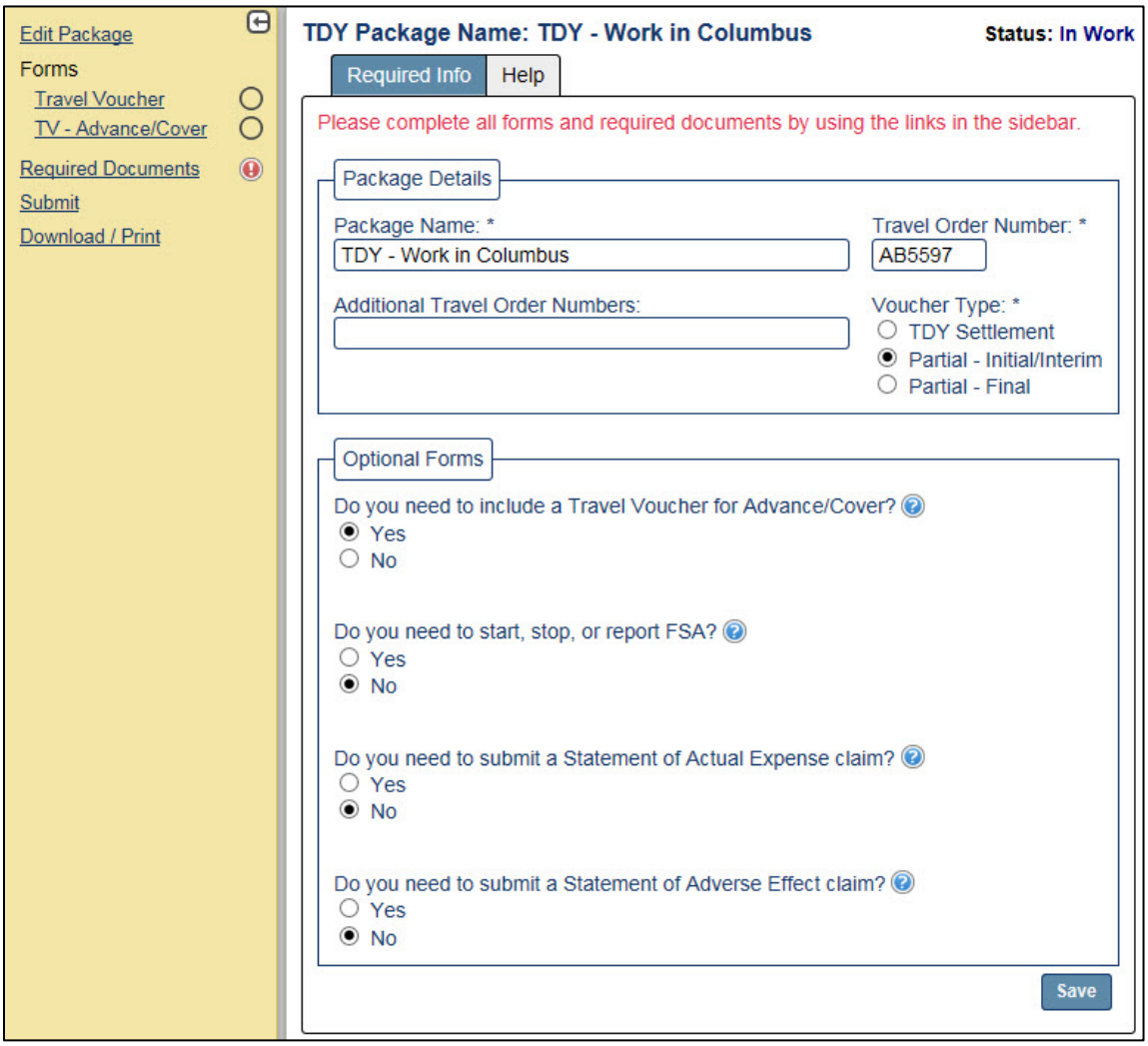


5. To complete the package, click the links in the sidebar. Each link opens a screen that requires additional information to complete the package. The following sections provide detailed information about each sidebar link:
   - Section 4.2.1 TDY Package Edit Package
   - Section 4.2.2 TDY Package Forms
   - Section 4.2.3 TDY Package Required Documents
   - Section 4.2.4 Submit TDY Package

4.2.1 TDY Package Edit Package

The Required Info tab is the default tab on the TDY Package screen. It enables users to edit TDY details and add forms.

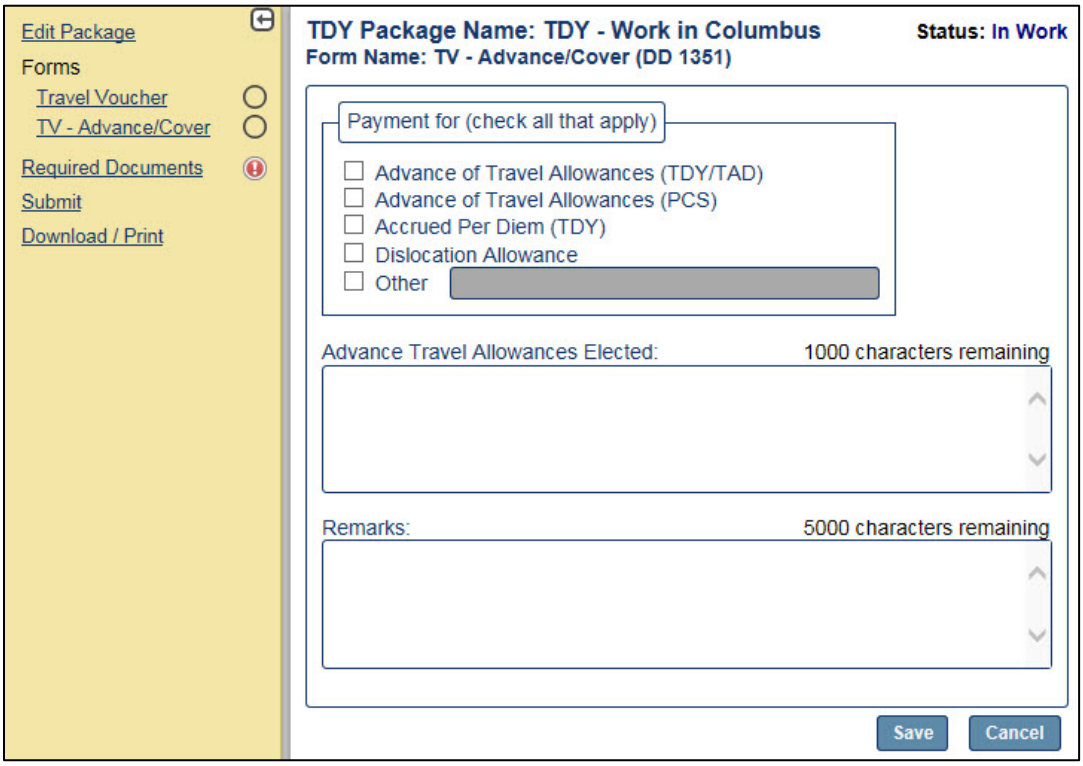
1. On the TDY Package screen, click the Edit Package link in the sidebar.
2. If applicable, in the Package Details section, edit information as needed.
3. (Optional) in the Optional Forms section, choose a form by selecting yes.
4. Click Save to save the package. If you added a form, it will display in the sidebar under the Forms title.



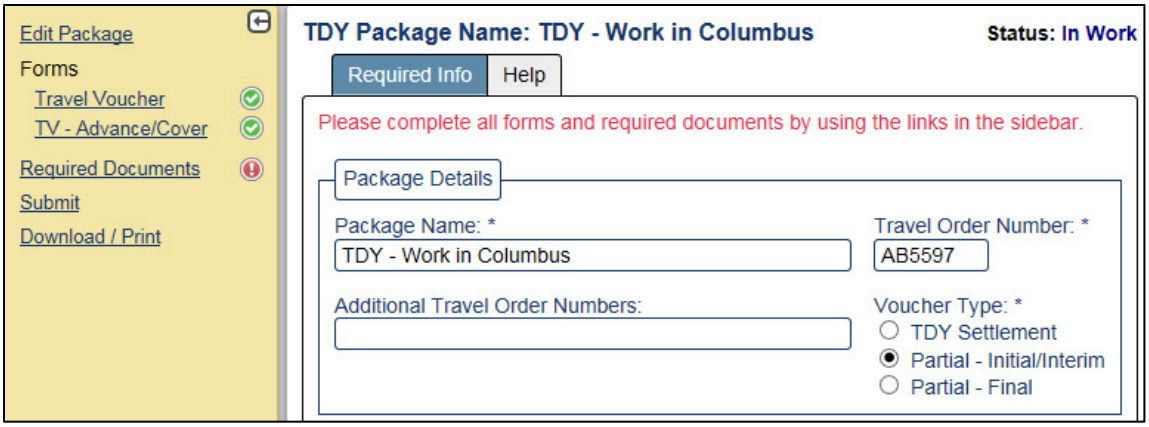
4.2.2 TDY Package Forms

The sidebar includes a list of required forms and forms that the user has added to the package. Each form name is a link to the form. The user will need to complete all forms to complete the package.

1. On the TDY Package screen, click a form name to open the form. In the example below, the TV – Advance/Cover form was selected.



2. Complete all fields. If the form has tabs, complete all of the fields on all tabs. Appendix A: Form Field Descriptions provides a description of each form field and Chapter 5 Create Forms provides additional information about forms.
3. Click the Save button to save the form. Click Cancel to discard changes. The Forms links will have one of three symbols next to the name:
   - The circle means that the user has not yet opened the form.
   - The red exclamation mark means the user has opened the form but not completed it.
   - The green checkmark means that the form is complete and saved.



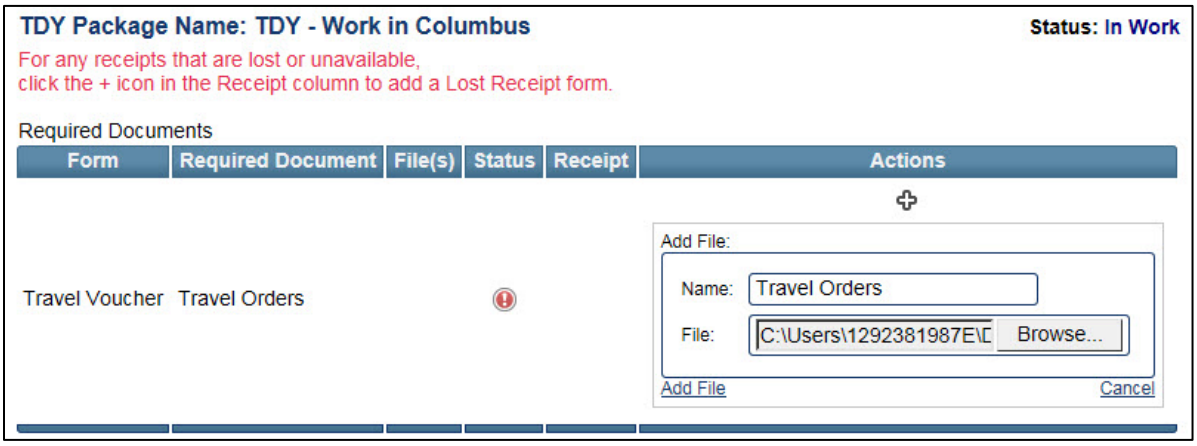
Note:

If a form has any errors, a list of the errors will display in a yellow box at the top of the screen.

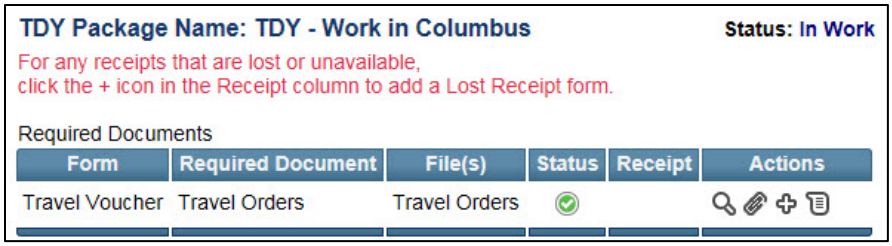
4.2.3 TDY Package Required Documents

On the Required Documents screen, users can attach documents required to complete a form as well as other forms needed to complete the package. There will be a red exclamation point next to the required documents link in the sidebar if the package has any required documents that have not been uploaded. The Required Documents table has a list of the forms and the documents that the form requires.

1. On the TDY Package screen, click the Required Documents link in the sidebar to open the Required Documents screen.
2. In the Required Documents table, select the Add icon in the Actions column to add a document:
   a. Enter a File Name in the Name field.
   b. Click the Browse button to browse to the file.



   c. Click Add File to add the file to the form and change the status to a checkmark.



Note

The + icon displays in the receipt column when a form that requires a receipt is attached to the package.

3. (Optional) After you successfully add a file, the Actions column for the form displays five icons that enable you to perform the following functions:
   - Click the View/Download File icon to download the attached file and view it.
   - Click the Un-assign Files icon to remove the document(s) from the form and place them in the Unassigned Documents list.
   - Click the Add Another File icon to add additional files to the form.
   - Click the Rename File icon to change the name of the file.
   - Click the Rotate file icon to rotate a file 180 degrees (applies to image files only)

   Note

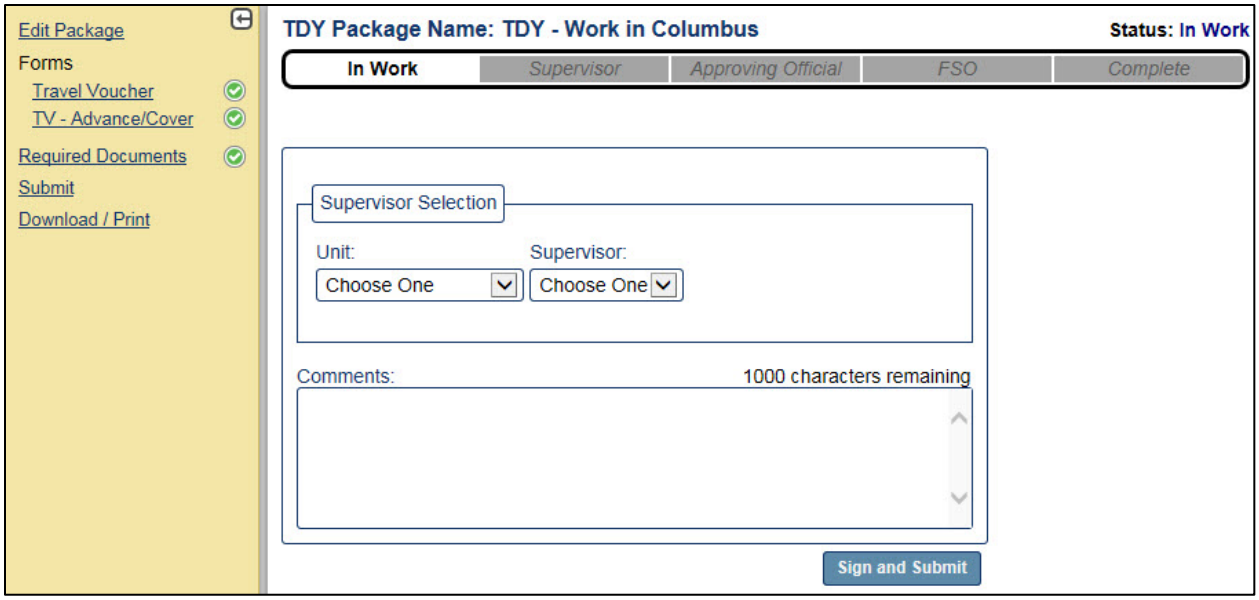
   The documents and images must be one of the following file types: PDF, PNG, BMP, JPG, GIF, or TIF.

4. (Optional) Attach Package Level, Unassigned, or Personal files. See Chapter 6 Attach Additional Documents to Form or Package for more information.

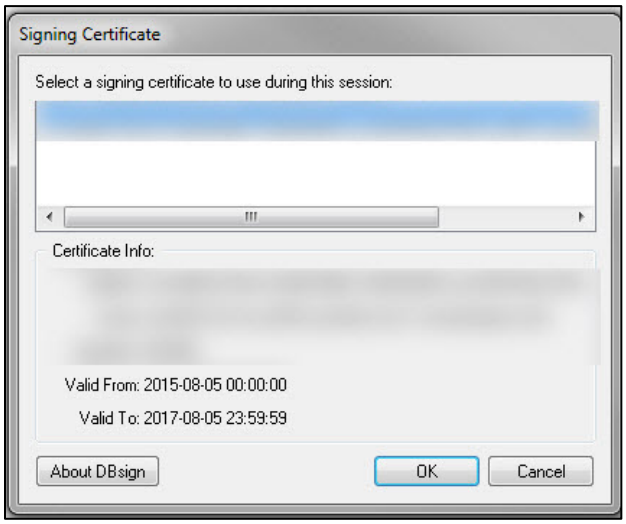
4.2.4 Submit TDY Package

Once the package is complete, denoted by a green checkmark next to all forms and the required documents link, the package can be submitted.

1. Click the Submit link in the sidebar. The package status at the top of the screen is In Work.
2. In the Supervisor Selection section, choose a Unit and a Supervisor from the appropriate dropdown.



3. Enter comments in the Comments field if applicable.
4. If there is a form in the package that requires certification. Check the "I agree to all listed certifications" checkbox.
5. Click the Sign and Submit button. A dialog opens with the statement "Are you sure you want to sign and submit this package?"
6. Click OK to continue. The DBSign dialog displays (it may take time to load).
7. Select a certificate and click OK.



The package is sent for approval to the Supervisor. See Chapter 7 Package and Form Approval Process for additional information.

Notes

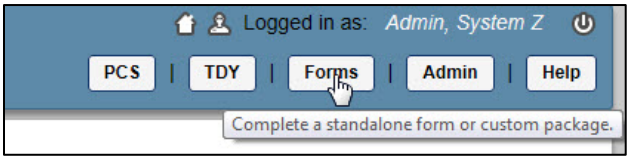
Users can check the status of the package in their inbox (see Chapter 3 eFinance Inbox).

After the package has been submitted once, a work history table displays that lists the date of the action, the user that performed the action, and the event. Any remarks put in by any approving official will be in the remarks column.

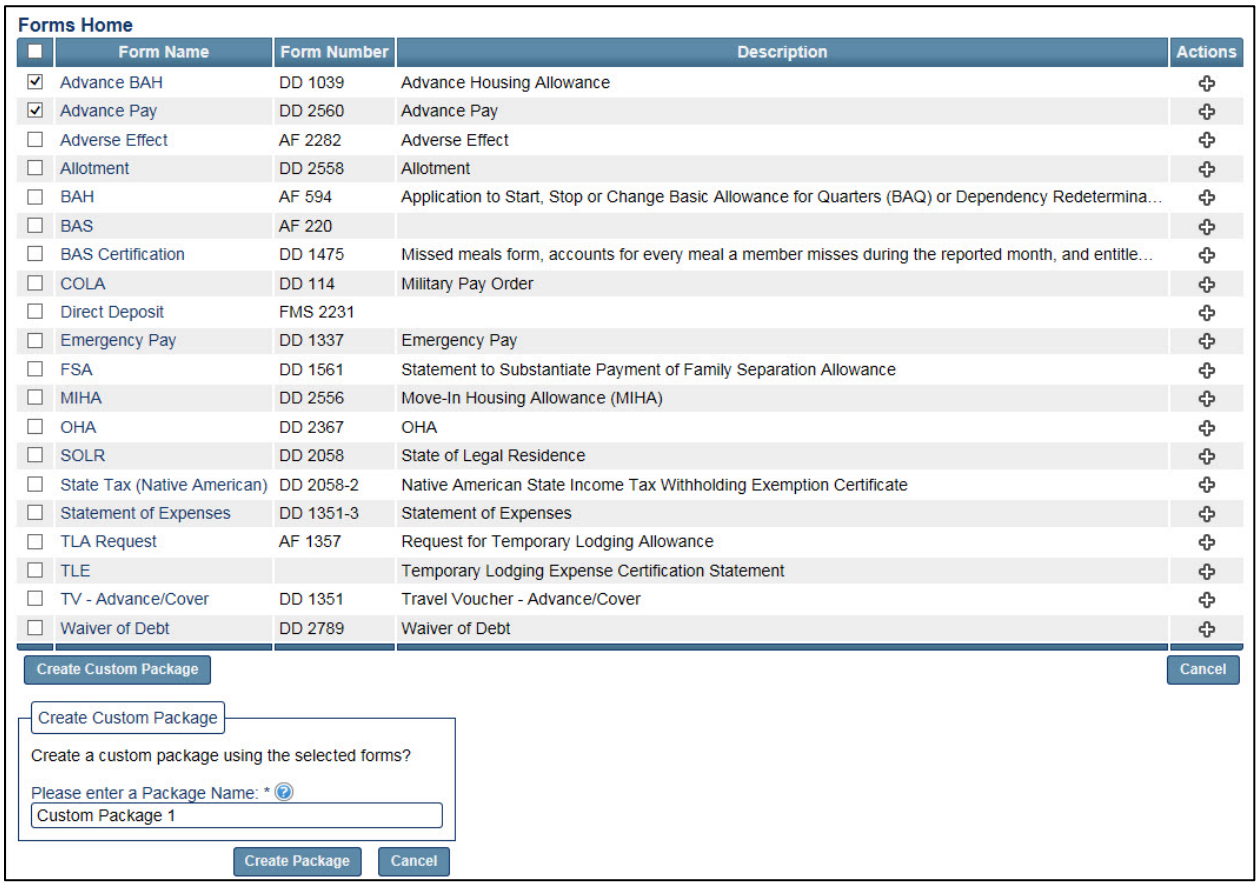
4.3 Create Custom Package

A Custom package enables a user to create a package using two or more forms. Instead of completing multiple standalone forms and handing them directly to each approving authority, the user is able to create a customized package with the forms and eFinance routes them as necessary.

1. Select the Forms link in the header to open the Forms screen.

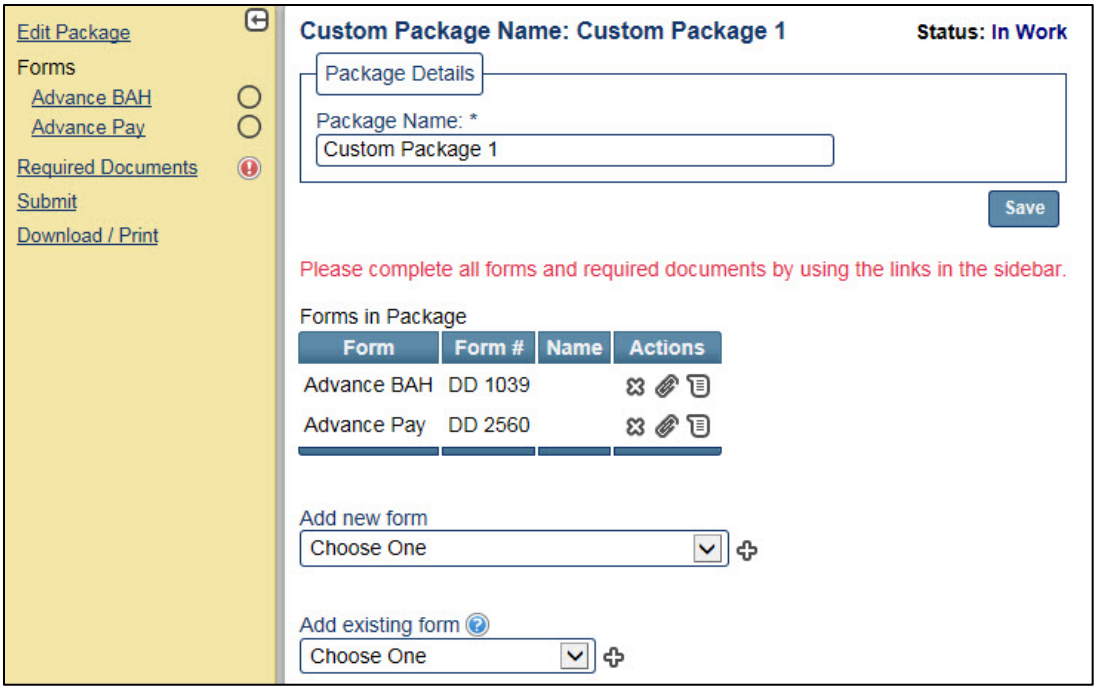


2. Click the checkbox next to the forms that you want to use in the custom package (at least two).
3. Click the Create Custom Package button.
4. Assign a package name and click the Create Package button or click Cancel to discard changes.



Form Name	Form Number	Description
Advance BAH	DD 1039	Advance Housing Allowance
Advance Pay	DD 2560	Advance Pay
Adverse Effect	AF 2282	Adverse Effect
Allotment	DD 2558	Allotment
BAH	AF 594	Application to Start, Stop or Change Basic Allowance for Quarters (BAQ) or Dependency Redetermina...
BAS	AF 220	
BAS Certification	DD 1475	Missed meals form, accounts for every meal a member misses during the reported month, and entitle...
COLA	DD 114	Military Pay Order
Direct Deposit	FMS 2231	
Emergency Pay	DD 1337	Emergency Pay
FSA	DD 1561	Statement to Substantiate Payment of Family Separation Allowance
MIHA	DD 2556	Move-In Housing Allowance (MIHA)
OHA	DD 2367	OHA
SOLR	DD 2058	State of Legal Residence
State Tax (Native American)	DD 2058-2	Native American State Income Tax Withholding Exemption Certificate
Statement of Expenses	DD 1351-3	Statement of Expenses
TLA Request	AF 1357	Request for Temporary Lodging Allowance
TLE		Temporary Lodging Expense Certification Statement
TV - Advance/Cover	DD 1351	Travel Voucher - Advance/Cover
Waiver of Debt	DD 2789	Waiver of Debt

The package opens in the Package screen.

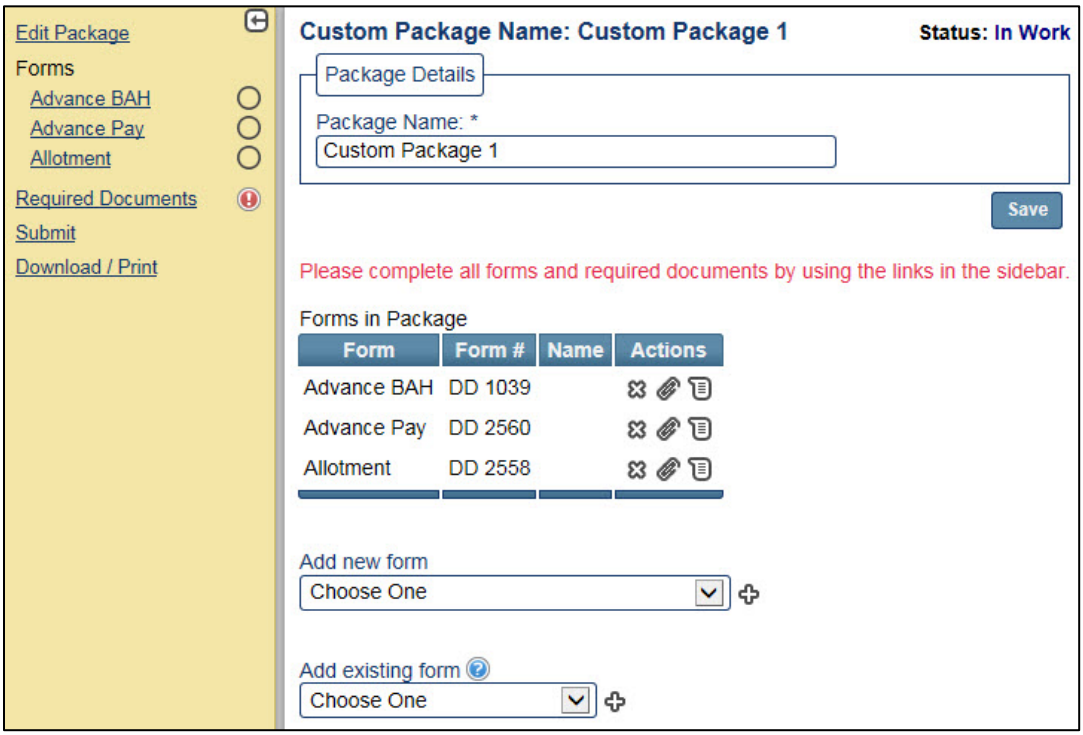

Edit Package
Forms
Advance BAH
Advance Pay
Required Documents
Submit
Download / Print
Custom Package Name: Custom Package 1
Status: In Work
Package Details
Package Name: *
Custom Package 1
Save
Please complete all forms and required documents by using the links in the sidebar.
Forms in Package
Form
Form #
Name
Actions
Advance BAH
DD 1039
Advance Pay
DD 2560
Add new form
Choose One
Add existing form
Choose One

5. To complete the package, click the links in the sidebar. Each link opens a screen that requires additional information to complete the package. The following sections provide detailed information about each sidebar link:
   - Section 4.3.1 Custom Package Edit Package
   - Section 4.3.2 Custom Package Forms
   - Section 4.3.3 Custom Package Required Documents
   - Section 4.3.4 Submit Custom Package

4.3.1 Custom Package Edit Package

The Required Info tab is the default tab on the Custom Package screen. It enables users to edit the Custom Package details and add forms.

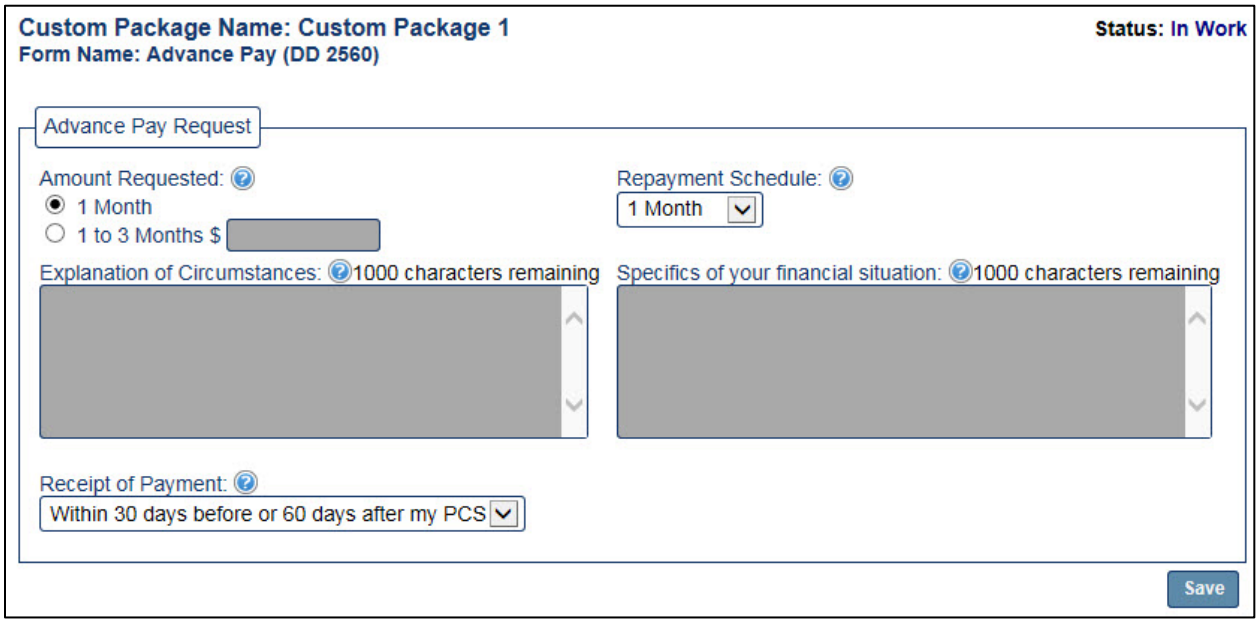
1. On the Custom Package screen, click the Required Information link in the sidebar.
2. If applicable, in the Package Details section, edit information as needed.
3. (Optional) In the Forms table, do one of the following for a selected form:
   a. Click the Delete icon to delete the form.
   b. Click the Remove icon to remove the form.
   c. Click the Rename icon to rename the form.
4. (Optional) Choose a form from the Add new form dropdown list and click the Add icon.
5. (Optional) Choose a form from the Add existing form dropdown, and click the Add icon.
6. Click Save to save the package. If you added a form, it will display in the sidebar under the Forms title.



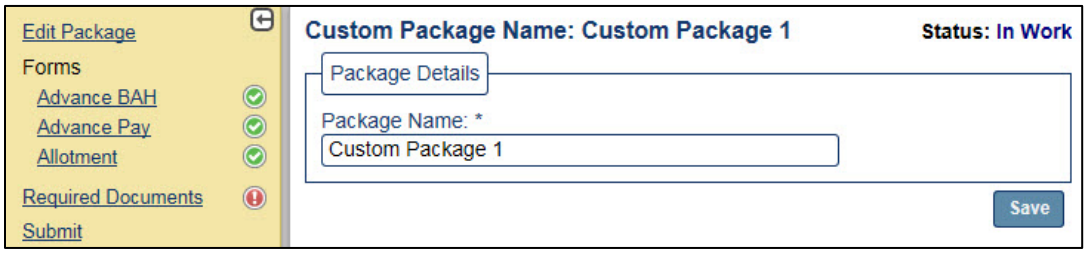
4.3.2 Custom Package Forms

The sidebar includes a list of forms the user has added to the package. Each form name is a link to the form. The user will need to complete all forms to complete the package.

1. On the Custom Package screen, click a form name to open the form. In the example below, the Advance Pay form was selected.



2. Complete all fields. See Chapter 5 Create Forms for details on how to complete forms.
3. Click the Save button to save the form. Click Cancel to discard changes. The Forms links will have one of three symbols next to the name:
   - The circle means that the user has not yet opened the form.
   - The red exclamation mark means the user has opened the form but not completed it.
   - The green checkmark means that the form is complete and saved.



Note:

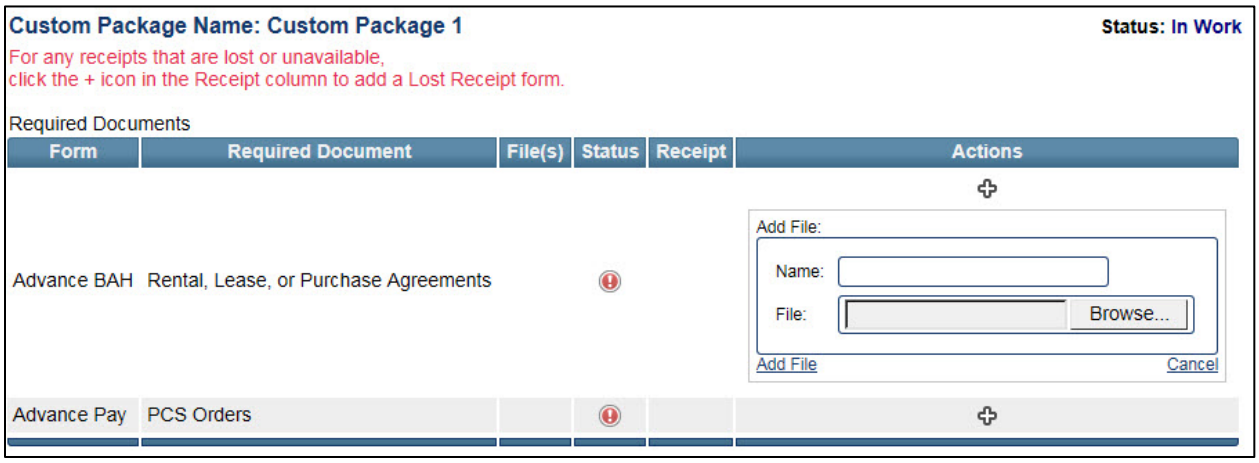
If a form has any errors, a list of the errors will display in a yellow box at the top of the screen.

4.3.3 Custom Package Required Documents

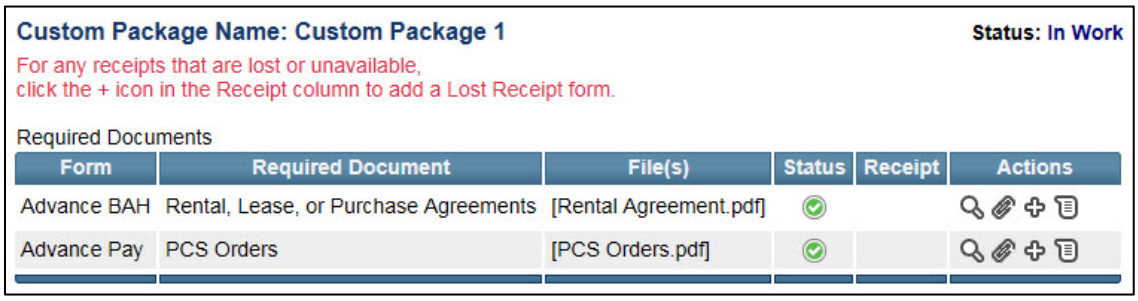
On the Required Documents screen, users can attach documents required to complete a form as well as other forms needed to complete the package. There will be a red exclamation point next to the required

documents link in the sidebar if the package has any required documents that have not been uploaded. The Required Documents table has a list of the forms and the documents that the form requires.

1. On the Custom Package screen, click the Required Documents link in the sidebar to open the Required Documents screen.
2. In the Required Documents Table, select the Add icon under the Actions column to add a document:
   a. Enter a File Name in the Name field.
   b. Click the Browse button to browse to the file.



   c. Click Add File to add the file to the form and change the status to a checkmark or click Cancel.



Note

The + icon displays in the receipt column when a form that requires a receipt is attached to the package.

3. (Optional) After you successfully add a file, the Actions column for the form displays four icons that enable you to perform the following functions:
   - Click the View/Download File icon to download the attached file and view it.
   - Click the Un-assign Files icon to remove the document(s) from the form and place them in the Unassigned Documents list.
   - Click the Add Another File icon to add additional files to the form.
   - Click the Rename File icon to change the name of the file.

- Click the Rotate file icon to rotate a file 180 degrees (applies to image files only)

Note

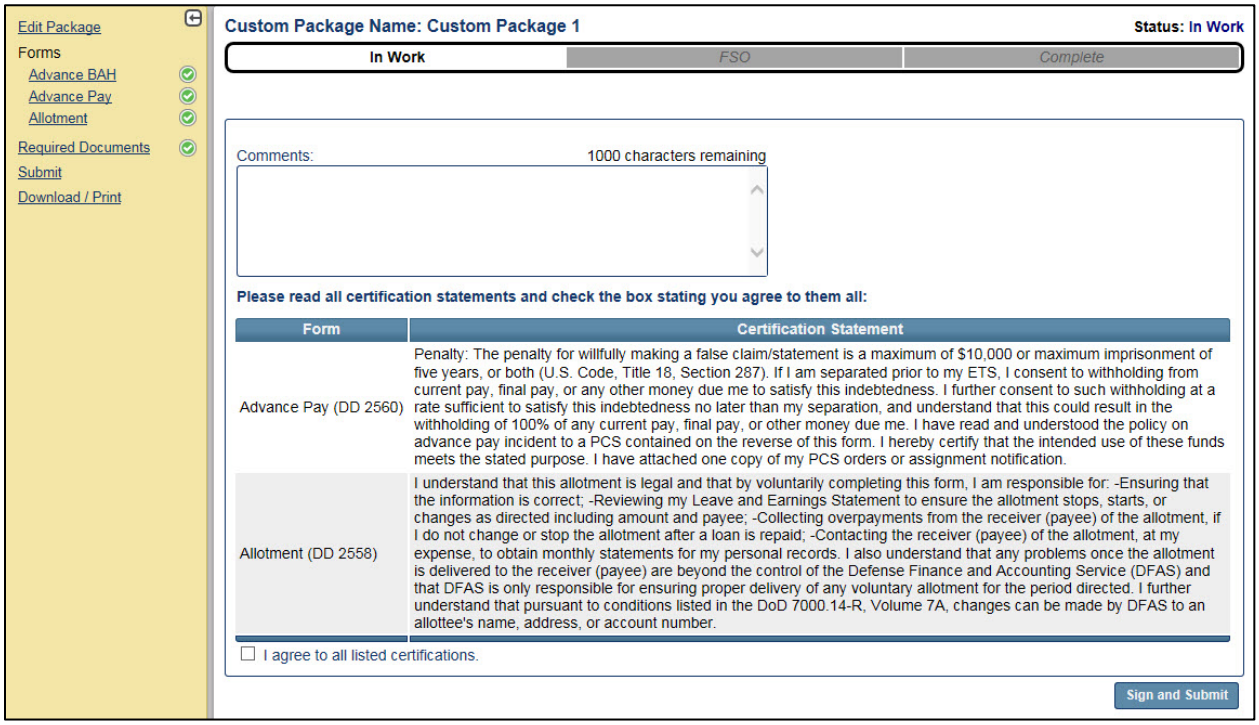
The documents and images must be one of the following file types: PDF, PNG, BMP, JPG, GIF, or TIF.

4. (Optional) Attach Package Level, Unassigned, or Personal files. See Chapter 6 Attach Additional Documents to Package or Forms for more information.

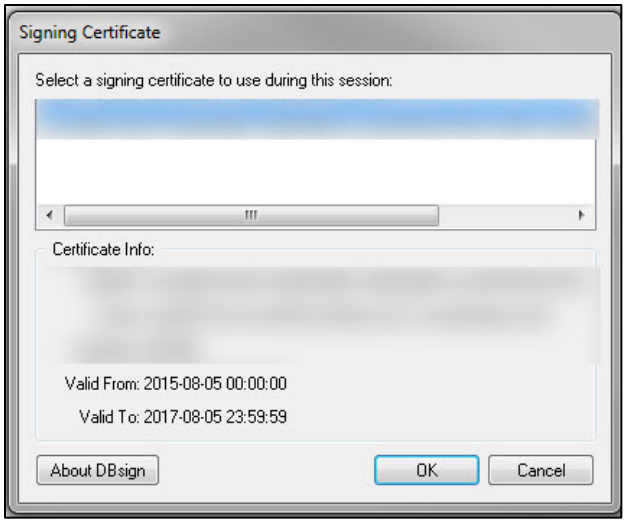
4.3.4 Submit Custom Package

Once the package is complete, denoted by a green checkmark next to all forms and the required documents link, the package can be submitted.

1. Click the Submit link in the sidebar. The package status at the top of the screen is In Work.



2. Enter comments in the Comments field if applicable.
3. If there is a form in the package that requires certification. Check the “I agree to all listed certifications” checkbox.
4. Click the Sign and Submit button. A dialog opens with the statement “Are you sure you want to sign and submit this package?”
5. Click OK to continue. The DBSign dialog displays.
6. Select a certificate and click OK.



The package is sent for approval to the FSO. See Chapter 7 Package and Form Approval Process for additional information.

Note

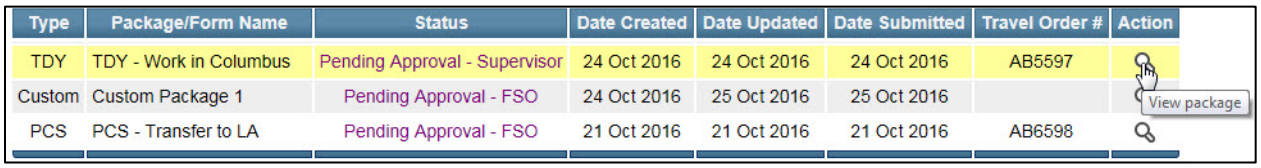
Users can check the status of the package in their inbox (see Chapter 2 eFinance Inbox).

After the package has been submitted once, a work history table displays that lists the date of the action, the user that performed the action, and the event. Any remarks put in by any approving official will be in the remarks column.

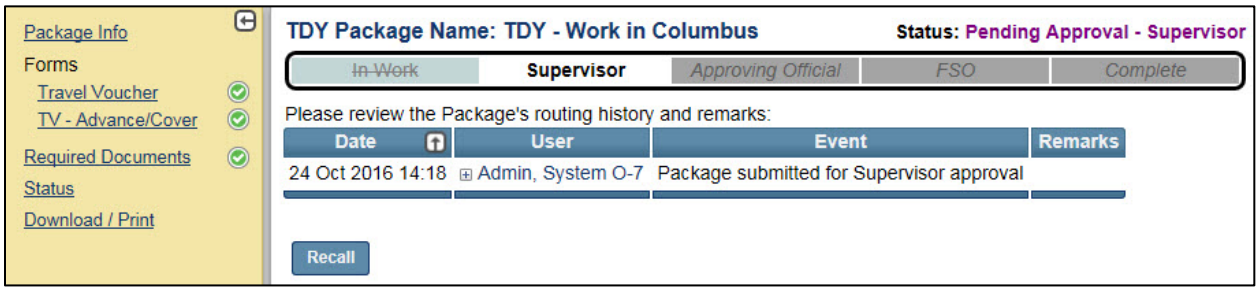
4.4 Recall Package

Users can recall a package after it is submitted and before the FSO approves it. If another AO must approve the package before it is sent to the FSO the package can still be recalled at that point.

1. In the Inbox, select the view package icon.



2. Click the Status link in the sidebar.

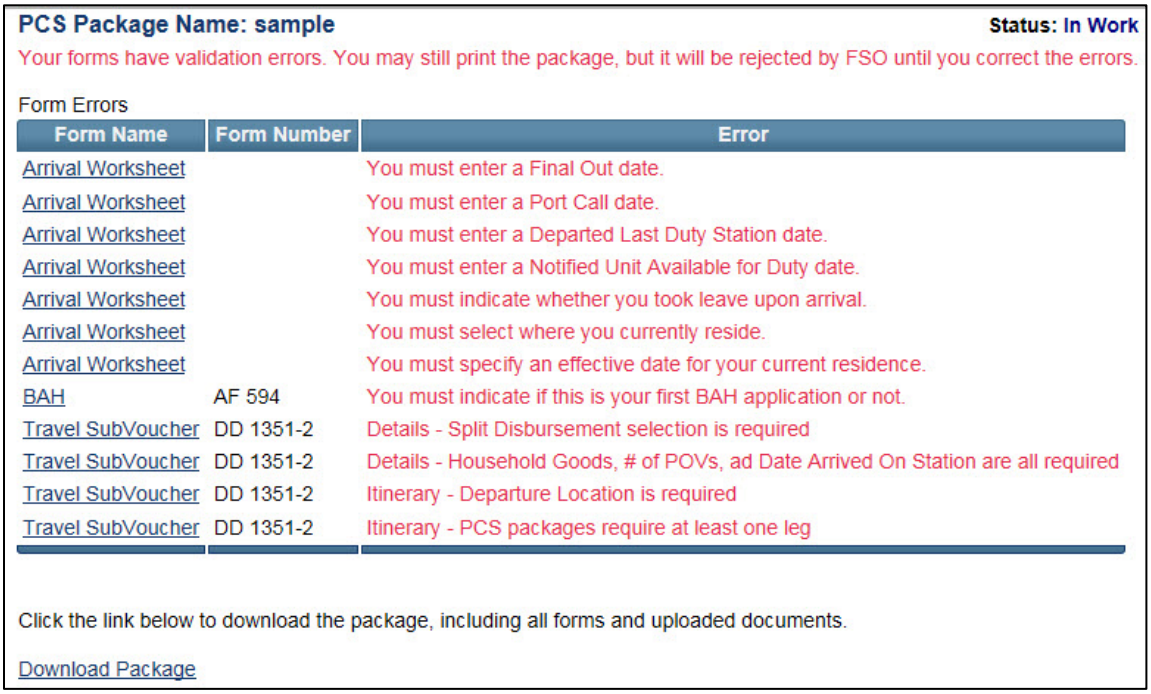


3. Click the Recall button. A dialog displays with the statement “Are you sure you want to recall this item?” Click OK to recall. The user can then edit the package.

4.5 Download/Print Package

The Download/Print Package screen enables users to print packages at any point before the package is approved by the FSO. Users can print all pages of the package and fill it out manually instead of electronically or complete the package electronically and print the completed package for signature. When the user prints the package before it is submitted the screen will include a list of errors.

1. On the Package screen, click the Download/Print link in the sidebar. A screen with a download link displays.



PCS Package Name: sample **Status: In Work**

Your forms have validation errors. You may still print the package, but it will be rejected by FSO until you correct the errors.

Form Errors

Form Name	Form Number	Error
Arrival Worksheet		You must enter a Final Out date.
Arrival Worksheet		You must enter a Port Call date.
Arrival Worksheet		You must enter a Departed Last Duty Station date.
Arrival Worksheet		You must enter a Notified Unit Available for Duty date.
Arrival Worksheet		You must indicate whether you took leave upon arrival.
Arrival Worksheet		You must select where you currently reside.
Arrival Worksheet		You must specify an effective date for your current residence.
BAH	AF 594	You must indicate if this is your first BAH application or not.
Travel SubVoucher	DD 1351-2	Details - Split Disbursement selection is required
Travel SubVoucher	DD 1351-2	Details - Household Goods, # of POVs, ad Date Arrived On Station are all required
Travel SubVoucher	DD 1351-2	Itinerary - Departure Location is required
Travel SubVoucher	DD 1351-2	Itinerary - PCS packages require at least one leg

Click the link below to download the package, including all forms and uploaded documents.

Download Package

2. Click the Download Package link.

Chapter 5 Create Forms

The Forms screen enables users to create a standalone form that can be completed in eFinance or downloaded, printed, and completed manually. Users can also create a custom package (see Section 4.3 Create Custom Package). Not every form is available as a standalone form; PCS and TDY packages include forms that are specifically for that package. See Appendix A Form Field Descriptions for a description of each form field. The table below provides links to each Form Field Description table for each form.

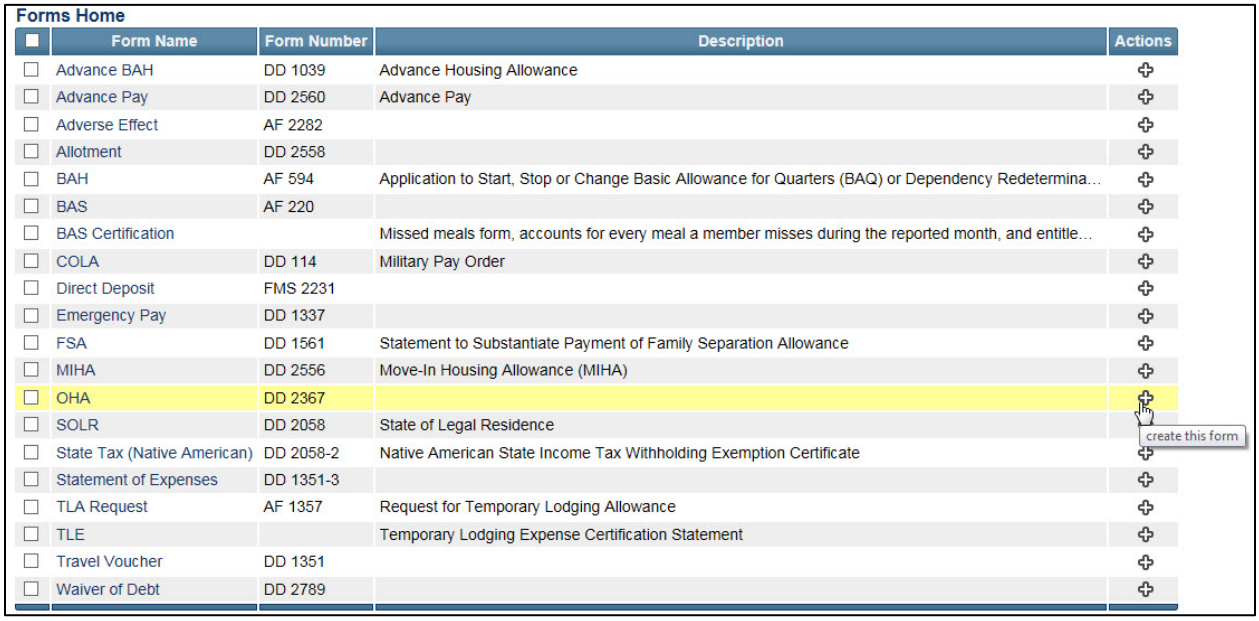
Link to Form Field Descriptions	Form Number	Description
Advance BAH	DD 1039	Used to request an advance for basic allowance for housing
Advance Pay	DD 2560	Used to request an advance of pay to meet an extraordinary-expenses incident to a PCS move
Adverse Effect	AF 2282	Used to justify using non-government lodging and mess
Allotment	DD 2558	Used to request allotments be drawn from pay for basic expenses such as housing
*Arrival Worksheet	AFFSC 01	Used to document the date of arrival at duty location
BAH	AF 594	Used to request basic allowance for housing
BAS	AF 220	Used to request Basic Allowance for Subsistence (BAS)
BAS Certification		Used to request extra payment of BAS
COLA	DD 114	Used to request supplemental Basic Allowance for Subsistence (BAS) in overseas locations or locations with a high cost of living
Direct Deposit	FMS 2231	Used to submit bank account changes for a user's travel pay
Emergency Pay	DD 1337	Used to request emergency pay
FSA	DD 1561	Used to request Family Separation Allowance when the user is separated from his or her family due to a TDY or PCS
*Lost Receipt	LR 01	Used to claim items if when there is no receipt
MIHA	DD 2556	Used to report Move-In Housing Allowance (MIHA) expenses for personnel occupying privately leased or owned quarters overseas
OHA	DD 2367	Used to request additional housing allowance to supplement BAH in overseas locations
SOLR	DD 2058	Used to change the State of Legal Residence
State Tax (Native American)	DD 2058-2	Used to provide all information needed to receive the State Tax Native American exemption
Statement of Expenses	DD 1351-3	Used to list all redeemable expenses that occurred on each date of orders
*Station Gain	DD 114	Enables FSOs to compile the necessary information about a member's package to create a form needed for manual entry into DMO.
TLA Request	AF 1357	Used to request financial assistance for temporary lodging costs

TLE	TLE 01	Used to request reimbursement of Temporary Lodging Expenses associated with a CONUS PCS
Travel Voucher	DD 1351-2	
*TV – Advance/Cover		Used to receive payment or advanced payment for certain types of travel allowances
Waiver of Debt	DD 2789	Used to allow the user to request to be relieved of repaying a debt to the government

*Not available as a standalone form.

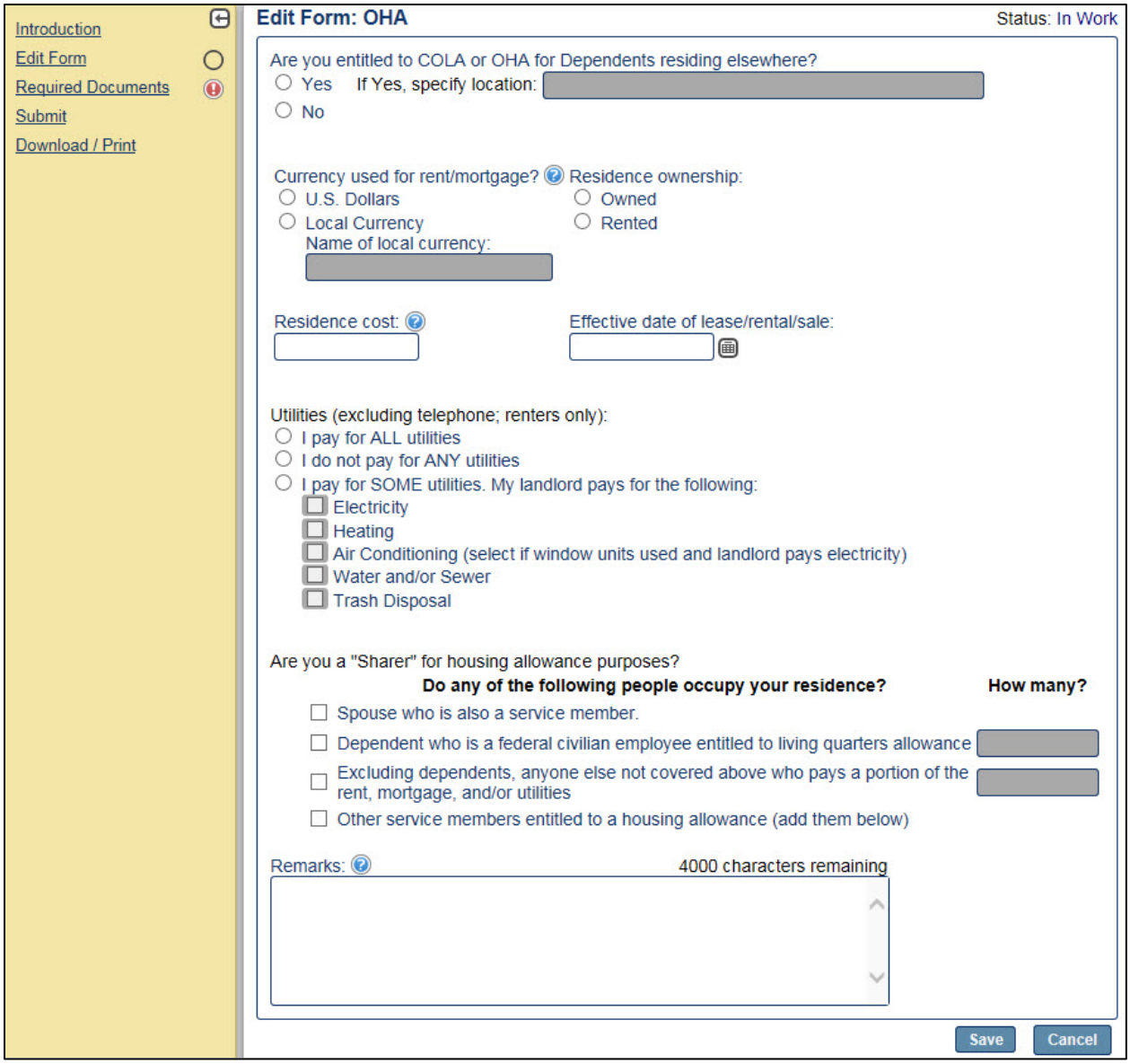
1. Click the Forms button in the header.

2. On the Forms screen, click the ✚ Create this Form icon in the Actions column next to a form name. A dialog displays with the statement "Are you sure you want to create xx Form?" Click OK.



Form Name	Form Number	Description	Actions
Advance BAH	DD 1039	Advance Housing Allowance	✚
Advance Pay	DD 2560	Advance Pay	✚
Adverse Effect	AF 2282		✚
Allotment	DD 2558		✚
BAH	AF 594	Application to Start, Stop or Change Basic Allowance for Quarters (BAQ) or Dependency Redetermina...	✚
BAS	AF 220		✚
BAS Certification		Missed meals form, accounts for every meal a member misses during the reported month, and entitle...	✚
COLA	DD 114	Military Pay Order	✚
Direct Deposit	FMS 2231		✚
Emergency Pay	DD 1337		✚
FSA	DD 1561	Statement to Substantiate Payment of Family Separation Allowance	✚
MIHA	DD 2556	Move-In Housing Allowance (MIHA)	✚
OHA	DD 2367		✚
SOLR	DD 2058	State of Legal Residence	
State Tax (Native American)	DD 2058-2	Native American State Income Tax Withholding Exemption Certificate	✚
Statement of Expenses	DD 1351-3		✚
TLA Request	AF 1357	Request for Temporary Lodging Allowance	✚
TLE		Temporary Lodging Expense Certification Statement	✚
Travel Voucher	DD 1351		✚
Waiver of Debt	DD 2789		✚

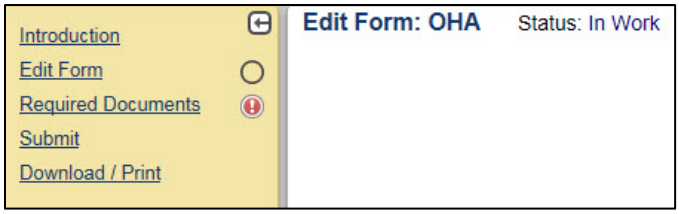
The Edit Form screen displays.



3. To complete the form, click the links in the sidebar. Each link opens a screen that requires additional information to complete the form. The following sections provide detailed information about each sidebar link:
   - Section 5.1 Introduction
   - Section 5.2 Edit Form
   - Section 5.3 Required Documents
   - Section 5.4 Submit
   - Section 5.5 Download/Print Form

5.1 Introduction

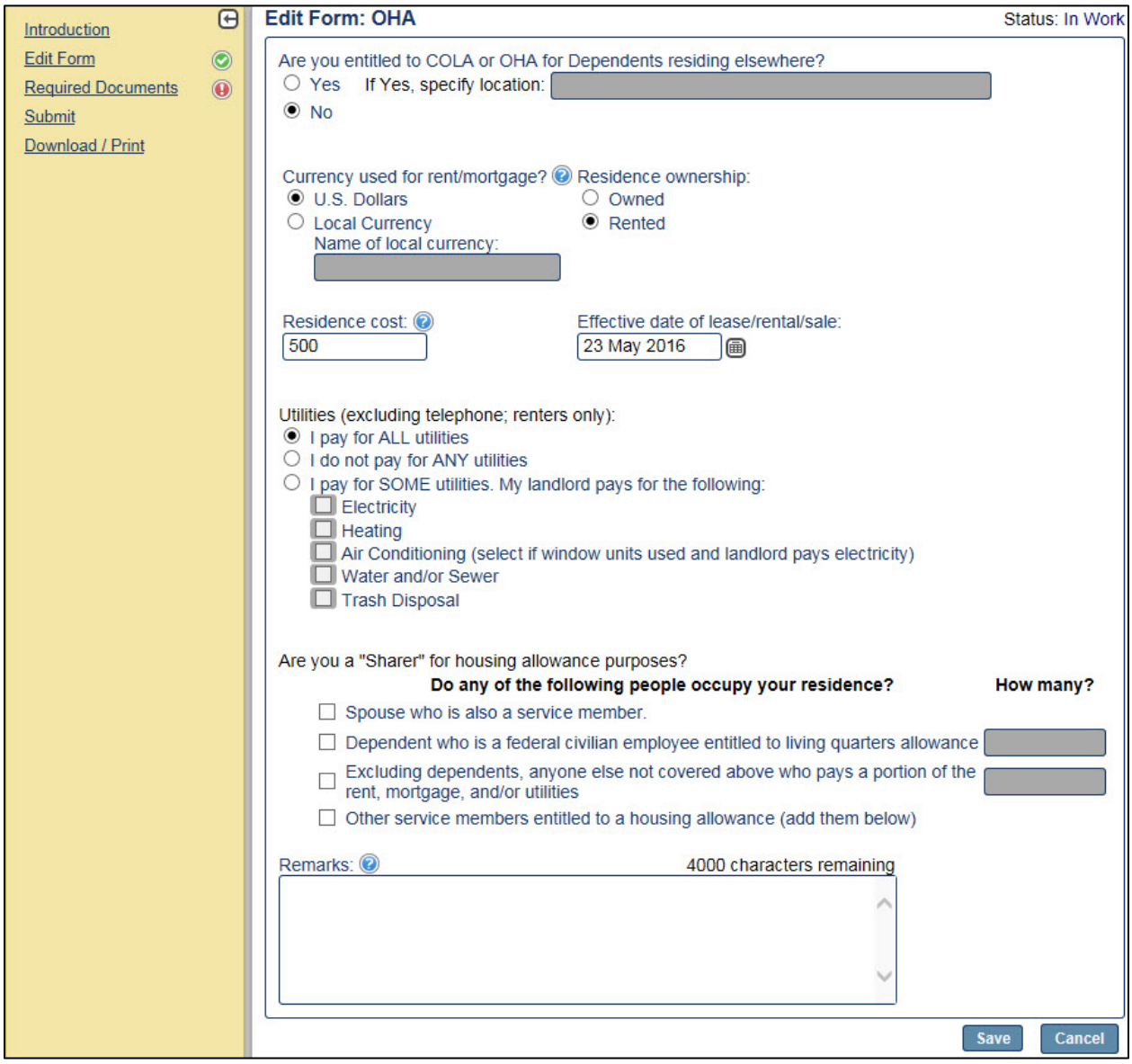
The introduction provides a description of the form and tips on how to complete the form



5.2 Edit Form

Users complete the form on the Edit Form screen.

1. The Form opens in edit mode.



2. Complete all applicable fields and click the Save button to save the edited form or click Cancel to discard the form.

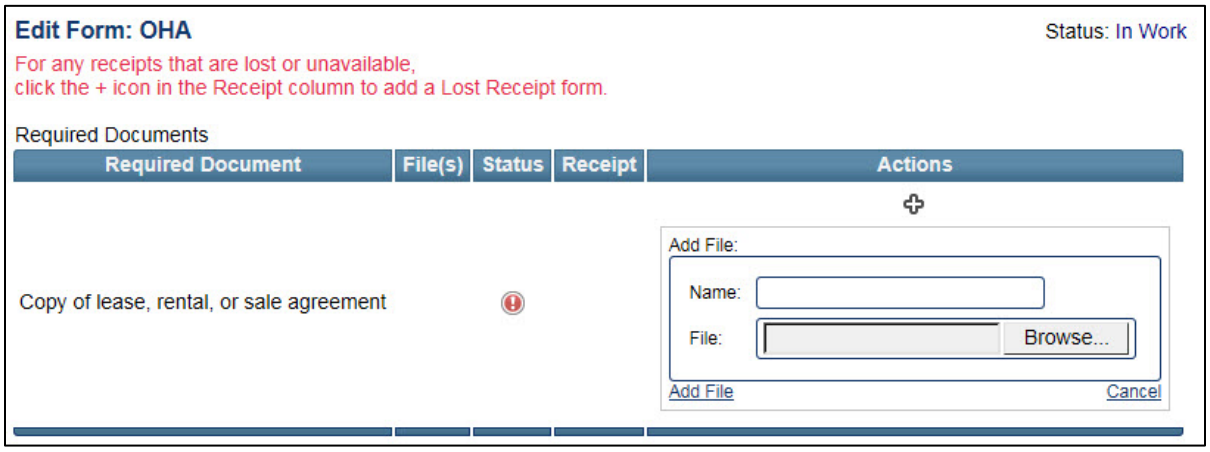
Note:

See the Appendix A to view a detailed description of each field for the form that you are completing.

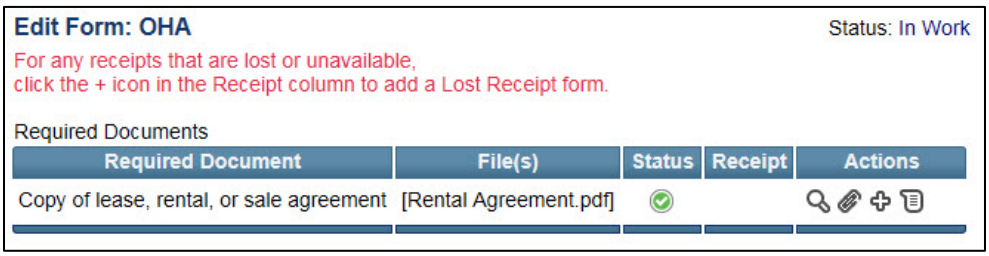
5.3 Required Documents

On the Required Documents screen, users can attach documents required to complete a form as well as other forms needed to complete the package. There will be a red exclamation point next to the required documents link in the sidebar if the package has any required documents that have not been uploaded. The Required Documents table has a list of the forms and the documents that the form requires.

1. On the Form screen, click the Required Documents link in the sidebar to open the Required Documents screen.
2. In the Required Documents Table, select the Add icon under the Actions column to add a document:
   a. Enter a File Name in the Name field.
   b. Click the Browse button to browse to the file.



   c. Click Add File to add the file to the form and change the status to a checkmark or click Cancel.



Note

The + icon displays in the receipt column when a form that requires a receipt is attached to the package.

3. (Optional) After you successfully add a file, the Actions column for the form displays four icons that enable you to perform the following functions:
   - Click the View/Download File icon to download the attached file and view it.

- Click the Un-assign Files icon to remove the document(s) from the form and place them in the Unassigned Documents list.
- Click the Add Another File icon to add additional files to the form.
- Click the Rename File icon to change the name of the file.
- Click the Rotate file icon to rotate a file 180 degrees (applies to image files only)

Note

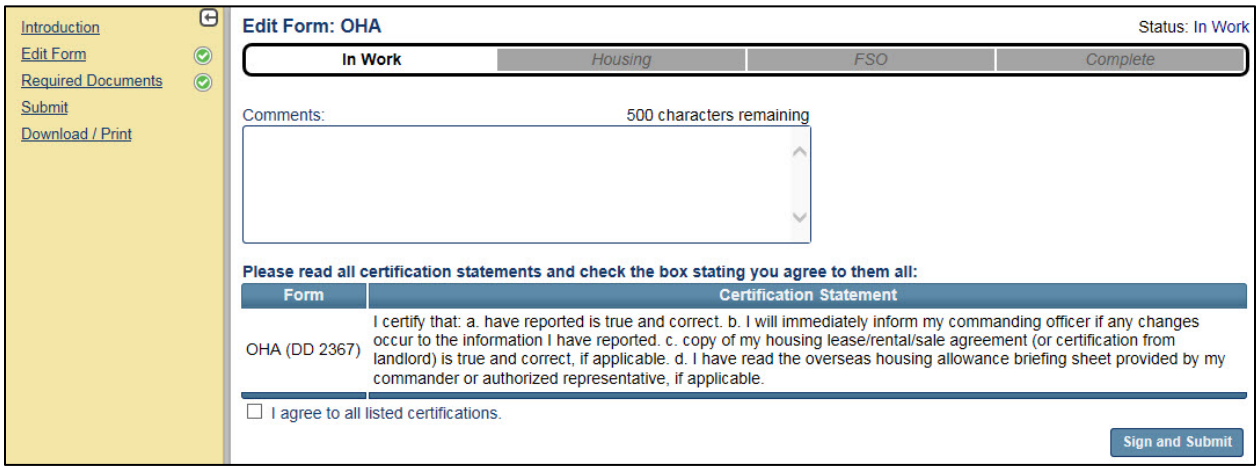
The documents and images must be one of the following file types: PDF, PNG, BMP, JPG, GIF, or TIF.

4. (Optional) Attach Package Level, Unassigned, or Personal files and Fax documents. See Chapter 6 Attach Additional Documents to Package for more information.

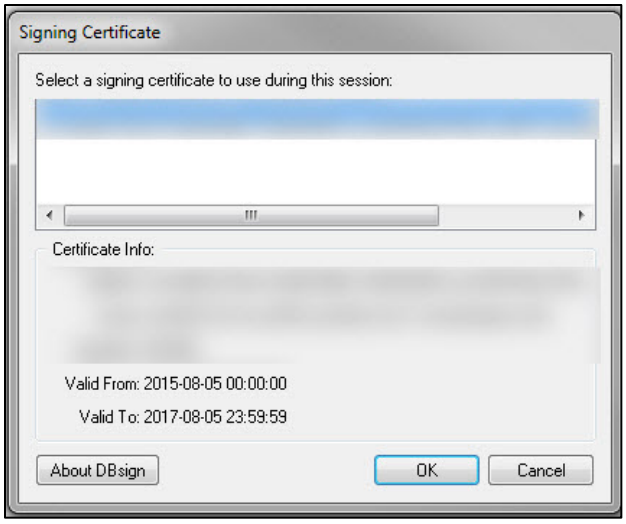
5.4 Submit Form

Once the form is complete, denoted by a green checkmark next the Edit Form and Required Documents link, the form can be submitted.

1. Click the Submit link in the sidebar. The package status at the top of the screen is In Work.



2. Enter comments in the Comments field if applicable.
3. If there is a form in the package that requires certification. Check the “I agree to all listed certifications” checkbox.
4. Click the Sign and Submit button. A dialog opens with the statement “Are you sure you want to sign and submit this form?”
5. Click OK to continue. The DBSign dialog displays.
6. Select a certificate and click OK.



The form is sent for approval. See Chapter 7 Package and Form Approval Process for additional information.

Note

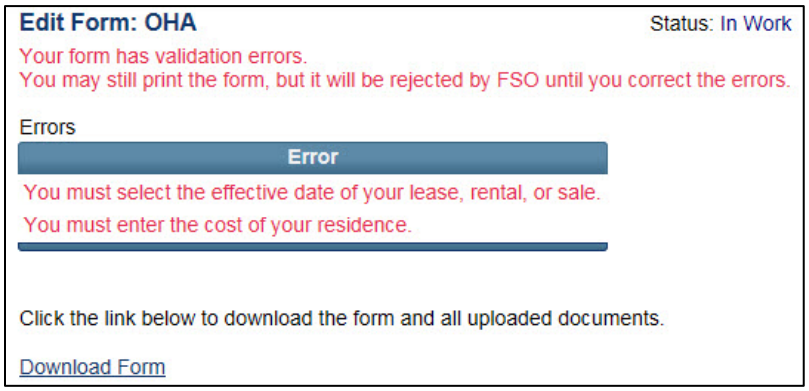
Users can check the status of the form in their Inbox (see Chapter 3 eFinance Inbox).

After the form has been submitted, a work history table displays that details the user that performed the action, the date of the action, and what the user did. Any remarks put in by any approving officials will be in the remarks column.

5.5 Download/Print Form

The Download/Print form screen enables users to print forms at any point before the form is submitted for approval. Users can print all pages of the form and fill it out manually instead of electronically or complete the form electronically and print the completed form for signature.

1. On the Package screen, click the Download/Print link in the sidebar. A screen with a download link displays.

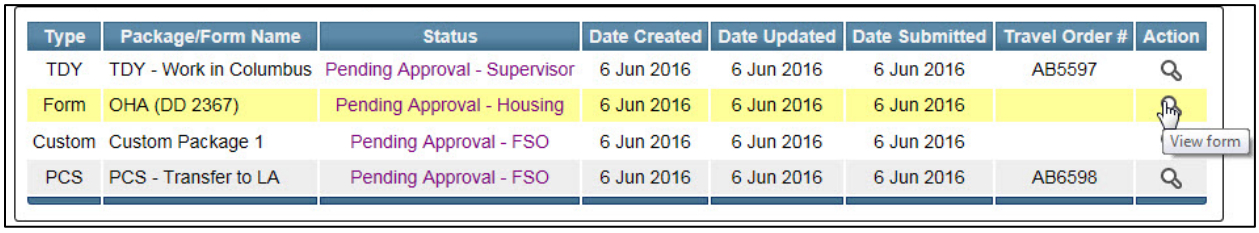


2. Click the Download/Print link to download the form.

5.6 Recall Form

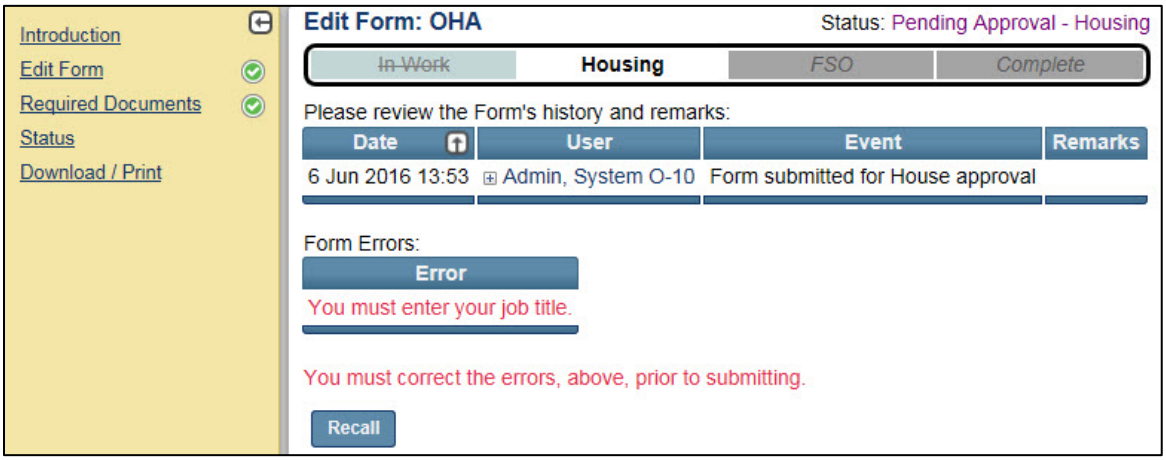
Users can recall a form after it is submitted and before the FSO approves it. If another AO must approve the form before it is sent to the FSO the form can still be recalled at that point.

1. In the Inbox, select the View Form icon.



Type	Package/Form Name	Status	Date Created	Date Updated	Date Submitted	Travel Order #	Action
TDY	TDY - Work in Columbus	Pending Approval - Supervisor	6 Jun 2016	6 Jun 2016	6 Jun 2016	AB5597	
Form	OHA (DD 2367)	Pending Approval - Housing	6 Jun 2016	6 Jun 2016	6 Jun 2016		
Custom	Custom Package 1	Pending Approval - FSO	6 Jun 2016	6 Jun 2016	6 Jun 2016		
PCS	PCS - Transfer to LA	Pending Approval - FSO	6 Jun 2016	6 Jun 2016	6 Jun 2016	AB6598	

2. Click the Status link in the sidebar.



3. Click the Recall button. A dialog displays with the statement "Are you sure you want to recall this item?" Click OK to recall.

Chapter 6 Attach Additional Documents to Packages and Forms

eFinance enables users to attach Package/Form Level, Unassigned, and Personal files to packages and forms. Users can also attach documents by fax.

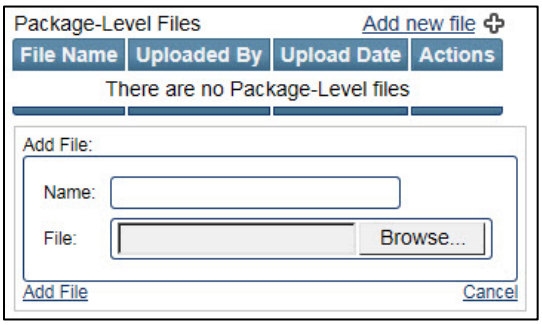
Note

The documents and images must be one of the following file types: PDF, PNG, BMP, JPG, GIF, or TIF.

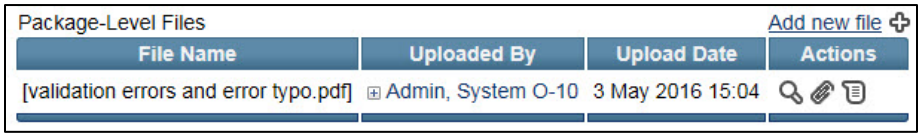
6.1 Package/Form Level Files

The Package/Form Level Files table includes any additional documents that the user wants to attach to the package or form. An approving authority can also add files to a user's package during the approval process. The table lists the file name, the name of the person who uploaded the file, and an upload date.

1. Click the Required Documents link in the sidebar of the package or form being worked to open the Required Documents screen.
2. Click the Add new file link above the Package/Form Level Files table to open the Add File section.
3. Enter the name of the file.
4. Click the Browse button to browse to the file.



5. Click the Add File link to add the file or click Cancel.
6. (Optional) After you successfully add a file, the Actions column for the form displays three icons that enable you to perform the following functions:
   - Click the View/Download File icon to download the attached file and view it.
   - Click the Un-assign Files icon to remove the document(s) from the form and place them in the Unassigned Documents list.
   - Click the Rename File icon to change the name of the file.
   - Click the Rotate file icon to rotate file 180 degrees (applies to image files only).



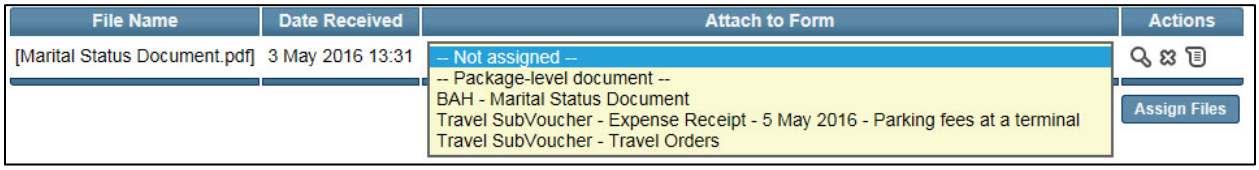
6.2 Unassigned Files

The Unassigned Files table includes any documents that were uploaded and removed from a form or faxed in to eFinance and have not yet been attached to a form or to the package itself. The table includes the file name, date the file was received, and a dropdown that has list of package level documents from which to choose a document to attach to a form.

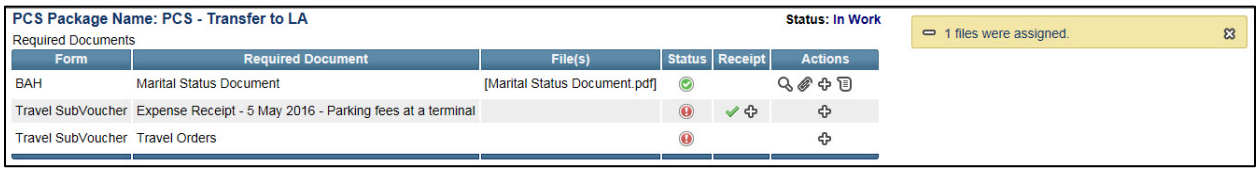
Note:

All files must be assigned before the package or form can be submitted.

1. Click the Required Documents link in the sidebar of the package or form being worked to open the Required Documents screen.
2. In the Unassigned Files table, select a form from the Attach to Document dropdown.



3. Click the Assign Files button. The Selected file is attached to the form and added to the Required Documents table.

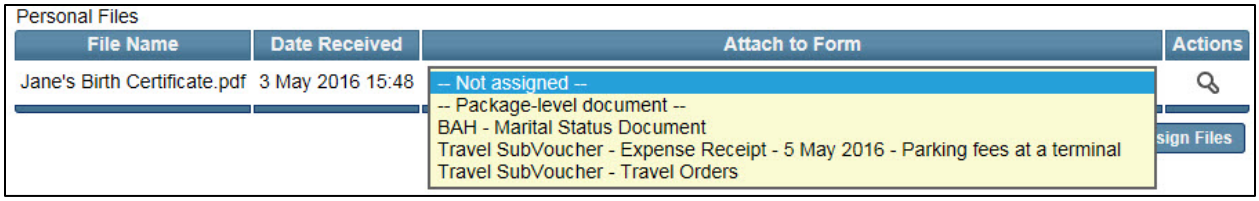


4. (Optional) The Actions column for the file displays three icons that enable you to perform the following functions for any files that are in the Unassigned File table:
   - Click the View/Download File icon to download the attached file and view it.
   - Click the Un-assign Files icon to remove the document(s) from the form and place them in the Unassigned Documents list.
   - Click the Rename File icon to change the name of the file.
   - Click the Rotate file icon to rotate file 180 degrees (applies to image files only).

6.3 Personal Files

The Personal Files table includes any documents that the user has added to their profile. The table includes the file name, date the file was received, and a dropdown that has list of package level documents from which to choose a document to attach to a form.

1. Click the Required Documents link in the sidebar of the package or form being worked to open the Required Documents screen.
2. In the Personal Files table, select a document from the Attach to Document dropdown.



3. Click the Assign Files button. The Selected file moves to the Required Documents table.
4. (Optional) The Actions column for the file includes a View/Download File icon. Click the icon to view or download files in the table.

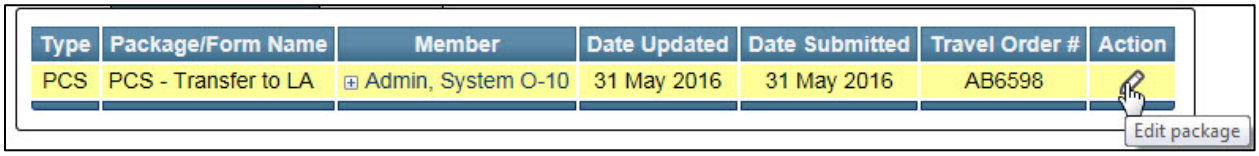
Chapter 7 Package and Form Approval Process

After a PCS, TDY, Custom package, or form has been submitted, it must be approved before it can be marked as complete. The approval process for forms and packages is detailed in the sections below.

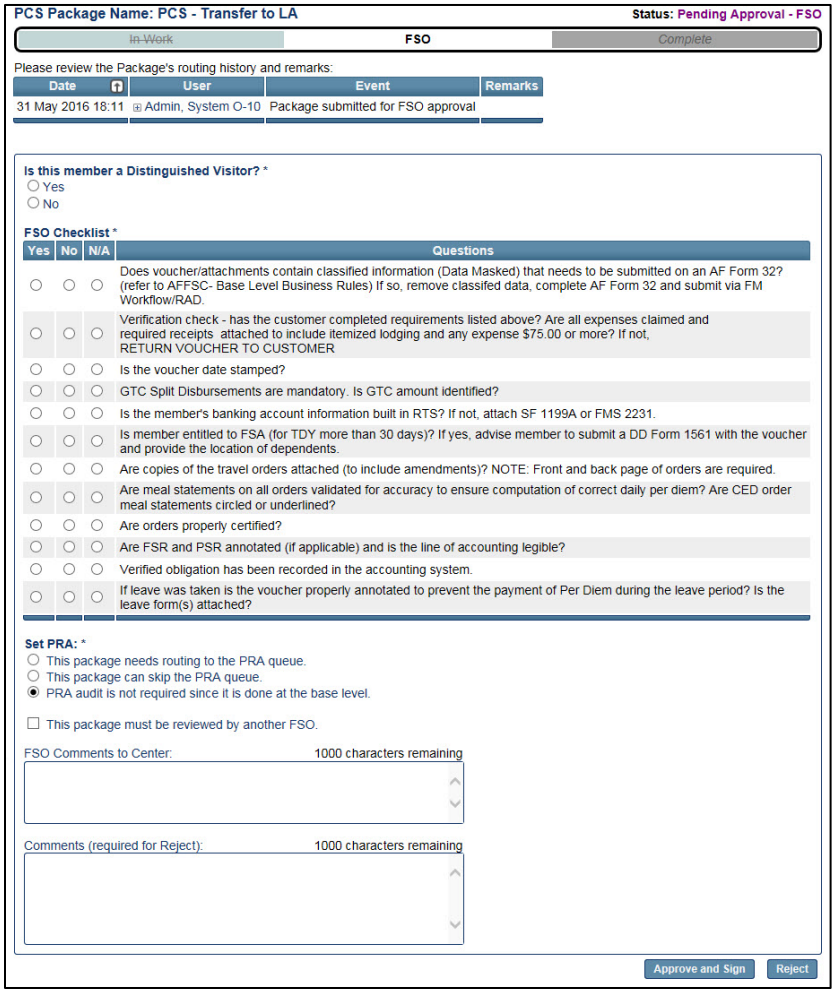
7.1 PCS

Once a user submits a PCS package for approval, the package is sent to the FSO's inbox to be reviewed. The FSO can reject the package or approve it. If the FSO rejects the package, the package status changes to rejected and the user is notified via email. If the package is approved, the package status changes to complete.

1. Select the Edit Package icon next to the package to be approved.



The PCS Package screen opens with the status Pending Approval – FSO.



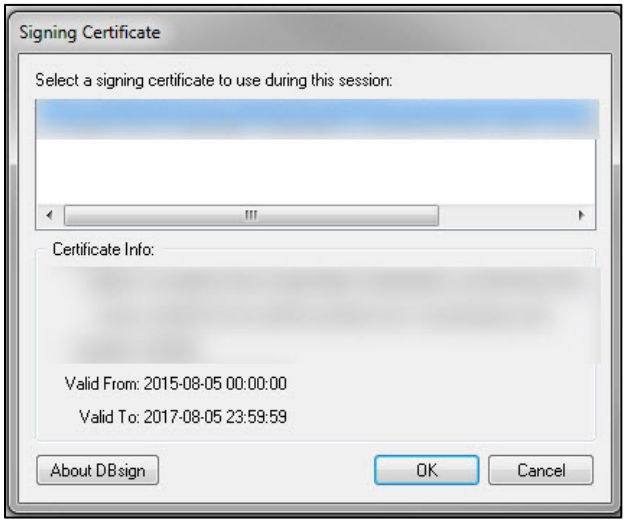
2. Complete the following fields:

a. Select yes or no to the question, “Is this member a Distinguished Visitor?”
b. Answer all questions in the FSO Checklist.
c. Set a PRA.
d. (Optional) Click the checkbox, “This package must be reviewed by another FSO” to have another FSO review the package.
e. (Optional) Enter FSO comments to center.

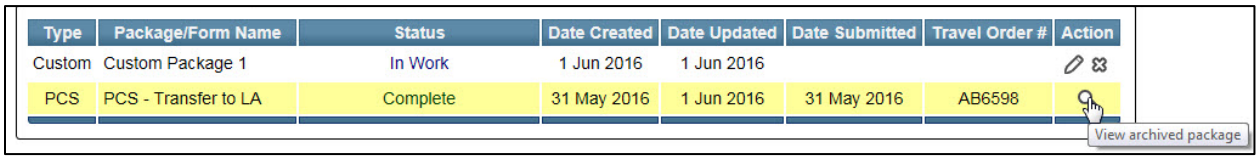
Note

FSOs have the capability to fill out fields to complete a Station Gain Form. This is only done for PCS packages. A link is available within the forms section of the sidebar when an FSO is reviewing a PCS package.

3. Click the Approve and Sign button. A dialog box opens with the statement “Are you sure you want to approve and sign this package?”
4. Click OK. The DBSign dialog box displays.
5. Choose a certificate and click OK.



The user is notified via email that the package has been approved. The package status changes to Complete in the User’s Inbox. The User can click the View Archived Package icon to download the package.



Type	Package/Form Name	Status	Date Created	Date Updated	Date Submitted	Travel Order #	Action
Custom	Custom Package 1	In Work	1 Jun 2016	1 Jun 2016			
PCS	PCS - Transfer to LA	Complete	31 May 2016	1 Jun 2016	31 May 2016	AB6598	

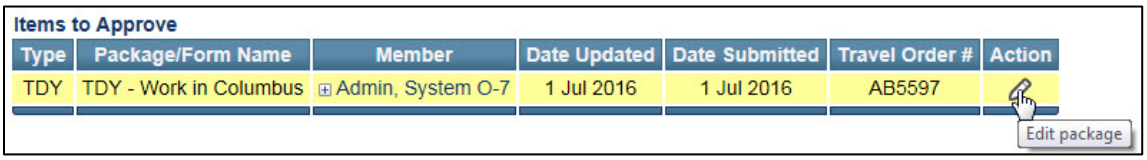
View archived package

7.2 TDY

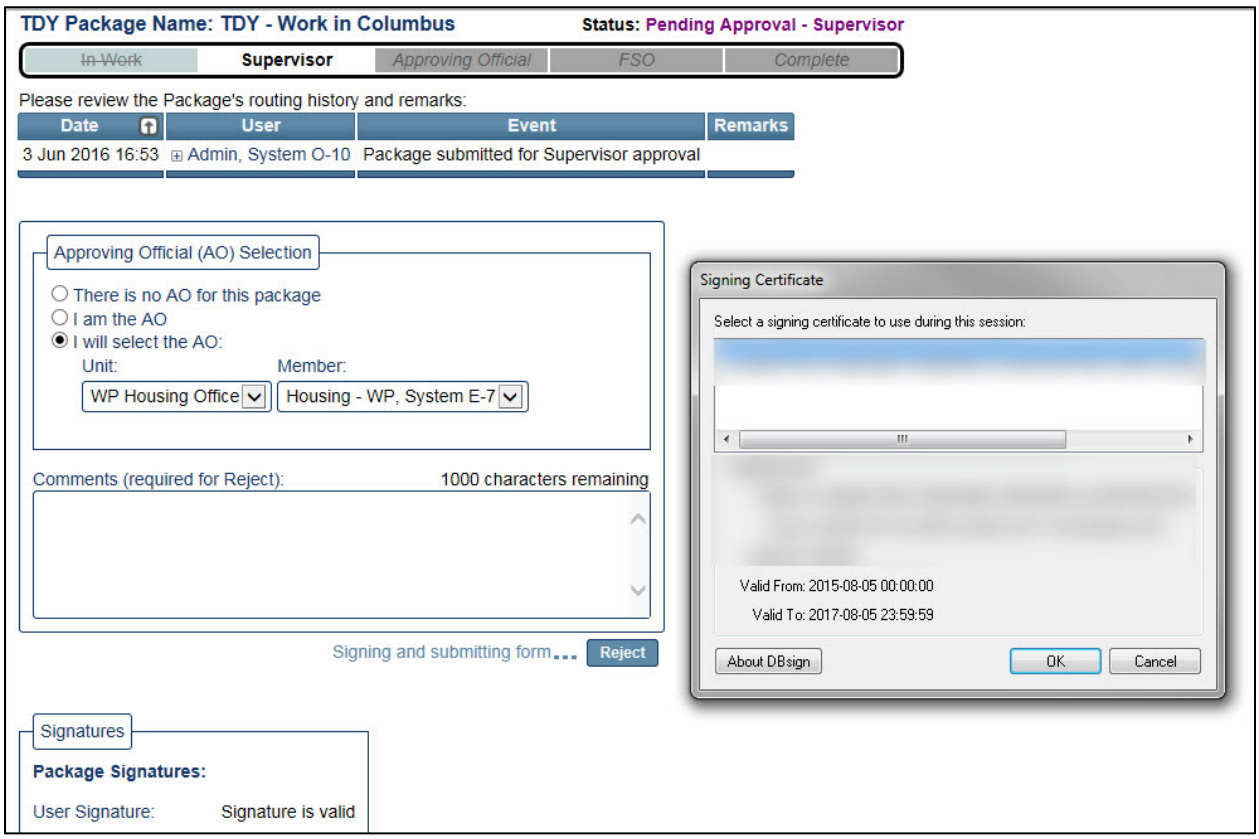
Once a user submits a TDY package for approval, the package is reviewed and approved by a supervisor and may require an approving official signature before it is sent to the FSO for final approval. The package can be rejected at any stage of approval. If the package is rejected, the package status changes to rejected and the user is notified via email. If the package is approved, the package status changes to complete.

7.2.1 Supervisor Approval

1. Select the Edit Package icon next to the package to be approved.



The TDY Package screen opens with the status Pending Approval – Supervisor.

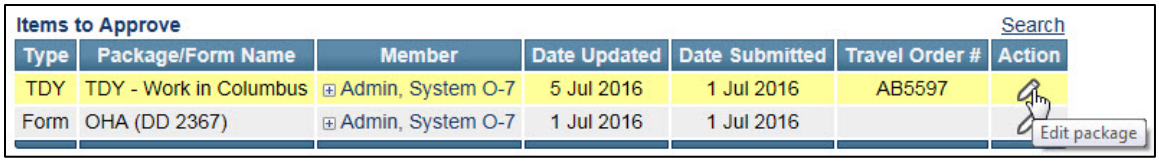


2. Select the AO and enter comments if applicable.
3. Click the Approve and Sign button. A dialog box opens with the statement "Are you sure you want to approve and sign this package?"
4. Click OK. The DBSign dialog box displays.
5. Choose a certificate and click OK.

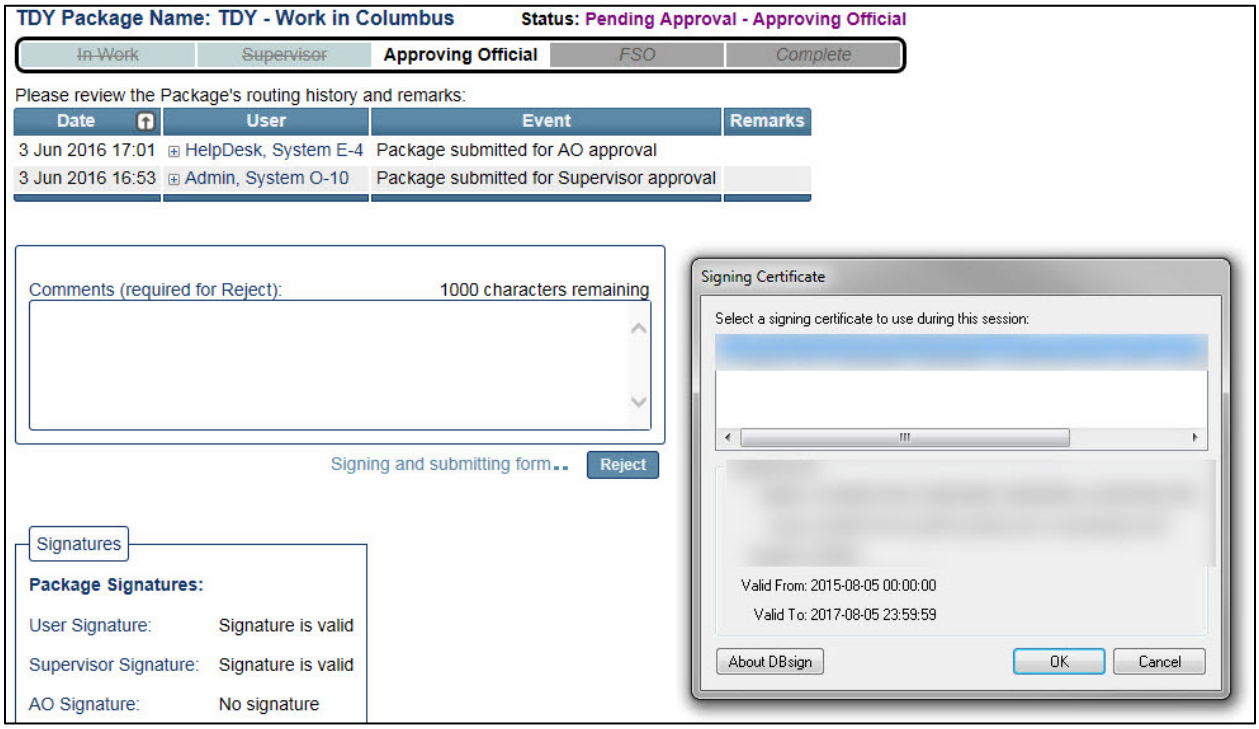
The AO is notified via email to approve/reject the package.

7.2.2 AO Approval

1. Select the Pending Approval tab in the AO's Inbox.
2. Select the Edit Package icon next to the package to be approved.



The TDY Package screen opens with the status Pending Approval – Approving Official.

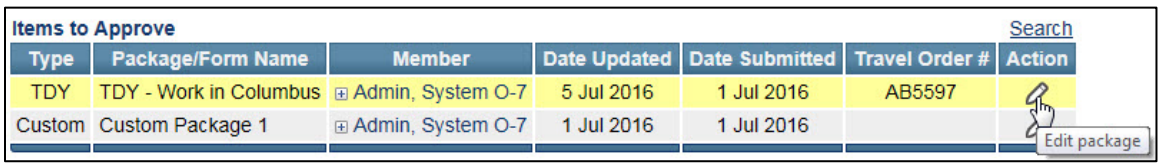


3. Enter comments if applicable.
4. Click the Approve and Sign button. A dialog box opens with the statement "Are you sure you want to approve and sign this package?"
5. Click OK. The DBSign dialog box displays.
6. Choose a certificate and click OK.

The package is sent to the FSO for approval.

7.2.3 FSO Approval

1. Select the Edit Package icon next to the package to be approved.



The TDY Package screen opens with the status Pending Approval – FSO.

TDY Package Name: TDY - Work in Columbus **Status: Pending Approval - FSO**

In Work	Supervisor	Approving Official	FSO	Complete

Please review the Package's routing history and remarks:

Date	User	Event	Remarks
3 Jun 2016 17:24	Housing - WP, System E-7	Package submitted for FSO approval	
3 Jun 2016 17:01	HelpDesk, System E-4	Package submitted for AO approval	
3 Jun 2016 16:53	Admin, System O-10	Package submitted for Supervisor approval	

Is this member a Distinguished Visitor? *
- ○ Yes
- ○ No

FSO Checklist *

Yes	No	N/A	Questions
○	○	○	Does voucher/attachments contain classified information (Data Masked) that needs to be submitted on an AF Form 32? (refer to AFFSC- Base Level Business Rules) If so, remove classifed data, complete AF Form 32 and submit via FM Workflow/RAD.
○	○	○	Verification check - has the customer completed requirements listed above? Are all expenses claimed and required receipts attached to include itemized lodging and any expense $75.00 or more? If not, RETURN VOUCHER TO CUSTOMER
○	○	○	Is the voucher date stamped?
○	○	○	GTC Split Disbursements are mandatory. Is GTC amount identified?
○	○	○	Is the member's banking account information built in RTS? If not, attach SF 1199A or FMS 2231.
○	○	○	Is member entitled to FSA (for TDY more than 30 days)? If yes, advise member to submit a DD Form 1561 with the voucher and provide the location of dependents.
○	○	○	Are copies of the travel orders attached (to include amendments)? NOTE: Front and back page of orders are required.
○	○	○	Are meal statements on all orders validated for accuracy to ensure computation of correct daily per diem? Are CED order meal statements circled or underlined?
○	○	○	Are orders properly certified?
○	○	○	Are FSR and PSR annotated (if applicable) and is the line of accounting legible?
○	○	○	Verified obligation has been recorded in the accounting system.
○	○	○	Is the PDT arrival worksheet attached and dates verified against itinerary? Has member provided current mailing address for their W-2 and a valid email address for payment/debt notification?
○	○	○	For Ret/Sep final vouchers, have DJMS, RTS and DTS been checked for outstanding debts? Ref: AFMAN 65-116V1, Para 69.14.3. If debts are found document them and include in the voucher submission to AFFSC with a screen shot from DJMS showing outstanding debt amount. The remaining debt will be collected from any amounts due the member for transportation of dependents, shipment of personal property, and separation travel (officers only).

Set PRA: *
- ○ This package needs routing to the PRA queue.
- ○ This package can skip the PRA queue.
- ◉ PRA audit is not required since it is done at the base level.

☐ This package must be reviewed by another FSO.

FSO Comments to Center: 1000 characters remaining

Comments (required for Reject): 1000 characters remaining

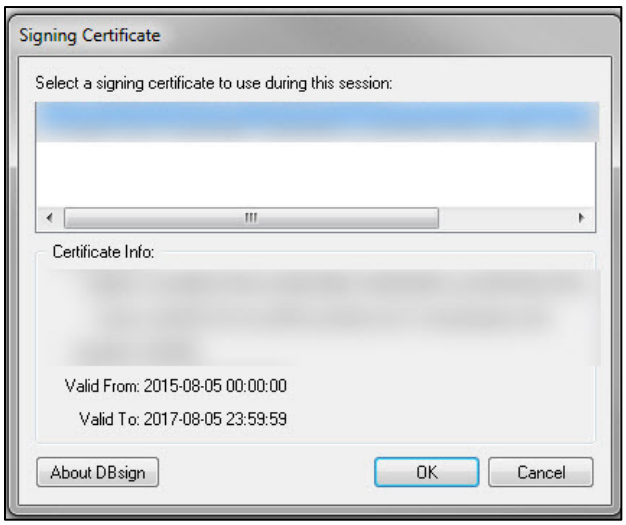
Approve and Sign | Reject

Signatures

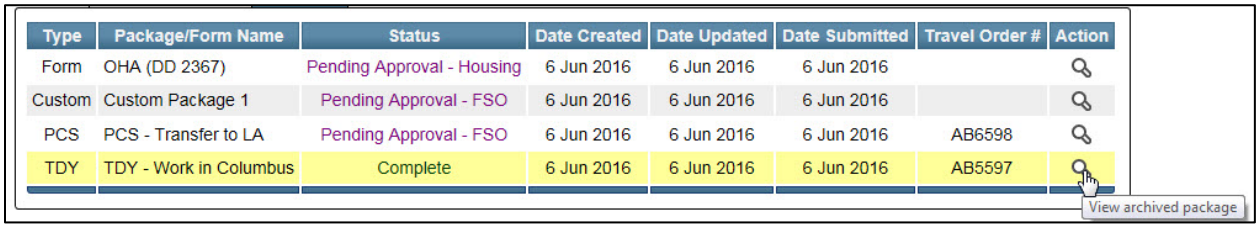
Package Signatures:

User Signature:	Signature is valid
Supervisor Signature:	Signature is valid
AO Signature:	Signature is valid

2. Complete the following fields:
   a. Select yes or no to the question, “Is this member a Distinguished Visitor?”
   b. Answer all questions in the FSO Checklist.
   c. Set a PRA.
   d. Click the checkbox, “This package must be reviewed by another FSO” to have another FSO review the package.
3. Enter FSO comments to center if applicable.
4. Click the Approve and Sign button. A dialog box opens with the statement “Are you sure you want to approve and sign this package?”
5. Click OK. The DBSign dialog box displays.
6. Choose a certificate and click OK.



The user is notified via email that the package has been approved. The package status changes to Complete in the User’s Inbox. The User can click the View archived package icon to download the package.



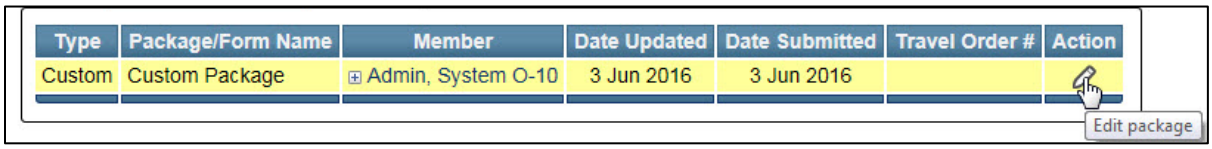
Type	Package/Form Name	Status	Date Created	Date Updated	Date Submitted	Travel Order #	Action
Form	OHA (DD 2367)	Pending Approval - Housing	6 Jun 2016	6 Jun 2016	6 Jun 2016		
Custom	Custom Package 1	Pending Approval - FSO	6 Jun 2016	6 Jun 2016	6 Jun 2016		
PCS	PCS - Transfer to LA	Pending Approval - FSO	6 Jun 2016	6 Jun 2016	6 Jun 2016	AB6598	
TDY	TDY - Work in Columbus	Complete	6 Jun 2016	6 Jun 2016	6 Jun 2016	AB5597	

7.3 Custom Package

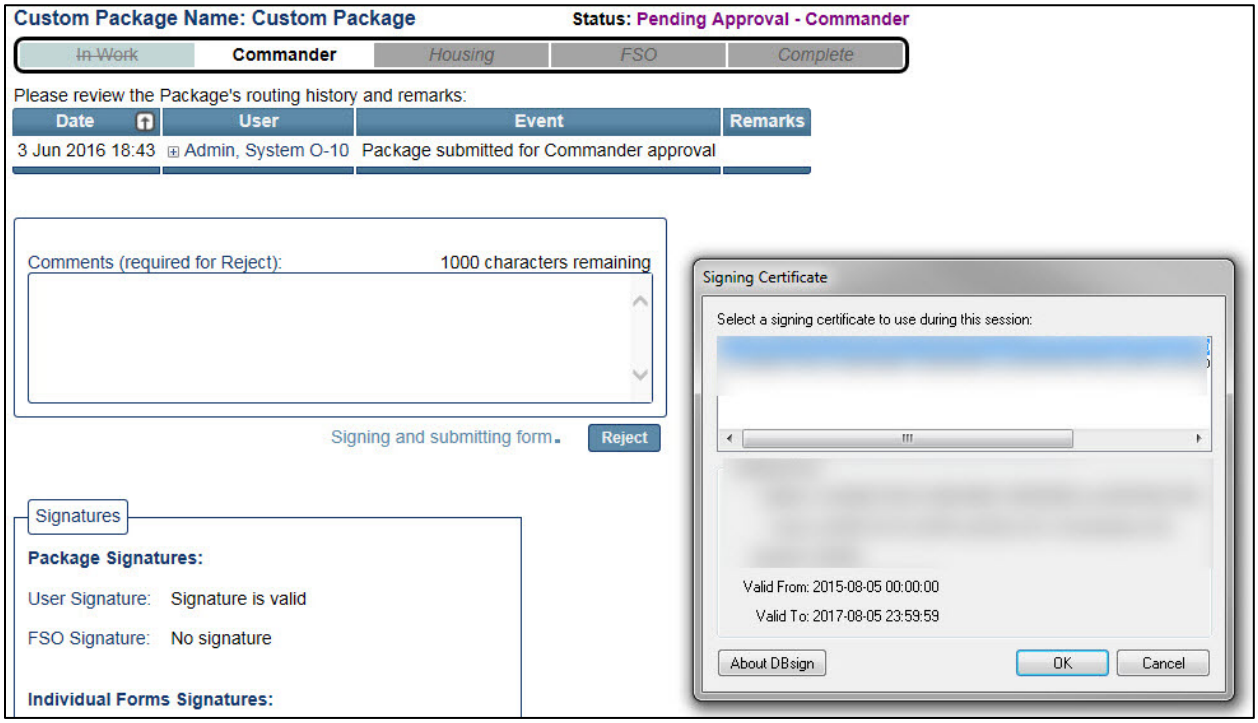
Once a user submits a Custom package for approval, it is sent to the Commander for approval if there is a form in the package that needs Commander approval. After the Commander approves the package, it is sent to Housing if there are forms relevant to its department. The package is then sent to the FSO for final approval. The package can be rejected at any stage of approval. If the package is rejected, the package status changes to rejected and the user is notified via email. If the package is approved it moves on to the next approving official. The status changes to complete after FSO approval.

7.3.1 Commander Approval

1. Select the Edit Package icon next to the package to be approved.



The Custom Package screen opens with the status Pending Approval – Commander.

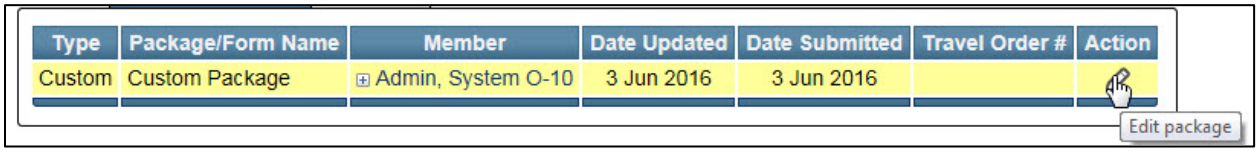


2. Enter comments if applicable.
3. Click the Approve and Sign button. A dialog box opens with the statement "Are you sure you want to approve and sign this package?"
4. Click OK. The DBSign dialog box displays.
5. Choose a certificate and click OK.

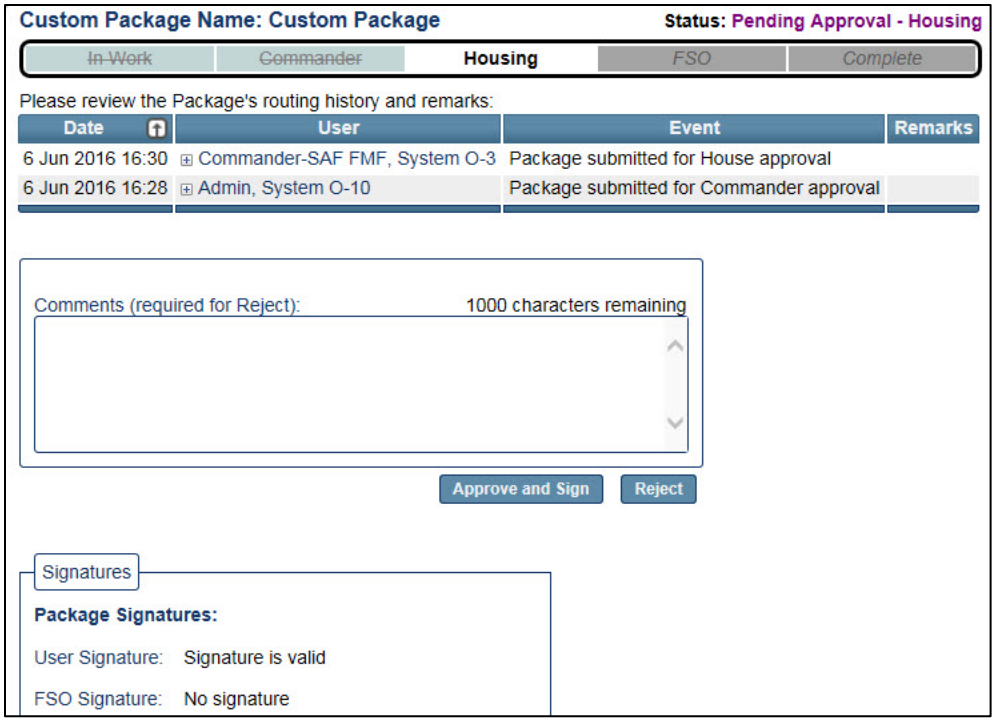
If applicable, the next AO is notified via email to approve/reject the package.

7.3.2 Housing Approval

1. Select the Edit Package icon next to the package to be approved.



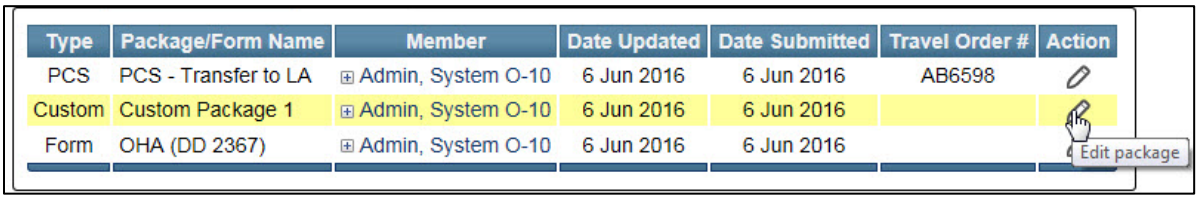
The Custom Package screen opens with the status Pending Approval – Housing.



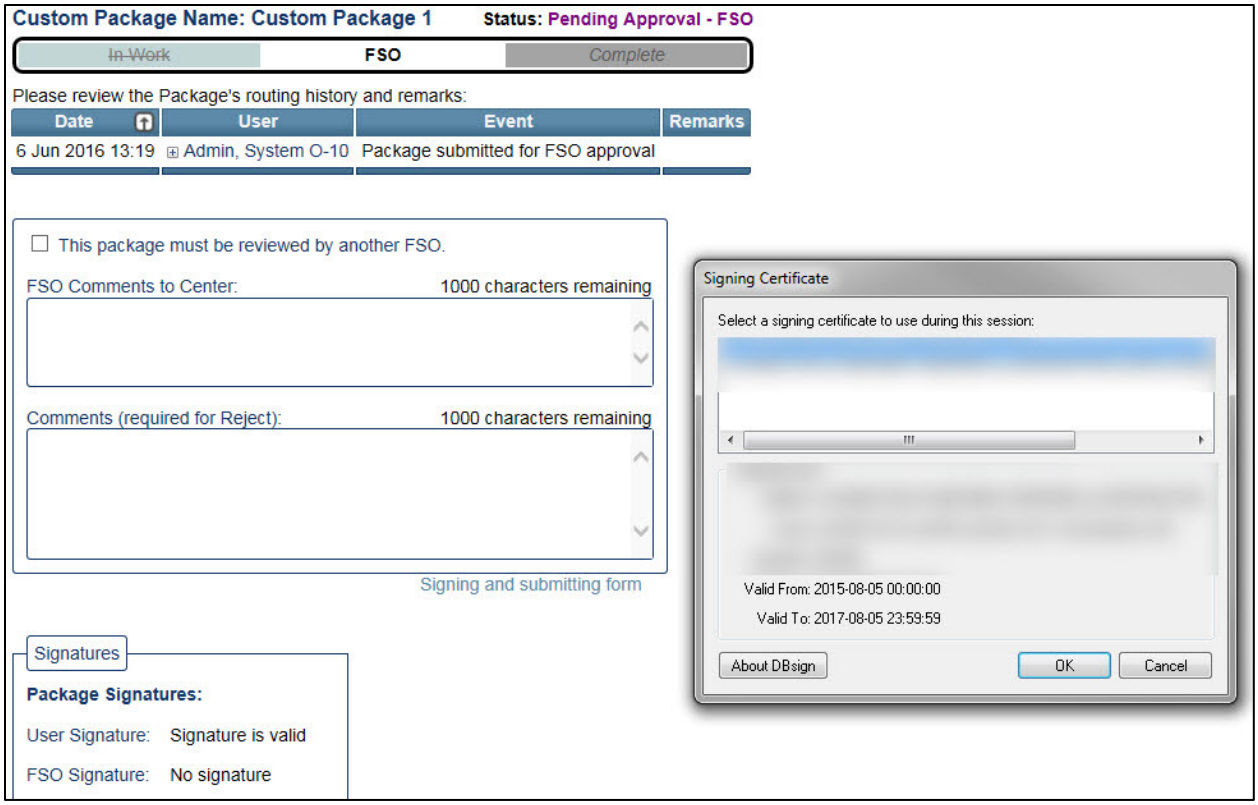
2. Enter comments if applicable.
3. Click the Approve and Sign button. A dialog box opens with the statement "Are you sure you want to approve and sign this package?"
4. Click OK. The DBSign dialog box displays.
5. Choose a certificate and click OK.

7.3.3 FSO Approval

1. Select the Edit Package icon next to the package to be approved.

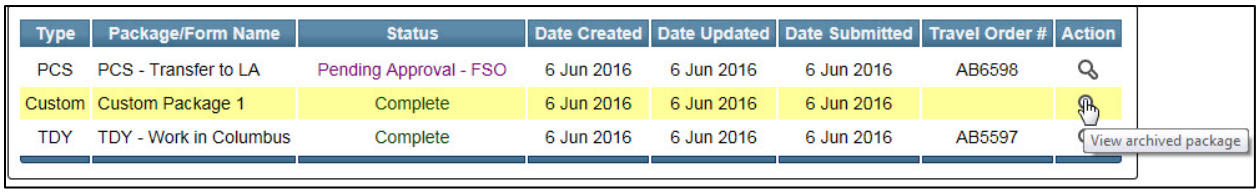


The Custom Package screen opens with the status Pending Approval – FSO.



2. (Optional) Click the checkbox, “This package must be reviewed by another FSO” to have another FSO review the package.
3. Enter FSO comments to center if applicable.
4. Enter Comments if applicable.
5. Click the Approve and Sign button. A dialog box opens with the statement “Are you sure you want to approve and sign this package?”
6. Click OK. The DBSign dialog box displays.
7. Choose a certificate and click OK.

The user is notified via email that the package has been approved. The package status changes to Complete in the User’s Inbox. The User can click the View archived package icon to download the package.



Type	Package/Form Name	Status	Date Created	Date Updated	Date Submitted	Travel Order #	Action
PCS	PCS - Transfer to LA	Pending Approval - FSO	6 Jun 2016	6 Jun 2016	6 Jun 2016	AB6598	
Custom	Custom Package 1	Complete	6 Jun 2016	6 Jun 2016	6 Jun 2016		
TDY	TDY - Work in Columbus	Complete	6 Jun 2016	6 Jun 2016	6 Jun 2016	AB5597	

View archived package

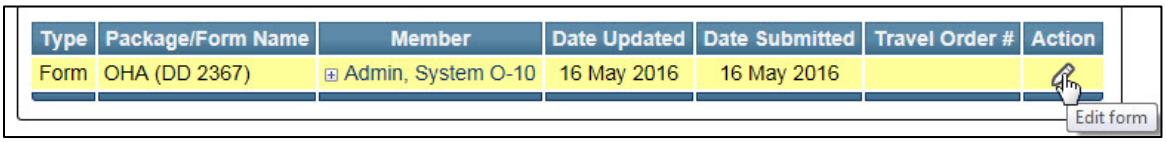
7.4 Form Approval

Once a user submits a Form for approval, the form is reviewed and approved by the FSO for final approval. Certain forms may also have to be reviewed and approved by the Commander or Housing (see table below). The form can be rejected at any stage of approval. If the form is rejected, the form status changes to rejected and the user is notified via email. If the form is approved, the form status changes to complete.

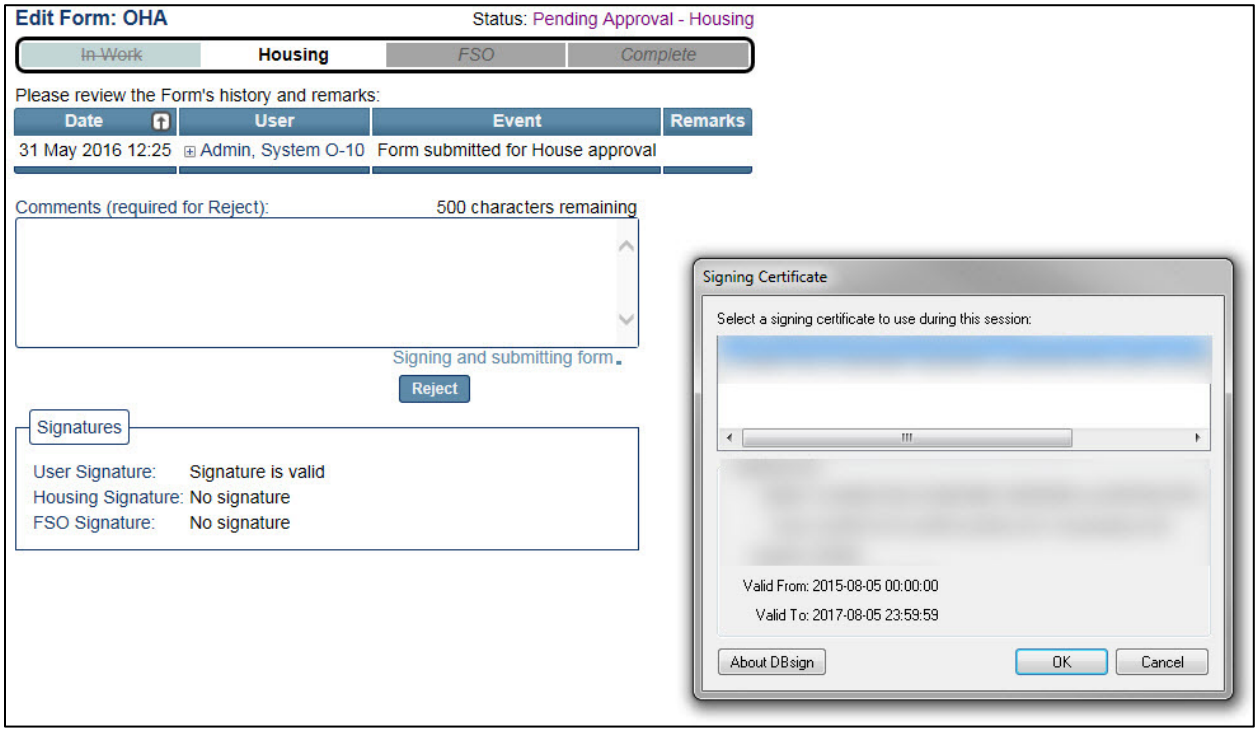
Form Name	Approving Official
Advance BAH	Commander
Advance Pay	Commander
BAS	Commander
MIHA	Housing
OHA	Housing
TLA Request	Housing
Waiver of Debt	Commander

7.4.1 Housing Approval

1. Select the Edit Form icon next to the form to be approved.



The Form screen opens with the status Pending Approval – Housing.

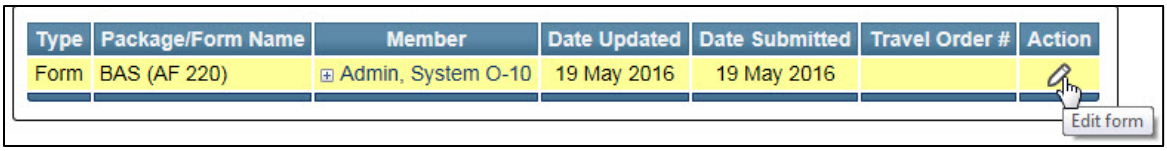


2. Enter comments if applicable.
3. Click the Approve and Sign button. A dialog box opens with the statement “Are you sure you want to approve and sign this package?”

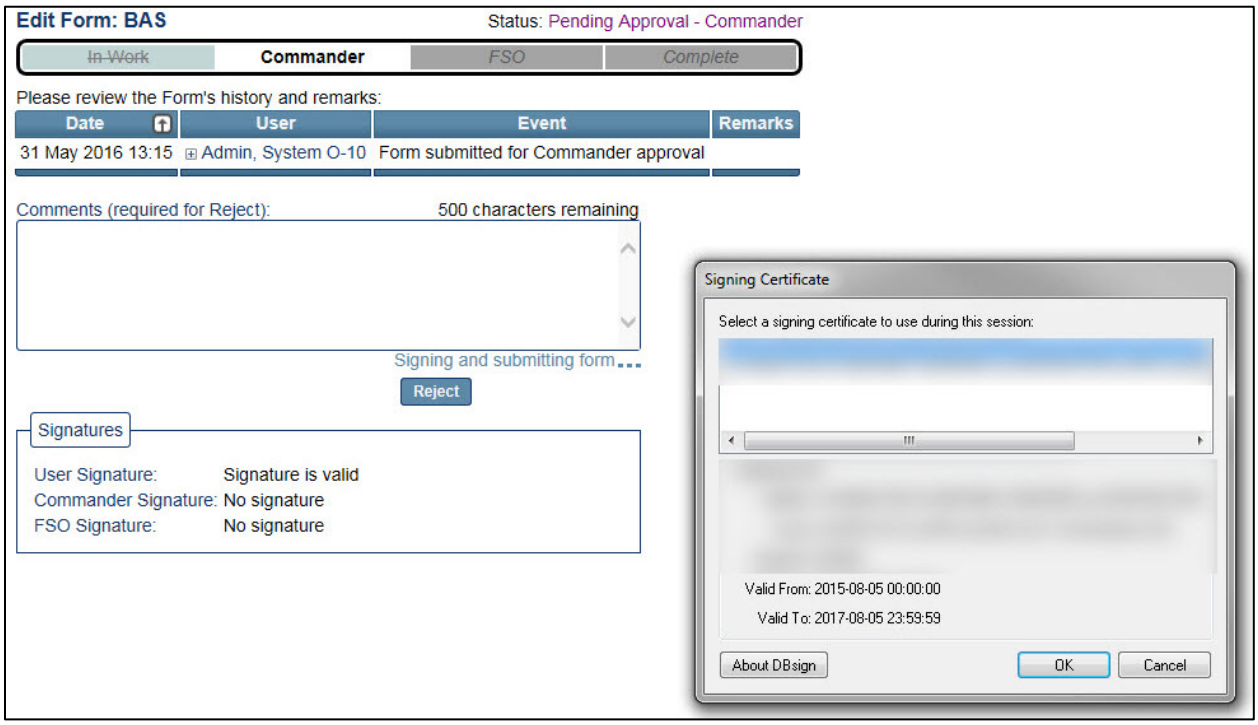
4. Click OK. The DBSign dialog box displays.
5. Choose a certificate and click OK.

7.4.2 Commander Approval

1. Select the Edit Form icon next to the form to be approved.



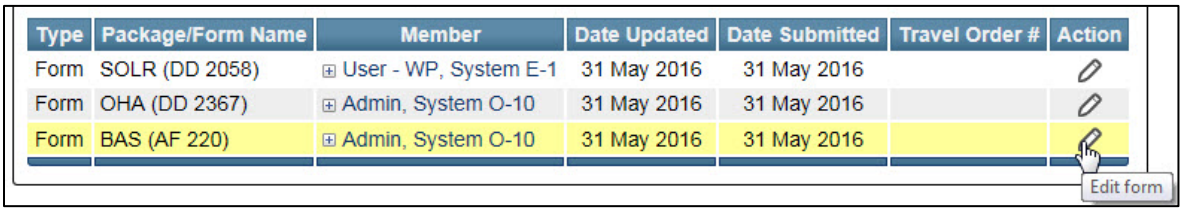
The Form screen opens with the status Pending Approval – Commander.



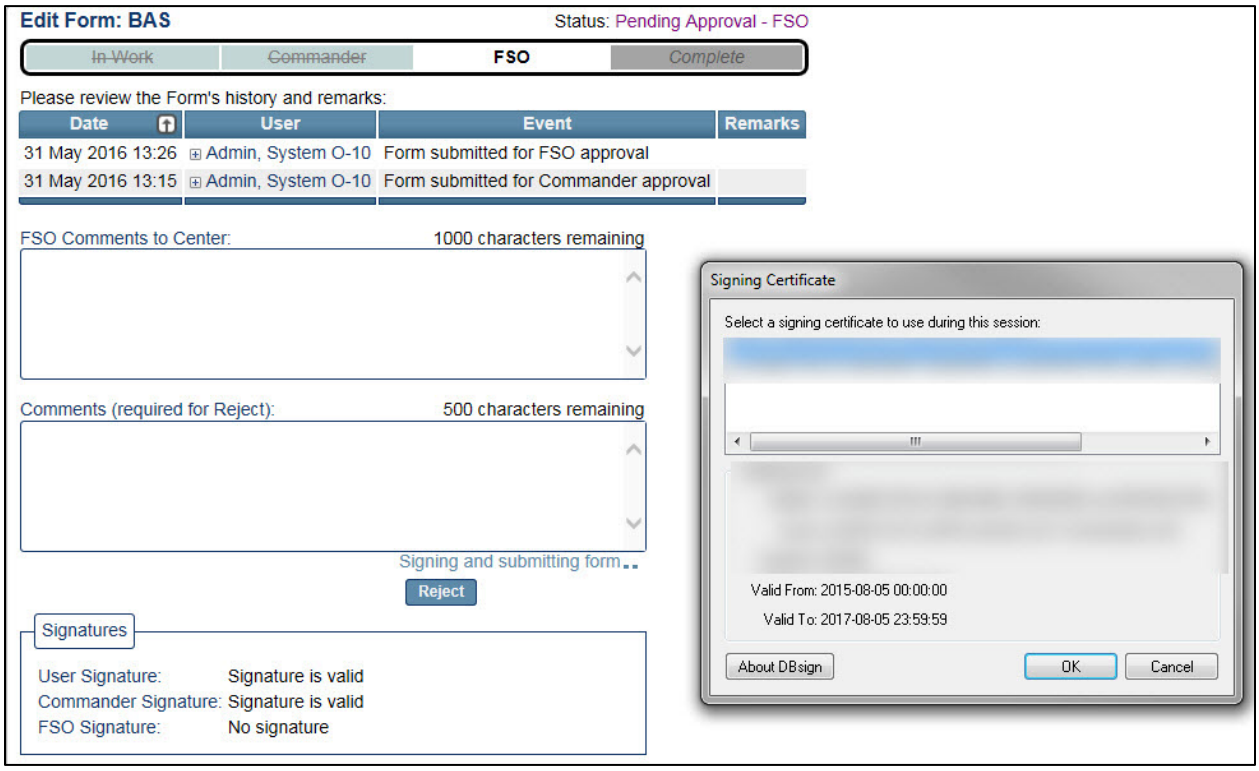
2. Enter comments if applicable.
3. Click the Approve and Sign button. A dialog box opens with the statement "Are you sure you want to approve and sign this package?"
4. Click OK. The DBSign dialog box displays.
5. Choose a certificate and click OK.

7.4.3 FSO Approval

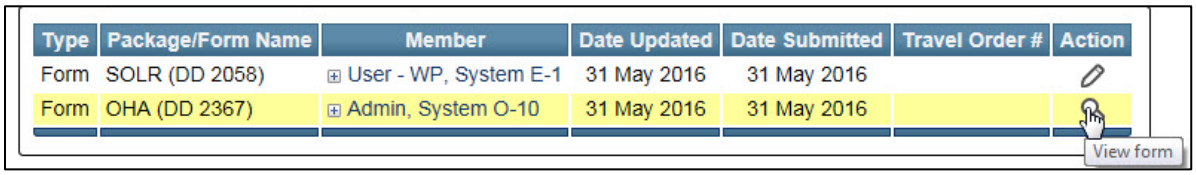
1. Select the Edit Form icon next to the package to be approved.



2. Enter FSO comments to center if applicable.
3. Enter general comments if applicable.
4. Click the Approve and Sign button. A dialog box opens with the statement "Are you sure you want to approve and sign this package?"
5. Click OK. The DBSign dialog box displays.
6. Choose a certificate and click OK.



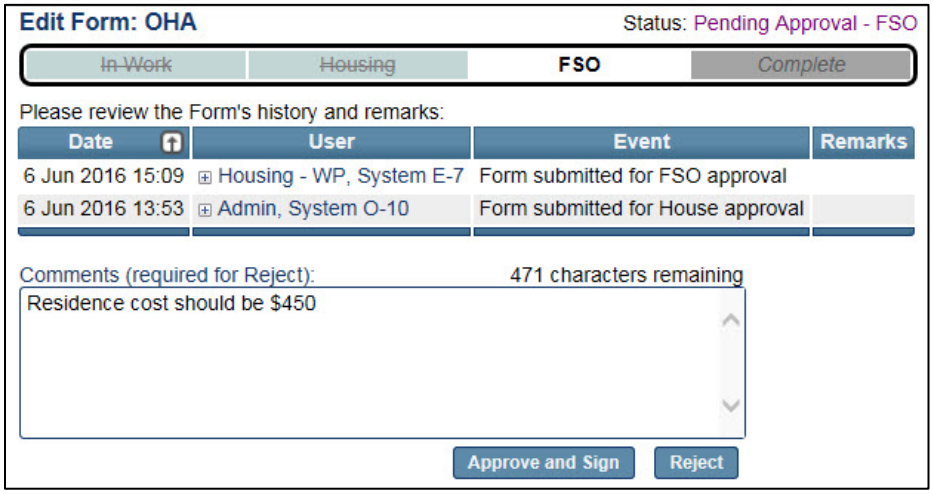
The user is notified via email that the package has been approved. The package status changes to Complete in the User's Inbox. The User can click the View archived package icon to download the package.



7.5 Reject Package or Form

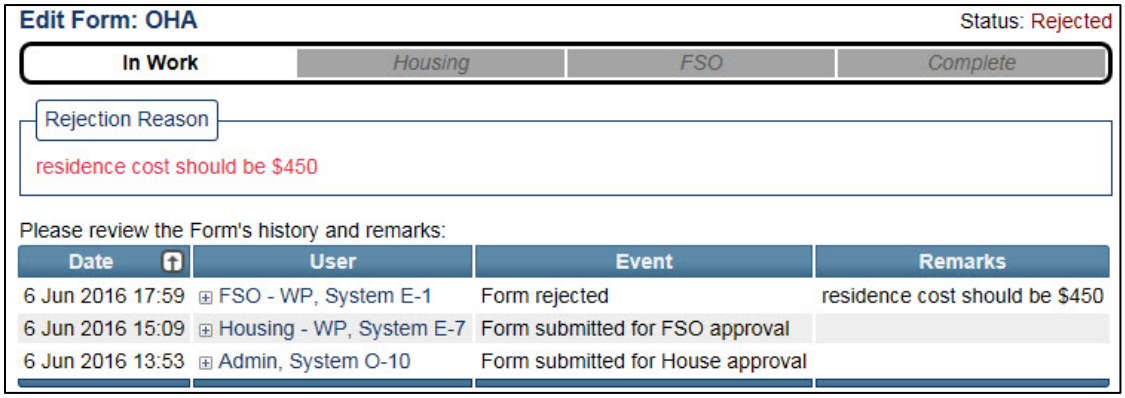
The AO can reject a package or form. When he or she rejects the package or form, it is sent back to the user to make corrections based on the comments the AO provides. The user then resubmits the package to go through the approval process again.

1. (AO) On the Package or Form edit screen, enter comments and click the Reject button.



The package or form goes back to the user with a status of rejected. The user is notified via email.

2. (User) In the Inbox, select the rejected form or package. The rejection reason is at the top of the Edit screen.



3. (User) Make required change and resubmit package.

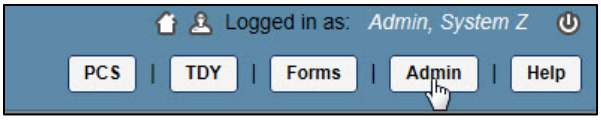
Chapter 8 eFinance Administration

The Admin screen includes a sidebar with a list of links to screens, which enable Global Administrators (GAs) to manage Bases, Briefings, Expense Types, Forms, FSO Checklists, Mass Emails, System Notifications, Bases, and Units. This screen also enables Financial Service Officers (FSOs) to manage Units and Briefings.

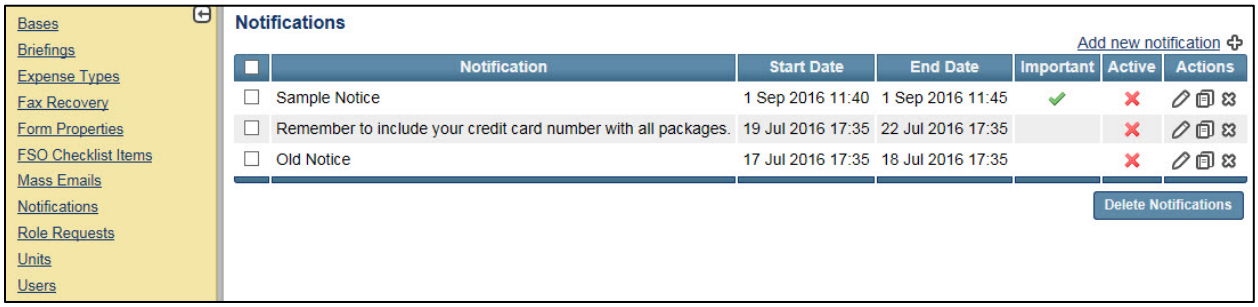
Note:

The Admin screens include an Audit table that tracks all changes.

1. Click the Admin link on the eFinance main screen.



The Admin screen displays. Notifications is the default screen.



2. Select one of the links in the sidebar to access a particular function. The following sections provide details about each screen:
   - Section 8.1 Bases
   - Section 8.2 Briefings
   - Section 8.3 Expense Types
   - Section 8.4 Form Properties
   - Section 8.5 FSO Checklist Items
   - Section 8.6 Mass Emails
   - Section 8.7 Notifications
   - Section 8.8 Role Requests
   - Section 8.9 Units
   - Section 8.10 Users

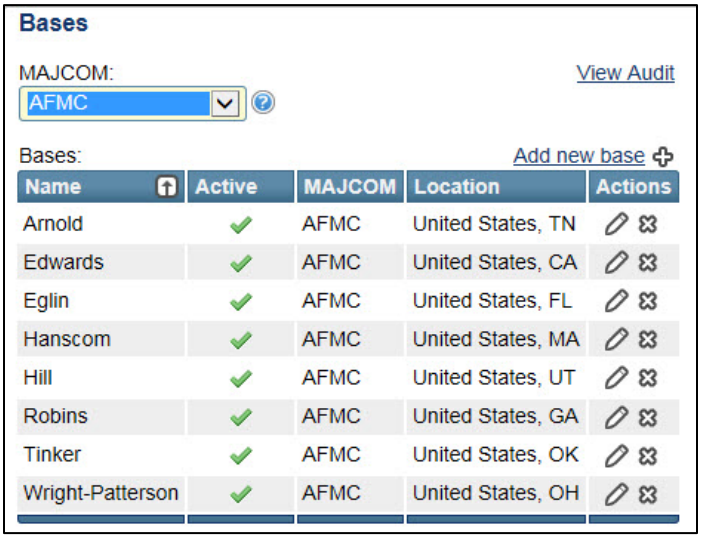
8.1 Bases

The Bases link enables GAs to edit and create Bases and assign FSOs to bases.

8.1.1 View Bases

The MAJCOM dropdown list contains a list of all MAJCOMs and controls the contents of the list of Bases. The table is initially sorted by Base Name; however, the table is user-sortable by Base Name, MAJCOM, and Location.

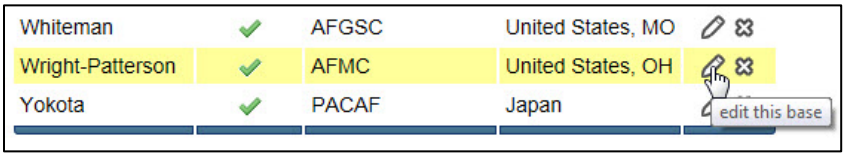
1. On the Admin screen, click the Bases link in the sidebar.
2. Select a MAJCOM to view the list of Bases for the selected MAJCOM.



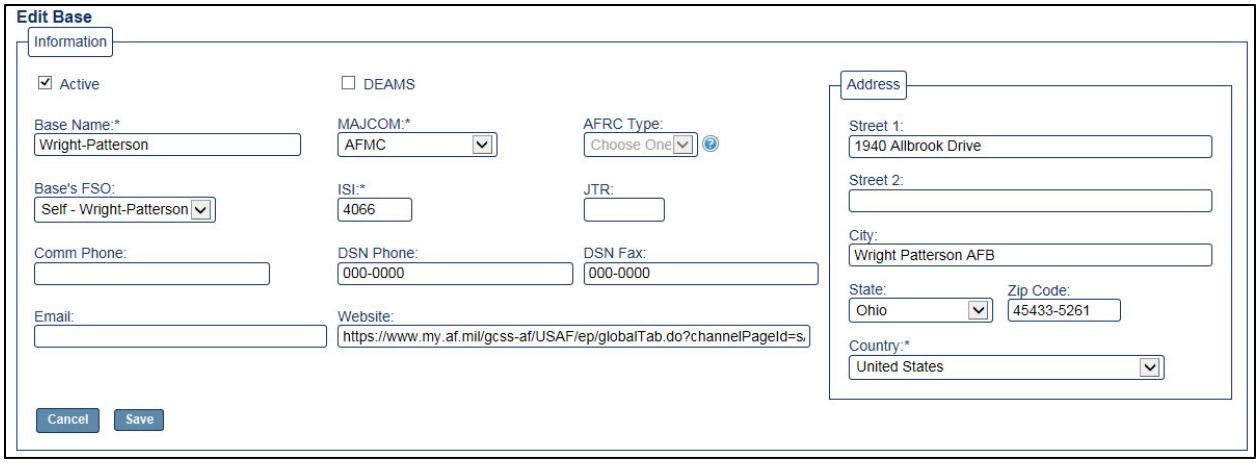
8.1.2 Edit Base Information

The Edit Base screen enables the GA to update base information such as the address.

1. Click the Edit icon next to the base that requires editing.



The Edit Base screen displays.

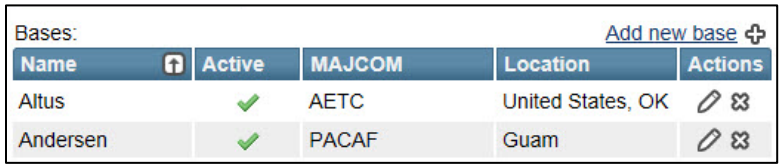


2. Update one or more of the following fields:
   - Base Name - Base's current name.
   - MAJCOM - MAJCOM the Base belongs to.
   - AFRC Type
   - Base's FSO - Contains a list of all available Bases. If the Base is not marked as a Servicing Finance Office, then the GA must select the Servicing Finance Office for the Base from this list. NOTE: This fields is required if the current Base is not an SFO.
   - ISI – Base's Individual Station Identifier
   - JTR - Joint Travel Regulation location code
   - Comm Phone – Commercial phone for the base
   - DSN Phone – DSN phone for the base
   - DSN Fax – DSN Fax for the base
   - Email – Email for the base
   - Website – Base's website
   - Address – Base's address
3. (Optional) Click the Active checkbox to make the base active or uncheck it to make the base inactive.
4. (Optional) Click the DEAMS checkbox.
5. Click save to save any update or click Cancel to discard your changes.

8.1.3 Create a New Base

The Edit Base screen enables the GA to add a new base to eFinance.

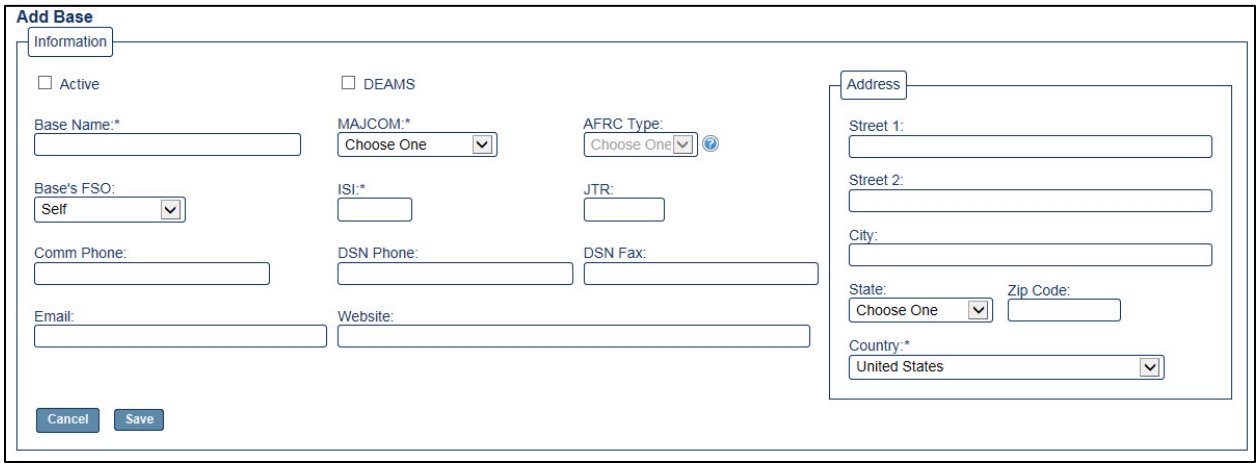
1. Click the Add New Base link.



The Add Base screen displays.

Note

The currently selected MAJCOM value on the Bases screen is used to prepopulate the MAJCOM field on the Edit Base screen when you click the Add New Base link.

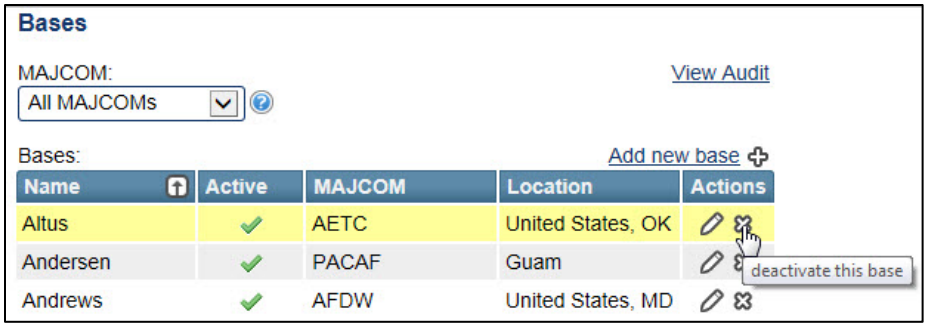


2. Enter information for one or more of the following fields:
   - Base Name - Base's current short name.
   - MAJCOM - MAJCOM the Base belongs to. NOTE: If the MAJCOM is OCONUS, then Location fields will be cleared and disabled accordingly.
   - AFRC Type
   - Base's FSO - Contains a list of all available Bases. If the Base is not marked as a Servicing Finance Office, then the GA must select the Servicing Finance Office for the Base from this list. NOTE: This fields is required if the current Base is not an SFO.
   - ISI – Base's Individual Station Identifier
   - JTR - Joint Travel Regulation location code
   - Comm Phone – Commercial phone for the base
   - DSN Phone – DSN phone for the base
   - DSN Fax – DSN Fax for the base
   - Email – Email for the base
   - Website – Base's website
   - Address – Base's address
3. Click the Active checkbox to make the base active or uncheck it to make the base inactive.
4. Click the DEAMS checkbox.
5. Click Save to save the base and add it to the list of bases or click Cancel to discard your changes.

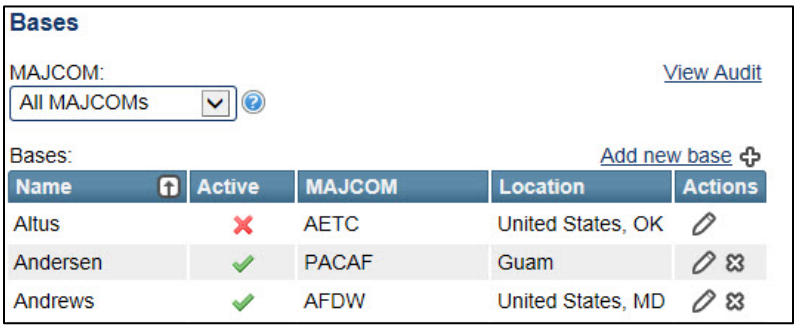
8.1.4 Deactivate/Activate a Base

The Bases screen enables GAs to inactivate or activate a Base.

1. On the Bases screen, click the Deactivate Base icon to deactivate the selected base.



2. A dialog box opens that asks, "Are you sure you want to deactivate this item," click OK. In the Active column, the checkmark changes to a red x to denote that the selected Base is inactive.



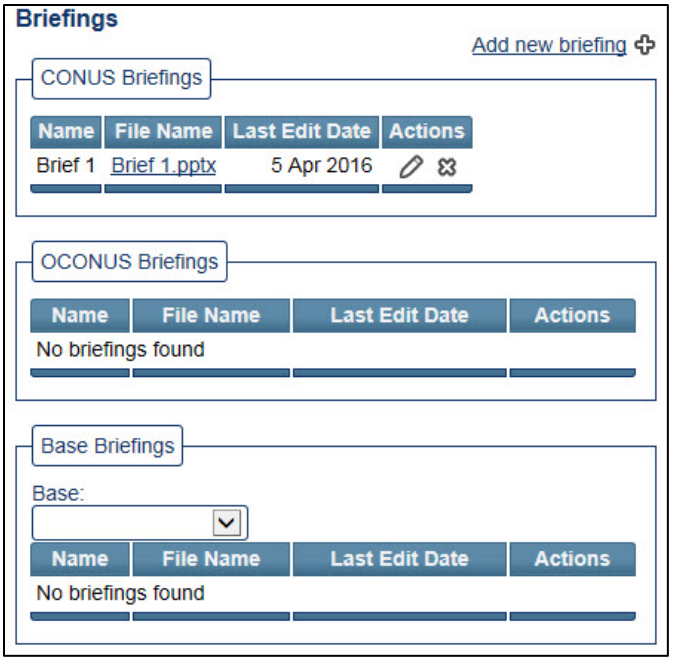
3. To reactivate the base, click the Edit Icon to open the Edit Base screen and click the Active checkbox. In the Active column, the red x changes back to a check mark.

8.2 Briefings

The Briefings screen enables GAs and FSOs view, add, edit and delete briefings in eFinance. The CONUS and OCONUS Briefings are visible to GAs only, and the Base Briefings are visible to both GAs and FSOs.

8.2.1 View Briefings

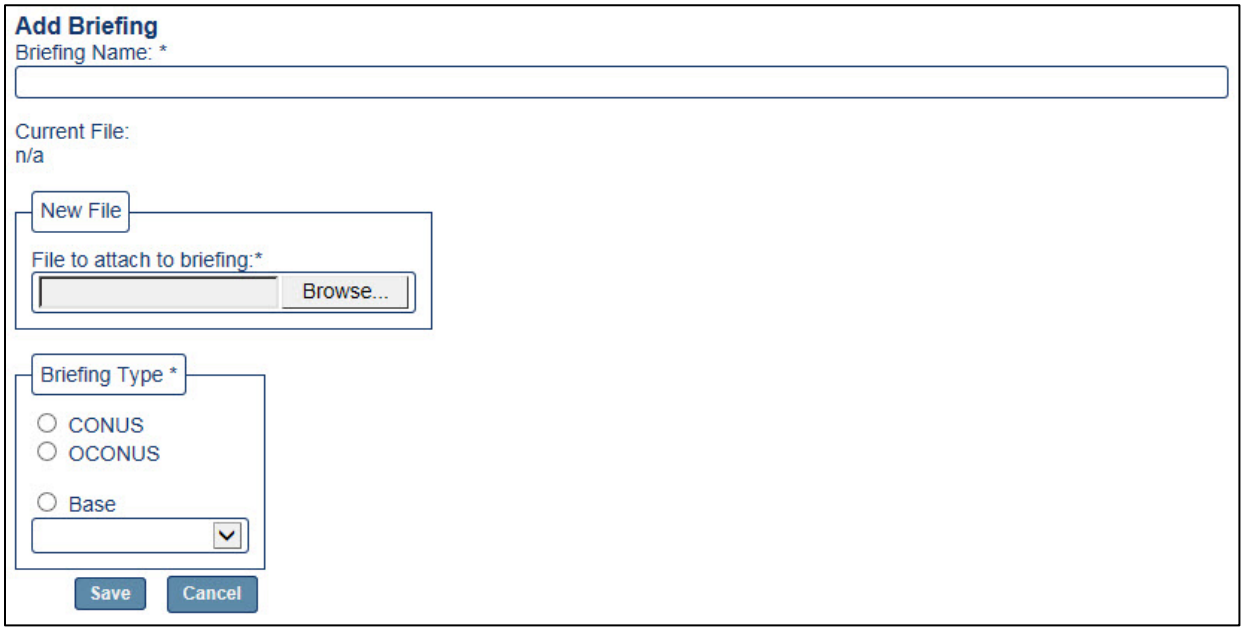
On the Admin sidebar, click the Briefings link to open the Briefings screen. Any available briefings are listed in one of the three tables, CONUS Briefings, OCONUS Briefings, or Base Briefings.



8.2.2 Add Briefings

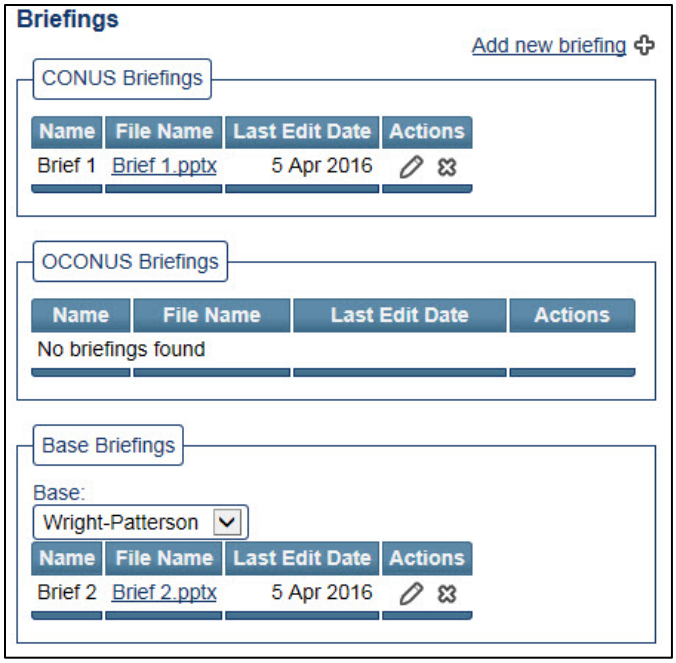
GAs and FSOs can add briefings to eFinance on the Briefing Creation screen.

1. On the briefings screen, click the Add new briefing link to open the Add Briefing screen.



2. Enter the Briefing Name, Browse to the file and select it, and choose a Briefing Type: CONUS, OCONUS, and Base. If you choose Base, select the base from the dropdown.
3. Click Save to upload the file or click Cancel to go back to the Briefings screen.

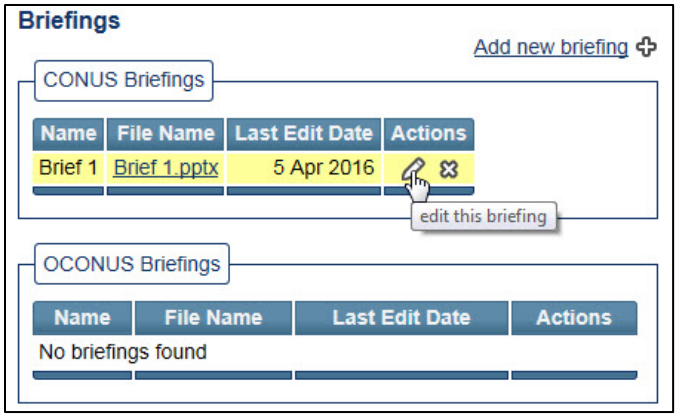
On the Briefings screen, the uploaded file is attached and displays in the selected Briefings folder. You can click the file name to download the file.



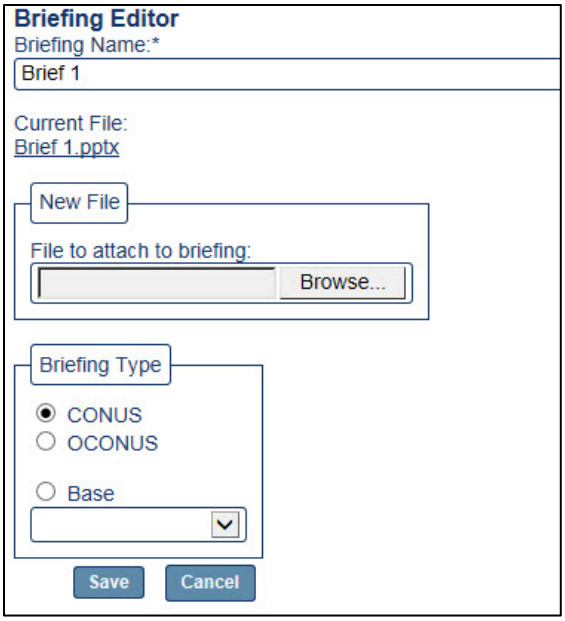
8.2.3 Edit a Briefing

The edit screen enables GAs or FSOs to download a briefing and edit it or upload a new briefing to replace an existing one.

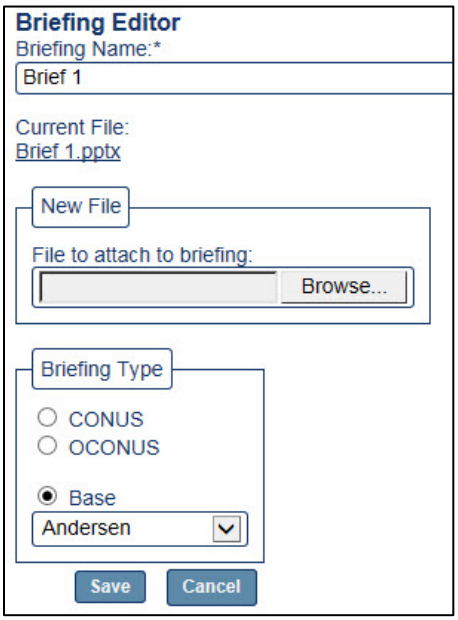
1. On the briefings screen, select the Edit this Briefing icon.



The Briefing Editor screen displays.

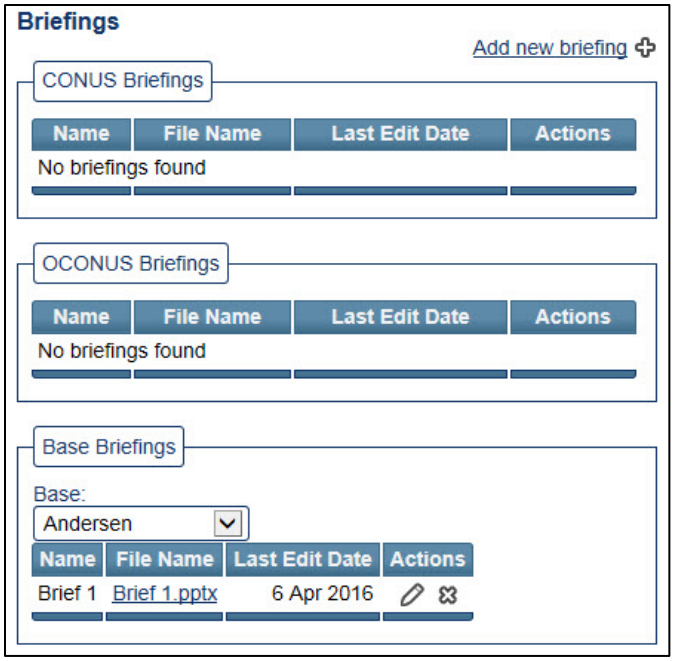


2. Do one of the following:
   - Edit Briefing Name.
   - Download Brief and edit it.
   - Click the browse button to browse to a new file or browse to the file that you downloaded and edited.
   - Select a new Briefing Type.



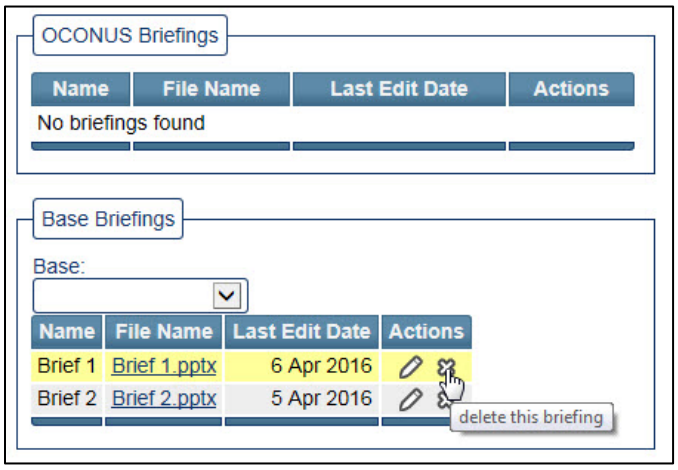
3. Click Save to save your edits or click Cancel to go back to the Briefings screen.

The changes show on the Briefings screen.

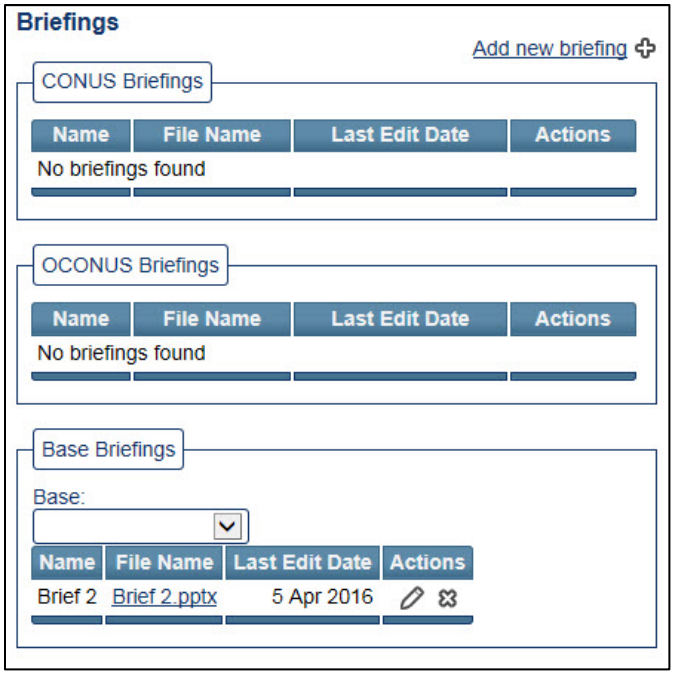


8.2.4 Delete a Briefing

1. On the briefing screen, select the Delete this Briefing icon.



2. A dialog box displays with the statement “Are you sure you want to delete this item?” Click OK to delete. The briefing is removed from the Briefings screen. Or, click cancel to go back to the briefings screen.



8.3 Expense Types

The Expense Types screen displays all Expense Types available in the system in alphabetical order. A GA may add, edit, or delete all Expense Types (both Active and Inactive).

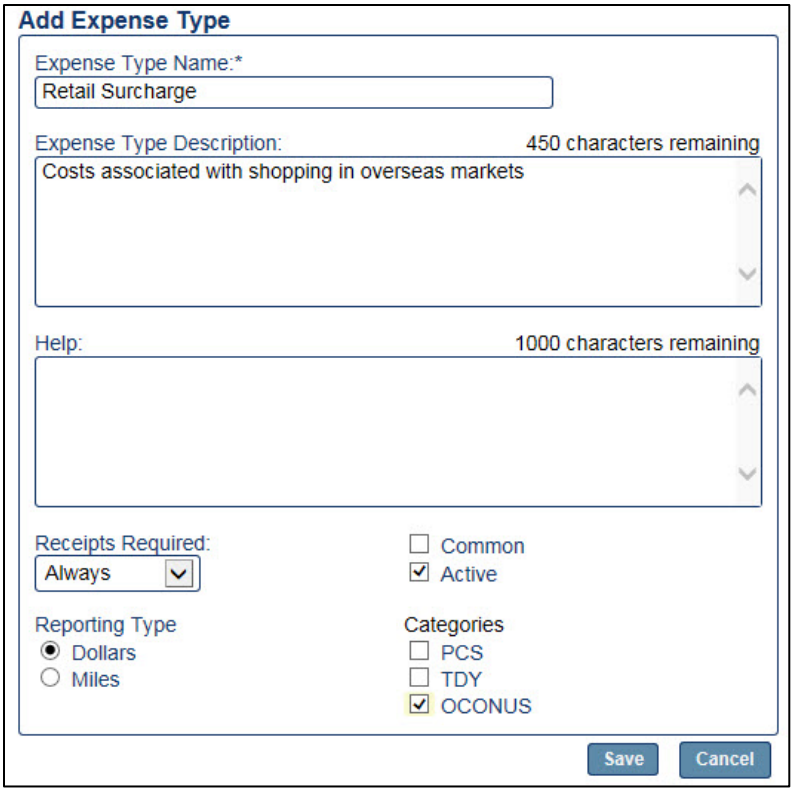
Note:

A GA can only delete an Expense Type if it is not in use. Attempting to delete an in-use Expense Type will deactivate it and the GA will be notified.

8.3.1 Add an Expense Type

The Add Expense Type screen enables a GA to add a new Expense Type to be used on the Travel Voucher form.

1. On the Expense Types screen, click the Add new expense type link. The Add Expense Type screen displays.



2. Complete the following fields:
   - Expense Type Name
   - Expense Type Description
   - Help
   - Receipts Required
   - Reporting Type
   - Categories
   - Select the Common and/or Active checkbox
3. Click Save to save the new Expense Type. The new expense type displays in the list on the Expense Types screen. Or, click cancel to discard changes.

Expense Types

View Audit | Add new expense type

Expense Type Name	Description	Dollars or Miles	Receipt Required	Common	PCS	TDY	OCONUS	Active	Actions
Baggage - excess baggage	Cost of excess baggage; authorized/approved by the AO	Dollars	Always	✓	✓	✓	✓	✓	
Baggage - storage	Cost of baggage storage; must be explained by the traveler	Dollars	Always			✓		✓	
Baggage tips - curbside check-in fee	Only if not an optional service; a tip separate from the fee can be paid	Dollars	Always	✓	✓	✓	✓	✓	
Baggage Transfer Fee	Cost of transfer of baggage between authorized modes of transportation	Dollars	Always		✓	✓	✓	✓	
Birth certificate	Cost of birth certificates or other acceptable evidence of birth; for OCONUS travel	Dollars	Always				✓	✓	
Carrier Terminal Fee	Airport transit, service charge/tax, landing, port tax, embarkation/debarkation or similar mandatory charge assessed against a traveler on arrival/departure from	Dollars	Always					✓	
Paper tickets	financial responsibility), when approved by the AO as necessary to meet government requirements (e.g., potential work stoppage by the airline or special circumstances involving international travel to foreign countries),	Dollars	Always			✓		✓	
Parking Fees – Related to Official Business	When driving by privately owned or government conveyance	Dollars	Always			✓		✓	
Parking fees at a terminal	Fees for terminal parking while TDY; NTE the cost of taxi fares (including tips), for one round-trip to the terminal.	Dollars	Always	✓		✓		✓	
Passport fees	Fees for a passport required for travel when on an official travel order/authorization is to/from a high-threat area or high-risk airport; for those not traveling on a no-fee passport.	Dollars	Always	✓		✓	✓	✓	
Passport/visa biometric fees	Cost of passport/visa biometric fees; only when mandatory for passport and/or visa insurance	Dollars	Always			✓	✓	✓	
Passport/visa/biometric visa/green card legal service fees	Cost of passport/visa biometric visa/green card legal service fees (all lawyer charges except retainer), for obtaining and/or processing applications.	Dollars	Always			✓	✓	✓	
Pet Quarantine Fees That Are Mandatory	May be reimbursed for "Actual" mandatory fees for household pets not to exceed $550 per PCS move	Dollars	Always		✓		✓	✓	
PIN Card Issue Fee		Dollars	Always					✓	
Prepaid rent	Cost of prepaid rent when TDY is curtailed/canceled/interrupted; authorized/approved by the AO	Dollars	Threshold			✓		✓	
Preparatory travel expenses	Cost of preparatory travel expenses (expenses incurred prior to the order being changed or cancelled),	Dollars	Always			✓		✓	
Rental car administrative fees	Cost of any per-day administrative rental car fees called for in the DTMO rental car agreements (including GARS); optional GPS is not authorized to be paid	Dollars	Always			✓		✓	
Resort fees – mandatory	Cost of mandatory resort fees	Dollars	Threshold			✓		✓	
Retail Surcharge	Costs associated with shopping in overseas markets	Dollars	Threshold				✓	✓	

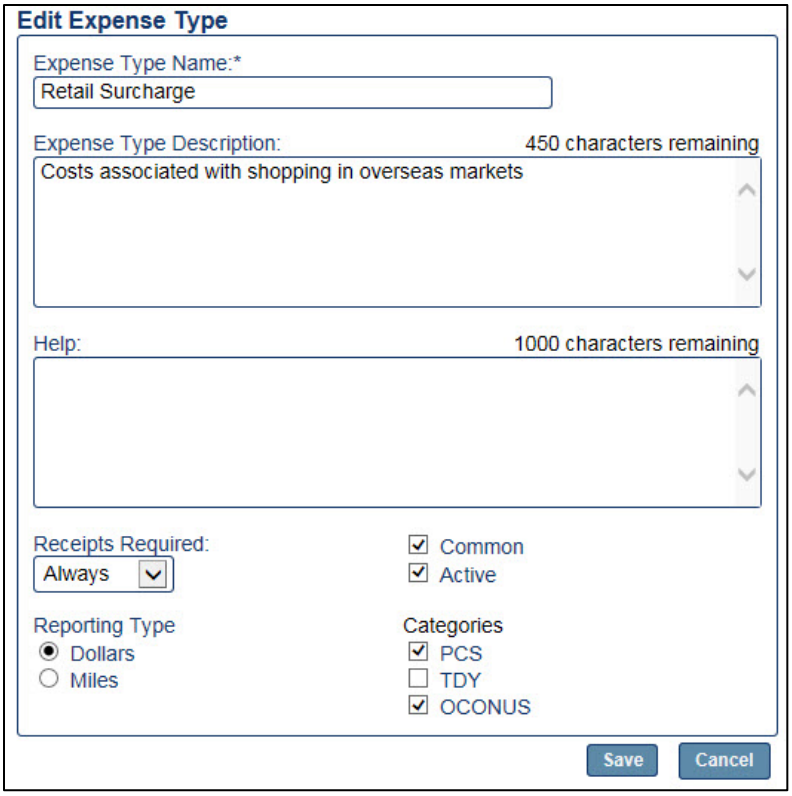
8.3.2 Edit Expense Type

The Expense Types screen enables GAs to edit an Expense Type.

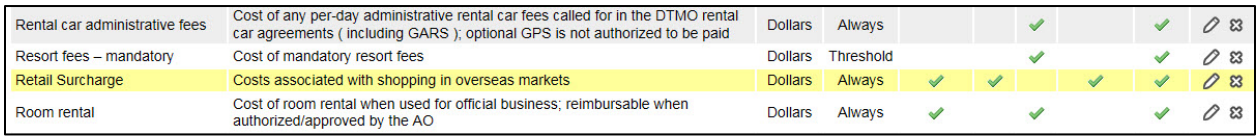
1. On the Expense Types screen, click the Edit this Expense Type icon next to a selected Expense Type.

Rental car administrative fees	Cost of any per-day administrative rental car fees called for in the DTMO rental car agreements (including GARS); optional GPS is not authorized to be paid	Dollars	Always			✓		✓	
Resort fees – mandatory	Cost of mandatory resort fees	Dollars	Threshold			✓		✓	
Retail Surcharge	Costs associated with shopping in overseas markets	Dollars	Threshold				✓	✓	edit this expense type
Room rental	Cost of room rental when used for official business; reimbursable when authorized/approved by the AO	Dollars	Always	✓		✓		✓	

The Edit Expense Type screen displays.



2. Make changes to one or more of the following fields:
   - Expense Type Name
   - Expense Type Description
   - Help
   - Receipts Required
   - Reporting Type
   - Categories
   - Select the Common and/or Active checkbox
3. Click Save to save the new Expense Type. The edited expense type displays in the list on the Expense Types screen. Or, click cancel to discard changes.

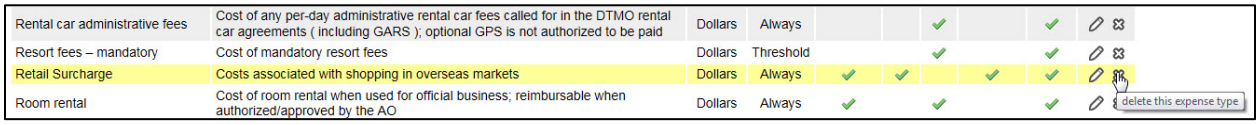


Rental car administrative fees	Cost of any per-day administrative rental car fees called for in the DTMO rental car agreements (including GARS); optional GPS is not authorized to be paid	Dollars	Always			✓		✓		
Resort fees – mandatory	Cost of mandatory resort fees	Dollars	Threshold			✓		✓		
Retail Surcharge	Costs associated with shopping in overseas markets	Dollars	Always	✓	✓		✓	✓		
Room rental	Cost of room rental when used for official business; reimbursable when authorized/approved by the AO	Dollars	Always	✓		✓		✓		

8.3.3 Delete Expense Type

GAs can delete Expense Types from eFinance.

1. On the Expense Type screen, click the Delete this Expense Type icon.



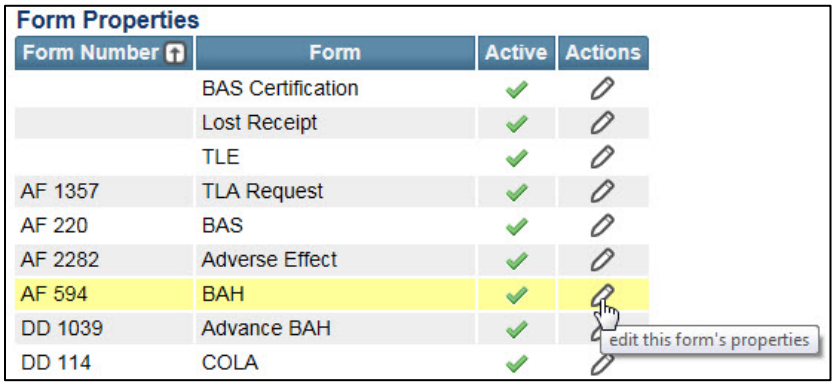
Rental car administrative fees	Cost of any per-day administrative rental car fees called for in the DTMO rental car agreements (including GARS); optional GPS is not authorized to be paid	Dollars	Always			✓		✓		
Resort fees – mandatory	Cost of mandatory resort fees	Dollars	Threshold			✓		✓		
Retail Surcharge	Costs associated with shopping in overseas markets	Dollars	Always	✓	✓		✓	✓		
Room rental	Cost of room rental when used for official business; reimbursable when authorized/approved by the AO	Dollars	Always	✓		✓		✓		

2. A dialog box displays with the statement “Are you sure you want to delete this item?” Click OK to delete. The Expense Type is removed from the list. Or, click cancel to go back to the Expense Types screen.

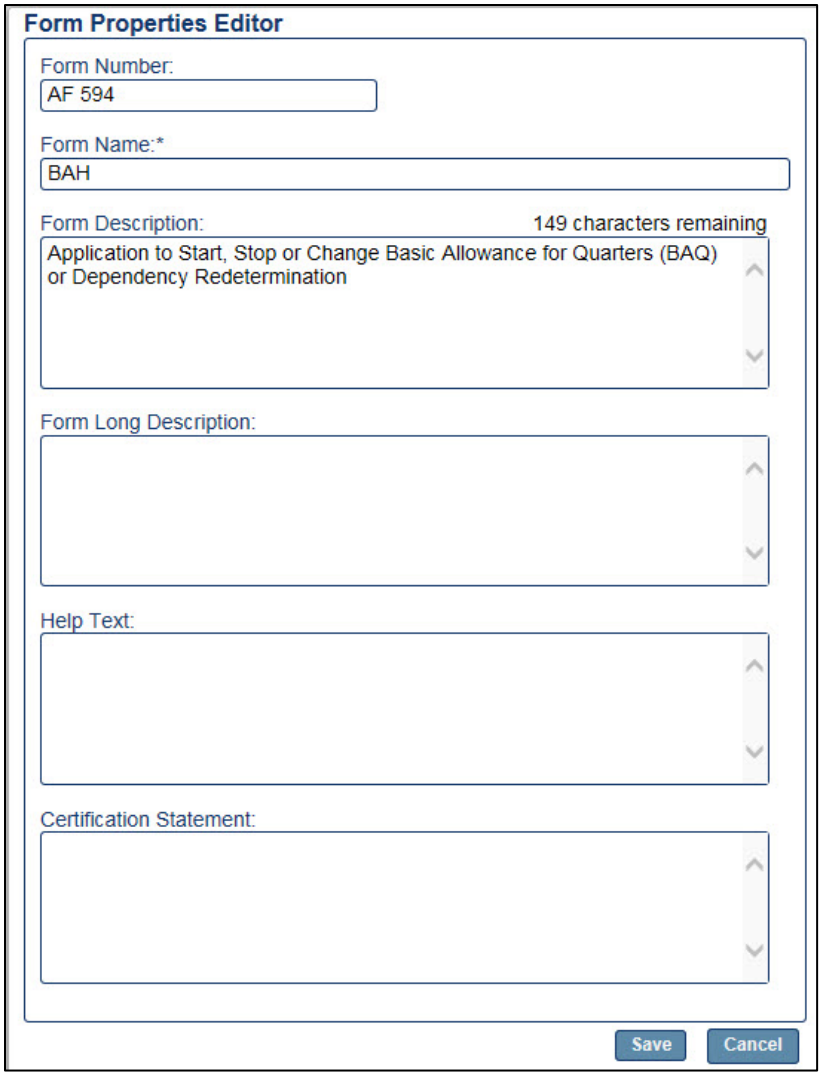
8.4 Form Properties

The Form Properties screen enables GAs to edit the properties of a form, such as the Form’s Number, Name, Description, and Certification Statement.

1. On the Admin screen, click the Form Properties link in the sidebar to open the Form Properties screen.
2. Click the Edit this Form’s Properties icon in the Actions column next to a selected form.



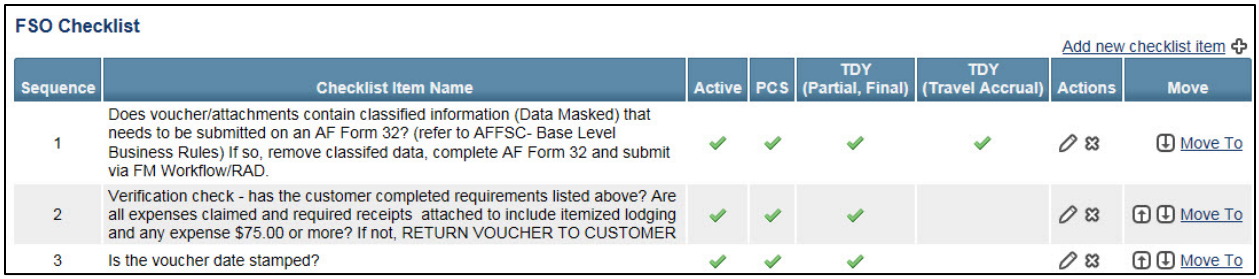
The Form Properties Editor screen displays.



3. Edit one or more of the following fields:
   - Form Number
   - Form Name
   - Form Description
   - Form Long Description
   - Help Text
   - Certification Statement
4. Click Save to save the changes or Cancel to go back to the Form Properties screen.

8.5 FSO Checklist Items

The FSO Checklist screen displays all checklist questions available in eFinance, in sequence order. A GA can add, edit, and delete all questions as well as activate inactive questions.



Note:

A GA can only delete a checklist question if it is not in use. Attempting to delete an in-use checklist question will deactivate it and the GA will be notified.

8.5.1 Add a Checklist item

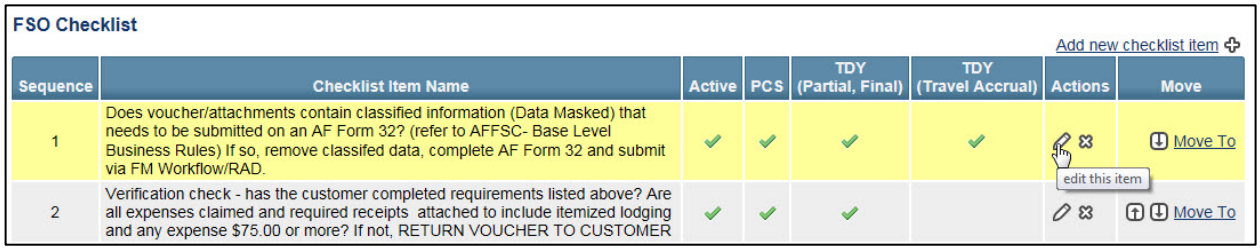
The FSO Checklist screen enables GAs to add a checklist question to the list of FSO Checklist questions.

1. On the Admin screen, click the FSO Checklist Items link. The FSO Checklist screen displays.
2. Click the Add New Checklist item link. The Add Checklist Item screen opens.
3. Enter Checklist item text.
4. The default status is active; select PCS, TDY (Partial, Final), and/or TDY (Travel Accrual).
5. Click Add to add the checklist item to the list or click Cancel to discard changes.

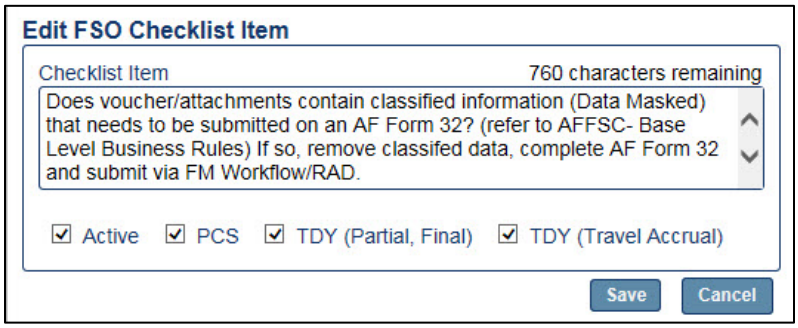
8.5.2 Edit a Question

The FSO Checklist screen enables GAs to edit an existing checklist item.

1. On the Admin screen, click the FSO Checklist Items link. The FSO Checklist screen displays.
2. Click the edit this item icon.



The Edit FSO Checklist Item screen displays.



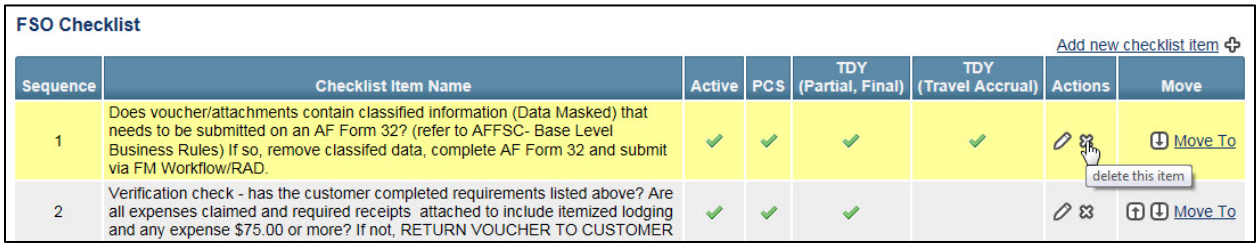
3. Make desired revisions to the Checklist Item.

4. Click Save to save the changes or Cancel to discard the changes. The updated Checklist Item displays in the current list. Or, click Cancel to discard transaction.

8.5.3 Delete a Checklist Item

The FSO Checklist screen enables GAs to delete an existing checklist item.

1. On the Admin screen, click the FSO Checklist Items link. The FSO Checklist screen displays.
2. Click the delete this item icon next to the Checklist Item that you want to remove.

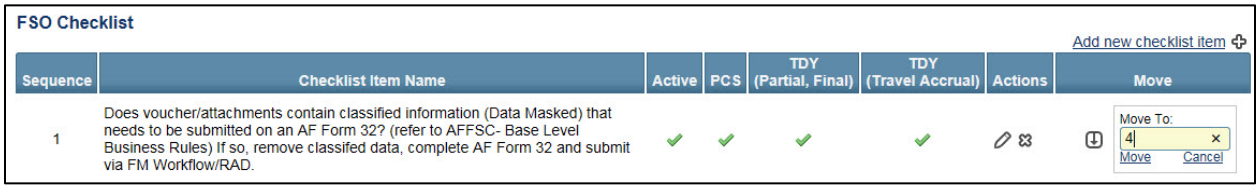


3. A dialog box displays with the statement "Are you sure you want to delete this item?" Click OK to delete or Cancel to keep the checklist item in the list.

8.5.4 Move a Checklist item

The Move Panel enables GAs to change the sequence number of a checklist item by using the Move To link or the Move up or Move Down arrows.

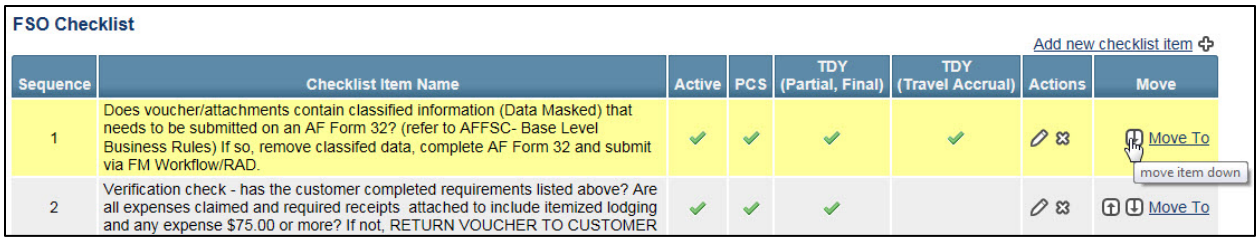
1. On the Admin screen, click the FSO Checklist Items link. The FSO Checklist screen displays.
2. On the FSO Checklist screen, click the Move To link next to the Checklist Item that you want to move.



3. Enter a sequence number and click Move To, to move the Checklist Item or Cancel to cancel the move.

OR

Click the move item down button next to the Checklist Item. Repeat as need until the checklist item is moved to the desired position in the list.



8.6 Mass Emails

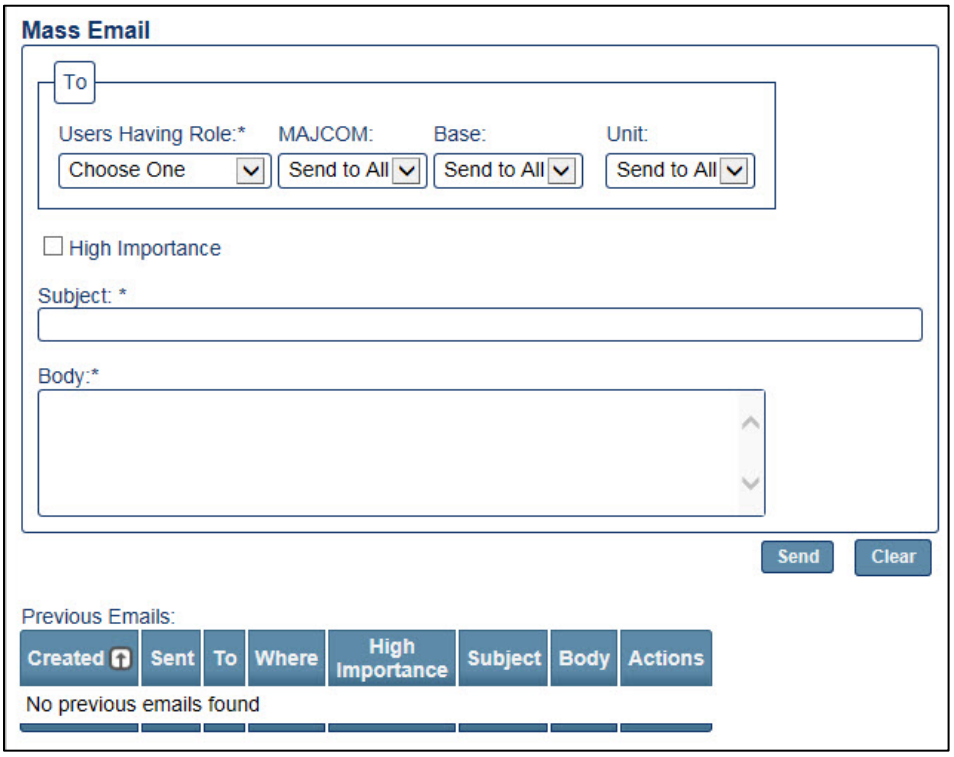
Mass Emails may be sent by GAs to eFinance users at multiple MAJCOMs and bases. The email can be sent to users with specific roles or locations.

Note:

The list of recipients will not be visible to all recipients of the email.

8.6.1 Send Email

1. On the Admin screen, click the Mass Emails link. The FSO Checklist screen displays.
2. Click the Mass Emails link to open the Mass Email screen.



3. Complete the following fields:
   - To:
     - Users having Role
     - MAJCOM
     - Base
     - Unit
   - Subject
   - Body
4. (Optional) Click the High Importance checkbox to send the email with high importance.
5. Click Send to send the email to the recipients or Clear to cancel the email.

8.6.2 Previous Emails

On the Mass Email screen in the Previous Emails table the GA can view previously sent emails. The table lists the following information:

- Created – name of the person who sent the email
- Sent - date the email was sent

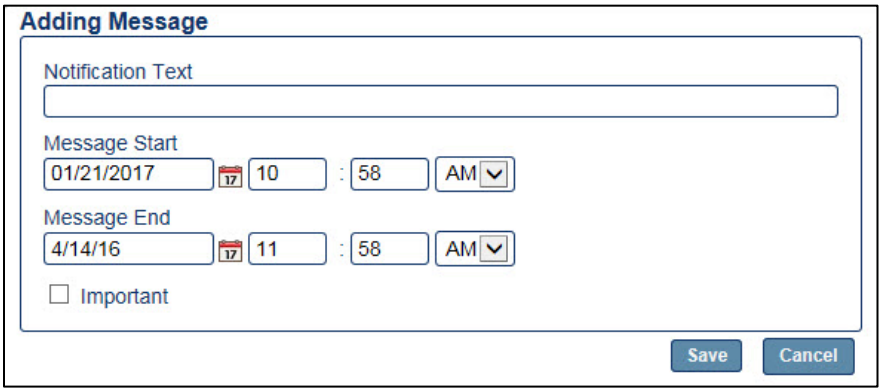
- To - recipient name
- Where – location such as MAJCOM or base
- High Importance – notes if email was sent as having high importance
- Subject – subject of the email
- Body - email content up to 2500 characters
- Action – Options to copy or view entire email

8.7 Notifications

The Notifications screen is the default Admin screen. It enables GAs to create, edit, copy and delete Notifications.

8.7.1 Create Notification

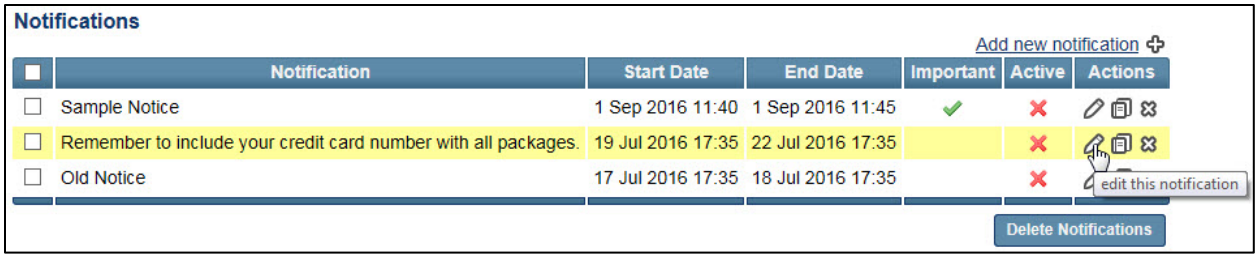
1. On the Admin screen, click the Notifications link to open the Notifications screen.
2. Click the Add new notification link to open the Adding Message screen.



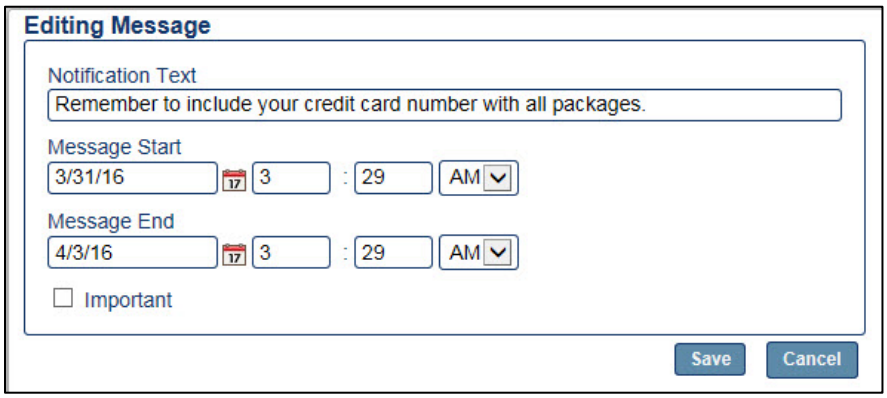
3. Do the following:
   a. Enter Notification Text
   b. Enter message start date or click the calendar and choose the start date.
   c. Enter the message start time.
   d. Enter message end date or click the calendar and choose the end date.
   e. Enter the message end time.
   f. (Optional) Click the Important check box.
4. Click save to save the message or click cancel to discard changes. The message will display on the main screen.

8.7.2 Edit Notification

1. On the Admin screen, click the Notifications link to open the Notifications screen.
2. Click the edit this notification icon next to a Notification.



The Editing Message screen displays.



3. Edit one or more of the following fields:
   - Notification Text
   - Message Start
   - Message End
4. Click Save to save the changes or Cancel to discard the changes.

8.7.3 Delete Notifications

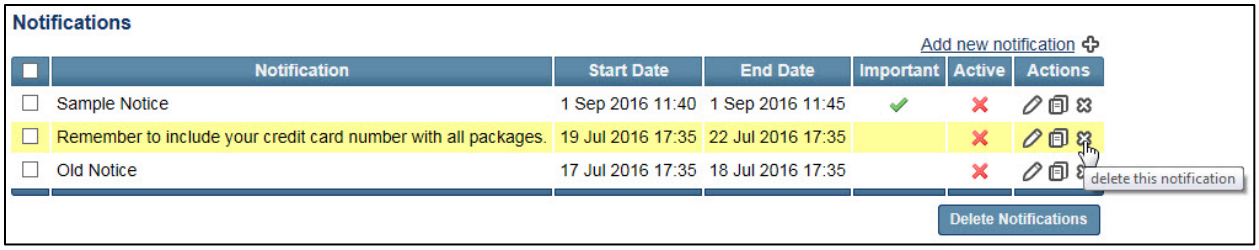
To click several notifications at once:

1. On the Admin screen, click the Notifications link to open the Notifications screen.
2. Click the checkbox next to one or more Notifications.

3. Click the Delete Notifications button.
4. A dialog box displays with the statement “Are you sure you want to delete this item?” Click OK to delete the selected Notification(s) or Cancel to keep it/them in the Notifications in the list.

To delete a single notification:

1. On the Admin screen, click the Notifications link to open the Notifications screen.
2. Click the Delete this Notification icon next to a notification.



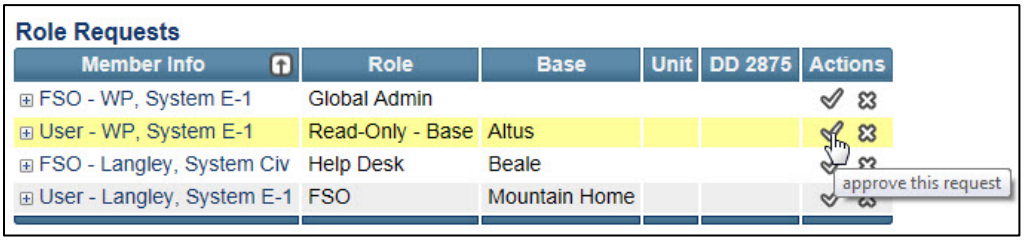
3. A dialog box displays with the statement "Are you sure you want to delete this notification?" Click OK to delete the notification or Cancel to keep it in the Notifications in the list.

8.8 Role Requests

The Role Requests screen enables GAs to approve or deny all role requests. The FSO can approve or deny Commander, Housing and FSO Read-Only role requests. An automated email is sent to the user informing them that they have been granted or denied privileges.

8.8.1 Approve Role Request

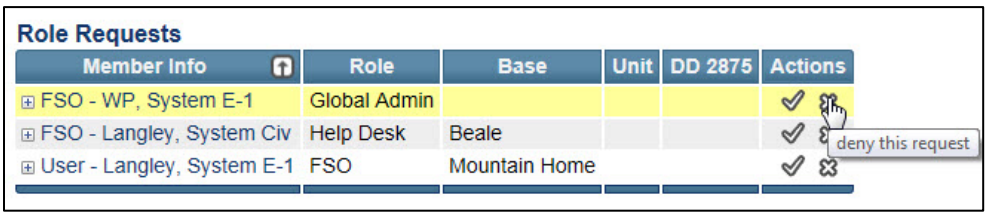
1. On the Admin screen, click the Role Requests link to open the Role Requests screen.



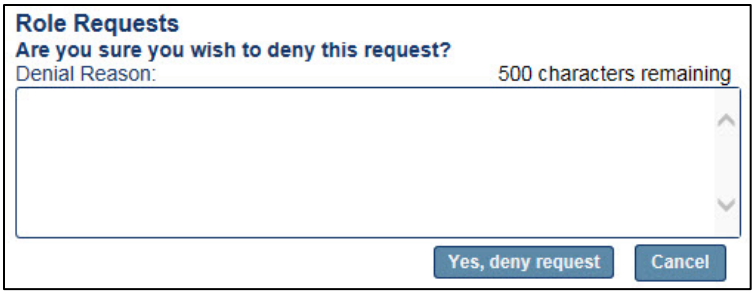
2. Click the Approve this Request icon to approve the user's request. The user will receive an email stating that the request is approved.

8.8.2 Deny Role Request

1. On the Admin screen, click the Role Requests link to open the Role Requests screen.



2. Click the Deny this Request icon to deny the user's request.
3. A new screen opens with the statement, "Are you sure you wish to deny this request?" Enter the reason for the denial and click the Yes, deny request button. Click Cancel to go back to the previous screen.

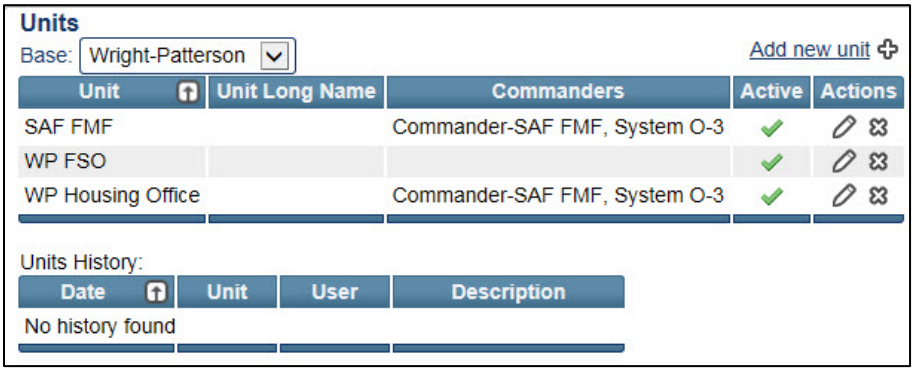


8.9 Units

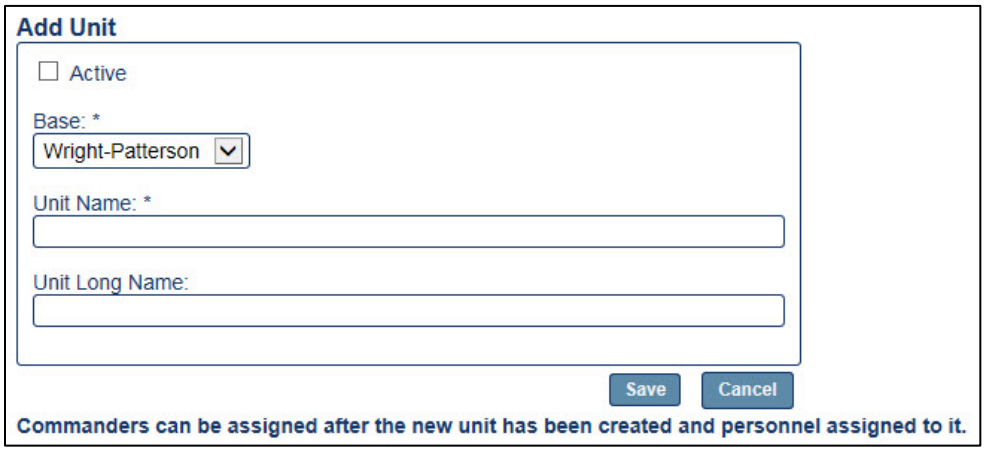
The Units screen displays the Units for all bases. A GA or FSO can create, edit, or delete any unit.

8.9.1 Create a Unit

1. On the Admin screen, click the Units link to open the Units screen.



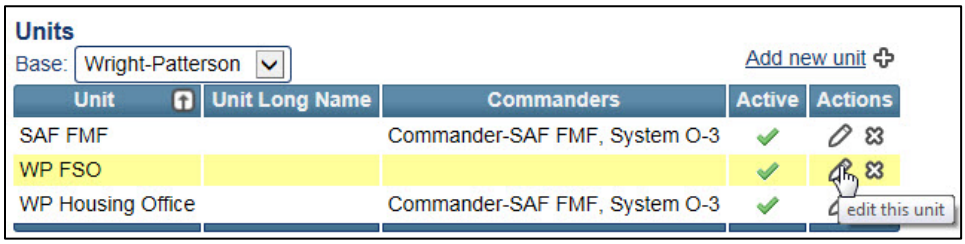
2. Click the Add new unit link to open the Add Unit screen.



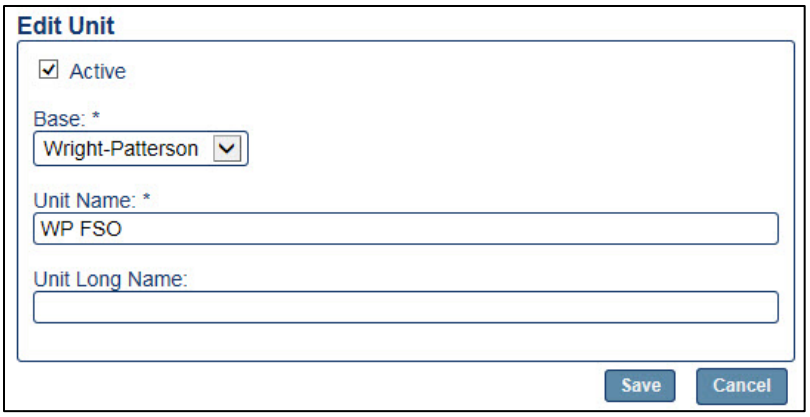
3. Complete the following fields:
   - Base
   - Unit Name
   - Unit Long Name
4. Click the Active checkbox to make the base active.
5. Click the Save to save the newly created unit or Cancel to go back to the Units screen.

8.9.2 Edit a Unit

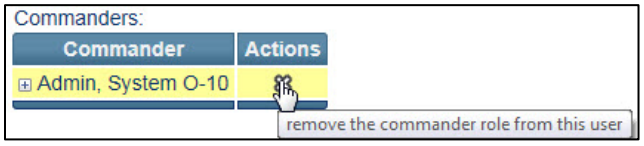
1. On the Admin screen, click the Units link to open the Units screen.
2. Click the edit this unit icon next to the Unit that you want to edit.



The Edit Unit screen displays.



3. Make changes to one or more of the following fields:
   - Base
   - Unit Name
   - Unit Long Name
4. (Optional) Select a commander from the Add a commander dropdown list and click Add. If there are no commanders listed, the dropdown will not display.
5. (Optional) In the Commanders table, click the Remove the Commander Role from this User icon to remove a commander.



6. Click Save to save the changes or Cancel to go back to the Units screen.

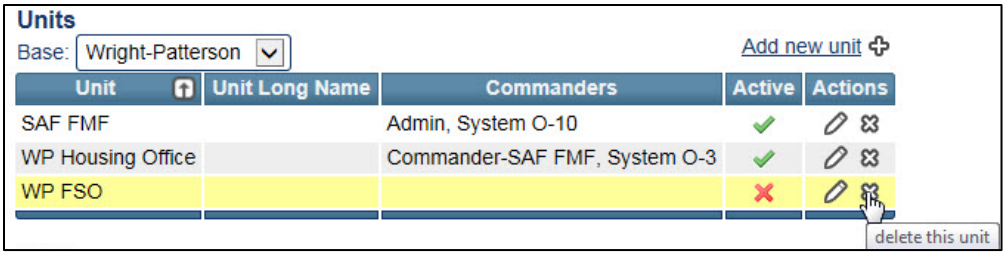
8.9.3 Delete a Unit

GAs and FSOs can delete an inactive unit.

1. On the Admin screen, click the Units link to open the Units screen.
2. Click the Delete this Unit icon next to an inactive unit.

   Note:

   If you try to delete an active unit, the unit will change to inactive.

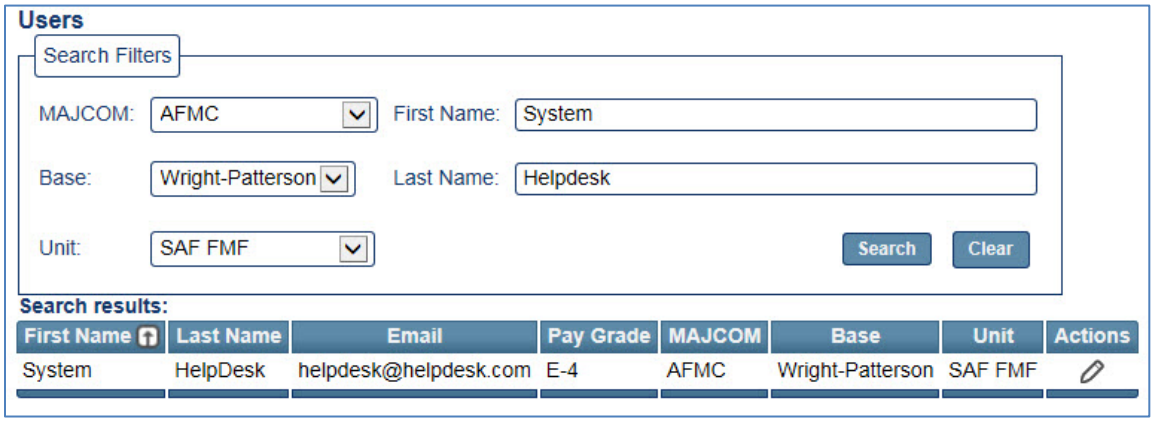


3. A dialog box displays with the statement "Are you sure you want to delete this unit?" click OK to delete or Cancel to keep the unit in the list.

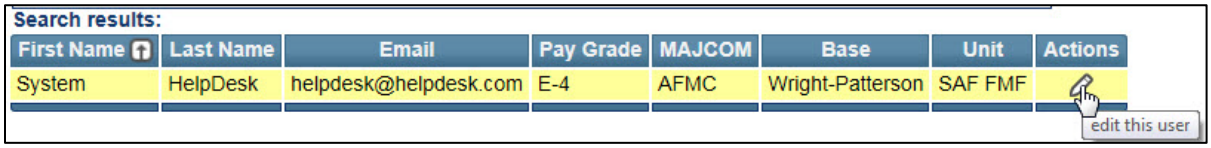
8.10 Users

The initial Users screen is a search screen that enables GAs and FSOs to locate users that are requesting a role. Once the user is located, the GA can assign them to a role.

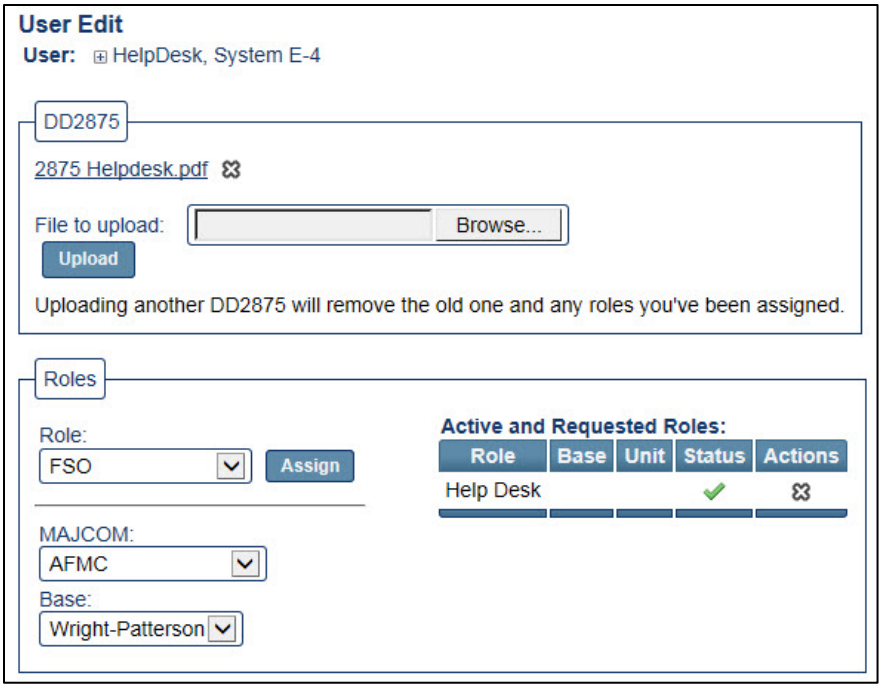
1. On the Admin screen, click the Users link to open the Users screen.



2. Enter search criteria:
   a. Select a MAJCOM, Base, or Unit from the dropdown list, or select all three.
   b. Enter the First Name and/or Last Name of the User.
3. Click Search to search for users or click Clear to clear the search criteria.
4. In the Search Results table, click the edit this user icon.



The User Edit screen displays.



5. Upload a DD2875 if there is not one attached.
6. In the Roles section, select a Role from the Role dropdown.
7. Select a MAJCOM and a Base.
8. Click the Assign button to assign the role to the user.

Appendix A Form Field Descriptions

Table A-1: Advance BAH Form Field Descriptions

Field Name		Description
Request		
Advance Rent		Advance rent being requested. If an amount is entered, Question B is enabled. If an amount is removed, Question B is disabled.
		Tool Tip Help text: If an amount entered for Advance Rent, then Question B in the Certification of Request section must be checked.
Security Deposit		Security deposit being requested
Moving-in Expense		Move-in expense being requested
Other		Other expenses being requested
Occupancy Date		Date that user will occupy the dwelling.
Type of Advance	**CONUS**	If checked, dwelling is in the Continental United States. User's profile used to determine CONUS/OCONUS status.
	OCONUS	If checked, dwelling is not in the Continental United States. User's profile used to determine CONUS/OCONUS status.
Item A		If checked, user has read and agreed to the text.
Item B		If checked, user has read and agreed to the text. Disabled if an amount is not entered in the Advance Rent field in the Request section of the form.
Item C		If checked, user has read and agreed to the text. Disabled if an amount is entered in the Advance Rent field in the Request section of the form.
Item D		If checked, user has read and agreed to the text.
Item E		If checked, user has read and agreed to the text.
Repayment		
Number of Months Repayment		Dropdown list of quantity of months requested for repayment.

Field Name	Description
Number of Months to Delay Repayment	Dropdown list of quantity of months requested to delay start of repayment.
Reason for extending more than 12 months or reason for postponing repayment	Reason why repayment is longer than 12 months and/or any delay to the start of repayment is greater than 0. Active only when Number of Months Repayment is greater than 12 and/or Number of Months to Delay Repayment is greater than 0.
Save	Saves all fields to the database tables. Every time form changes are saved to the database, the associated frm_forms record is updated to indicate a new last modified date/time.
Cancel	Returns user to their Inbox.

Table A-2: Advance Pay Form Field Descriptions

Field Name	Description	
Amount Requested		Help text: "Requesting more than one month of pay will require an Explanation of Expenses and your Commander's Approval."
	1 Month	
	1 to 3 Months	
	$ - the dollar amount requested if more than one month	
Repayment Schedule		Help text: "Repayment of more than 12 months will require Justification of Extended Repayment and your Commander's approval."
	Lists 1 to 24 months for repayment options	
Explanation of Circumstances		Help text: "Explanation of the circumstances where greater-than-normal expenses might be incurred or circumstances requiring an early or late payment" Visible only if "1 to 3 Months" is selected as the "Amount Requested".
	The explanation of all listed expenses. Visible only if "1 to 3 Months" is selected as the "Amount Requested".	
Specifics of your financial situation		Help text: "List specifics of your financial situation, including outstanding debts and monthly payment amounts that indicate a severe hardship in repaying the advance in the normal 12-month time period." Visible only if more than 12 months is selected as the "Repayment Schedule".
	The full text of the descriptions of the user's financial situation. Visible only if more than 12 months is selected as the "Repayment Schedule".	
Receipt of Payment		Help text: "Payment more than 30 days before or 60 days after will require an Explanation of Expenses and your Commander's Approval."
	Lists all Receipt options: • Within 30 days before or 60 days after my PCS • 31 – 90 days before my PCS • 61 – 180 days after my PCS	
Expenses	See section 3.1.1.1 Advance Pay Expenses for more information.	
Save	Saves the fields in the "Advance Pay Request" section.	
Cancel	Cancels any changes and returns the user to the inbox.	

Table A-3: Adverse Effect Form Field Descriptions

Field Name	Description	
Issuing Organization and Station	The station and organization that is issuing the form/refunds.	
Date orders issued	The date the orders were issued to the member.	
Order Number	The travel order number.	
Justification	The justification as to why the meal/mess/quarters were not used.	
Save	Saves the form.	
Cancel	Cancels any changes and returns the user to the inbox.	
Non-Use of Government Quarters	See section 3.1.1.1.1 Non-Use of Government Quarters for more information.	
Non-Use of Government Mess/Open Mess	See section 3.1.1.1.2 Non-Use of Government Mess/Open Mess for more information.	
Non-Use of Government Quarters		
Add new +	Opens the editor with a blank item. Not visible once at least twenty-four items have been entered.	
No.	Displays a count of how many items are in the table.	
Date	The date of the event.	
Location	The issuing base.	
Valid		Indicates that the corresponding item is valid. All items must be valid to enable form submission.
		Indicates that the corresponding item is not valid. If any items are not valid, the form cannot be submitted.
Actions		Opens the corresponding item in the editor and displays any errors.
		Deletes the corresponding item from the list.
Error section		
Error	Lists any errors associated with the item currently being edited.	
Editor section		
[Header]	Displays “Add Non-Use of Government Quarter” if the “Add new +” is clicked. Displays “Edit Non-Use of Government Quarter” if the Edit icon is clicked.	

Field Name	Description	
Date	Allows the user to enter the date.	
Location	Allows the user to enter the location.	
Add	Allows the user to save a new item. Visible only if the “Add new +” link is clicked.	
Save	Allows the user to save any updates to an existing item. Visible only if the Edit icon is clicked.	
Cancel	Cancels any changes and closes the editor.	
Non-Use of Government Mess/Open Mess		
Add new +	Opens the editor with a blank item. Not visible once at least twenty-four items have been entered.	
No.	Displays a count of how many items are in the table.	
Date	The date of the event.	
Location	The issuing base.	
Meals Not Used	Displays which meals were not used. “M” indicates morning, “N” indicates afternoon, and “E” indicates evening.	
Open Mess Not Used	Displays which open mess were not used. “M” indicates morning, “N” indicates afternoon, and “E” indicates evening.	
Valid		Indicates that the corresponding item is valid. All items must be valid to enable form submission.
		Indicates that the corresponding item is not valid. If any items are not valid, the form cannot be submitted.
Actions		Opens the corresponding item in the editor and displays any errors.
		Deletes the corresponding item from the list.
Error Section		
Error	Lists any errors associated with the item currently being edited.	
Editor Section		
[Header]	Displays “Add Non-Use of Government Mess/Open Mess” if the “Add new +” is clicked. Displays “Edit Non-Use of Government Mess/Open Mess” if the Edit icon is clicked.	
Date	Allows the user to enter the date.	

Field Name	Description
Location	Allows the user to enter the location.
Meals Not Used section	
Morning	Allows the user to select Morning.
Noon	Allows the user to select Noon.
Evening	Allows the user to select Evening.
Open Mess Not Used Section	
Morning	Allows the user to select Morning.
Noon	Allows the user to select Noon.
Evening	Allows the user to select Evening.
Add	Allows the user to save a new item. Visible only if the “Add new+” link is clicked.
Save	Allows the user to save any updates to an existing item. Visible only if the Edit icon is clicked.
Cancel	Cancels any changes and closes the editor.

Table A-4: Allotment Form Field Descriptions

Field Name		Description
Allotment Action	**Start**	Allows the user to start an allotment. The Previous Amount field is disabled. The New Monthly Amount field is enabled.
	Stop	Allows the user to stop an allotment. The Previous Amount field is enabled. The New Monthly Amount field is disabled.
	Change	Allows the user to change an allotment. The Previous Amount field is enabled. The New Monthly Amount field is enabled.
Previous Amount		The amount of the allotment before the Change or Stop action. If Start radio button selected, this field is disabled.
New Monthly Amount		The amount of the allotment, after a Start or Change action. If Stop radio button selected, this field is disabled.
Allotment Type	**Insurance**	Insurance allotment type.
	Mortgage	Mortgage allotment type.
	Privatized Housing	Privatized Housing allotment type.
Effective Date		
[Effective Date]		The label of this field changes based on what Allotment Action is selected: • Nothing Selected: “Effective Date:” • Start: “Date the first allotment needs to be received by the allottee:” • Stop: “Date the last allotment needs to be received by the allottee:” • Change: “Date the new allotment amount needs to be received by allottee:” Field allows user to enter the date the allotment action is to become effective. The effective date should always be the 1st of a month—if user enters any other day, the field will save as 1st of the month and update in the field’s box as 1st of the month.

Field Name		Description
Allottee		
Company Name		Name of the company receiving the allotment.
Account/Policy Number		The account/policy number of the account receiving the allotment.
Account Type	**Checking**	If selected, Account is a Checking Account.
	Savings	If selected, Account is a Savings Account.
Defense Pay System Company Code		The allottee's Defense Pay System Company Code.
		When user hovers over this icon, this text will pop up: Only enter this if you know it. Your FSO will override/complete this field, if necessary.
Remarks		Text box for user to enter any additional remarks.
Allottee Address Panel		A valid address must be entered. See the Profile SDD for complete information on the Address panel component.
Save		Allows the user to save the form.
Cancel		Returns the user to their Inbox

Table A-5: Arrival Worksheet Form Field Descriptions

Field Name		Description
PCS Information Tab		
PCS Dates	Final Out	The date for final out at current duty location. Placeholder of "d mmm yyyy" used." NOTE: Must be same date as or occur before all other PCS Dates.
	Port Call	The date Intermediate stop on trip. Placeholder of "d mmm yyyy" used." NOTE: Must be same date as or occur before following 2 dates. Disabled if user is not going OCONUS.

Field Name	Description	
	Departed last Duty Station	The date user departed previous duty station. Placeholder of “d mmm yyyy” used.” NOTE: Must be same date as or occur before following date.
	Notified unit that I was available for duty	The date the user notified they were available for duty. Placeholder of “d mmm yyyy” used.” NOTE: Must be same date as or occur before all other dates.
If applicable, explain delays between the following PCS dates	PCS Date Type 1	PCS Date Type from which a delay occurred. Choices are: • Final Out Date • Port Call Date • Date Departed Last Duty Station • Date Notified Unit Available for Duty
	PCS Date Type 2	PCS Date Type from which a delay occurred. Choices are: • Final Out Date • Port Call Date • Date Departed Last Duty Station • Date Notified Unit Available for Duty
Explanation for delays between specified dates	Reason for the delay between PCS Date Type 1 and PCS Date Type 2. NOTE: Disabled unless PCS Date Type 1 and 2 both have a selection.	
		Tooltip text: “Examples include mass out processing, leave taken prior to departure, holidays, etc.”
Was leave taken upon arrival	Yes	Indicates leave was taken.
	No	Indicates that leave was not taken.
Save	Saves all fields to the database tables.	
BAH/OHA/FSH Tab		
1. My dependent(s) is/are residing…	A checked box indicates a Yes answer. Disabled if user has no dependents.	

Field Name	Description	
My dependent(s) was/were assigned…	Date when dependents was assigned to quarters. Placeholder of “d mmm yyyy” used.” Disabled if user has no dependents or the “1. My dependent(s) is/are residing…” checkbox is not checked.	
2. I have a unique situation…	A checked box indicates a Yes answer. Disabled if user has no dependents.	
Please explain your unique situation here…	A text box allows the user to explain the unique situation. Disabled if user has no dependents or the “2. I have a unique situation…” checkbox is not checked.	
3. I certify I currently reside	A dropdown list allows a user to select where he or she resides.	
	Effective	Date the user began residing in the selected location. Placeholder of “d mmm yyyy” used.”
4. If claiming ONLY a child as primary dependent, who is NOT in your custody, whom is the child residing with (ex-spouse, grandparent, etc.)?	A text box allows the user to identify who the child is residing with. Disabled if user has no dependents.	
	Name	If child resigning with a former spouse who is Military, this field will contain the full name of the Military ex-spouse. Disabled if user has no dependents.
	SSN	If child resigning with a former spouse who is Military, this field will contain the SSN of the Military ex-spouse. Placeholder of “123456789” used.” Disabled if user has no dependents.
	Duty Station	If child resigning with a former spouse who is Military, this field will contain the name of the duty station of the Military ex-spouse. Disabled if user has no dependents.
Save	Saves all fields to the database tables.	
Travel Tab		
1. I received my overseas air ticket…	Checkbox	If checked, indicates the user received overseas air ticket(s).

Field Name		Description	
		DID	If checked, indicates user received their ticket from on-base CTO. NOTE: Disabled unless “I received my overseas air ticket…” is checked.
		DID NOT	If checked, indicates user did not receive their ticket from on-base CTO. If this is checked, then a non-availability statement becomes a required document. NOTE: Disabled unless “I received my overseas air ticket…” is checked.
	Checkbox	A checked box indicates a Yes answer.	
	All	Allows a user to indicate that All of his or her travel was in a Privately Owned/Operated Vehicles. NOTE: Disabled unless “I used a privately owned/operated…” is checked.	
	Partial	Allows a user to indicate that A Portion of his or her travel was in a Privately Owned/Operated Vehicles. NOTE: Disabled unless “I used a privately owned/operated…” is checked.	
		From	A date picker allows a user to identify the From date that he or she began using a Privately Owned/Operated Vehicles for travel. NOTE: Disabled unless “Partial” is checked. Placeholder of “d mmm yyyy” used.”
		To	A date picker allows a user to identify the To date that he or she completed using a Privately Owned/Operated Vehicles for travel. NOTE: Disabled unless “Partial” is checked. Placeholder of “d mmm yyyy” used.”
Save		Saves all fields to the database tables.	
Dislocation Allowance Tab			
1. I am married to another military member and we relocated at … time(s).		A checked box indicates a Yes answer. Entire item disabled is user does not have a spouse.	

Field Name	Description	
	Same	Indicates the relocation was at the Same time.
	Separate	Indicates the relocation was Separate times.
a. We lived in the … household at old PDS	A checked box indicates a Yes answer. Entire item disabled is user does not have a spouse.	
	Same	Indicates the user lived in the Same household at the old PCS.
	Separate	Indicates the user lived in a Different household at the old PCS.
b. We lived in the … household at new PDS	A checked box indicates a Yes answer. Entire item disabled is user does not have a spouse.	
	Same	Indicates the user lived in the Same household at the new PCS.
	Separate	Indicates the user lived in a Different household at the new PCS.
c. We were stationed at different PDSs before relocating to new PDS	A checked box indicates a Yes answer. Entire item disabled is user does not have a spouse.	
d. We married en route to new PDS (not married at last PDS)	A checked box indicates a Yes answer. Entire item disabled is user does not have a spouse.	
2. I am E4 or above w/at least 3 yrs service w/o Dependents & do not/will not have Gov quarters assigned	A checked box indicates a Yes answer. Disabled is user has dependents or has a Pay Grade less than E4.	
3 I am currently in Billeting/TLF but WILL be assigned Dorms or Gov't Base Housing.	A checked box indicates a Yes answer.	
Save	Saves all fields to the database tables.	
OCONUS Tab		
Date Arrived in Country	Date the user arrived in the country. Placeholder of “d mmm yyyy” used.”	

Field Name		Description
JTR Location		JTR Location name—found in a Base's DB record. NOTE: Prefills with OCONUS base's JTR location, but should remain editable.
1. I traveled with dependents		A text box allows the user to enter the number of dependents travelling OCONUS.
2. I am currently serving a tour	**Accompanied**	A selected radio button indicates a Yes answer. Disabled if user does not have dependents.
	Unaccompanied	A selected radio button indicates a Yes answer.
Save		Saves all fields to the database tables.

Table A-6: BAH Form Field Descriptions

Element Label	Purpose
Non-Custodial Parent	
I am a Non-Custodial Parent	When checked, indicates user is a non-custodial parent. Checking will enable all controls in section except '$' field, which is only enabled if "I pay a partial amount" selected. Entire section is disabled if user has no dependents.
I pay the full amount of with-dependent rate BAQ	Paying full custodial amount for support of dependent.
I pay a partial amount	Paying a portion of custodial amount for support of dependent. Selecting this option enables the '$' field.
$	Partial amount paid of with-dependent rate BAQ.
Based on	Payment amount basis. Choices are: • Divorce Decree • Court Order • Legal Separation Agreement • Written Agreement with Child's Custodian
Dependents	
I am claiming BAQ for dependent(s)	When checked indicates user is claiming BAQ for dependents. Checking enables controls in this section. Entire section disabled if user has no dependents.

Element Label	Purpose
IN My Custody	User claims the dependents are in their custody.
NOT In My Custody (but paying child support)	User does not claim the dependents are in their custody, but that they are paying child support.
Effective Date	Date when dependents started to be in, or not be in, the custody of the user.
	Link the displays a popup calendar used to select a date.
	Tooltip text: "Effective Date of Custody is one of: (1) date of marriage if married to a civilian; (2) date of birth of youngest child if single or married to military member and claiming with dependent rate; or (3) date custody determined for adopted child or parents."
First Dependent	Dependent picked from the list of profile dependents.
Second Dependent	Dependent picked from the list of profile dependents less the dependent from the first dependent selection.
The Dependent(s) named above is a Child whose Parent is a military member...	When checked, indicates the child(ren) selected is a dependent of a parent in the military, or spouse of a military member. If checked, the Name, SSN, Branch and Duty Station fields are enabled.
Name	Name of military member (last, first, middle initial).
SSN	SSN entry.
Branch of Service	Name of the branch of service that spouse military member belongs.
Station	Displays the station of where the spouse military member stationed.
Certify Application	
This section is not visible if the form is part of a PCS package.	
Yes	User selects if this is their first filed BAH.
No	User selects if they have previously filed BAH. When selected, Previous BAH filed Date field is enabled.
Previous BAH filed on	Date when previous BAH was filed.
	Link the displays a popup calendar used to select a date.
Form control button	
Save	Saves all fields to the database tables

Table A-7: BAS Form Field Descriptions

Field Name	Description	
Effective Date	The effective date for the request.	
		When clicked displays a date picker control.
Reason for Request	The reason for the request.	
Save	Saves all fields to the database tables.	
Cancel	Changes all fields back to their previously saved state.	

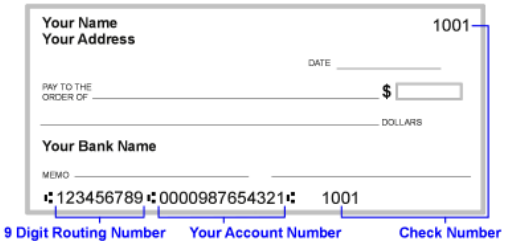
Table A-8: BAS Certification Form Field Descriptions

Element Label	Purpose	
Month	The month in which the meals were missed.	
Year	The year in which the meals were missed. List includes three years: one previous year, the current year, and one future year.	
Set all meals selections	When clicked, checks all meal boxes in the table.	
Clear all meals selections	When clicked, unchecks all meal boxes in the table.	
Save	Saves the data for the form.	
Cancel	Returns the user to their Inbox.	
Meals		
Meal Type	Header on the left for all checkboxes in a row. Indicates the named meal of the day.	
Day Number	Header on the top for all checkboxes in a column. Indicates the day of the month for the meal.	
Checkboxes	This is a grid of checkboxes that indicates a specific meal on a specific day.	
Actions		When clicked, checks all checkboxes in the row.
		When clicked, unchecks all checkboxes in the row.

Table A-9: COLA Form Field Descriptions

Field Name	Description
Effective Date	The effective date of the allowance
COLA Type	Can be one of the following: • OCONUS Start • OCONUS Change • CONUS Start • CONUS Change • Dual *(this only displays if the user has dependents)*
Save	Saves any changes to the form
Cancel	Cancels any changes to the form

Table A-10: Direct Deposit Form Field Descriptions

Field Name		Description
MyPay		When clicked takes the user to https://mypay.dfas.mil.
Financial Institution Name		The Financial institution name of the Direct Deposit Account.
Account Holder's name		The name of the person who owns that Direct Deposit Account. Prefilled with information from the user's profile.
Account Type	**Checking**	Checking account type.
	Savings	Savings account type.
9-Digit Routing Number		The 9-Digit Routing number of the Direct Deposit Account.
		Displays a picture of a check: 
Account Number		The account number of the Direct Deposit account.

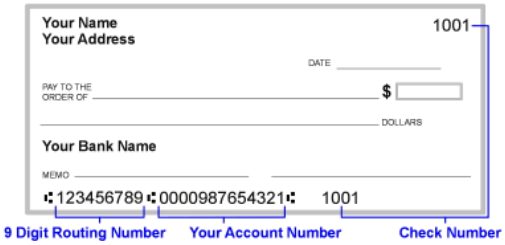
Field Name	Description
	Displays a picture of a check: 
Save	Saves all data in the fields.
Cancel	Returns users to their Inbox.

Table A-11: Emergency Pay Form Field Descriptions

Field Name	Description
Dependents Available	
Only displays dependents not added to the form.	
Name	The name of the dependent.
Actions	A link that adds the dependent to the form and adds them to the Dependents Added to the Form list.
Dependents Added to the Form	
Only 9 dependents are allowed on the form.	
Name	The name of the dependent.
Primary	This button allows the member to select the primary dependent.
Actions	A link that removes the dependent from the form and adds them to the Dependents Available list.
Payment Designation	
Advance of Pay	Allows user to choose this type of payment designation. When selected, the Maximum Amount $ field is enabled, otherwise it is disabled.
Maximum Amount $	Allows the user to enter an amount after the advance pay radio button is selected. Disabled if Advance of Pay field not selected.

Field Name	Description
Evacuation Allowance	Allows user to choose this type of payment designation.
Evacuation Dislocation Allowance	Allows user to choose this type of payment designation.
Save	Saves the form to the database.
Cancel	Cancels any changes to the form and takes the user back to the Home screen.

Table A-12: FSA Form Field Descriptions

Field Name	Description
FSA Type	Temporary
	Restricted
	Ship
Departure Date	The date departed from his/her residence
Certifications	
I am not divorced or separated from my spouse.	Member certification of dependent status
My dependent child/children was/were not in the legal custody of another person when I received my orders.	Member certification of dependent status
My dependent was (except spouse) is not a member of the military on active duty.	Member certification of dependent status
My sole dependent is not in an institution (or expected to be) for more than a year.	Member certification of dependent status
I am claiming FSA for my dependent parents.	Member certification of dependent status
I am married to another military member on active duty.	Member certification of dependent status

Field Name	Description
Was	Only enabled if the “I am married to a military member” item is checked.
Was Not	Only enabled if the “I am married to a military member” item is checked.
Spouse’s SSn, Branch, Duty Station, and Unit	The branch, base, and unit of the user’s military spouse. This field is editable but will be pre-populated with the spouse’s information if the spouse is also an eFinance user.
This is not my first TDY.	Member certification of prior TDY status
Was	Only enabled if the “This is not my first TDY.” item is checked.
Was Not	Only enabled if the “This is not my first TDY.” item is checked.
Save	Saves all changes made to the form.
Cancel	Reverts any changes made to the form.

Table A-13: Lost Receipt Form Field Descriptions

Field Name	Description
Please provide full explanation as to why receipt(s) are not available.	Field for inputting an explanation for the missing receipt(s).
[Red Text]	Notifies the user of how many lost receipts of each type may be created.
Add Lost Receipts	Contains a list of lost receipt types from which the user can select to create new lost receipts. Only one of each type can be added to the form, with the exception of Airfare and Lodging, where two can be added. Once a lost receipt type has reached its maximum allowance of instances on the form, it is no longer available in the Add Lost Receipts dropdown.
Receipts table section	
Type	Type of receipt.
Name	Name of the receipt.
Date	The date of the receipt transaction.
Amount	The total amount of the receipt.

Field Name	Description	
Valid		Indicates that the corresponding lost receipt is valid. All receipts in the form must be valid to enable form submission.
		Indicates that the corresponding lost receipt is not valid. If any lost receipts are not valid, the form cannot be submitted.
Action		Opens the corresponding lost receipt in the editor.
		Deletes the corresponding lost receipt.
Error	Displays errors that are keeping form submission from being allowed. Any existing errors are displayed when an editor is loaded and also after saving.	
Editor section		
Editor	The Other Transportation Receipt editor is displayed in Figure 1: Lost Receipt Editor The editor is different for each lost receipt type. The following sub sections of this document explain each lost receipt editor.	
Airfare Panel		
Carrier Name	The carrier's name.	
Base Airfare Cost	The base airfare cost.	
Airfare Taxes	The airfare taxes.	
CTO Fee	The CTO fee.	
City (Traveled From)	The city traveled from.	
State (Traveled From)	The state traveled from. Visible only if the selected Country (Traveled From) is United States.	
Province (Traveled From)	The province traveled from. Visible only if a non-U.S. Country (Traveled From) is selected.	
Country (Traveled From)	The country traveled from. If United States is selected, the State (Traveled From) dropdown is displayed and the Province (Traveled From) field is hidden. If a non-U.S. country is selected, the Province (Traveled From) field is displayed and the State (Traveled From) dropdown is hidden.	

Field Name	Description
City (Traveled To)	The city traveled to.
State (Traveled To)	The state traveled to. Visible only if the selected Country (Traveled To) is United States.
Province (Traveled To)	The province traveled to. Visible only if a non-U.S. Country (Traveled To) is selected.
Country (Traveled To)	The country traveled to. If United States is selected, the State (Traveled To) dropdown is displayed and the Province (Traveled To) field is hidden. If a non-U.S. country is selected, the Province (Traveled To) field is displayed and the State (Traveled To) dropdown is hidden.
Date Traveled	The date traveled.
Select the method used to purchase the Airfare	List for selecting the method the airfare was purchased with: • Individual GTC/CSA • Unit GTC(CBA) • Personal Credit Card
CTO Purchased	If the ticket was purchased though the CTO.
Indirect Routing	If the ticket was routed indirectly.
	Help text – “Examples leave/leisure/circuitous travel”
Save	Saves the lost receipt.
Cancel	Closes the editor without saving any changes.
Conference Panel	
Conference Purpose	The conference purpose.
Paid To	Who the fee was paid to.
Amount	The amount of the receipt.
Were any meals included?	Radio group for selecting yes or no pertaining to whether the meals were included.
Was any lodging included?	Radio group for selecting yes or no pertaining to whether the lodging was included.
Save	Saves the form.
Cancel	Closes the editor without saving any changes.
Lodging Panel	

Field Name	Description
Lodging	The hotel name.
Check-in-Date	The date checked in.
Check-out-Date	The date checked out.
City	The city.
State	The state. Visible only if the selected country is United States.
Province	The province. Visible only if a non-U.S. country is selected.
Country	The country. If United States is selected, the State dropdown is displayed and the Province field is hidden. If a non-U.S. country is selected, the Province field is displayed and the State dropdown is hidden.
Daily Room Rate	The daily room rate.
Daily Tax	The daily room tax.
Was the room shared with any military/government employees?	If the room was shared.
If room was shared with military/government employees, were they on funded travel orders?	If the shared room was funded travel orders.
	Help text – This question may only be answered if the question directly above is answered 'Yes'.
Save	Saves the form.
Cancel	Closes the editor without saving any changes.
Other Expense Panel	
Other Expense	Help text - If claiming reimbursement for mailing/shipping baggage or property, you must include weight tickets.
	The other expense.
Expense Date	The expense date.
Amount	Amount of the expense.
Save	Saves the form.
Cancel	Closes the editor without saving any changes.
Other Transportation Panel	
Carrier Name	The carrier name.

Field Name	Description
Vehicle Type	The vehicle type.
Base Cost	The base cost.
Taxes	The cost of the taxes.
Tip	The cost of the tip.
City (Traveled From)	The city traveled from.
State (Traveled From)	The state traveled from. Visible only if the selected Country (Traveled From) is United States.
Province (Traveled From)	The province traveled from. Visible only if a non-U.S. Country (Traveled From) is selected.
Country (Traveled From)	The country traveled from. If United States is selected, the State (Traveled From) dropdown is displayed and the Province (Traveled From) field is hidden. If a non-U.S. country is selected, the Province (Traveled From) field is displayed and the State (Traveled From) dropdown is hidden.
City (Traveled To)	The city traveled to.
State (Traveled To)	The state traveled to. Visible only if the selected Country (Traveled To) is United States.
Province (Traveled To)	The province traveled to. Visible only if a non-U.S. Country (Traveled To) is selected.
Country (Traveled To)	The country traveled to. If United States is selected, the State (Traveled To) dropdown is displayed and the Province (Traveled To) field is hidden. If a non-U.S. country is selected, the Province (Traveled To) field is displayed and the State (Traveled To) dropdown is hidden.
Save	Saves the form.
Cancel	Closes the editor without saving any changes.
Rental Car Panel	
Company Name	The rental car company name.
Date Rented	The date the car was rented.
Date Returned	The date the car was returned.
Date Traveled	The date traveled.
Fuel Paid In Advance	The cost of fuel paid for in advance.
Basic Rental Rate	The basic car rental rate.

Field Name	Description
Taxes	The car taxes.
Insurance (OCONUS only)	The cost of insurance for the rental car.
Save	Saves the form.
Cancel	Closes the editor without saving any changes.
Taxi Panel	
Company Name	The company name.
Basic Fare	The basic fare.
Tip	The tip.
City (Traveled From)	The city traveled from.
State (Traveled From)	The state traveled from. Visible only if the selected traveled from country is United States.
Province (Traveled From)	The province traveled from. Visible only if a non-U.S. traveled from country is selected.
Country (Traveled From)	The country traveled from.
City (Traveled To)	The city traveled to.
State (Traveled To)	The state traveled to. Visible only if the selected traveled to country is United States.
Province (Traveled To)	The province traveled to. Visible only if a non-U.S. traveled to country is selected.
Country (Traveled To)	The country traveled to.
Save	Saves the form.
Cancel	Closes the editor without saving any changes.

Table A-14: MIHA Form Field Descriptions

Field Name	Description
Expenses List	
Type	The type of expense

Field Name	Description	
Expense Name	The name of the expense	
Amount Claimed	The dollar amount claimed for the expense	
Amount Allowed	The dollar amount allowed for the expense. This amount is entered by the housing office.	
Actions		Edit – Edit the expense
		Delete – Delete the expense
Expense Editor		
Expense Type	The type of expense: Rent or Security	
Expense Name	The name of this expense	
Amount Claimed	The amount claimed for this expense	
Add/Save	Adds a new expense or Saves the expense being edited	
Cancel	Clears the form; reverts the editor back to add mode if an expense was being edited	

Table A-15: OHA Form Field Descriptions

Field Name	Description	
Are you entitled to COLA or OHA for dependents residing elsewhere?	Yes (specify location)	
	No	
	Text Box – If “Yes” is selected this textbox will be enable; this is the location where the other dependents are residing.	
Currency used for rent/mortgage	U.S. Dollars	
	Local Currency	
	Text Box – If “Local Currency” is selected this textbox will be enable – the name of the currency used.	
		Help text – “Enter the name of the currency here. The dollar amount goes in the Residence Cost field below.”
Residence ownership	Owned	
	Rented	

Field Name	Description
Residence cost	The cost of the rent or mortgage.
	Help text – "Use the currency specified above. Renters: enter monthly rent amount. If sharing report total rent, not your share. Owners: enter original purchase price, excluding closing costs, taxes, etc."
Effective Date of lease/rental agreement	The date the residence was rented or bought.
Utilities (excluding telephone; renters only)	I pay for ALL utilities.
	I do not pay for ANY utilities.
	I pay for SOME utilities. My landlord pays for the following:
	Electricity
	Heating
	Air Conditioning
	Water and/or Sewer
	Trash Disposal
Are you a "Sharer" for housing allowance purposes?	Spouse who is also a service member.
	Dependent who is also a federal civilian employee…
	If "Dependent who is also a federal civilian employee…" is checked the Text Box for the number of applicable dependents will be enabled.
	Excluding dependents, anyone else not covered above who pays a portion of the rent, mortgage, and/or utilities.
	If "Excluding dependents, anyone else not covered above…" is checked the Text Box for the number of other people who pay a portion of the housing expenses will be enabled
	If "Other service members entitled to a housing allowance …" is checked the Service Members Living With You section will be enabled. (Add them below)
Service Members Living With You	
Add new Service member living with you	When clicked, Add new Service member living with you panel will appear.
Full Name	The full name of the service member.

Field Name	Description	
SSN	The social security number of the service member.	
Service Branch	The military service branch of the service member.	
Valid	Record is valid or not. A green checkmark states the record is valid, and red "X" states the record is not valid. Valid means that all the required fields have a value in them.	
Actions		edit – edits the selected service member
		delete – removes the selected service member.
Add/Edit Service Member		
Full Name	The full name of the service member.	
SSN	The social security number of the service member.	
Service Branch	The military service branch of the service member.	
Add/Save Member	Adds a new service member or updates the one being edited.	
Cancel	Cancels any changes to the current service member and reverts the screen back to Add move.	
Remarks	Allows the user to enter extra remarks.	
		Help text – "If you paid rent more than three months in advance please provide the following information: the number of months paid in advance, the amount of advance rent paid (in local currency if applicable), and the exchanged rate used for local currency (if applicable)."
EOHA - Housing		
Job Title	The job title of the housing official.	
MIHA or Misc Payment Authorized?	Whether MIHA or other miscellaneous payments are authorized for the member.	
MIHA or Misc Entitlement	Initial. Only enabled if MIHA or miscellaneous payments are authorized.	
	Subsequent Only enabled if MIHA or miscellaneous payments are authorized.	
Save	Saves any changes to the form.	
Cancel	Reverts any changes to the form.	

Table A-16: SOLR Form Field Descriptions

Element Label	Purpose
City or County	Name of City or County
State	New state of legal residence.
Save	Saves the form
Cancel	Cancel any changes and directs the user to the inbox

Table A-17: State Tax - Native American Form Field Descriptions

Element Label	Purpose
Status	Displays the current status of the form. See the Form Editor SDD for more information.
Name of federally recognized Tribe that you are a member of	Name of the Tribe the user is a member of.
Name of federally recognized Tribe Reservation or Indian Country	Name of the Tribe Reservation or Indian County.
Year	Year user exempt from taxes.
Save	Saves the changes on the screen for processing.
Cancel	Cancels any changes and returns the user to the inbox.

Table A-18: Statement of Expenses Form Field Descriptions

Element Label	Purpose
Status	Indicates the current status of the form. See the Form Editor SDD for more information.
Expenses section	
Add new expense	Enables the user to add a new expense.
Date	The date the expenses occurred.
Lodging	The cost of the lodging expenses.
Breakfast	The cost of the breakfast expenses.

Element Label	Purpose	
Lunch	The cost of the lunch expenses.	
Dinner	The cost of the dinner expenses.	
Laundry	The cost of laundry expenses.	
Local Transportation	The cost of local transportation expenses.	
Other	The cost of any other expenses.	
Valid		Indicates that the expense is valid. If all expenses are valid the form can be submitted.
		Indicates that the expense is not valid. If the form has any invalid expenses it cannot be submitted.
Actions		Enables the user to edit an expense.
		Enables the user to delete an expense.
Edit section		
Error	Lists any errors associated with the item currently being edited.	
Date	Enables the user to select or enter a date.	
Lodging	Enables the user to enter a Lodging expense amount.	
Breakfast	Enables the user to enter a Breakfast expense amount.	
Lunch	Enables the user to enter a Lunch expense amount.	
Dinner	Enables the user to enter a Dinner expense amount.	
Laundry	Enables the user to enter a Laundry expense amount.	
Local Transportation	Enables the user to enter a Local Transportation expense amount.	
Other	Enables the user to enter an Other expense amount.	
Add	Visible if the user clicked the “Add new expense+” link. Adds the new expense to the Expenses list.	
Save	Visible if the user clicked the Edit icon. Saves any changes made to the corresponding expense.	
Cancel	Changes all fields back to previously saved state.	

Table A-19: Station Gain Form Field Descriptions

Field Name	Description	
Total Accountable Days: [16]	The number of days from the constructed DDLDS to the date arrived on duty station.	
		DDLDS Counts as [0]. (See 3.4.11 DDLDS count as [x] TDY Days for formula.)
[151201] Final Out Date	The final out date reported by the member. (Arrival Worksheet).	
		Actual business days between F/O and DDLDS is [1]. Duty Days allowed between F/O and DDLDS is [1] because last PDS was CONUS. Constructed DDLDS: [151204] (See 3.4.8 Duty Days allowed between F/O and DDLDS for formula. See 3.4.9 Actual business days between F/O and DDLDS for formula.)
[151204] DDLDS	The DDLDS reported by the member. (Arrival Worksheet)	
		Actual business days between F/O and DDLDS is [1]. Duty Days allowed between F/O and DDLDS is [1] because last PDS was CONUS. Constructed DDLDS: [151204] (See 3.4.8 Duty Days allowed between F/O and DDLDS for formula. See 3.4.9 Actual business days between F/O and DDLDS for formula.)
Number of Leave Days: [9]	The total number of Leave Days. (The sum of the SB03 Report Leave days, and SB03 Report RAP Leave days)	
SB03: [151201-151210] RAP: [151211-151212] Leave Dates	Displays the calculated leave dates for any leave generated by the SG form. (See sections: 3.4.1, 3.4.2, 3.4.3, 3.4.4 for formulas on generating these dates.)	
Number of TDY Days: [5]	Represents the number of TDY Days. See section 3.4.6 TDY Days for formula.	

Field Name	Description
[151210-151214] TDY Dates	The date ranges from the TDY Dates, CSD and CGD table.
Number of Proceed Days: [0]	The number of Proceed Authorized Days. (The Proceed Time Authorized field in the SG03 Report Station Gain section)
[Blank] Proceed Dates	The date ranges generated for any Proceed Time Authorized. (See sections 3.4.16 and 3.4.17 for formulas to generate these dates.)
Number of Travel Days: [2]	Represents the total number of travel days. (The number of Travel Days from section SG03 Report Station Gain)
[151218-151219] Travel Dates	The dates generated for travel. (See sections 3.4.12 and 3.4.13 for formulas to generate these dates.)
Total: [16]	The total days. (The sum of the Leave Days, Proceed Days, TDY Days, and Travel Days)
[151220] Date Arrived on Duty Station	The date arrived on station reported from the user.
Number of Days Out of Balance: [0]	Shows the difference between the Total Accountable Days and Total. Displays “Please double check all fields” if the leave days are less than zero, or if the TDY Days are less than zero. Displays “Travel Days can not be a negative number” if Number of Travel Days is less than zero.
Typed Name and Grade of Certifying Officer:	Allows the FSO to type his or her name and grade for the printed form.
Save	Saves the Typed Name and Grade of Certifying Officer to the database.
General Information	
TDY Dates	
Add New+	This link will allow the FSO to add a new entry into the Down Days table. Will display the “Add Down Day” section. This link will not be visible if five items are in the table.
Down Days, Acts of God, or Holidays	Any extra dates that need to be taken into consideration. Five dates maximum.
Actions	Allows the FSO to edit a date. Will display the TDY section after being clicked.

Field Name	Description	
		Allows the FSO to remove a date.
Add Down Day		
Date		The date of the down day to be added.
[Add]	Will either Add or Save a record. Text will change from Add or Save depending on whether a new record is being added or a current record is being edited.	
Cancel	Cancels new date entry.	
TDY Dates		
Add New+	This link will allow the FSO to add a new entry into the CSD/CGD table. Will display the “Add Class Dates” section. This link will not be visible if three sets of dates are in the table.	
CSD	Class Start Date. Three dates maximum.	
CGD	Class Graduation Date. Three dates maximum. Must be after CSD. The CSD date cannot be before the CGD date.	
Actions		Allows the FSO to edit a date. Will display the TDY section after being clicked.
		Allows the FSO to remove a date.
Plus [7] actual TDY Days	A Label that Displays the number of TDY days. This is the accumulated days from the CSD/CGD list.	
Add Class Dates		
CSD		The CSD date to be added.
CGD		The CGD date to be added.
[Add]	Will either Add or Save a record. Text will change from Add or Save depending on if a new record is being added or a current record is being edited.	
Cancel	Cancel new dates.	
SG03 - Report Station Gain		

Field Name	Description	
Movement Reason Code	The reason for PCS. The choices are: A - Operational (Normal) B - Hospital, Patient Status C - Awaiting Phys. Eval. Board E - Other Gov't Agency F - Permissive PCS G - Training School I - Accession T - Pipeline Personnel	
Date Depart/Arrive CONUS		The date the member departed/arrived CONUS.
		Help Text: Not needed for CONUS/CONUS or OS/OS moves.
Date Arrived on Station		The Date the member arrived on the station.
		Help Text: Defaults to Date Arrived on Station from Travel Subvoucher form if only one member Travel Subvoucher exists.
Travel Days	Number of days allotted for travel.	
		Help Text: Number of Travel Days. (Actual NTE Authorized) Include Days En Route to TDY Location(s): **Miles** **Days** 1 - 400 1 401 - 750 2 751 - 1100 3 1101 - 1450 4 1451 - 1800 5 1801 - 2150 6 2151 - 2500 7

Field Name	Description	
		2501 - 2850 8 2851 - 3200 9 3201 - 3550 10 3551 - 3900 11 3901 - 4250 12 4251 - 4600 13 4601 - 4950 14
Proceed Time Authorized	The Choices are: No - 0 Yes - 1 Yes - 2 Yes - 3 Yes - 4	
		Help Text: PCSing to/from an Unaccompanied OCONUS Tour. NOTE: Not authorized for first PDS.
Gov. Quarters Adequacy:	The choices are: 6 = Dorm Resident, 35 = R 4 = Dorm Resident, 35 Not R or I 7 = Dorm Resident, 35 = I 8 = No Dorm, 35 = R 9 = No Dorm, 35 = I [Blank] = No Dorm, 35 Not R or I (or) Member is Officer	
Number of RAP days Authorized/Used	The choices are: 0 - 12	
		Help Text: If recruiter's assistance was taken.
Zip Code	Zip Code of new Duty Station.	

Field Name	Description	
		Help Text: Enter zip code ONLY if member is authorized With-Dependent BAH.
SC04 - Address		
Import an address from the member's profile.	Allows the FSO to import an address from a list of all the member's addresses found in the member's profile.	
SB03 - Report RAP		
Leave Number	The Leave number	
		Help Text: Leave Number from SG Leave Log.
Leave Area	The leave area with of the Member's RAP leave. 1 – CONUS 2 – OS 3 – OS/OCONUS	
SB03 - Report Leave		
Leave Number	The leave number.	
		Help Text: Leave Number from SG Leave Log.
Leave Area	The leave area with of the Member's leave. 1 – CONUS 2 – OS 3 – OS/OCONUS	
Leave Type	The Leave Type. I - Accession J - Graduation L - Tech School (Under 20 weeks) M - CONUS N - OCONUS T - Permissive Leave	
SB06 - Cancel Leave		

Field Name	Description	
Leave Number	The leave number.	
DN01 - Start Meal Deductions		
Effective Date		The effective Date.
6501 - Start Family Separation		
Effective Date		The effective Date.
5101 - Start CONUS COLA		
Effective Date		The beginning date of the COLA.
Zip Code	The Zip Code.	
3501 / 3502 - BAH (Conus, E6 and below)		
Add new +	Allows the FSO to add a new 3501/3502 Start/Stop record. (This link will not be visible when the table has two items in it)	
BAH Type	Represents the type of BAH.	
Effective Date		Represents the effective date of the BAH record.
Quarter Adequacy	Represents the quarter adequacy.	
Closest Dependent	Represents the closest dependent.	
Actions		Allows the FSO to edit a BAH Type.
		Allows the FSO to remove a BAH Type.
		Will move the corresponding BAH record down a row.
		Will move the corresponding BAH record up a row.
Edit BAH Type		
BAH Type	3501 – Start 3502 – Stop	
Effective Date		The effective date of the BAH.

Field Name	Description
Quarter Adequacy	The choices are: 0 - Off-Base 1 - Base Housing 3 – Dorms
Closest Dependent	The Choices are: R - Single, No Deps I - Mil-to-Mil, not claiming deps A - Married to Civilian W - Mil-to-Mil, claiming deps C - Single, Claiming deps D - Parent K - Ward of Court L - Parent-In-Law S - Student (Age 21 to 22) T - Incapacitated Child
Save	Saves the current record. Button will read as “Add” for a new record.
Cancel	Cancels the addition of the 3501/3502 Start/Stop.
3503 - Report (Interim) BAH	
Date-Start	The start date.
Date-Stop	The stop date.
BAH Interim	The Choices are: T All Other
	Help Text: Last PDS was Overseas (OS) and member is not receiving BAH (68) for dependents who remained CONUS
Quarter Adequacy	The choices are: 0 - Off-Base 1 - Base Housing 3 – Dorms

Field Name	Description
Closest Dependent	The Choices are: R - Single, No Deps I - Mil-to-Mil, not claiming deps A - Married to Civilian W - Mil-to-Mil, claiming deps C - Single, Claiming deps D - Parent K - Ward of Court L - Parent-In-Law S - Student (Age 21 to 22) T - Incapacitated Child
6801 - Start BAH (VHA Portion) (CONUS)	
Effective Date	The effective Date.
Zip Code	The Zip Code corresponding to the BAH
Accompanied Status	The choices are: 0 – Single-type BAH 1 – With Dependents
4601 – Start COLA	
Location Lookup	Link that directs the FSO to a new tab in his or her browser allowing him or her to look up the location code. http://www.defensetravel.dod.mil/site/locCodeCalc.cfm
Location	The location of the member using the code form the location lookup website.
Effective Date	The effective date of the COLA
Number of Dependents	Allows the FSO to enter the number of dependents necessary.
4701 – Start DUAL COLA	
Location Lookup	Link that directs the FSO to a new tab in his or her browser allowing him or her to look up the location code. http://www.defensetravel.dod.mil/site/locCodeCalc.cfm
Location	The location of the member using the code form the location lookup website.

Field Name	Description
Effective Date	The effective date of the COLA
Number of Dependents	Allows the FSO to enter the number of dependents necessary.
1401 – Start Hardship Duty Pay	
Effective Date	The effective date of the hardship duty pay.
2301 – Start Hostile Fire Pay	
Effective Date	The effective date for starting pay.
Hostile Fire Pay Qualifier	The choices are: [blank] 1 - IDP without CZTE 2 - IDP with CZTE 3 - HFP without CZTE 4 - HFP with CZTE
Combat-Zone Deduction	The choices are: [blank] 0 - Member not authorized 1 - No taxes Withheld 2 - FITW & SITW based on taxable wage - maximum wage excl. 3 - (Officers Only) FITY & SITW based on taxable wage w/o regard to wage excl. 4 - (Officer Only) Prior Election from latest history 23 entry

Table A-20: TLA Request Form Field Descriptions

Field Name	Description
PCS Information	
Last Permanent Duty Station	The user's last base
Departure Date	The Departure date from the last PDS
PCS Order Number	The Order number for the user's PCS

Field Name	Description
Arrival Date	The arrival date at the new PDS
TLA Request Information	
TLA Type	The type of TLA being requested. Can be one of the following: • Arrival • Departure • Interim
Payment Type	The type of payment being requested. Can be one of the following: • Initial Payment • Incremental Payment • Final Payment • Adjustment
Tour Type	Accompanied
	Other
TLA Requested For	Member
	Dependents
Dependent Travel	Concurrent
	Designated Location
Dependents List	Checkbox – Marks the dependent as included for the request
	Name – The dependent's full name
	Type – The dependent type (spouse, child…)
Temporary Lodging Information	
Name of Hotel / Accommodation	The name of the lodging location
Street	The street of the lodging location address
City	The city of the lodging location address
State	The state of the lodging location address. Will only be visible for US addresses and will only allow Alaska or Hawaii as these are the only OCONUS states.

Field Name	Description
Country	The country of the lodging location address. Will only be visible for non-US addresses.
Inclusive Dates	From – the start date of the lodging
	To – the end date of the lodging
Cooking Facilities	No – the lodging did not have cooking facilities
	Yes – the lodging did have cooking facilities
Government Mess Used	No – Gov mess was not used
	Yes – Gov mess was used
Save	Saves the text field data
Cancel	Clears the text field data
Housing Section	
Housing Certification	
Government quarters were not available during the time period TLA is claimed	Flag determining whether or not the Government quarters were not available during the time period TLA is claimed. This defaults to False.
Permanent housing was occupied / Government quarters were assigned on	Flag determining whether or not the Permanent housing was occupied / Government quarters. This defaults to False.
	Date – the date the quarters were assigned
Permanent housing was vacated on	Flag indicating that the Permanent housing was vacated. This defaults to False.
	Date – the date the quarters were vacated
Government quarters were terminated on	Flag indicating that the Permanent housing was vacated. This defaults to False.
	Date – the date the quarters were vacated

Table A-21: TLE Form Field Descriptions

Element Label	Purpose
CONUS Duty Stations – PCS Details	

Element Label	Purpose
Losing	
Base	The user's prior duty station
Date of Departure	The date the user left the prior duty station
Date Cleared Quarters	The date the user cleared out of his or her permanent quarters
Household Goods Shipped	Indicates whether or not the user's household goods were shipped
Date Goods Shipped	The date the user's household goods were shipped. Only enabled if the user selected "Yes" to indicate that the goods were shipped.
Gaining	
Base	The user's current duty station.
Date of Arrival	The date the user arrived at the current duty station
Date Assigned Quarters	The date the user was assigned permanent quarters
Household Goods Delivered	Indicates whether or not the user's household goods were delivered
Date Goods Delivered	The date the user's household goods were delivered. Only enabled if the user selected "Yes" to indicate that the goods were delivered.
Lodging (One to four entries)	
Add New Lodging	When clicked, Add new lodging panel appears.
Valid	Record is valid or not. A green checkmark states that the record is valid, and a red "X" states that the record is not valid. Valid means that all the required fields have a value in them.
Date Range	Displays the From and To Dates of the lodging. The To Date may not be present.
TLE Claimed For	The people for whom TLE is being claimed
# Dependents	The number of dependents for whom TLE is being claimed
Lodging Type	The type of lodging
Nightly Cost	The cost per night of the lodging
Actions	Edit – Copies the details of this entry to the Edit Lodging section to allow changes.

Element Label	Purpose	
		Delete – Removes this lodging entry
Lodging Add/Edit		
Check In / Lodging Start Date	The start date of the lodging occurrence	
Check Out / Lodging End Date	The end date of the lodging occurrence	
TLE Claimed For	The individuals that TLE is being claimed for. Can be one of the following: • Member • Member & Dependents • Dependents Only The two dependent options are not enabled if the user has no dependents.	
Lodging Type	The type of lodging. Can be one of the following: • Billeting • Off Base • With friends or family	
# Dependents	The number of dependents this claim is representing. Disabled if the TLE type is Member.	
Nightly Cost	The cost per night of the lodging	
Save/Add	Save any changes to an existing item or adds a new item. Add it not enabled if the form already has four entries.	
Cancel	Discards any changes to the current items, clears the form and resets it back to Add mode.	

Table A-22: Travel Voucher Form Field Descriptions

Element Label	Purpose	
Split Disbursement		Help Text: Military personnel are required to designate a payment that equals their outstanding Government Travel Credit Card (GTCC) balance. For Civilian users, the GTCC is paid the portion of their reimbursement related to transportation, lodging, and rental cars unless they specify a different amount.

Element Label	Purpose	
	• None • All • Partial Indicate the requested disbursement type for the voucher payment.	
	$ [Partial]	The amount to pay to GTCC for split disbursement. Only enabled if the disbursement type is Partial. Allows up to two decimal places.
I am entitled to DLA.	Indicates whether the user is entitled to Dislocation Allowance. Only shown for PCS packages.	
		Help text: There are many guidelines that determine if DLA is allowed. Please see the DLA section of the Help tab for more information.
Have your household goods been shipped?	• Yes • No Indicates whether or not household good have been shipped. Only shown for PCS packages.	
	Why Not?	The reason household goods have not been shipped. Only enabled if the user selects “No.”
How many POVs were used for travel?		Help text: The user is only reimbursed for up to two vehicles.
	• 1 • 2 or more The number of privately owned vehicles used during the move. Only shown for PCS packages.	
Date Arrived on Station		The date the user arrived at his or her new duty station.
Save	Saves the data entered on the form.	
Cancel	Cancels any changes and resets the form to its currently saved values.	
Details - Miscellaneous		
Split Disbursement	Same as PCS.	
I am entitled to DLA.	Same as PCS.	
TDY Start Date		The first official day of temporary duty.
TDY End Date		The last official day of temporary duty.

Element Label	Purpose
Duration of Travel	• 12 Hours or Less • 13 to 24 Hours • More than 24 Hours The overall length of the trip. Only shown for TDY packages.
Reservist TDY Status	This records several possible statuses for a reservist TDY. Only visible for reservists. Can be any of the following: • TR - Traditional Reservist • AT - Annual Tour • ART - Air Reserve Technician • IDT - Inactive Duty Training • CS - Civilian Status • IMA - Individual Mobility Augmentee • RPA - Man Days - Reserve Personnel Account • MPA - Man Days - Military Personnel Account
Save	Saves the data entered on the form.
Cancel	Cancels any changes and reset the form to its currently saved values.
Details - Dependents	
Claim all auto-claimed dependents	This link adds all missing dependents that are marked as auto-claimed.
Claim another dependent	This shows the “Claim a Dependent” section.
List	
Dependent	The name of the dependent.
Relationship	The relationship of the dependent to the member.
Date of Birth or Marriage	The date of marriage for spouses, or the date of birth for other dependent types.
Actions	Remove – Removes the item after showing a confirmation prompt.
Claim a dependent	
[Dependent Name]	Displays the list of dependents that are not already claimed on the form.
Add	Adds the select dependent to the claimed dependent list.

Element Label	Purpose
Cancel	Hides the Claim s Dependent section without adding any dependents.
Dependents' Prior Address (prior duty station)	
Address	Address fields. Fields are not shown here. See the User Profile SDD for an example of what fields are used in an address.
Save	Saves the prior address.
Details – Previous Gov Payments/Advances	
Add Payment +	Clears and displays the edit form to add a new payment.
List	
DO Voucher #	The voucher number of the payment.
Payment Type	The type of payment.
Location	Where the payment was made.
Payment Date	The date of the payment.
Amount	The amount of the payment. Allows up to two decimal places.
Valid	The item is valid with no errors.
	The item has validation errors.
Actions	Edit – Displays the edit form for the item.
	Delete – Removes the item after showing a confirmation prompt.
Add/Edit Payment Section	
Disbursing Office Voucher #	The voucher number of the payment.
Payment Date	The date of the payment.
Payment Amount	The amount of the payment.
Payment Type	• PCS • TDY • DLA The type of payment.
Location	Where the payment was made.

Element Label	Purpose	
Add/Save	Adds a new payment or saves an existing one and hides the edit section.	
Cancel	Cancels any edits and hides the edit section.	
Details – Government Deductible Meals		
[Help]		Help text: Gov meals are meals received directly from a government facility. Deductible meals are other meals that have an added expense to the government. See the Help tab for more information.
Add Meal +	Clears and displays the edit form to add a new meal.	
List		
Date	The date of the meals.	
# of Meals	The number of meals on that day.	
Valid		The item is valid with no errors.
		The item has validation errors.
Actions		Edit – Displays the edit form for the item.
		Delete – Removes the item after showing a confirmation prompt.
Add/Edit Meals Section		
Meal Date		The date of the meals.
# of Meals	• 1 • 2 • 3 The number of meals on that day.	
Add/Save	Adds a new meal or saves an existing one and hides the edit section.	
Cancel	Cancels any edits and hides the edit section.	
Details – Reimbursable Expenses		
Add Expense +	Clears and displays the edit form to add a new expense.	
List		
Expense Type	The type of the expense.	

Element Label	Purpose
Expense Date	The date of the expense.
Receipt Required	Indicates if a receipt is required for this expense type. Is Always, Never, or the dollar threshold for expenses.
Amount	The amount of the expense, or the mileage for mileage-based expense types. Allows up to two decimal places for Amount, but none for Miles.
Valid	The item is valid with no errors
	The item has validation errors
Actions	Edit – Displays the edit form for the item.
	Delete – Removes the item after showing a confirmation prompt.
Add/Edit Expense Section	
Type	The type of the expense.
[Expense Type detailed list]	This icon opens the Expense Type overlay, which can be used to choose an expense type from a more detailed screen. See section 3.1.1.5.1 Details – Expenses Types Selection form for more information.
Date	The date of the expense.
Amount [or Miles]	The amount of the expense. This field may be called Miles for expense types that are mileage based versus amount based.
Add/Save	Adds a new expense or saves an existing one and hides the edit section.
Cancel	Cancels any edits and hides the edit section.
Travel Voucher– Itinerary	
Departure Location	
[Text Field]	The starting departure location.
Home Address	Copies the user's current address into the departure location field.
Duty Station	Copies the user's current base name into the departure location field.

Element Label	Purpose
Prior Duty Station	Copies the user's prior base name into the departure location field. Only visible for PCS packages.
In Place	Designates the Departure Location as being in place. Only visible for TDY packages.
Save	Saves the departure location.
Travel Legs	
Travel Legs	Help text: More information about what legs to include or not include can be found on the Help tab.
Add Reverse Legs	After a confirmation, clicking this link adds a reverse of all existing legs to the bottom of the itinerary.
Add leg	Clears and displays the edit form to add a new leg.
Travel Legs - List	
In Place	Designates the Departure Location as being in place. Only visible for TDY packages.
Departure Date	The departure date of the leg.
Mode of Travel	The mode of travel of the leg.
Arrival Date	The arrival date of the leg.
Arrival Location	The arrival location of the leg.
Home Address	Copies the user's current address into the arrival location field.
Duty Station	Copies the user's current base name into the arrival location field.
Prior Duty Station	Copies the user's prior base name into the arrival location field. Only visible for PCS packages.
Reason for Stop	The stop reason of the leg.
Miles	The number of miles driven on the leg.
Lodging	The lodging amount, not including taxes.
Lodging Tax	The lodging taxes.
Actions	Move Up – Moves the leg up one spot in the itinerary.

Element Label	Purpose
	Move Down – Moves the leg down one spot in the itinerary.
	Edit – Displays the edit form for the item.
	Delete – Removes the item after showing a confirmation prompt.
Add/Edit Travel Leg	
Departure Date	The departure date of the leg.
Mode of Travel	The mode of travel of the leg. Not all travel modes are realistic or commonly used (such private rail), so the government has limited the travel modes that may be used on the form. The modes on this form are shown below: • CA – Commercial Auto • CB – Commercial Bus • CM – Commercial Motorcycle • CP – Commercial Plane • CR – Commercial Rail • CV – Commercial Vessel • GA – Government Auto • GB – Government Bus • GP – Government Plane • GV – Government Vessel • PA – Private Auto • PM – Private Motorcycle • PP – Private Plane • PV – Private Vessel • TB – Government Issued Bus • TP – Government Issued Plane • TR – Government Issued Rail • TV – Government Issued Vessel
Arrival Date	The arrival date of the leg.
Location	The location arrived at of the leg.

Element Label	Purpose
Reason for Stop	The stop reason of the leg. Options are: • AD – Authorized Delay • AR – Authorized Return • AT – Awaiting Transportation • HA – Hospital Admittance • HD – Hospital Discharge • LV – Leave En Route • MC – Mission Complete • TD – Temporary Duty • VR – Voluntary Return
Miles	The number of miles driven on the leg. Allows no decimal places.
	Help text: Do not enter terminal miles here. Terminal mileage is entered in Expenses.
Lodging Amount	The loading amount not including taxes. Allows up to two decimal places.
Lodging Tax	The lodging taxes. Allows up to two decimal places.
Add/Save	Adds a new leg or saves an existing one and hides the edit section.
Cancel	Cancels any edits and hides the edit section.
Transportation Details	
Ticket Cost	The cost of the ticket.
This ticket was purchased using my GTCC.	Indicates is the member's GTCC was used to purchase the ticket.
Was this your vehicle?	• I am the owner/operator. • I was a passenger. Identifies whether the member is the owner of the vehicle used for travel.
Add/Save	Saved the transportation details.
As Seen on Voucher Section	
[Form]	Replica of printed form. This section looks exactly like the form. See the form description in section 3.1.5 Travel Voucher or Subvoucher Printed Forms for details of that section.

Element Label	Purpose
Travel Voucher or Subvoucher – FSO	
Member-entered ticket cost	The government cost of this ticket as entered by the package owner.
Ticket Cost	The actual government cost of this ticket as entered by the FSO.
Save	Saves the form.

Table A-23: TV – Advance Cover

Element Label	Purpose
Payment for:	Advance of Travel Allowance – TDY/TAD.
	Advance of Travel Allowance – PCS.
	Accrued Per Diem – TDY.
	Dislocation Allowance.
	Other (Checkbox).
	Other (Text field) – Name of the user-defined payment. Only enabled if the Other checkbox is selected.
Travel Order	The travel order number.
Advance Travel Allowances Elected	Explanation of advance travel allowances elected.
Remarks	Any extra remarks needed.
Save	Saves the contents of the form.
Cancel	Cancels any changes to the form and returns the user to the inbox.

Table A-24: Waiver of Debt Form Field Descriptions

Field Name	Description
Type of Debt	An explanation of what this debt is.
Debt Amount	The total amount of the debt.
When did you first become aware of the debt?	When – the date of debt awareness.

Field Name	Description
How did you first become aware of the debt?	When – the date of debt awareness.
If aware of the debt, what corrective actions did you take?	Any corrections the user has already attempted to resolve the issue.
Reason for waiver/remission and why you feel it should be approved.	The reason the user feels this request is valid.
Job Title / Career Field	The user's job title.
ETS Date	The user's Estimated Time of Separation (ETS).
Did you receive Leave and Earnings Statements?	Yes, No—Indicates whether or not the user received an LES.
Did you request them from EMSS/MyPay?	Yes, No—Indicates whether or not an LES was requested.
Have you filed for a correction of military records?	Yes, No—Indicates whether or not the user has attempted to have his or her records corrected.
Save	Saves all changes on the form editor.
Cancel	Cancels any changes on the form editor.

Appendix B User Profile Screen Field Descriptions

Table B-1: Personal Information Tab Field Descriptions

Element Label	Purpose
First Name	The first name of the user.
MI	The middle initial of the user.
Last Name	The last name of the user.
Initials	The initials of the user.
Date of Birth	The user's date of birth
SSN	The SSN of user.
	Enter your 9-digit Social Security Number without dashes (for example, \"123456789\")."
Email	The current email address of the user.
Time Zone	The user's current time zone.
Current Marital Status	The marital status of the user. The list of items includes: • N/A (Only if Service Type is Civilian) • Single • Married – Civilian • Married – Military • Separated • Divorced
Date of [Marriage]	The date of the user's Marriage/Separation/Divorce. This field will be disabled if Marital Status is N/A or Single. This field will be labeled as Date of Separation if the Marital Status is Separated. This field will be labeled as Date of Divorce if the Marital Status is Divorced.
Personal Phone Number	The phone number of the user.
Commercial Number	The commercial phone number of the user.
DSN	The user's DSN.
Current Assigned Base	The current assigned base of the user.

Element Label	Purpose
Current Organization Unit	The current organizational unit selected by the user. The list of Units will be shown from the selected base only.
Service Type	The service type of the user. The list of items includes: • Active Duty • National Guard • Reserves • Civilian • Contractor
Pay Grade	The current Pay Grade selected by the user. Contains the military ranks E-1 through E-9, O-1 through O-10, Ctr, and Civ. This field will be limited to Civ only if the user's Service Type is Civilian. This field will be limited to Ctr only if the user's Service Type is Contractor.
Office Symbol	The user's current Office Symbol.
Supervisor's Base	Allows the user to select the base at which their supervisor belongs. Will default to the user's base if there is no supervisor selected.
Supervisor's Unit	Allows the user to select the unit at which their supervisor belongs. Will default to the user's base if there is no supervisor selected.
Supervisor	Displays the list of personnel in the selected Unit allowing the user to choose their supervisor.
FMW Logon User Id	Field only available for users with an FSO role. Allows the user to enter their ID associated with AFFSC.
Save	Clicking the button saves the personal information.
Cancel	Clicking this button cancels and returns the user to the Home screen.

Table B-2: Addresses Tab Field Descriptions

Element Label	Purpose
+ Add Address	Link that allows the user to add a new address.
Address Name	Displays the address nickname.
Street	Displays the user's number and street address.
City	Displays the user's city.
State	Displays the user's state.
Zip/Postal code	Displays the user's zip, or Postal, code.

Element Label	Purpose	
Country	Displays the user's country.	
Current	Displays the current address type.	
Action: Edit		Link that allows the user to edit the addresses.
Action: Delete		Link that allows the user to remove the addresses.

Table B-3: Address Editor (USA) Field Descriptions

Element Label	Purpose
This is my current Address	Selecting this will mark the address as "Current". Only one current address can exist at a time.
This is a PSC Address	Selecting this will toggle the Address Editor form USA/Foreign and PSC type addresses.
Address Name	Allows users to enter their address nickname.
Street 1	Allow the user to enter his or her street and number.
Street 2	Allows the user to enter his or her street and number.
City	Allows the users to enter their city.
State	Allow the users to select their state.
Province	Allows the user to enter their province. (Currently not shown in image)
[Zip] Code	Allow the users to enter their zip (postal) code. Will change to Postal Code if using a foreign country.
Country	Allow the users to select their country.
Save/Add	Button that allows the user to add a new address or save a preexisting one. The button will read "Save" when editing an existing address. The button will read "Add" when adding a new address.
Cancel	Allow the user to cancel the address.

Table B-4: Address Editor (PSC) Screen Field Descriptions

Element Label	Purpose
This is my current Address	Selecting this will mark the address as “Current”. Only one current address can exist at a time.
This is a PSC Address	Selecting this will toggle the Address Editor form USA/Foreign and PSC type addresses.
Address Name	Allows users to enter their address nickname.
PSC Number	Allows the user to enter their PSC Number.
Box Number	Allows the user to enter their Box Number.
City	Allows the user to select their PSC city. This list includes: • APO • FPO • DPO
State	Allows the user to select their PSC state. This list includes: • AA • AE • AP
Zip Code	User’s zip code.
Save/Add	Button that allows the user to add a new address or save a preexisting one. The button will read “Save” when editing an existing address. The button will read “Add” when adding a new address.
Cancel	Allow the user to cancel the address.

Table B-5: Dependents Tab Field Descriptions

Element Label	Purpose
Add Dependent	Link that allows the member to add a dependent.
Last Name	Displays the dependent’s last name.
First Name	Displays the dependent’s first name.
Dependent Type	Displays the dependent’s type.
Auto Claimed	Displays whether or not a dependent is auto-claimed.
Active Dependent	Allows the user to determine if a dependent is set to active or inactive.

Element Label	Purpose	
Actions		Link that allow users to edit the dependent.
Editor: Relationship	Allows the user to select their relationship. This list includes: • Spouse • Child • Parent • Other	
Editor: Auto-claim this dependent	Allows the user to select whether to auto-claim a dependent.	
Editor: Active Dependent	Allows the user to select whether or not this dependent is active or inactive.	
Editor: Dependent has the same address as sponsor.	This will have the user's current address be assigned to this dependents address. This field will be disabled if the current user does not have a current address.	
Editor: First Name	The first name of the user's spouse.	
Editor: Last Name	The last name of the user's spouse.	
Editor: MI	The middle initial of the user's spouse.	
Editor: SSN	The social security number of the user's spouse.	
		Enter your 9-digit Social Security Number without dashes (for example, \"123456789\")."
Editor: Date of Birth		The dependents date of birth.
		Date of Birth is only required if Child is selected above for Relationship.
Editor: Base Name	This field is only available if the user's spouse type is Military and the chosen Dependent Type is Spouse. The base name for the user's military spouse.	
Editor: Pay Grade	This field is only available if the user's spouse type is Military and the chosen Dependent Type is Spouse. The current Pay Grade selected by the user. Contains the military ranks E-1 through E-9, O-1 through O-10.	

Element Label	Purpose
Editor: Service Branch	This field is only available if the user's spouse type is Military and the chosen Dependent Type is Spouse. Allows the user to select their military spouses Service Branch: • Army • Navy • Air Force • Marine Corps • Coast Guard
Editor: Save/Add	Clicking the button saves the dependents information. The button will read "Save" when editing a dependent, and "Add" when adding a new dependent.
Editor: Cancel	Clicking this button cancels the form and hides the editor.

Table B-6: Personal Documents Tab Field Descriptions

Element Label	Purpose	
Add A Personal File	A link that allows the user to add an additional personal file. This link will make the editor section appear.	
Document Name	Displays a user's personal document.	
Date Added	Displays when the user uploaded that personal document.	
Actions		A link that allows the user to view the personal document.
		A link that allows the user to delete the personal document.
Browse	A button that allows the user to browse a location in order to retrieve a personal document.	
Upload	A button that allows the user to upload a personal document.	
Cancel	Will cancel the upload process. Removes the editor from the screen.	

Table B-7: Roles Tab Field Descriptions

Element Label	Purpose
2875 Link	Displays the DD2875 that the user uploaded.
Delete	Link that allows the administrator to delete the uploaded DD2875.
Browse	A button that allows the user to browse a location in order to retrieve a DD2875.
Upload	A button that allows the user to upload a DD2875.
Cancel	A button that will cancel the upload refreshing the current page.
Roles: Role	Allows the user to select their privilege. This list includes: • Global Admin • FSO • Help Desk • Commander • Housing Office • Read-Only Base • Read-Only Unit
Roles: [Assign]	Button that allows the user to request or assign a privilege. If the user has the ability to assign the privilege, the button will read Assign and the role will be automatically assigned to the user. If the user does not have the ability to assign the privilege, the button will read Request and the role will be requested for someone to approve.
Roles: Base	Allows the user to select the Base depending on privilege that was selected. This field becomes visible if the Role field is FSO, Commander, Housing Office, Read-Only Base, or Read-Only Unit.
Roles: Unit	Allows the user to select the Unit depending on privilege that was selected. This field becomes visible if the Role field is Commander, or Read-Only Unit.
Active and Requested Roles	Displays the user's privilege that has been added.
Base	Displays the base for the privilege added.
Unit	Displays the Unit for the privileged added.
Status	Displays the status of the role. Status will be "Requested" until the role is approved.

Element Label	Purpose	
	✔	Approved role.
Action	✖	Link that allows the user to delete a privilege that was previously added.
Audit: Date	The date the event took place.	
Audit: Approved	✔	Shows that a role was approved.
Audit: Role	States what role the action was taken on.	
Audit: Base	Shows the Base corresponding to the role	
Audit: Unit	Shows the Unit corresponding to the role.	
Audit: Approval Authority	A user panel displaying brief details of who performed the action.	
Audit: Details	The details of the audit event.	