

## List of Effective Pages

The following is a list of the effective pages of the CGMA Manual released in March 2004. This Manual was last updated in October 2008.

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- **Financial Assistant:**  (202) 493-6627

Contact for questions and/or comments concerning collection agency actions, final active duty repayment, past due accounts, refunds, other society loans, and general account management.

- **Financial Assistant:**  (202) 493-6636

Contact for questions and/or comments concerning allotment and cash repayments, CGMA-CMP user names, passwords, and general questions.

- **Client Services Specialist:**  (202) 493-6664

Contact for questions and/or comments concerning the annual campaign, education assistance programs, and respite care processing.

- **Administrative Assistant:**  (202) 493-6621

Contact for questions and/or comments concerning general office procedures, correspondence, file and mail management and to request forms and publications.

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when reasonable costs remain after other forms of assistance have been exhausted causing a serious financial burden. Other forms of assistance may include personal resources, SGLI, other government and private insurance, Veterans Administration and other various government benefits, which may be available.

Individuals contacting CGMA prior to making funeral arrangements should be cautioned that CGMA should not be expected to assist with extravagant costs beyond the family's ability to afford. Assistance for individuals who contact CGMA after the fact, who have costs that are considered high or beyond the family's ability to afford, should be limited only for reasonable expenses. Contacting the funeral director and negotiating lower costs - given a charity is being asked to assist with the bill - may result in lower cost to the family and should be considered. Assistance for funeral expenses will normally be in the form of a loan. However, information concerning loans, grants, or a combination of a loan and grant is included with the following guidelines.

When possible, verification of the emergency and financial need should be accomplished prior to providing assistance. However, due to the urgency of the situation, full documentation may be provided at a later date. In these situations, timely assistance in the form of a loan may be provided and if appropriate, consideration for converting the loan into a grant may be made when full financial disclosure has been made, demonstrating the need for a grant vs. a loan. (See section 5-F for additional information concerning converting a loan into a grant.)

**Note:** The Executive Director of CGMA is to be contacted prior to making exception to these policies. (See paragraph 2-D-2 for CGMA-HQ contact information.)

See paragraph 3-C-2-c for information concerning assistance for Emergency Travel due to the death of the CGMA sponsor or family member.

Providing assistance for funeral expenses should comply with the following guidelines:

Stillbirth and Miscarriage: When this occurs, there can be a cost associated with the burial of the remains that may not be covered by insurance or SGLI. In such cases CGMA Reps may provide a Grant, not to exceed \$1,500. (A grant under this provision has been pre-approved by the BOC. In CMP use Approve By "BOC" and Approval Code "BOCPA.")

Service Members Eligible for SGLI Coverage: The amount of Service Members Group Life Insurance (SGLI) coverage, including Family Coverage, for eligible service members should normally be adequate for all funeral expenses in the event of the death of a service member, their spouse or child.

Assistance from CGMA should not normally be needed or provided. However, assistance in the form of a loan may be considered as an interim measure while the family is waiting for insurance reimbursement. Grants should not normally be considered in these cases.

Eligible Service Members Who Decline SGLI: Service members who decline SGLI coverage for themselves or their family members should not expect CGMA to provide a grant for their funeral expenses. Limited assistance in the form of a loan may be considered on a case-by-case basis, when all other sources have been exhausted, and a serious financial burden remains. Assistance should be limited to an amount that would provide for a modest, dignified funeral. Grants should not normally be considered in these cases.

Retired Members: CGMA believes that at this stage of their lives, long retired members should anticipate funeral expenses and rely on insurance, personal resources, government programs and community resources to pay funeral expenses. CGMA should not normally be expected to provide funeral expenses for retired members. Exceptions may be considered when unique situations exist preventing the surviving spouse or immediate family member from paying funeral expenses from their own resources. Limited assistance may be considered on a case-by-case basis when all other sources have been exhausted and a serious financial burden remains. Assistance should be limited to an amount that would provide for a modest, dignified funeral. A grant or a combination of a loan and a grant should not normally be considered in these cases unless there are unusual circumstances that would justify an exception to this policy and only for cases where providing a loan offers little prospect of real help, and repaying a loan would result in a serious financial hardship on the family. Full financial disclosure will be required demonstrating the need for a grant vs. a loan.

Other CGMA Sponsors, Not Eligible For SGLI Coverage: Limited assistance in the form of a loan or grant or a combination of a loan and grant may be considered on a case-by-case basis when all other sources have been exhausted and a serious financial burden remains. Assistance should be limited to an amount that would provide for a modest, dignified funeral. A grant or a combination of a loan and a grant should be considered in cases only where there are unusual circumstances where providing a loan offers little prospect of real help, and repaying a loan would result in a serious financial hardship on the family. Full financial disclosure will be required demonstrating the need for a grant vs. a loan.

Other Family Members: Assistance for funeral expenses for other family members will only be considered on a case-by-case basis when unique situations exist and where the CGMA sponsor will be responsible for part or all of the funeral expenses. Assistance will be limited to a loan to assist with

the cost of a modest dignified funeral. Grants should not normally be considered in these cases.

Non-Family Members: Assistance for funeral expenses for non-family members will not normally be made. Exceptions may be considered on a case-by-case basis for non-family members who have maintained a long-term, live-in relationship with the CGMA sponsor and the CGMA sponsor will be responsible for part or all of the funeral expenses. Assistance in these situations will be limited to a loan to assist with the cost of a modest dignified funeral.

c. **Emergency Travel**  
**Due to Death or Serious Illness and Other Emergency Situations**

Emergency travel due to the death or serious illness of the CGMA sponsor or a family member along with other emergency travel situations is usually unplanned and unexpected. Time is usually of the essence and families seldom have funds or resources set aside for these purposes. CGMA assistance may be provided for necessary travel, food, lodging and incidental expenses, including childcare in some circumstances, associated with the emergency situation when reasonable costs remain causing a serious financial burden on the client after other forms of assistance have been exhausted. Other forms of assistance may include personal resources or government funded transportation. (See paragraph 3-C-3-b for information concerning non-emergency travel.)

Assistance for emergency travel expenses will normally be in the form of a loan. However, information concerning loans, grants, or a combination of a loan and grant is included with the following guidelines:

When possible, verification of the emergency and financial need should be accomplished prior to providing assistance. However, due to the urgency of the situation, full documentation may be provided upon return of the CGMA sponsor. In these situations, timely assistance in the form of a loan may be provided and if appropriate, consideration for converting the loan into a grant may be made when full financial disclosure has been made, demonstrating the need for a grant vs. a loan.

In cases where emergency travel assistance was provided for travel associated with the serious illness of an individual, additional assistance may be considered if that individual later dies.

**Note:** The Executive Director of CGMA is to be contacted prior to making exception to these policies. (See paragraph 2-D-2 for CGMA-HQ contact information.)

Assistance under this provision is generally authorized for emergency travel by providing assistance as follows:

Death or Critical Medical Condition of the CGMA Sponsor: Emergency travel assistance may be provided to immediate family members when a CGMA sponsor has died or is seriously ill. When need has been verified, this assistance may also be extended to other family members. Assistance to other family members will normally be limited to the parents of the CGMA sponsor or the parents of the CGMA sponsor's spouse, but, when appropriate, may include other family members. When justified and supported by the Command, and a verified need exists, this assistance may be provided to a non-family member who has maintained a long-term, live-in, relationship with the CGMA sponsor.

Assistance will normally be in the form of a loan. A grant or a combination of a loan and a grant may be considered only when there are unusual circumstances where providing a loan offers little prospect of real help, and repaying a loan would result in a serious financial hardship on the family. Full financial disclosure will be required demonstrating the need for a grant vs. a loan.

Death or Critical Medical Condition of an Immediate Family Member: Emergency travel assistance may be provided to the CGMA sponsor when there is a death or serious illness of an immediate family member. Assistance will normally be for the travel expenses of the CGMA sponsor and/or the CGMA sponsor's spouse, and may include assistance for members of the immediate family. When appropriate and need has been verified, the CGMA sponsor may also request assistance for the travel of other family members to attend or assist with the situation. Assistance for other family members will normally be limited to the parents of the CGMA sponsor or the parents of the CGMA sponsor's spouse, but, when appropriate, may include other family members. Emergency travel assistance may also be provided on behalf of a non-family member who has maintained a long-term, live-in, relationship with the CGMA sponsor.

Assistance will normally be in the form of a loan. A grant or a combination of a loan and a grant may be considered only when there are unusual circumstances where providing a loan offers little prospect of real help, and repaying a loan would result in a serious financial hardship on the family. Full financial disclosure will be required demonstrating the need for a grant vs. a loan.

Death or Critical Medical Condition of Other Family Members: Assistance may be provided to assist the CGMA sponsor and their immediate family with emergency travel expenses when there is a death or serious illness of an Other Family Member of the CGMA sponsor or the CGMA sponsor's spouse.

Assistance will normally be provided for the CGMA sponsor and spouse to travel. Additional assistance may be provided when the whole family needs to travel. Assistance will not normally be provided for other family members. Assistance will normally be in the form of a loan. Grants or a combination of a loan and grant will not normally be considered in these situations.

Death or Critical Medical Condition Non-Family Members: Assistance may be provided to a CGMA sponsor for emergency travel due to the death or serious illness of a non-family member only on behalf of a non-family member who has maintained a long-term, live-in, relationship with the CGMA sponsor. Assistance will normally be in the form of a loan. Grants or a combination of a loan and grant will not normally be considered in these situations.

Other Emergency Situations: On a case-by-case basis, assistance may be considered for other emergency situations, including, but not limited to:

- Clients stranded while traveling. Limited assistance may be provided to return the client and their family members to their home when the client is unable to do so and circumstances indicate that the shortage of funds was beyond their control. Typically this assistance is related to emergency car repairs, loss of funds due to theft or loss, or to replace lost airline tickets. If the exact cause of the shortage cannot be verified, the client should be given the benefit of doubt and assistance should be provided. However, requests for assistance will not be honored, if checking the client's past loan history indicates that repeated requests for assistance under similar questionable conditions have been provided.
- Relocate an immediate family member. Assistance may be provided when a situation exists where immediate relocation of an immediate family member is justified and government assistance is not available.
- When the client's presence is the best solution to an emergency situation. Assistance may be provided when it is determined that the best solution to an existing problem would be the client's or spouse's presence.

Assistance will normally be in the form of a loan. Grants or a combination of a loan and grant will not normally be considered in these situations.

#### **d. Emergency Home Repair**

Assistance may be provided to aid with emergency home repairs when clients are facing major, unexpected, emergency repairs beyond their financial ability. Emergency repairs must be essential to the well being of the family.

Special consideration should also be given when such a request is received from a spouse when the CGMA sponsor is deployed. Assistance may not be used for routine maintenance or routine repairs that all homeowners must plan for and expect to occur. CGMA funds may not be used for remodeling, redecorating or expanding living space. Assistance is not authorized for repairs to property owned, but not occupied by the client or their immediate family members or property rented by the client from a landlord. Examples of Emergency Home Repairs that the use of CGMA funds may be considered, includes:

- Emergency furnace or air conditioning repairs in situations where extreme temperatures could cause significant medical problems.
- Major emergency plumbing problems causing water damage to the building.
- Roof damage where leaking water may cause damage to the building, including emergency repairs following a storm, while waiting for insurance coverage.
- Situations where the repair company will not proceed with emergency repairs until a payment is made or when a payment plan could not be worked out with the repair company for major emergency repairs.

Assistance will normally be in the form of a loan. Grants or a combination of a loan and grant will not normally be considered in these situations.

**e. Loss of Funds or Property**  
**Theft, Police reports, Insurance reports**

The theft or loss of funds (cash, checks, and money orders) along with the loss of property may cause an emergency situation for our clients. Assistance may be provided to aid with these emergencies provided the loss has been reported to the proper authorities; police, insurance company, Commanding Officer, etc., or if the CGMA Representative is able to verify the client's claim of loss.

**Note:** Assistance due to the loss of funds or property will be provided to help meet specific emergency financial needs and not necessarily replace the full amount of the claimed loss.

Caution in providing assistance should be taken if a client has not reported the loss prior to coming to CGMA and does not wish to report the loss after discussing the case with a Representative. In these cases, Representatives should take action to verify the client's story. This may include finding out what else was lost or stolen, such as ID cards, credit cards, driver's license, etc., and determine what, if any action the client has taken to report these

losses. Clients should be able to explain how the loss or theft occurred and why they choose not to report it to authorities. (Clients are sometimes reluctant to report cases involving the loss of funds vs. theft. These cases should also be reported in case the funds or property are found and turned in.)

In cases involving the loss of funds entrusted to others (typically given to their spouse, roommate, relative, etc., to pay bills on behalf of the client, or for safekeeping) the client should explain what actions they have taken to prevent further loss of funds.

Assistance will normally be in the form of a loan. Grants or a combination of a loan and grant will not normally be considered in these situations.

**f. Fire and Other Disasters**  
**Single Incident, Group Situation, Individual Assistance, Immediate and Long-Term Need**

Assistance may be provided to help with immediate needs when a client or their immediate family members are affected by a disaster. The disaster may affect only a few individuals, such as a house or apartment fire, or an entire community, such as a flood, tornado, or hurricane. While CGMA cannot act as an insurance company, CGMA can provide assistance to help our clients through the disaster and reestablish their normal lifestyle with items not provided for by the Coast Guard, other government agencies, insurance coverage, the American Red Cross or other relief organizations. Assistance is not authorized for blanket group relief; it must be given only to individuals on a case-by-case basis. Each client's financial circumstances are different, and each case must be considered on its own merits, based on demonstrated financial need.

Assistance under this provision is generally authorized for disaster relief by providing assistance as follows:

Immediate Need: Due to the time sensitive nature of these cases, initial assistance will be provided as a loan only for items immediately needed to prevent privation (food, shelter, and clothing). Clients should complete the basic CGMA Application for Assistance (CGMA Form 5) or, when directed by CGMA-HQ, the CGMA Application for Disaster Assistance (CGMA Form 6), without full financial disclosure required, and sign the CGMA check (CGMA Form 52) indicating receipt of the assistance and repayment authorization. Clients should be advised to return after the disaster has passed to provide additional financial information, discuss repayment options and determine if additional assistance is needed.

Additional Need: After the disaster has passed, additional assistance may be considered for basic essentials such as food, uniforms, civilian clothing, beds

and linens, eating table and chairs, temporary lodging etc., not covered by other sources. Assistance under other sections may also be considered to help reestablish a household. The client will be expected to provide full financial disclosure to obtain additional assistance.

CGMA believes that everyone should arrange for, and maintain, adequate health, life, vehicle, homeowners or renters insurance as part of their normal budget. Clients should not consider CGMA as an alternative to having adequate or no insurance. Loans, grants, and loans converted into grants are not automatic and should not be expected in lieu of adequate insurance. Therefore, assistance for disaster relief will normally be in the form of a loan. A grant, a combination of a loan and grant, or converting a loan into a grant may be considered only when circumstances indicate that providing a loan will offer little prospect of real help, and repaying a loan would result in a serious financial hardship on the family. Full financial disclosure will be required demonstrating the need for a grant vs. a loan.

Assistance for items covered by insurance or government reimbursement will only be given as a loan until reimbursement has been received. Loans must be repaid in full upon receipt of the reimbursement. Extended repayment over several months is not authorized. Clients must be cautioned that repayment of the CGMA loan will not be postponed indefinitely. When reimbursement from other sources is not received within 90 days, the client will be expected to repay the CGMA loan, either lump sum, provided the client can afford to do so, or with monthly repayments within the client's ability to repay.

See Appendix F for additional information on disaster assistance.

**g. Temporary Living Expenses**

Assistance may be provided for food, temporary lodging, and incidental expenses when a client demonstrates a need for such assistance because of an emergency or when an unexpected event has caused a serious financial burden, and assistance is not available from other sources.

Such a need may arise from a loss of income, or it may arise in connection with medical treatment or an emergency leave situation. It may result from fire, flood, earthquake, or other natural disasters or in circumstances where the family must immediately vacate their normal residence for health or safety reasons or to be out of harms way.

Assistance with temporary living expenses will normally be provided in the form of a loan. A grant, a combination of a loan and grant, or conversion of a loan to a grant may be considered only when circumstances indicate that providing a loan will offer little prospect of real help, and repaying a loan

would result in a serious financial hardship on the family. Full financial disclosure will be required to demonstrate the need for a grant vs. a loan.

When it is anticipated that temporary living expenses will be reimbursed by insurance, the Coast Guard, other government agencies, or other sources, a loan may be provided for covered items while the client awaits reimbursement. In such cases, the client must be cautioned that repayment of the CGMA loan will not be postponed indefinitely. If the expected reimbursement is not received within 90 days, the client will be expected to repay the CGMA loan, either in lump sum, provided the client can afford to do so, or with monthly repayments within the client's ability to repay.

**g. Childcare**

Assistance for childcare may be provided to assist a client during an emergency situation, but is not normally provided for regular monthly childcare costs. Normally, childcare costs must be budgeted for in the same manner as other regular monthly expenses. However, a one-time exception may be considered to initially establish childcare or when unique circumstances prevent clients from paying for budgeted childcare from their own resources.

Assistance will be in the form of a loan and will not exceed two months of childcare costs. Grants or a combination of a loan and grant will not be considered in these situations.

**h. Family In-Home Childcare Facility**

Although CGMA does not provide assistance to help finance business ventures, an exception may be considered when a client is working with the Coast Guard to establish an In-Home Childcare facility. Assistance may be provided to assist in obtaining the initial licensing fee and liability insurance necessary to gain Coast Guard Certification to operate an In-Home Childcare facility.

Assistance will be in the form of a loan. Grants or a combination of a loan and grant will not be considered in these situations.

**i. Bills and Expenses****Rent, Utilities, Credit Cards, Other Recurring Obligations**

Assistance may be considered when a client, who is normally able to pay all of their normal recurring bills and expenses, is experiencing short-term difficulty in making payments due to an illness, emergency, unforeseen circumstance or other legitimate reasons which created a hardship, preventing them from having sufficient funds to pay their bills using their own resources. However, assistance is not intended to permit clients to live beyond their income, nor is it to be used to provide frequent help for basic needs.

Assistance will be in the form of a loan and will not exceed two months of recurring expenses. Grants or a combination of a loan and grant will not be considered in these situations.

Recurring requests may indicate poor money management or that a more serious, financial problem exists, indicating a need for long-term financial counseling and budgeting assistance. (See paragraph 3-C-6 for additional information concerning financial counseling and debt management.)

moving out of government quarters or requesting assistance from CGMA. Rental assistance from CGMA should be limited to unexpected costs or when problems arise with establishing allowances previously requested and authorized.

Newly Married - Establishing First Household: Although the cost of establishing a household can be expensive, it is an expense that must be anticipated and planned for. Clients should plan for the cost of establishing a household before taking on these responsibilities. Military members should also request all government entitlements and allowances they may be entitled to, realizing that it might take time for the Coast Guard to recognize the new family members and authorize housing allowances.

Assistance for newly married clients and those establishing their first household, should be limited to situations where, after careful planning and budgeting, a demonstrated financial need remains due to unexpected costs, higher than expected moving expenses, or when there is an unexpected delay or problem with establishing allowances previously requested and authorized. Any aid provided must agree with a projected viable budget.

Not Authorized: Rental assistance will not normally be provided for convenience moves or, except as noted above, relocation to a new residence in the same general area. Rental assistance will not be provided to aid a client in breaking an existing lease or rental agreement.

**Note:** Due to potential problems, care must be exercised before providing rental assistance to clients who must depend on roommates for expenses. If a roommate moves out or fails to pay their share of expenses, limited one-time assistance may be provided to allow time for the client to find a new roommate or make other viable plans. (See paragraph 3-C-3-i for additional information concerning recurring bills and expenses, including rent and utilities.)

Supporting Documentation: In addition to items normally required when requesting assistance, the client must supply a copy of the lease or rental agreement showing required deposits, first and last month's rent and proof that arrangements have been made to obtain renters insurance. (If written proof of renters insurance is not available at the time assistance is provided, Representatives are to indicate in the remarks block of the CGMA Form 52 that proof must be provided within 30 days.) (See paragraph 3-D-5 for additional information concerning required documentation when requesting assistance and paragraph 3-C-3-e for additional information concerning insurance.)

Authorized Expenses: Assistance may be provided for first and last month's rent and security deposits. Assistance may also be provided for required real-

## 6. Financial and Housing Counseling and Debt Management Assistance

As a charitable organization, CGMA is usually willing to share the risk of extending financial assistance to clients who are performing their Coast Guard duties in a satisfactory manner and are unable to receive assistance from commercial financial institutions. However, recurring requests for assistance may indicate poor money management or that a more serious, financial problem exists, indicating a need for long-term financial counseling and budgeting assistance.

Assistance under this section differs from assistance that may be provided for recurring bills and expenses as discussed in paragraph 3-C-3-i, in that debt management assistance focuses on long-term financial difficulty. Education and training are combined with financial assistance to help the client get out of long-term debt and **remain debt free in the future.**

Due to the nature of casework, it is not feasible to anticipate all possible situations that can occur. There will be times an exception to normal CGMA policy may be justified. (See section 4-E for additional information concerning exceptions to CGMA policy, prior to providing financial assistance.)

### a. General

The purpose of financial and housing counseling and debt management assistance is to help our clients become good managers of their personal finances. To become good financial managers, they must first be able to meet their financial obligations. To assist our clients in accomplishing these goals, CGMA is willing to become a partner with the client by providing financial and housing counseling services and, when needed, debt management assistance.

Certain eligibility and assistance restrictions apply, and are outlined below.

### b. Financial and Housing Counseling

Clients requesting assistance from CGMA often need more than financial assistance to resolve their long-term financial problems. This is particularly true when a client demonstrates long-term financial mismanagement. Providing counseling and training to help the client change poor money management skills is often a better solution. Learning personal money management skills, such as establishing and living on a budget, using credit wisely, managing a checkbook and being a smart consumer are intended to provide long-term results that providing a loan or grant will not.

CGMA will help our clients receive professional, confidential, financial planning and counseling. Any Coast Guard member or employee may contact

## 8. Layette Program

The Coast Guard Mutual Assistance Layette Program is designed to provide support to certain clients and their families following the birth or adoption of a child.

Coast Guard Mutual Assistance will provide a layette package directly to the families of junior members of the Coast Guard community who meet the eligibility criteria indicated below.

Arrangements have also been made for a layette package to be provided to Coast Guard active duty personnel attending an Air Force Aid Society's (AFAS) "Bundles for Babies" class or a Navy-Marine Corps Relief Society's (NMCRS) "Budgeting for Babies" class.

### a. General

The layette package (containing a receiving blanket, accessories and other items for a newborn child) is a gift from Coast Guard Mutual Assistance. In the case of multiple births (or adoptions) a layette package will be provided for each child.

Layettes will be provided on a first come, first serve basis, limited to annual funding levels.

A client may receive a layette from CGMA, AFAS or NMCRS, but not from more than one source. (Clients eligible to receive a layette from more than one source must choose which layette they would like to receive.) If a client erroneously receives a layette that they are not entitled to, they will be expected to reimburse CGMA for the cost of the layette received in error, regardless if the client, AFAS, NMCRS, or CGMA is the cause of the error.

Requests for a layette package must be received and processed within six months following the birth or adoption of the child or children.

### b. Eligibility

CGMA Layette: Military members E-3 and below, civilian employees GS-4 and below, WG-2 and below, and NAF employees NF-2 and below are eligible to receive a layette directly from CGMA under this program.

AFAS or NMCRS Layette: Active Duty members of any rank may receive a layette by attending an Air Force Aid Society (AFAS) "Bundles for Babies" class or a Navy-Marine Corps Relief Society (NMCRS) "Budgeting for Babies" class.

Children: Children who are considered dependent children of the CGMA client are eligible for this program. This includes natural or adopted children, as well as stepchildren.

CGMA clients who are currently delinquent in repaying any CGMA loan or appear on the CGMA Restricted List are not eligible for assistance.

**c. Procedures - CGMA Layette**

Client: To request a CGMA layette package, eligible CGMA clients must:

- Complete the Application for CGMA Layette (CGMA Form 7).
- Attach a copy of the child's birth certificate or final adoption papers. In the case of multiple births (or adoptions) a copy of each child's birth certificate is required. A layette will be sent for each child.
- Attach a photocopy of the client's valid Coast Guard ID card (both sides, clearly legible) (If the CGMA client is deceased, a copy of the spouse's/legal guardian's valid ID must be provided).
- Military members must also attach a copy of a completed Application for Uniformed Services Identification Card DEERS Enrollment (DD 1172).
- Send the completed Form 7 with the required documentation to CGMA HQ:
  - E-mail the forms to [ARL-DG@uscg.mil](mailto:ARL-DG@uscg.mil), or
  - Fax them to 202-493-6686
  - Mail to 4200 Wilson Blvd Suite 610 Arlington, VA 22203-1804

CGMA-HQ: Upon receipt of the Form 7 and required documents, CGMA-HQ will:

- Mail the layette directly to the client. The package will normally be shipped within 1 business day and should arrive within 5 business days.
- Maintain a database to prevent duplicate layettes from being provided to a client.

**d. Procedures - AFAS or NMCRS Layette**

Client: To attend an AFAS "Bundles for Babies" class or a NMCRS "Budgeting for Babies" class and receive a layette package upon the completion of the class, eligible Coast Guard active duty members must:

- Contact the AFAS ([www.afas.org](http://www.afas.org)) or NMCRS ([www.nmcrs.org](http://www.nmcrs.org)) for assistance in determining where and when classes will be held, and to register to attend. They need not apply through CGMA to attend the class.
- Attend and complete the class.

AFAS or NMCRS: Upon completion of the AFAS "Bundles for Babies" class or the NMCRS "Budgeting for Babies" class the AFAS or NMCRS, will:

- Provide a layette directly to Coast Guard active duty members completing the class in the same manner as they do their own members.
- Bill CGMA-HQ for the cost of the layette provided to Coast Guard active duty members in accordance with the Memorandum of Understanding (MOU) established for this purpose.

CGMA-HQ: Upon receipt of an AFAS or NMCRS invoice, CGMA-HQ will:

- Reimburse the society for the layette provided to CGMA clients.
- Maintain a database to prevent duplicate layettes from being provided to a client.

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## C. Forms

### 1. General

The following forms have been adopted for use by CGMA:

CGMA 5	CGMA Application for Assistance
CGMA 6	CGMA Application for Disaster Assistance
CGMA 6a	CGMA Application for Conversion of Disaster Loan into a Grant
CGMA 7	Application for CGMA Layette
CGMA 8	Application for CGMA Stafford/PLUS Loan Origination Fee Refund
CGMA 10	Application for CGMA Supplemental Education Grant (SEG)
CGMA 15	CGMA Budget Form
CGMA 16	Pre-Authorization Form
CGMA 17	CGMA Disapproval/Appeal Statement
CGMA 20	Representative Information and Certification Form
CGMA 20a	Assistant Representative Information and Certification Form
CGMA 21	Relief of Representative or Assistant Representative Audit Form
CGMA 22	CGMA/NFCC Agreement
CGMA 22a	CGMA Letter of Introduction
CGMA 22b	Counselor Recommendation Form
CGMA 41	Cash Contribution Form
CGMA 42	Memorial Contribution Form
CGMA 43	Active Duty Contribution Allotment Authorization Form
CGMA 44	Civilian Employee Contribution Allotment Authorization Form
CGMA 45	Retired Contribution Allotment Authorization Form
CGMA 46	Credit Card Contribution Form
CGMA 47	Securities Contribution Form
CGMA 52	CGMA Check
DD 2558	Authorization to Start, Stop or Change an Allotment (For use when providing assistance to DOD members)
HUD-1	Settlement Statement
00-35-2653NSBW	Bank of America Corporate Signature Card

See appendix C for a copy of each of these forms.

### 2. Campaign Forms

In addition to the forms listed above, CGMA-HQ will prepare and distribute forms necessary to conduct the annual fundraising campaign. These forms will be sent directly to each Representative site and made available on the CGMA-HQ website ([www.cgmahq.org](http://www.cgmahq.org)) each year prior to the campaign.

## CGMA Forms

### A. General

The following forms have been adopted for use by CGMA:

CGMA 5	CGMA Application for Assistance
CGMA 6	CGMA Application for Disaster Assistance
CGMA 6a	CGMA Application for Conversion of Disaster Loan into a Grant
CGMA 7	CGMA Application for CGMA Layette
CGMA 8	Application for CGMA Stafford/PLUS Loan Origination Fee Refund
CGMA 10	Application for CGMA Supplemental Education Grant (SEG)
CGMA 15	CGMA Budget Form
CGMA 16	Pre-Authorization Form
CGMA 17	CGMA Disapproval/Appeal Statement
CGMA 20	Representative Information and Certification Form
CGMA 20a	Assistant Representative Information and Certification Form
CGMA 21	Relief of Representative or Assistant Representative Audit Form
CGMA 22	CGMA/NFCC Agreement
CGMA 22a	CGMA Letter of Introduction
CGMA 22b	Counselor Recommendation Form
CGMA 41	Cash Contribution Form
CGMA 42	Memorial Contribution Form
CGMA 43	Active Duty Contribution Allotment Authorization Form
CGMA 44	Civilian Employee Contribution Allotment Authorization Form
CGMA 45	Retired Contribution Allotment Authorization Form
CGMA 46	Credit Card Contribution Form
CGMA 47	Securities Contribution Form
CGMA 52	CGMA Check
DD 2558	Authorization to Start, Stop or Change an Allotment (For use when providing assistance to DOD members)
HUD-1	Settlement Statement
00-35-2653NSBW	Bank of America Corporate Signature Card

A copy of each form is to follow this page.

### B. Additional Information

See section 6-C for information on obtaining, securing and accountability of forms.

Contact the CGMA-HQ Director of Administration or Executive Director if changes are needed to the list of forms or any specific form. (See paragraph 2-D-2 for CGMA-HQ contact information.)

## Locations of CGMA Regional Directors and Representatives

### A. ACADEMY – Regional Director

1. Academy
2. USCGC EAGLE

### B. ATC MOBILE – Regional Director

1. ATC Mobile
2. Sector Mobile

### C. DISTRICT 14 – Regional Director

1. Air Station Barbers Point
2. District Fourteen
3. ISC Honolulu
4. Sector Guam
5. USCGC JARVIS
6. USCGC RUSH

### D. HEADQUARTERS SUPPORT COMMAND – Regional Director

1. Deployable Operations Group
2. Headquarters Support Command
3. National Pollution Fund Center
4. National Vessel Documentation Center
5. TISCOM

### E. ISC ALAMEDA – Regional Director

1. Air Station Sacramento
2. Air Station San Francisco
3. Group/Air Station Humboldt Bay
4. ISC Alameda
5. Sector San Francisco
6. USCGC BERTHOLF
7. USCGC BOUTWELL
8. USCGC MORGENTHAU
9. USCGC SHERMAN
10. USCGC WAESCHE

**F. ISC BOSTON – Regional Director**

1. Air Station Cape Cod
2. ISC Boston
3. Sector Boston
4. Sector Long Island Sound
5. Sector New York
6. Sector Northern New England
7. Sector Southeastern New England
8. SFO Moriches
9. SFO Southwest Harbor
10. USCGC CAMPBELL
11. USCGC ESCANABA
12. USCGC RELIANCE
13. USCGC SENECA
14. USCGC SPENCER
15. USCGC TAHOMA

**G. ISC CLEVELAND – Regional Director**

1. Air Station Detroit
2. Air Station Traverse City
3. ISC Cleveland
4. MSU Chicago
5. MSU Duluth
6. Sector Buffalo
7. Sector Detroit
8. Sector Lake Michigan
9. Sector Sault Ste. Marie
10. SFO Grand Haven
11. USCGC MACKINAW

**H. ISC KETCHIKAN – Regional Director**

1. Air Station Sitka
2. ISC Ketchikan
3. ISC Ketchikan-Juneau
4. MSU Valdez
5. Sector Anchorage
6. Sector Juneau

**I. ISC KODIAK – Regional Director**

1. ISC Kodiak

# Coast Guard Mutual Assistance



## Appendix E

# Case Management Program

This Section is currently being rewritten  
Contact CGMA-HQ for additional assistance

# Coast Guard Mutual Assistance



## Appendix F

# Disaster Response