Department of the Army   TRADOC Regulation 1-11
Headquarters, United States Army
Training and Doctrine Command
Fort Eustis, Virginia 23604-5700

26 August 2015

STAFF PROCEDURES

FOR THE COMMANDER:

OFFICIAL: REX A. SPITLER
                                                   Major General, U.S. Army
                                                   Deputy Chief of Staff

RICHARD A. DAVIS
Senior Executive
Deputy Chief of Staff, G-6

History. This is a major revision to this regulation. The portions affected are listed in the summary of change.

Summary. This regulation prescribes policy, procedures, and formats for preparing and coordinating correspondence and other administrative actions for Headquarters (HQ), U.S. Army Training and Doctrine Command (TRADOC). It also provides responsibilities and procedures for scheduling conferences and briefings.

Applicability. This regulation applies to all TRADOC organizations that prepare correspondence for HQ TRADOC.

Proponent and exception authority. The proponent of this regulation is the Secretary of the General Staff (SGS). The proponent has the authority to approve exceptions or waivers to this regulation that are consistent with controlling law and regulations. The proponent may delegate this authority in writing, to a division chief with the proponent agency or its direct reporting unit or field operating activity (FOA), in the grade of colonel or the civilian equivalent. Activities may request a waiver to this regulation by providing justification that includes a full analysis of the expected benefits and must include formal review by the activity's senior legal officer. All waiver requests will be endorsed by the commander or senior leader of the requesting activity and forwarded through their higher headquarters to the policy proponent.

*This regulation supersedes TRADOC Regulation 1-11, dated 29 March 2012

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Army Management Control Process. This regulation does not contain management control provisions.

Supplementation. Supplementation of this regulation and establishment of command and local forms are prohibited without prior approval from the Secretary of the General Staff (ATCS-XS), 950 Jefferson Avenue, Fort Eustis, VA 23604-5700

Suggested improvements. Users are invited to send comments and suggested improvements on Department of the Army (DA) Form 2028 (Recommended Changes to Publications and Blank Forms) directly to the Secretary of the General Staff (ATCS-XS), 950 Jefferson Avenue, Fort Eustis, Virginia 23604-5700, or usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil.

Distribution. This regulation is available in electronic media only and is published on the TRADOC Homepage at http://www.tradoc.army.mil/tpubs/.

Summary of Change

TRADOC Regulation 1-11
Staff Procedures

This revision, dated 26 August 2015-

o Replaces Command Group Actions Office with Secretary of the General Staff (throughout).

o Removes references to Assistant Chief of Staff (throughout).

o Removes references to Joint Federal Travel Regulation (throughout).

o Maintains use of the REPLY TO ATTENTION OF on U.S. Army Training and doctrine Command letterhead (para 2-1c(1)).

 Limits requirement for Headquarters, Department of the Army Form 5 to accompany staff actions to only Secretary of the Army, Chief of Staff, Army, Under Secretary of the Army, Vice Chief of Staff, Army, or Director of the Army Staff (para 2-3b(14)), unless requested.

o Adds Rapid Equipping Force to U.S. Army Training and doctrine Command distribution list (fig 2-7).

o Adds requirement for draft operation orders to be approved by originating organization's general officer/senior executive service member and submitted to G-3/5/7 for the Deputy Chief of Staff G-3/5/7's approval (para 2-4b(1)).

o Adds requirement that draft tasking orders (internal taskings) be approved by originating organization's colonel/GS-15 leadership (para 2-4b(2)).

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o Adds requirement to coordinate all actions impacting strategic communications with Deputy Chief of Staff, G-9, in addition to Public Affairs Office, Commander's Planning Group, and Congressional Activities Office. (para 2-12b)

º Adds requirement for Secretary of the General Staff Administrative Support Division and Executive Services Office to review requests to expend .0012 funds (para 2-12c(11)).

o Allows use of point of contact statements on correspondence going to higher headquarters.

º Changes venue for approval of distinguished visitor requests to regularly scheduled visit update briefings with the Deputy Commanding General/Chief of Staff (para 2-17a).

o Changes distinguished visitor visit approval authority to Deputy Commanding General/Chief of Staff (para 2-17a).

o Establishes procedures and requirements for processing memorandums of understanding, memorandums of agreement, and service level agreements (para 2-18).

o Changes executive summary and information paper formats to match Headquarters, Department of the Army formats (paras 3-6 and 3-8).

o Changes responsibility for scheduling conferences and briefings to deputy chiefs of staff, and chiefs of special staffs via the Conference Room Scheduler (paragraph 4-2a).

o Changes approval authority for the Command Conference Room requests to Office of the Commanding General (para 4-2b). Command Conference Room requests are submitted using the Conference Room Scheduler.

o Changes procedure to reserve the Command Conference Room or Morelli Auditorium to the Conference Room Scheduler (paras 4-2b and 4-2c).

o Adds requirement to send requests for protocol support for Commanding General, Deputy Commanding General/Chief of Staff, or Deputy Chief of Staff-hosted events to Chief, Executive Services Office (para 4-2c).

o Adds requirement to number briefing slides using "__ of __" format, e.g., "2 of 15" (para 4-4g).

º Updates Enterprise E-mail instructions (para 5-1).

o Updates the Automated Message Handling System to include instructions for the Organizational Messaging Service (para 5-2).

o Adds Days of Remembrance to special/ethnic observances (para 6-2a).

o Removes Prisoner of War/Missing in Action Recognition Day from special/ethnic observances (para 6-2a).

o Requires requests for Command Group participation in events (to introduce guest speaker, present recognitions, etc.), be sent on a U.S. Army Training and Doctrine Command Form 5-E through Secretary of the General Staff to the Deputy Chief of Staff, Deputy Commanding General/Chief of Staff, or Commanding General (para 6-3e).

o Changes regulatory document for invitational travel authorization requests to the Joint Travel Regulation (para 7-3a).

o Revises information and instructions for the U.S. Army Training and Doctrine Command Enterprise Calendar (chap 8).

Contents

Figure List

Table List

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Chapter 1
Introduction

1-1. Purpose
This regulation prescribes administrative policy and staff procedures for Headquarters (HQ) U.S. Army Training and Doctrine Command (TRADOC) and agencies that prepare correspondence for HQ TRADOC.

1-2. References
Required and related publications and prescribed and referenced forms are listed in Appendix A.

1-3. Explanation of abbreviations and terms
Abbreviations and special terms used in this regulation are explained in the glossary.

1-4. Responsibilities

   a. The Secretary of the General Staff (SGS) will-

      (1) Establish policy and procedures to prepare and manage TRADOC correspondence.

      (2) Review all correspondence sent to the Command Group for administrative completeness and correctness, appropriate coordination, proper level of signatures, and compliance with established policies. Enforce policies, regulations, and instructions governing correspondence for TRADOC.

      (3) Serve as primary tasking authority for all non-operational taskings generated by the Commanding General (CG), Deputy Commanding General (DCG)/Chief of Staff (CoS), and Deputy Chief of Staff (DCoS), reflected as CG, and Chief of Staff (CS) taskings. Process all external suspense (ES) actions generated by proponents. Manage tasking continuity using the Command Action Tracking System (CATS).

      (4) Distribute and track official mail addressed to the Command Group and actions generated by the Command Group.

      (5) Assign staff responsibility for TRADOC-led special/ethnic observances and recurring events.

      (6) Maintain the SGS Web site.

      (7) Manage site content for the Staff Action Officer Resource Center.

      (8) Schedule and conduct monthly Staff Officer Orientation Briefings (SOOBs) to familiarize newly assigned action officers (AOs) with staff procedures. Maintain essential information related to the HQ organization on the DCG/CoS Documents Web site for AO review and reference.

      (9) Manage TRADOC policy memorandums and delegations of authority.

(10) Maintain Command Group internal TRADOC distribution lists (Commanders/Commandants, Chiefs, Staff Principals, executive officers (XOs), SGS, senior executive services (SESs), and Senior Commanders).

(11) Conduct the bi-monthly Executive Officers Breakfast to provide a forum for enhanced communication between staff sections.

(12) Operate the Command Group Action Center (CGAC).

(13) Conduct bi-annual Staff Actions Training.

(14) Serve as lead for CATS.

(15) Conduct quarterly TRADOC SGS synchronization meetings via video teleconference.

b. The Deputy Chief of Staff (DCS), G-3/5/7 Current Operations (G-33) will-

(1) Serve as primary tasking authority for all internal (IN), external (EX), and operational (OP) taskings not generated by the TRADOC Command Group (see paragraph 2-4) in accordance with TRADOC Regulation 10-5, Chapter 2.

(2) Receive and process all requests for military aircraft travel (see TRADOC Regulation 95-5).

c. DCSs and Chiefs of Special Staff will-

(1) Require incoming personnel to review DCG/CoS Web site in their welcome/sponsorship letters.

(2) Ensure newly assigned personnel (military and civilian) attend the first available SOOB within 2 months of arrival. Contractors may attend the SOOB at the discretion of their director.

d. The Chief, Congressional Activities Office (CAO) will monitor and provide assistance on all congressional actions (see paras 2-8g(1) and B-4d). Additional guidance and information on CAO functions and services is available on the CAO SharePoint site.

e. XOs and SGSs at subordinate organizations (core function leads (CFLs), special activities and field operating activities (FOAs), DRUs, schools and centers), and HQ TRADOC will-

(1) Ensure proper coordination and formatting of all staff products forwarded to the TRADOC Command Group.

(2) Provide designated organization points of contact (POCs) list (name, e-mail address, and phone number) to the TRADOC SGS (Staff Actions Division) (SAD) and update as changes occur in order to maintain current contact lists.

(3) Ensure records (hardcopy or electronic) created and/or received in the course of doing Army business will be maintained in accordance with Army Regulation (AR) 25-400-2.

f. Designated organization POCs will upload documents to the TRADOC Knowledge Environment (TKE) Actions Library (for CG, CS, IN, EX, OP taskings, and ES actions) in accordance with Appendix H.

g. AOs will prepare and process TRADOC correspondence in compliance with regulatory guidance.

Chapter 2
Staff Policies and Procedures

2-1. Correspondence

AR 25-50, Preparing and Managing Correspondence, prescribes policies, procedures, and standard formats for preparing and processing Army correspondence. It is available on the Army Publishing Directorate Web site. TR 1-11 prescribes guidance specific to TRADOC. It is available on the TRADOC Homepage.

a. Prepare correspondence for DCoS signature, unless directed to prepare for DCG/CoS, or CG signature.

b. Prepare correspondence for CG, DCG/CoS, and DCoS signature in final form, not as a draft.

c. Letterhead.

(1) Use TRADOC letterhead stationery for all formal memorandums for Command Group signature. The "REPLY TO ATTENTION OF" should appear in the bottom left area of the letterhead, next to the seal. Type the proponent's office symbol under "REPLY TO ATTENTION OF." (See fig. 2-6.)

(2) Use CG, DCG/CoS, or DCoS letterhead stationery for letters. Do not use office titles or office symbols on CG, DCG/CoS, or DCoS letters. The space under "REPLY TO ATTENTION OF" should remain blank. In general, letters are used to correspond to civilians, members of congress, and dignitaries, or in response to a personal letter. Refer to AR 25-50, Preparing and Managing Correspondence, Chapter 3, for guidance on preparing letters.

(3) Electronic letterhead templates are available on the TRADOC Web site (http://www.tradoc.army.mil/Publications.htm).

d. Use of the slogan "Victory Starts Here!" as the last paragraph in letters, memoranda, or messages is optional. It may be used in correspondence of a complimentary, positive nature going to individuals and/or higher or subordinate commands. Omit if it adds a second page to the correspondence.

e. As a general rule, respond in like form. For example, use a memorandum to respond to a memorandum; personal letter to a personal letter, etc.

f. Address memorandums of commendation "THRU" the chain of command and "FOR" the recipient, by name.

g. Use TRADOC Form 5-E, dated Dec 2014, (Transmittal, Action and Control) for all correspondence (hard copy or electronic) going to the Command Group. It is a .pdf- fillable form.

h. Staff offices must route actions going to the Command Group through the SGS. SGS will assign a CATS control number, proofread and edit, ensure required coordination, and forward the correspondence to the Command Group. Actions received at the Command Group without prior SGS approval will be returned to the SGS for processing. Ensure you provide the SGS a copy of the action to be presented for CG, DCG/CoS, or DCoS signature for review prior to a briefing so SGS can proofread. If bypassing the SGS, provide a copy of signed correspondence and TRADOC Form 5-E to the SGS for official files following the briefing by uploading it to your Actions Library folder in accordance with Appendix H.

i. Command Group Action Center (CGAC) will date correspondence the Command Group signs (if not dated at time of signature). A copy of the correspondence will be scanned and placed in CATS. Unless directed otherwise, the SGS will e-mail all actions signed by the CG, DCG/CoS, or DCoS that are addressed to all subordinate organizations, and HQ TRADOC. See Figure 2-7, Distribution list for correspondence. Distribution of actions addressed elsewhere is the responsibility of the lead organization. Proponents are responsible for maintaining their records in accordance with AR 25-400-2.

j. Provide executive summaries (EXSUMs) and/or tasking updates to SGS on TRADOC Form 5-E. SGS will review and forward to Command Group. If space allows, type EXSUMs on TRADOC Form 5-E in the discussion section of block 7 (instead of attaching it as a tab). Upload TRADOC Form 5-E (containing the EXSUM and appropriate digital signatures) to the TKE Actions Library in accordance with Appendix H. E-mail TRADOC SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil when TRADOC Form 5-E has been uploaded, be sure to include EXSUM title in the subject line. When proponent head chooses to route the EXSUM directly to the CG, DCG/CoS, or DCoS, as a minimum, provide a courtesy copy (cc) to the following individuals:

(1) For EXSUMs sent directly to the CG, provide cc to:

(a) DCG/CoS

(b) DCoS

(c) CG XO

(d) DCG/CoS XO

(e) DCoS XO

(f) SGS to track response/close tasking

(2) For EXSUMs sent directly to the DCG/CoS, provide cc to:

(a) DCoS

(b) DCG/CoS XO

(c) DCoS XO

(d) SGS to track response/close tasking

k. Multiple-addressee correspondence, memorandums of instruction, policy letters, electronic messages, and standing operating procedures will not be used as substitutes for issuing, changing, or revising TRADOC-wide policy and procedure publications in accordance with AR 25-30, paragraph 3-38a.

l. Incorporate interim policy, procedural guidance messages, or memorandums into a publication within 6 months of issuance, in accordance with AR 25-30, paragraph 1-25d(4).

2-2. Commanding General (CG) actions

a. Actions requiring CG approval and/or signature take precedence over routine actions. Ensure staff principals handle in a priority manner.

b. TRADOC Form 5-E will accompany all CG correspondence, whether for information, signature, or approval.

c. Unless otherwise indicated, items for CG approval, information, review, or signature are assigned a **5-duty day** suspense and a control number with a "CG" prefix.

d. CG-generated requests for information or action require feedback within **5 duty days**. Complex actions still require initial feedback within **5 duty days**. Provide interim response to TRADOC SAD via e-mail to mailto:usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil, who will forward to the CG and cc the DCG/CoS and/or DCoS. Follow up with weekly updates until complete.

(1) Coordinating staff and/or their deputies will submit responses to simple questions and interim responses in EXSUM format. Follow EXSUM forwarding instructions in paragraph 2-1k.

(2) For detailed actions requiring more than 5 duty days to complete, upload TRADOC Form 5-E (containing the EXSUM and appropriate digital signatures) to the TKE Actions Library in accordance with Appendix H. E-mail TRADOC SAD at usarmy.jble.tradoc.mbx. hq-tradoc-sad@mail.mil when TRADOC Form 5-E has been uploaded. Include EXSUM title in the

subject line. TRADOC SGS will then forward it to the CG and cc individuals listed in paragraph 2-1k(1). Provide current status and way ahead with milestones to complete the tasking.

   e. Expedite all returned CG actions for rewrite, corrections, questions, etc. through the SGS. Maximum turnaround time is 24 hours. At times, the suspense may require turnaround in less than 24 hours due to the CG's travel schedule. Always use the documents your staff action control officer (SACO) posted in your folder in the TKE Actions Library for your rewrite or corrections. These documents contain changes to your original submission. Do not use your original documents.

2-3. Staff action process

   a. Coordinating staff and subordinate organizations' representatives will review the CATS Daily Status Report to monitor suspense dates for their respective taskings and ensure they are met on time.

   b. Action Officers will:

      (1) Become familiar with AR 25-50, TRADOC Regulation 10-5 series, and this regulation. Follow regulatory guidance to determine action required, level of approval, and appropriate signature for the action. Contact the SGS with questions on signature/approval authority or coordination of ES actions prior to processing actions.

      (2) Prior to attending the SOOB, review documents on the DCG/CoS Web site which provides an introduction to TRADOC. An Army Knowledge Online (AKO) user identification is required to access the site.

      (3) Conduct a thorough mission analysis of the action being submitted. Before taking action, thoroughly consider the issue and why the CG is involved, staff recommendations, implications for accepting or rejecting the staff recommendations, and assessment of supporting and background information. Provide Command Group the second- and third-order effects and the implications to the Army and TRADOC. Think at the strategic level.

      (4) Initiate a lead transfer if, as the lead, he/she believes the tasking is outside of their organization's area of responsibility. See paras 2-3g(1) and (2) for procedures to transfer lead.

      (5) Provide assistance to subordinate commands/activities. Ensure instructions to subordinate commanders are clear, concise, and leave no doubt about the objectives. Act on subordinate commander requests or recommendations promptly.

      (6) If review of the subordinate command request or recommendation results in nonconcurrence, discuss the decision with the affected organization before forwarding to the Command Group for final action/signature. This gives the field an opportunity to understand the forthcoming response and ensures consideration of the most critical data points from the centers'/ schools' perspective. Explain action fully and in a positive manner, pointing out alternatives, if available. Nonconcurrences/negative responses to subordinate activities and/or other commands outside of TRADOC require CG, DCG/CoS, and/or DCoS approval.

(7) Ensure subordinate commanders receive copies of their requests that HQ TRADOC endorses to Headquarters, Department of the Army (HQDA) for consideration. Until actions are complete, provide periodic updates, through their SGS, on status of requests.

(8) Ensure content of action is consistent with similar staff actions and cites only approved policies.

(9) Carefully review the final product to ensure proper format, administrative correctness, and use of appropriate letterhead prior to forwarding to SGS.

(10) Complete coordination with subordinate organizations, special activities and FOAs, schools and centers, HQ TRADOC organizations, and other Army commands (ACOMs) in accordance with TRADOC Regulation 10-5 and paragraph 2-12 of this regulation prior to forwarding to SGS. Ensure coordinating office is commensurate with level of signature. For subordinate organizations, the chief of staff or higher must provide his/her name for concurrence/ nonconcurrence on an action. For HQ TRADOC organizations, the deputy chief of staff, assistant deputy chief of staff, must provide his/her name for concurrence/nonconcurrence on an action.   Include date and concur or nonconcur on TRADOC Form 5-E. If they nonconcur, include additional tab that explains objections. (For example, if TRADOC CG signs correspondence requiring coordination with U.S. Army Forces Command (FORSCOM), the FORSCOM CG is the coordinating authority.)

(11) Comply with AR 380-5 for security considerations.

(12) Ensure the distribution is appropriate (see paragraph 2-13).

(13) Ensure staff action includes a completed TRADOC Form 5-E.

(14) Ensure staff actions going to the Secretary of the Army (SA), Chief of Staff, Army (CSA), Under Secretary of the Army (USA), Vice Chief of Staff, Army (VCSA), or Director of the Army Staff include a HQDA Form 5 at TAB A. Include HQDA Form 5 with staff actions going to other DA senior leaders onlywhen requested.

(15) Obtain approval of the proper authority within respective directorate or subordinate organization.

(16) Provide their designated organization POC an electronic copy of all documents to upload in accordance with Appendix H. Designated organization POC will make administrative corrections, but will not change the content of the correspondence.

(17) Prepare letters of appreciation/commendation expeditiously (within 15 calendar days of the event). For actions that require sending a number of different letters or invitations, the following guidelines will expedite the process:

(a) When sending the same letter to multiple recipients, submit one draft letter or memorandum to SGS for review. Once approved, the action is returned to the proponent to complete the remaining letters/memorandums. Upload the entire package to TKE Action Library and notify SGS for signatures on the remaining correspondence.

(b) Prepare Command Group invitations to major events early enough so they may be mailed no later than 30 calendar days prior to the event. Submit one letter or memorandum along with a list of the names of all individuals invited. Present the names in categories (for example, retirees, former commanders, civilian contractors, etc.), along with mailing address, in correct format, and proposed salutation for approval. If the CG wants to personally deliver or pen a personal note to some of the invitees, indicate and provide CG with recommendation on breakout of proposed invitees. Include addressee's first name or nickname so the CG can line through the salutation and write in the name, if desired.

(18) Deliver signed or lined-through correspondence to addressees. If correspondence lists another THRU addressee, AO will deliver to that individual or office. Determine method of delivery based on sensitivity of contents, suspense dates, etc., to ensure expeditious receipt of correspondence. Options include e-mail, fax, regular mail, express mail, and courier (to the Pentagon). See Appendix G for access to and instruction for public distribution lists.

(a) To deliver correspondence or information to all HQ TRADOC subordinate commands and/or schools, centers, and activities, e-mail the action to the **SGS-TRADOC** distribution list for appropriate tracking and delivery to the respective command groups. If counterparts at subordinate activities are also working the action, inform their SGSs.

(b) E-mail critical and/or strategic-level actions to the TRADOC DCSs and Chief of Special Staff Office via the **TRADOC Staff Principals** distribution list. Only staff principals should use this list.

(19) Upload a copy of the final response in accordance with Appendix H when a direct reply from an outside agency is received and notify SGS. For example, actions addressed to a HQDA agency that result in a direct reply to the proponent.

(20) Maintain and manage life-cycle recordkeeping requirements for the record copy of correspondence and electronic records in accordance with AR 25-400-2.

(21) While coordinating documents, mark draft versions with the "For Official Use Only" (FOUO) designation in accordance with AR 25-55, paragraph 4-100. Paragraph 4-11 specifies use of FOUO marking under FOIA exemptions 2-9. FOIA exemption 5 applies to draft documents, as they are predecisional and a deliberative part of the decisionmaking process. Mark draft documents FOUO in accordance with AR 25-55, paragraph 4-200, in bold letters at least 3/16 of an inch at the bottom on the outside of the front cover, on each page, and on the outside of the back cover.

c. Proponents will upload documents associated with CG, CS taskings, or ES actions for Command Group approval/signature in accordance with Appendix H. SACOs will make required administrative corrections, but will not change content.

d. Chief, SAD will:

(1) Task elements throughout TRADOC on non-operational taskings generated by the TRADOC CG, DCG/CoS, or DCoS. Manage tasking continuity using CATS.

(2) Conduct mission analysis, assign actions to appropriate proponent in accordance with TR 10-5, and monitor suspense dates using CATS (see Figure 2-1 for a flow chart of the Command Group tasking process).

(a) Upon receipt in CGAC, assign a CATS number with ES prefix to actions generated by the proponent requiring TRADOC CG, DCG/CoS, or DCoS approval.

(b) Assign staff lead/assist(s) and immediately e-mail the CG, DCG/CoS, and DCoS taskings/requests for information to respective proponent with a cc to AO (if known).

(3) Act as liaison between the Command Group and action offices concerning correspondence preparation and administrative procedures.

(4) Review all correspondence sent to the Command Group for administrative completeness and correctness, appropriate coordination, proper level of signature, and compliance with established policies.

(5) Date all correspondence the Command Group signs before returning to proponent for dispatch.

(6) Maintain electronic file copies of completed actions, update CATS to close action, and return to XO of originating proponent for dispatch.

(7) E-mail scanned correspondence signed or lined-through by the Command Group in response to HQDA taskings to G-33. Copy lead organization, including AO, if known, on e-mail to G-33. Deliver original signed/initialed correspondence to lead organization.

(8) Package and e-mail Command Group correspondence addressed to SA, USA, CSA, VCSA, and Director of the Army Staff on behalf of lead organizations.

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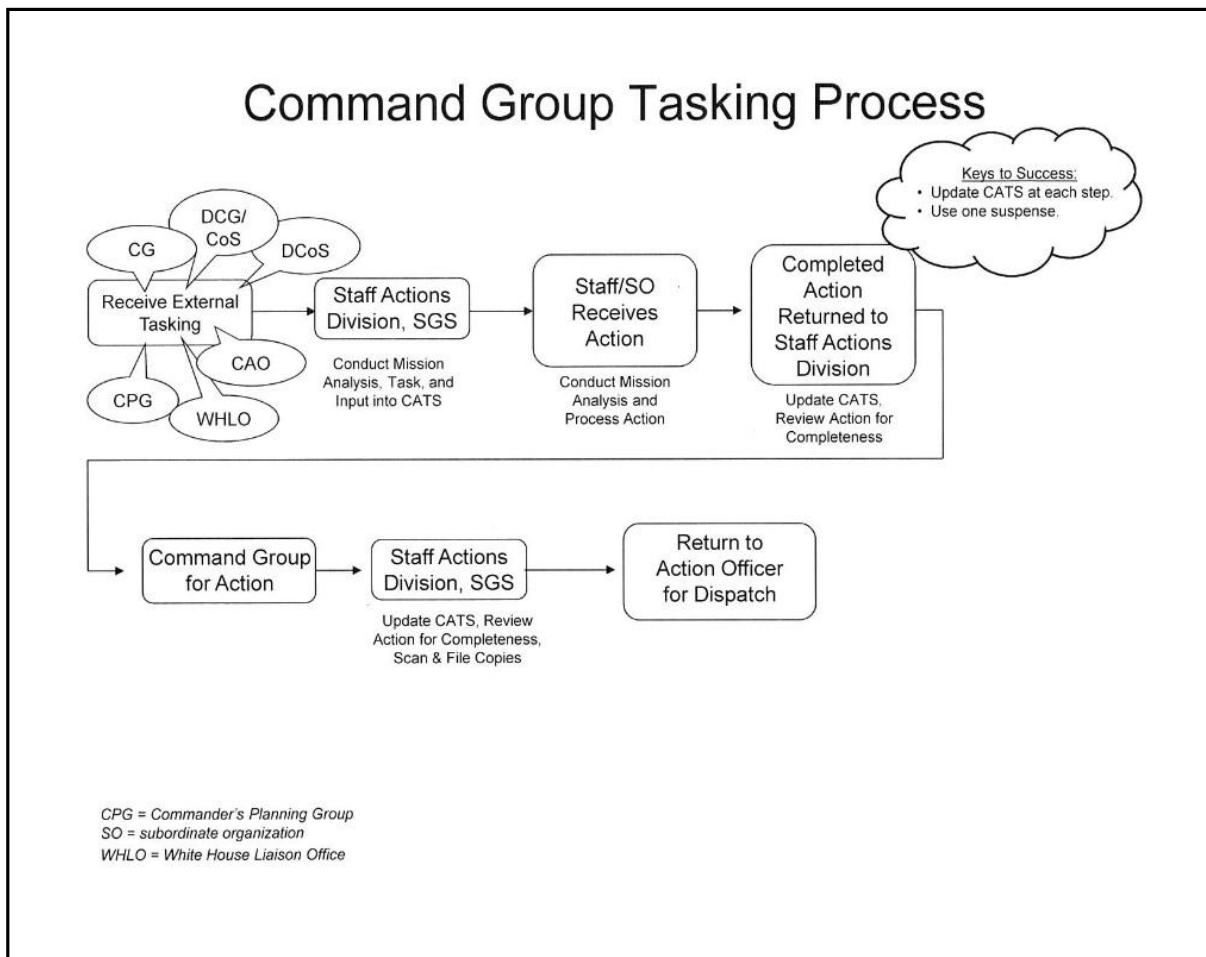
Figure 2-1. Command Group tasking process

e. Lead organizations will:

(1) Conduct a thorough mission analysis of the tasking (see paragraph 2-3b(3)) and take responsibility for satisfactory completion of the tasking.

(2) For G-33 taskings, construct the tasking following the current TRADOC tasking order (TASKORD) format. (Figure 2-2)

UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

U.S. ARMY TRAINING AND DOCTRINE COMMAND
G-33 CURRENT OPERATIONS
950 Jefferson Avenue (Suite 1016)
Fort Eustis, Virginia 23604-5711
(757) 501-5095 or DSN: 312-501-5095
UNCLAS FAX: 5122 or Secure FAX: 5123

HQ TRADOC TASKING ORDER

S: 30 JUN 15

(Or enter " Multiple " if more than one suspense)

{NOTE: Suspense less than 30 days requires COL/GS-15 approval. Approving official must be listed in paragraph 5D}

{TASKORD is for internal TRADOC taskings only. This order cannot be used outside of TRADOC}

DTG:

SUBJECT: TRADOC TASKORD *{Insert title. Use plain language – do not use acronyms or abbreviations. G-33 will add control number}*

1. Situation. 12pt Arial black font. *{Background leading to the need for the tasking. Describe why this tasking is needed, what is the mission/intent of higher HQ and higher HQ/DA timeline. Describe the Commander's intent. Frame the problem or issue so all can understand why this tasking is needed. If TASKORD has a short suspense justify why the urgency; what is the external suspense being met. If you have background documents describe and list as an enclosures. Ensure the electronic attachments are named the same as written in the order. Situation subparagraphs may be used to describe missions or parallel efforts of other ACOMs, ASCCs or DA Staff. }*

2. Mission. *{Who, What, Where, When, Why (5Ws) and overall suspense. Mission statement contains no subparagraphs. Be clear, concise, specific and directive. Active voice. Should be a single sentence. TRADOC level mission statement. }*

3. Execution.
3.A. Suspense: *{DDMMMYY such as 03JUN15.*
If multiple suspenses, list each with brief description. All suspenses must be referenced within the body of the TASKORD under 3.C TASKS. NOTE: If suspense is less than 30 days, submission must be approved by COL/GS15. Approving official must be listed in paragraph 5D.}
3.B. Concept of operations. *{Expand on situation and mission paragraphs. Describe how the Lead sees the actions of subordinate units fitting together to accomplish the mission. May be a single paragraph or multiple subparagraphs. Address decisive and shaping operations. Address phases if appropriate. This is not the paragraph for specific tasks only a description of how the overall mission }*
3.C. Tasks. *{Identify each in a separate line; the standard first task is always 3.C.1 acknowledge receipt of tasking to primary POC. Use actual name - do not just refer to a following paragraph.}*
3.C.1. Acknowledge. *Within 2 working days reply via e-mail to Lead point of contact (POC) {Use actual name - do not just refer to a following paragraph.}*
3.C.2. *{Specify tasks to CFL, CoE, and Staff in separate lines. Be clear what is to be done. Tasks should be to CFL, CoE and not to sub-elements within a major organization.}*
3.C.2.(a). *{Format for multiple subparagraphs.}*

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

Version 1 Apr 15. Previous versions are obsolete.

Figure 2-2. TRADOC tasking order (TASKORD) format

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

ATXX-XXX {Office symbol of Originator}
SUBJECT: TRADOC TASKORD {G-33 will add control number. Insert title. Use plain language – do not use acronyms or abbreviations.}

3.D. Coordinating Instructions. *{Always the last subparagraph in paragraph 3. List any CCIRs, specific formats, spreadsheets, etc. that respondents must use to answer the task. Provide web address to any referenced documents.}*

4. Admin and Log. *{List what is required to support the tasking, funding, or administrative instructions. Cite any references or enclosures here. Ensure any attachments are named the same as cited in the TASKORD.}*

Classification markings – if TASKORD is marked **FOR OFFICIAL USE ONLY***, then beginning of each paragraph must be marked to indicate (U) or (FOUO).*

5. Command and Signal.
5.A. Lead. *{Provide a Primary and Secondary POC or subject matter expert (SME) name, phone, and e-mail (NIPRNET and SIPRNET).*
5.B. Assist. See DISTRIBUTION below. *{list POC/action officer name(s), if known for tasked organizations.}*
5.C. Originator. *{Initiating office is office of primary responsibility (OPR). Include POC/SME name, phone, and e-mail (NIPRNET and SIPRNET(if appropriate)}*
5.D. Approval. *{NOTE: Suspense less than 30 days requires COL/GS-15 approval. 15 days or less requires G3/5/7 GO/FO approval}*

JEFF UPCHURCH
Chief, Taskings Division
HQ TRADOC G-33

Encl *{List in para 4 above. Ensure any attached references and enclosures are named the same as cited in the TASKORD}*

DISTRIBUTION: *{customize the below list to reflect the intended audience for your tasking. Do not indicate distribution into sub-elements. Delete any organization not involved in the tasking to minimize tasking spam. For tasking involving all Schools, we may task to AMEDD, USAJFKSWC and JAG School by exception.}*

DISTRIBUTION:
Commander
U.S. Army Combined Arms Center
U.S. Army Combined Arms Support Command
U.S. Army Cadet Command
U.S. Army Recruiting Command

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

Figure 2-2. TRADOC TASKORD format, continued

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

ATXX-XXX {Office symbol of Originator}
SUBJECT: TRADOC TASKORD {G-33 will add control number. Insert title. Use plain language – do not use acronyms or abbreviations.}

Centers of Excellence
U.S. Army Soldier Support Institute
Asymmetric Warfare Group

DCG, Initial Military Training

Commandants, TRADOC Schools

Director
Army Capabilities Integration Center
U.S. Army TRADOC Analysis Center
Rapid Equipping Force

Deputy Chiefs of General and Chiefs of Special Staff Offices,
    HQ TRADOC

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

Figure 2-2. TRADOC TASKORD format, continued

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

ATXX-XXX {Office symbol of Originator}
SUBJECT: TRADOC TASKORD {G-33 will add control number. Insert title. Use plain language –
do not use acronyms or abbreviations.}

{Continuation page}

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) **FOR OFFICIAL USE ONLY**

Figure 2-2. TRADOC TASKORD format, continued

(3) Accomplish all required communications and coordination, within the proponent organization, external and higher organizations, and across the command (see TRADOC Regulation 10-5, Chapter 2).

(4) Use the telephone directories/rosters provided at the Staff Action Officer Resource Center to contact all assist organizations within 1 duty day and identify their primary AO and his/her contact information.

(5) Identify and task additional organizations required to complete action.

(6) Ensure SGS SACOs are aware of time-sensitive actions to facilitate quick turnaround and tracking. Highlight the TRADOC Form 5-E or attach a note that clearly states the reason why an action is time sensitive.

(7) For G-33 taskings, coordinate and approve requests for extension and courtesy copy G-33 Tasking Division at usarmy-jble.tradoc.mbx.eustis-g33-tasking@mail.mil on all extension requests and status.

f. Within **1 duty day**, assist organizations will provide the lead organization their AO's name and contact information. Assist the lead, as directed/required, to complete the tasking.

g. Procedures to request transfer of lead:

(1) G-33 Taskings: If the assigned lead organization believes a tasking is outside its area of responsibility within **2 duty days** of receipt of tasking they will e-mail the XO of the organization they consider the appropriate lead (with a cc to the G-33 Tasking Office at usarmy.jble.tradoc.mbx.eustis-g33-tasking@mail.mil). The e-mail will include detailed justification for transfer of lead. The gaining organization has **1 duty day** to assess the request for lead change and reply to the originating organization (with cc to the G-33 Tasking Office at usarmy.jble.tradoc.mbx.eustis-g33-tasking@mail.mil) of their acceptance/rejection. Transfer must occur within **3 duty days** of the initial assignment of the tasking.

(a) If the gaining organization accepts the lead, G-33 will retask the action to the new lead and notify all concerned.

(b) If the tasked organization cannot gain concurrence from the new organization within 3 duty days, TRADOC Deputy Chief of Staff, DCS, G-3/5/7 (Operations, Plans, and Training) will make the final decision on the organization to assume the lead for completing the tasking.

(2) SGS Staff Actions Division: If the assigned lead organization believes a tasking is outside its area of responsibility within **2 duty days** of receipt of tasking they will e-mail the XO of the organization they consider the appropriate lead (with a cc to the Staff Action Division at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil). The e-mail will include detailed justification for transfer of lead. The gaining organization has **1 duty day** to assess the request for lead change and reply to the originating organization (with cc to the SGS SACO who issued the tasking) of their acceptance/rejection. Transfer must occur within **3 duty days** of the initial assignment of the tasking.

(a) If the gaining organization accepts the lead, SGS Staff Actions Division will retask the action to the new lead and notify all concerned.

(b) If after 3 duty days no agreement is reached, Chief, SAD will determine the lead.

h. Requesting extensions

(1) SGS procedures. TRADOC lead organizations may request a suspense extension for SGS taskings (CS or CG prefix). Requests will be accepted from organization principals or their deputies/XOs only. AOs should request an extension in an e-mail to the lead organization who will then forward it to the Staff Actions Division. Subordinate organization commanders/ deputies/XOs and HQ TRADOC staff DCSs/XOs will send request via e-mail to the SGS organizational mailbox at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil. Copy the individual SACO who initiated the tasking. Include the CATS control number, a detailed reason for the request, and an estimated date for completion. Only the SGS, in coordination with the Command Group, may grant extensions for CG and CS taskings.

(2) G-33 procedures. TRADOC lead organizations may request a suspense extension for G-33 taskings. The requests must specify the rationale to support justification of the extension, the CATS control number, the subject of the tasking, the original suspense date, and the estimated date of completion. Base the rationale for requesting the extension upon the AO/subject matter expert (SME) mission analysis of the tasking and what is required to provide a complete response.

(a) For EX taskings originated by HQDA, Joint Staff, or other non-TRADOC agencies, the TRADOC organization assigned as the lead for TRADOC will submit the request for extension of suspense date directly to the external POC and cc: G-33 TRADOC Tasking (usarmy-jble.tradoc.mbx.eustis-g33-tasking@mail.mil). For HQDA (ARSTAFF) taskings, refer to DA Memo 25-52. For Joint Action Control Office (JACO) tasking from the Joint Staff, refer to DA Memo 1-18. Both references are available via the TKE portal to TRADOC SGS site's Staff Action Officer Resource Center. TRADOC assist agencies will coordinate directly with the TRADOC Lead organization.

(b) For IN or OP taskings, the TRADOC organizations assigned as assists will coordinate directly with the TRADOC lead organization.

2-4. G-33 responsibilities

a. Process and track taskings until completed, to include:

(1) EX taskings originated outside TRADOC and tasked to elements within TRADOC. Note: White House and congressional inquiries are tasked by the SGS.

(2) IN and OP taskings:

(a) Originated within TRADOC, (but NOT from TRADOC CG, DCG/CoS, DCoS, or Commander's Planning Group (CPG)).

(b) Must be tasked to organizations external to originator's organization and require significant resources, involve changes in policy, generate new policy, or require formal concurrence/comment. Taskings are not required for routine staffing. Examples are a TRADOC

subordinate organization tasking another; a TRADOC subordinate organization tasking the HQ TRADOC staff; a TRADOC subordinate organization/HQ TRADOC tasking a special activity; or a HQ TRADOC staff office tasking another HQ TRADOC staff office.

b. Receive the draft tasking in the current TRADOC TASKORD (Figure 2-2) format from the originator of the tasking. Review the draft TASKORD and finalize for publication.

(1) Draft OPORDs must be approved by originating organization's general officer (GO)/SES and submitted to G-3/5/7 for the DCS G-3/5/7's approval.

(2) Draft TASKORDs (IN taskings) must be approved by originating organization's COL/GS-15 leadership.

(3) Draft TASKORD must include distribution list customized for the order. TASKORD distribution is not normally to all of TRADOC and is tailored to those TRADOC subordinate organizations affected by the order.

c. Conduct brief mission analysis, assign staff lead/assists, and dispatch taskings to respective designated organization POCs, coordinating staff, and AO (if known) to include control number, lead and assist organizations, and primary suspense date.

d. Close tasking in tracking system only upon receipt of lead organization response. For HQDA Executive Communications and Control taskings, ensure lead organization sends TRADOC responses to HQDA.

e. Monitor DA tasking reports. Ensure external tasks are properly updated or closed in the DA Tracking System with Executive Communications and Control and HQDA Staff.
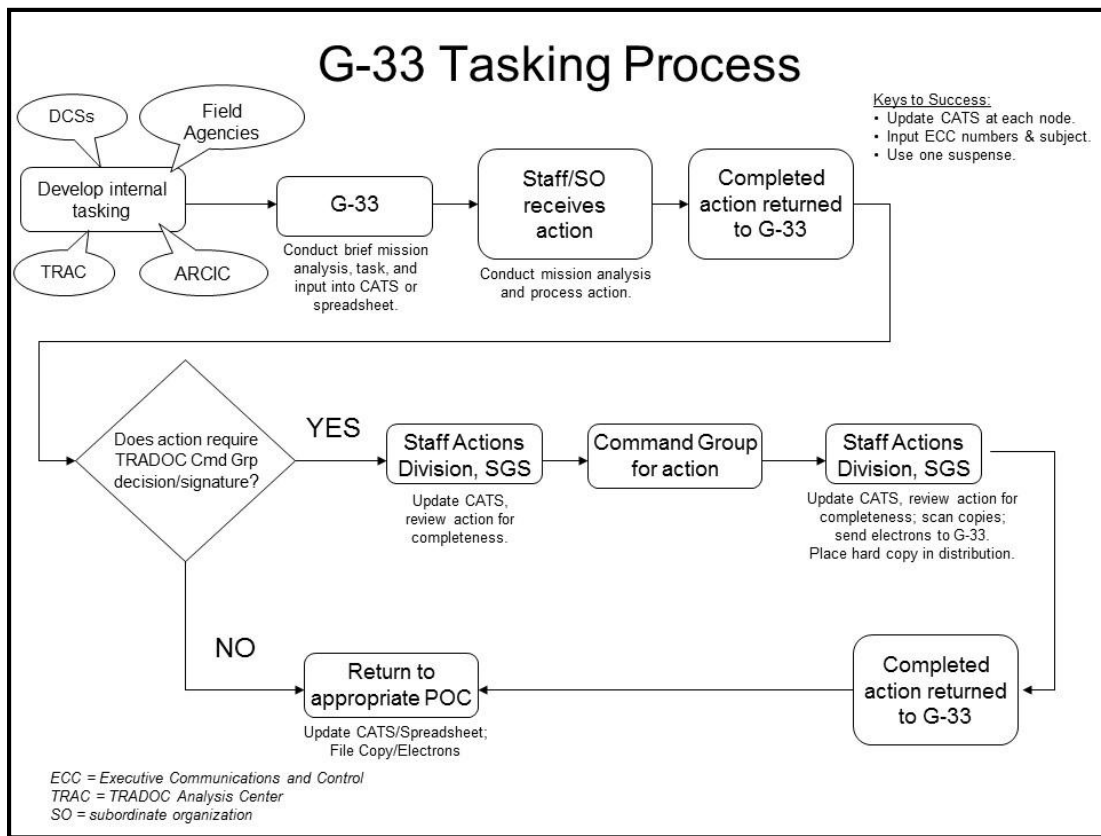
Figure 2-3. **Deputy Chief of Staff (DCS), G-3/5/7 Current Operations (G-33) tasking process**

2-5. Readaheads (RAs)

RAs are a special type of staff action forwarded with the TRADOC Form 5-E, tasked on short notice (less than 10 duty days), that require immediate action. RAs prepare the CG for trips, visits of military/civilian dignitaries, or briefings. A complete RA is critical to the success of CG calendar events. RAs MUST FOCUS THE CG's THOUGHTS--NOT JUST COVER BACKGROUND INFORMATION. Include only essential items, using key points the CG should know before the meeting. As the CG has limited time to review an RA, ensure all pertinent issues are covered succinctly in the executive overview. All RAs must contain an executive overview. See Appendix C for procedures to prepare RAs.

2-6. Command Group notification, review, or approval

Proponents will notify the Command Group of these specific items of interest which require Command Group notification, review, approval, and/or signature:

   a. Any meetings involving subordinate commanders or school commandants, that provide less than 30 calendar days notification, must have DCoS approval.

   b. Outgoing correspondence making personal reference to CG (CG, DCG/CoS, or DCoS SENDS, PERSONAL FOR messages, or any correspondence using first person in reference to CG or DCG/CoS). Only the CG, DCG/CoS, or DCoS may release such correspondence.

c. Responses to incoming communications addressed personally to CG, DCG/CoS, or DCoS unless directed otherwise.

d. Correspondence to and from:

(1) The President, Vice President, Members of Congress, national and state governments, and other important civilian officials.

(2) CSA; VCSA; or any commander or deputy commander of an ACOM. Note: Responses for CSA and VCSA also require an HQDA Form 5.

(3) DA staff principals (for example, Corps of Engineers; HQDA DCS, G-1; HQDA Deputy Chief of Staff, Intelligence (DCS, G-2); HQDA DCS, G-3/5/7).

(4) TRADOC CoE commanders or school commandants.

e. Nonconcurrences and disapprovals.

(1) Nonconcurrence of actions proposed by higher HQ or other ACOMs.

(2) Disapproval of actions proposed by subordinate commands.

f. TRADOC administrative publications that establish new policy, revise existing policy, delegate authority, or assign responsibility (that is, TRADOC supplements to ARs, regulations, circulars, and memorandums) require DCoS approval with Staff Judge Advocate (SJA) and G-6 publications manager coordination. See TRADOC Regulation 25-35 for additional instructions on preparing and coordinating administrative publications. Publish new policies or a major change to existing policies in the appropriate publications medium.

g. Communications that affect the good name or reputation of an officer or organization.

h. Communications that convey even a suggestion of censure, including errors, deficiencies, or irregularities higher headquarters or other ACOMs allege.

i. Reports of significant financial or property irregularities.

j. Serious accidents or incidents involving members of the command or occurring at subordinate organizations, special activities, FOAs, schools and centers, and HQ TRADOC in accordance with TR 1-8.

k. Communications of exceptional information or importance that require prompt command attention or that existing policy does not cover (as the DCS/staff office chiefs determine).

l. Any assignment, reassignment, or relief-for-cause actions involving senior officers or noncommissioned officers.

m. Requests for other than permanent change of station travel on military aircraft by Family members of military personnel, government civilian employees, U.S. civilians without federal employment status, or foreign dignitaries and their entourage.

n. Requests for approval of outside continental United States (OCONUS) temporary duty (TDY) or overseas conference travel. See paragraph 2-19.

o. Reports of annual general inspections of TRADOC subordinate activities.

p. Recommended decorations and awards for CG or DCG/CoS approval.

2-7. Signature blocks/complimentary closings

a. AR 25-50, Chapter 6, section II, provides guidelines on signature blocks. Signature blocks begin at the center of the page, on the fifth line below the authority line or last line of text. See Figure 2-4 for generic CG, DCG/CoS, DCoS, and CSM signature blocks.

b. Use "Sincerely" as the complimentary closing on all letters addressed to military and civilian equivalents or subordinates that the CG, DCG/CoS, and DCoS signs. Use "Very respectfully" when addressing the CSA, VCSA, Members of Congress, or higher authorities, as well as retired four-star GOs. For additional guidance on forms of address, salutations, and complimentary closings, see AR 25-50, Appendix D.

c. Current signature blocks are available at the Staff Action Officer Resource Center.

COMMANDING GENERAL

Military correspondence,
e.g., memorandums
(Use TRADOC letterhead.)

    JOHN A. SMITH, JR
    General, U.S. Army
    Commanding

For Memorandums of Understanding

    JOHN A. SMITH, JR.
    General, U.S. Army
    Commanding General
    U.S. Army Training and Doctrine
      Command

_____
        (Date)

Nonmilitary correspondence,
e.g., letters to civilians, all star notes
(Use CG's letterhead, 4-star note paper.)

    John A. Smith, Jr.
    General, U.S. Army

DEPUTY COMMANDING GENERAL/CHIEF OF STAFF

Military correspondence,
e.g., memorandums
(Use TRADOC letterhead.)
paper.)

    JOHN A. SMITH, JR.
    Lieutenant General, U.S. Army
    Deputy Commanding General/
      Chief of Staff

For Memorandums of Understanding

    JOHN A. SMITH, JR.
    Lieutenant General, U.S. Army
    Deputy Commanding General/
      Chief of Staff
    U.S. Army Training and Doctrine
      Command

_____
        (Date)

Nonmilitary correspondence,
e.g., letters to civilians, all star notes
(Use DCG's letterhead, 3-star note

    JOHN A. SMITH, JR.
    Lieutenant General, U.S. Army

DEPUTY CHIEF OF STAFF

Military correspondence,	**Nonmilitary correspondence,**
e.g., memorandums	**e.g., letters to civilians, all star notes**
(Use TRADOC letterhead.)	**(Use DCoS's letterhead, 2-star note**
paper.)	

JOHN A. SMITH, JR.	John A. Smith, Jr.
Major General, U.S. Army	Major General, U.S. Army
Deputy Chief of Staff	

For Memorandums of Understanding

JOHN A. SMITH, JR.
Major General, U.S. Army
Deputy Chief of Staff
U.S. Army Training and Doctrine
  Command

_____
(Date)

COMMAND SERGEANT MAJOR

Military Correspondence,	**Nonmilitary Correspondence,**
e.g., memorandums	**e.g., letters to civilians**
(Use TRADOC letterhead.)	

JOHN A. SMITH, JR.	John A. Smith. Jr.
CSM, U.S. Army	Command Sergeant Major, U.S. Army
Command Sergeant Major	

Figure 2-4. Generic CG, DCG/CoS, DCoS, and CSM signature blocks

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2-8. Suspenses

   a. The SGS designates the proponent for all CG and CS taskings. Chief, Tasking Division, G-33 designates the proponent for IN, EX, and OP taskings.

   b. Suspenses of less than 30-calendar days require approval by a colonel or civilian of equivalent grade (except those higher HQ directs). Internal suspenses of 15 calendar days or less require TRADOC G-3/5/7 approval.

   c. Unless otherwise indicated, items for CG approval, information, review, or signature are assigned a **5-duty day** suspense and a CG CATS control number.

d. Items for DCG/CoS and DCoS approval, information, review, or signature are generally assigned a suspense of 5 duty days and a CS CATS control number.

e. When staff offices cannot meet SGS (CS and CG) suspenses, the organization principal, deputy, or XO will e-mail the control number, subject, and rationale for extension to SGS organizational mailbox at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil. Subordinate organization commanders/deputies/XOs and HQ TRADOC staff DCSs/XOs will send request via e-mail to the SGS organizational mailbox at usarmy.jble.tradoc. mbx.hq-tradoc-sad@mail.mil. See paragraph 2-3h(1) for detailed instructions on requesting SGS extensions. When staff offices cannot meet G-33 suspenses, the lead organization may request an extension. See paragraph 2-3h(2) for detailed instructions on requesting G-33 extensions. Submit request to usarmy.jble.tradoc.mbx.eustis-g33-tasking@mail.mil. Base the rationale for requesting a suspense extension upon AO/SME analysis of the tasking and what is required to prepare response (for example, requesting data from the field, coordination, availability of DCS/coordinating staff for approval, etc.). For actions with an external suspense, XOs will ensure the external suspense is extended based upon coordination between the AO/SME and the external POC before requesting an extension from the SGS or G-33. This early-on coordination between the HQ TRADOC AO/SME and the external POC facilitates clearer communication and understanding of the deliverable, action required, and timeline.

f. Interim responses are encouraged and will contain acknowledgment of the requirement/request, plan of action/approach, milestones, and an estimated date of completion. For guidance on interim responses to TRADOC CG taskings, see paragraph 2-2d.

g. Written congressional inquiries normally have a **5-duty day** suspense from the date of receipt. Ensure inquiries are processed expeditiously and without delay.

(1) In coordination with CAO, SGS will task and track congressional inquiries in CATS. The task overview outlines the inquiry processing instructions and requested deliverable. CAO will provide preformatted response templates to the AO with congressional member addressing instructions and general guidance for use in responding to inquiries.

(2) Task leads will staff and coordinate response with agencies listed as assist when appropriate, as well as local staff judge advocate for legal review when deemed necessary. Staff all draft replies with CAO AO and cc the SGS SACO prior to final signature.

(3) For time-sensitive e-mail or telephone inquiries, CAO will coordinate directly with appropriate TRADOC legislative coordinators or, as necessary, the organization CoS via telephone or e-mail in ascertaining a response.

(4) Tasked inquiries have a **5-duty day** suspense. However, there may be a circumstance where an extension is required. Tasked agencies seeking an extension will immediately notify the SGS SACO and CAO AO with the reason for the extension request. CAO will seek approval for extensions directly from HQDA, Office of the Chief of Legislative Liaison.

(5) When circumstances prevent a final or draft reply by the suspense date, provide an interim reply. The interim reply will acknowledge receipt of the inquiry, contain as much information that is available at the time, inform the congressional member of the reason for the

delay (if appropriate), and set a specific time period for a final response. These instances are rare and reserved for very complex issues that require additional time to prepare an adequate answer.

(6) Delegation of signature authority for routine inquiries is typically at the colonel or civilian equivalent level. Signature by position (for example, CoS) is appropriate when the tasked office does not have a colonel or civilian equivalent available for signature. For inquiries that have SA, USA, CSA, or VCSA interest, CAO may recommend a higher signature level (for example CG, DCSs, etc.).

(7) E-mail CAO for further guidance or questions concerning responding to or processing congressional inquiries at usarmy.jble.tradoc.mbx.hq-congressional-activities-offi@mail.mil.

2-9. Note taking and suspenses for CG forums

CG taskings. It is important to make note of any guidance, taskings, and/or observations the CG provides in various venues (for example, during meetings, video teleconferences (VTCs), visits, conferences, discussions en route, etc.). To ensure unity of effort and maintain visibility, responsible staff lead will, within **2 duty days**, e-mail a summary of significant issues that arose to SGS for dissemination, with cc to the CG XO and CPG Chief. Highlight only significant CG guidance, decisions, and taskings and provide the who, what, when, where, and why of the event. Prior to adjournment, the lead will confirm the list of taskings by the CG. See Figure 2-5 for notes and tasking memorandum format for providing this information to the SGS. The CG notes and taskers is released by your staff principal or deputy.

   a. CG calendar event (office, Morelli, VTC, etc.). Upon approval by staff principal or deputy, staff lead submits an e-mail summary of CG decisions, taskings, and/or guidance to SGS within **2 duty days**.

   b. CG VTC with all commanders (with no staff lead). The CPG representative submits an e-mail summary of decisions, taskings, and/or guidance to SGS within **2 duty days**.

   c. CG-directed conference. Staff lead submits a summary not later than **5 duty days** in memorandum format for DCG/CoS to send to all commanders/coordinating staff.

   d. CG installation visits. The installation representative/lead compiles a comprehensive trip report to include CG decisions, taskings, and/or guidance and submits it to SGS with cc to CG XO and CPG Chief within **2 duty days** of return from travel.

   e. CG attendance at CSA conferences. CPG Chief or CG's XO will record taskings and forward them to SGS for dissemination.

   f. CG discussions en route. Recipient of decisions, taskings, and/or guidance sends an e-mail within **2 duty days** to SGS with cc to CG XO and CPG Chief.

   g. Key points:

      (1) Lead organization will designate AO to record notes and taskings issued by the CG at the meeting.

(2) Prior to adjournment the lead will confirm the list of taskings by the CG.

(3) AO will specify the format for the deliverable (for example, EXSUM, briefing, memorandum, decision memorandum, etc.) of the specific tasking. See Chapter 4 for guidance on conferences and taskings.

(4) AO will prepare notes and taskings memorandum recommending leads and suspenses. (Figure 2-5.)

(5) Upon approval by staff principal or deputy, send final memorandum to SGS for tasking out any official taskers.

2-10. Note taking and suspenses for Deputy Commanding General (DCG)/Chief of Staff (CoS) and Deputy Chief of Staff (DCoS) forums

a. DCG/CoS taskings. Responsible staff lead will serve as note taker and e-mail to SGS a summary of significant issues and taskings directed by the DCG/CoS during any venue (for example, meetings, VTCs, visits, conferences, discussions en route, etc.) for dissemination within **2 duty days**. Prior to adjournment the lead will confirm the list of taskings by the DCG/CoS.

b. DCoS taskings. Responsible staff lead will serve as note taker and e-mail to SGS a summary of significant issues and taskings directed by the DCoS during any venue (for example, meetings, VTCs, visits, conferences, discussions en route, etc.) for dissemination within **2 duty days**. Prior to adjournment the lead will confirm the list of taskings by the DCoS.

DEPARTMENT OF THE ARMY
HEADQUARTERS, YOUR COMMAND
YOUR COMMAND'S STREET ADDRESS
YOUR COMMAND'S POST NAME 23651-1047

REPLY TO
ATTENTION OF

Your Directorate's Office Symbol

MEMORANDUM FOR SGS

SUBJECT: Title of Meeting, Location, and Date(s)

1. Provide a brief synopsis of the meeting the CG attended. Answer the five Ws: who, what, when, where, and why.

2. Objectives. Write a simple statement of the meeting's objectives. What were attendees gathered to do?

3. Tasker Recap. Identify taskers, if any, that come from the CG, DCG/CoS, or DCoS during the meeting. Ensure the tasker is clear, specific, concise, and includes subject, deliverable, recommended lead and assist(s), and suspense. Refer to a key point as necessary. If no taskers emerged from the meeting, say so.

4. Summary of key points. Summarize the key points in the meeting. Do not try to capture discussions verbatim. Key points should be clear and concise. A good example would be: "Brigade Modernization Command – GEN Smith and MG Jones discussed FCS training strategy, Brigade manning, concerns with ownership of the overall network, issues associated with the JTRS radio, and upcoming reports to Congress."

5. Point of contact is LTC Sad, Your Directorate, DSN 501-xxxx, (757) 501-xxxx, james.p.sad.mil@mail.mil.

JAMES W. SAD
LTC, IN
Respective Title

CF:
Chief, CPG
Other individuals as necessary

Figure 2-5. Memo format for CG notes and taskings

2-11. Staff assistance

All taskings initiated through SGS or G-33 will identify a lead, as well as staff sections and/or subordinate commands or activities that may need to provide assistance to the lead. On occasion, the initial tasking may not identify all assist staff sections. A good staff requires a "one team" mindset when it comes to assisting others in completing taskers. Even if a DCS or special staff office is not identified on the original tasker, consider the request from the staff lead as a valid requirement. Resolve conflicts at the XO/deputy assistant level before bringing an issue to G-33/SGS level.

2-12. Coordinating Staff Actions

   a. Staff actions must be coordinated both within the lead organization (internal coordination), and with other TRADOC organizations that have an interest in the action (external coordination). For subordinate organizations, the chief of staff or higher must provide his/her name for concurrence/nonconcurrence on an action. For HQ TRADOC organizations, the deputy chief of staff or assistant deputy chief of staff must provide his/her name for concurrence/nonconcurrence on an action. That individual should initial and date the TRADOC Form 5-E in the appropriate space. A note indicating the individual's name and the date of his/her review is acceptable. Also see paragraph 2-3b for AO responsibilities in the staff action process.

      (1) Internal Coordination

      (a) The lead organization's staff will electronically or pen and ink initial and date TRADOC Form 5-E, block 8 to indicate the organization's internal chain of approval. For example, entries might include branch chief, division chief, deputy, and director.

      (b) The releasing authority for each level within the lead organization will either electronically or pen and ink sign and date the action for forwarding to the next appropriate (usually the next higher) office.

      (c) The signature in block 8 "PRINCIPAL" must be the individual responsible for releasing the action to the TRADOC Command Group. This is the most senior person in the organization. The principal block must be completed before forwarding through SGS to the Command Group. Ensure all required coordination has been completed prior to principal block being signed. If the senior person is unavailable, his/her deputy, or XO may sign in the principal block.

      (2) External Coordination. All staff actions going to the Command Group must be coordinated with TRADOC organizations that have an interest in the action.

   b. Any organization directly affected by the action or having expertise in the subject matter, must be given the opportunity to review it. For example, any action that involves training or education must be reviewed by TRADOC G-3/5/7. If an action impacts the TRADOC budget, or if it's a memorandum of agreement/understanding, it must be reviewed by TRADOC G-8 and SJA. If it involves a regulatory or legal issue, it must be reviewed by TRADOC SJA. If it involves leader development, it must be reviewed by U.S. Army Combined Arms Center and TRADOC G-3/5/7. Coordinate all actions impacting strategic communications with Public

Affairs Office (PAO), CPG, CAO, and DCS, G-9. Coordinate appropriate actions with resource impacts with the TRADOC DCS, G-8. Coordinate actions having an environmental impact with TRADOC DCS, G-1/4 and TRADOC DCS, G-3/5/7. Often an action crosses several disciplines and must be reviewed by multiple organizations.

   c. See paragraph B-4, Coordinating Staff Actions.

     (1) Consult TR 10-5 and TR 10-5-1 for functional areas of responsibility across TRADOC.

     (2) Do not limit your coordination to subordinate or even lateral organizations. When called for, CoEs should coordinate with other CoEs and also with the TRADOC headquarters staff and subordinate organizations. In other words, think outside your organizational box.

     (3) Simultaneous coordination is encouraged. Use e-mail, TKE portals, and other electronic tools to share documents and collect responses.

     (4) List the agency and name of the person giving the coordination on the TRADOC Form 5-E in block 9, Staff Coordination. Check the concur or non-concur block. Include the person's phone number, date of concurrence/nonconcurrence, and any appropriate remarks.

     (5) If an organization nonconcurs with comments and the nonconcurrence cannot be resolved, the lead organization will include those comments at a tab in the action packet. The lead organization will make every effort to resolve nonconcurrences. This may require coordination between SGSs, AOs, and the author of the nonconcur comments. If, after careful consideration, the lead organization rejects the suggestions of the nonconcurring organization and chooses to maintain the action as written, the originating action office will prepare a consideration of nonconcurrence memorandum and attach it as the last tab to the staff action. The originating AO will address each nonconcurrence separately based on its own merit. Prepare only one consideration of nonconcurrence memorandum. DCSs and special staff office chiefs or their deputies will sign all nonconcurrences and considerations of nonconcurrence (see Figure 2-6). In all cases, the lead organization is responsible for the content of the action.

     (6) There is no designated format for conveying nonconcurrences. E-mail comments will suffice. A copy of the e-mail can be placed under a tab in the action.

     (7) Concurrence with comment is only allowed to provide additional information, not to set conditions for concurrence. Conditional concurrences are not authorized.

     (8) Staff actions with Reserve component (RC) and/or resource (manpower, dollars, or environmental) impact will describe how the action will affect the RC and/or TRADOC in terms of resources in a separate paragraph on TRADOC Form 5-E, block 7, Discussion section. Coordinate staff actions that have RC impact with Office of the DCG, U.S. Army Reserve/Office of the DCG, Army National Guard.

OFFICE SYMBOL   (Date)

MEMORANDUM FOR RECORD

SUBJECT: CONSIDERATION OF NONCONCURRENCE

1. The first sentence will read: "I have personally discussed this matter with XXXXXXXX, and we cannot reach agreement."

2. State the reason for not accepting the nonconcurrence. Be sure to address every point. Address all nonconcurrences on one memorandum for record.

3. Send a copy furnished to the nonconcurring office.

4. Place as last tab of the staff action.

PETER W. GREENE
Colonel, GS
Chief of Staff
CF:
XXXXXXXX

Figure 2-6. Consideration of nonconcurrence

(9) Organizations asked to provide coordination have **2 duty days** to give their concurrence/nonconcurrence. The review and "chop" must be from a senior individual of the organization. For subordinate organizations, the chief of staff or higher must provide his/her name for concurrence/nonconcurrence on an action. For HQ TRADOC organizations, the deputy chief of staff or assistant deputy chief of staff must provide his/her name for concurrence/ nonconcurrence on an action. That individual should initial and date the TRADOC Form 5-E in

the appropriate space. A note indicating the individual's name and the date of his/her review is acceptable.
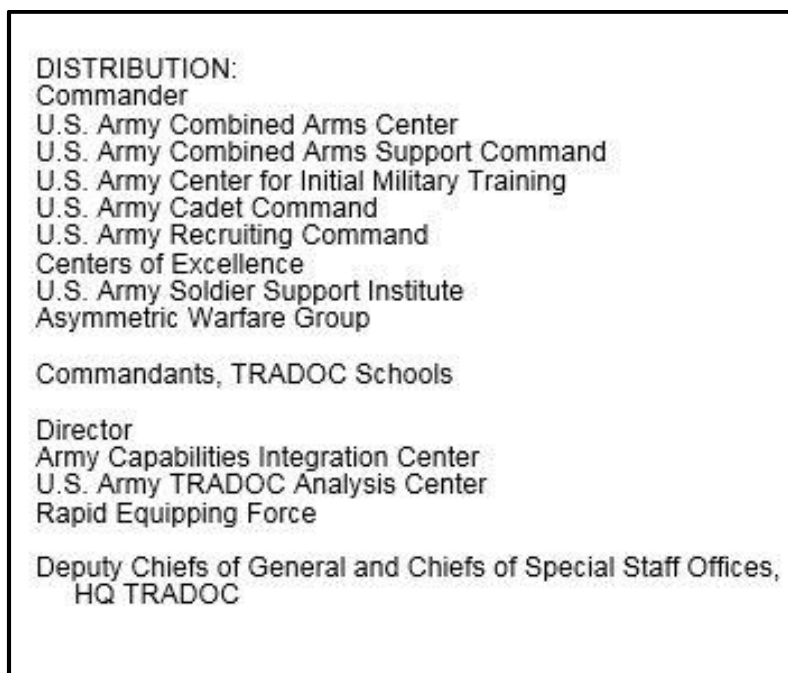
(10) The TRADOC SJA and TRADOC G-8 will review all memorandums of agreement (MOAs) and memorandums of understanding (MOUs) before submitting to SGS for processing.

(11) The SGS Administrative Support Division and Executive Services Office will review requests to expend .0012 funds before submitting to SGS for processing.

2-13. Distribution

a. If offices both external and internal to the HQ receive the correspondence, the AO will determine whether to show the internal distribution on the original correspondence.

b.   When addressing correspondence to all addressed to TRADOC subordinate activities and deputy chiefs of general and chiefs of special staff offices, type distribution list as shown in Figure. 2-8.

```
DISTRIBUTION:
Commander
U.S. Army Combined Arms Center
U.S. Army Combined Arms Support Command
U.S. Army Center for Initial Military Training
U.S. Army Cadet Command
U.S. Army Recruiting Command
Centers of Excellence
U.S. Army Soldier Support Institute
Asymmetric Warfare Group

Commandants, TRADOC Schools

Director
Army Capabilities Integration Center
U.S. Army TRADOC Analysis Center
Rapid Equipping Force

Deputy Chiefs of General and Chiefs of Special Staff Offices,
    HQ TRADOC
```

Figure 2-7. Distribution list for correspondence

c. The TRADOC Principal Commanders and Key Staff Officers Roster identifies TRADOC subordinate activities and key HQ coordinating staff. It is located at the Staff Action Officer Resource Center under Telephone Directories/Rosters.

d. To determine correct addresses use:

(1) U.S. Army Addresses and Office Symbols Online database at https://www.rmda.army.mil/aao/Search.aspx.

(2) TRADOC Senior Leaders Contact List. SGS SAD posts TRADOC Senior Leaders Contact List updates at the Staff Action Officer Resource Center under Telephone Directories/Rosters.

2-14. Abbreviations and acronyms
Use acronyms in correspondence except when writing to individuals or organizations not familiar with their use. The first time an abbreviation, brevity code, or acronym (ABCA) is used in text, spell it out and follow it with the abbreviation in parentheses. Thereafter, use the acronym. Use the electronic version of authorized ABCA database located at https://www.rmda.army.mil/abbreviation/MainMenu.asp for Army-approved ABCAs. See AR 25-52 for examples of acceptable and unacceptable capitalization of meanings of abbreviations, brevity codes, and acronyms.

2-15. Type font and size
Use Arial font, size 12 for all correspondence.

2-16. Identification of point of contact (POC)
POC information is generally placed in the last paragraph of the correspondence: military rank or civilian prefix, last name only, office/organization, Defense Switch Network (DSN) phone number, commercial phone number, and e-mail. For example, "Point of contact is Mr. Sample, Office of the DCS, G-1/4, DSN 501-XXXX, (757) 501-XXXX, joe.a.sample.civ@mail.mil".

2-17. Distinguished visitors (DVs)

   a. Visits to HQ TRADOC. Distinguished visitor visit approval authority is the DCG/CoS. DV visit requests are approved during regularly scheduled visit update briefings with the DCG/CoS. If a visit requires a lead assigned prior to a regularly scheduled meeting with the DCG/CoS, the visit request will be coordinated through the DCoS. (See Chapter 6 for policy on special/ethnic observances and recurring events.) The request will include the type of visit/event, the objectives, the visitor's biography, and the 5Ws. (See TRADOC Memorandum 1-16 for additional distinguished visitor information.) Along with Executive Services Office (ESO), the staff lead will attend the bi-weekly meeting with the DCG/CoS and brief all aspects of the visit or event.

      (1) Upon DCG/CoS approval:

      (a) If there is Command Group involvement, the staff lead will prepare an RA for the CG, DCG/CoS, and/or DCoS, as appropriate and conduct in-process review(s) (IPR) as required.

      (b) If there is no Command Group involvement, the staff lead will prepare an RA for the host and conduct IPR as required.

      (c) Ensure visit or event is added to the TRADOC Enterprise Calendar (TEC).

      (2) Upon DCG/CoS disapproval, proponent will notify all concerned. See Figure 2-8 for flow chart of process.

b. GOs, active and retired, in the rank of lieutenant general and above; civilian equivalents; and/or foreign dignitary visits to subordinate commands and/or activities. Electronically report initial notification of distinguished visitors through installation protocol channels on a weekly basis to ESO via e-mail to usarmy.jble.tradoc.mbx.hq-eso@mail.mil.

c. Member of Congress and professional staffer visits to subordinate command and/or activities. Electronically report initial notification of congressional visitors to the CAO office via e-mail to usarmy.jble.tradoc.mbx.hq-congressional-activities-offi@mail.mil. After the visit, submit an EXSUM via the "Reporting Contacts with Congress" feature on the CAO SharePoint site.

d. Secretary of the General Staff (SGS) will maintain a SharePoint repository for Command Group-hosted DVs and Conferences. Note Taking and Suspenses for DVs and Conferences hosted by the Command Group (CG, DCG, or DCoS). The staff lead is responsible for taking notes during events hosted by the Command Group. Prepare notes and taskers in accordance with the format in the Staff Action Officer Resource Center under TRADOC Templates. Command Group notes and taskers are released by the staff principal or deputy. Forward the notes and taskers to TRADOC SGS Staff Actions Division (SAD), by e-mail for disposition/required taskings within 2 duty days of the event with a cc to the CG XO, DCG/CoS XO, DCoS XO, and the Commander's Planning Group. SAD will post the notes and taskers on a SharePoint site and send out any taskers, accordingly.
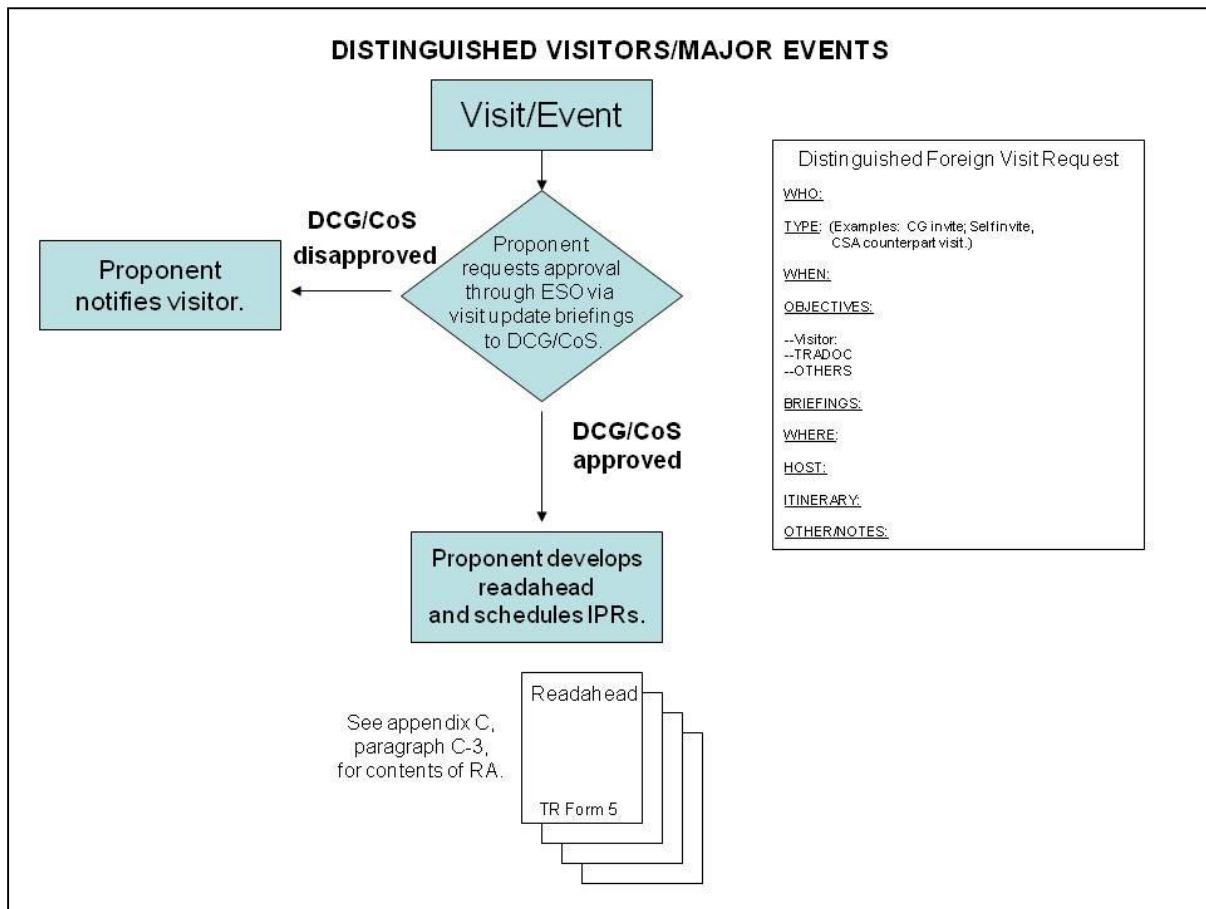

Figure 2-8. Distinguished visitors/major events

2-18. Memorandums of agreement (MOAs), memorandums of understanding (MOUs), support agreements, and service level agreements (SLAs)

a. HQ TRADOC G-8 provides administrative policy and guidance, and assists TRADOC organizations in the development, review, and staffing of MOAs, MOUs, and other support agreements to include DD Form 1144 Support Agreement, Inter and Intra-agency Support Agreements (ISAs), and SLAs. DoDI 4000.19, Support Agreements (25 Apr 2013) will be used for required content in the development of agreements. AR 25-50, Preparing and Managing Correspondence will be used for formatting requirements of agreements.

   (1) MOA: An MOA will be used to document the specific terms and responsibilities that two or more parties agree to in writing. MOAs between outside organizations and TRADOC organizations which involve command level agreements which apply across TRADOC equities (e.g., mission categories such as Training Development, Leader Development, Training Support, Aviation, Fires, Maneuver, Function Training, Futures, Capability Development, Combat Development) or organizations must be approved and signed by the DCG/CoS to ensure HQ TRADOC is part of the coordination or decision process for such agreements.

   (a) MOAs that involve reimbursable support paid by TRADOC, signature authority is delegated in accordance with thresholds prescribed in TRADOC Regulation 5-14, Acquisition Management and Oversight.

   (b) MOAs that establish responsibilities for providing reimbursable support will be supplemented with a DD Form 1144 that defines the support, basis for reimbursement for each category of support, the billing and payment process, and other terms and conditions of the agreement.

   (2) MOU: An MOU will be used to document issues of general understanding between two or more parties that do not involve reimbursement. Except for significant policy agreements, approval authority for MOUs is delegated to TRADOC subordinate organizations, core function leads, CoE Commanders, TRADOC DCGs, personal and special staff officers, and FOAs. The TRADOC SJA will review all MOUs prior to approval by the designated HQ TRADOC staff elements. MOUs approved by other TRADOC authorities will be reviewed by their servicing SJA prior to approval. Memorandums that define general areas of understanding between two or more parties and do not require reimbursement or other support from the receiver do not require a DD Form 1144, Support Agreement.

   (3) SLAs and Support Agreements: SLAs and Suppoer Agreements between outside organizations and TRADOC organizations will be approved and signed using the thresholds outlined in TRADOC Regulation 5-14. Support Agreements (DD Form 1144) will be used to document recurring reimbursable or non-recurring reimbursable support. DD Form 1144 will not be used to document only non-reimbursable support unless both parties agree to its use in lieu of an MOA.

b. TRADOC organizations executing MOAs, MOUs, SLAs, and Support Agreements will:

(1) At a minimum ensure staffing review by the organization G-8 and SJA prior to signature and initiation of an agreement.

(2) Ensure agreements are not effective until at least 45 days after final signature.

(3) Ensure final signed copies of all agreements are provided to the TRADOC Deputy Chief of Staff, G-8 NLT 30 days prior to the effective date of the agreement.

(4) Ensure a unique identifier (e.g., number or alpha-numeric) is assigned to each support agreement.

c Signatories on support agreements will be commensurate (i.e., rank and level of authority are equivalent) between the parties (e.g., grade of colonel (O-6) to GS-15 (to include GG), and general officer to SES).

d. TRADOC organizations processing support agreements requiring CG, DCG/CoS, or DCoS approval will record such approvals on the TRADOC Form 5-E.

e. HQ TRADOC G-8 will review all agreements and modifications prior to approval by the CG, DCG/CoS, or DCoS and maintain a repository of all TRADOC support agreements.

2-19. Approval of outside continental United States (OCONUS) temporary duty (TDY) or overseas conference travel

a. Submit requests on TRADOC Form 712-R-E, Request for Official OCONUS Temporary Duty Travel. See Department of Defense (DOD) 4500.54-G, Department of Defense Foreign Clearance Guide (https://www.fcg.pentagon.mil), and AR 55-46 (Travel Overseas) Chapter 8, for guidance on submitting requests for OCONUS TDY or overseas conference travel.

b. HQ TRADOC personnel will submit a completed TRADOC Form 712-R-E (Request for Official OCONUS Temporary Duty Travel) and any documentation required by the DOD Foreign Clearance Guide to TRADOC Deputy Chief of Staff, G-1/4 (Personnel and Logistics) (ATBO-BP) at least 60 calendar days prior to travel.

c. Include detailed itinerary, purpose, and POC for each location/facility to be visited. Requests for travel based on invitations, previously approved clearances, or those initiated by other ACOMs will include copies of such documentation with the request.

d. Coordinating staff will notify CG, TRADOC of the reason and intent for all OCONUS TDY. The CG, DCG/CoS, or DCoS may want to meet with coordinating staff prior to their departure.

e. Traveler must verify current Antiterrorism Level I Awareness training and completion of area of responsibility brief for country destined for travel in accordance with AR 525-13.

Chapter 3
U.S. Army Training and Doctrine Command (TRADOC) Forms and Formats

3-1. Guidelines

This chapter prescribes specific forms and formats to use within HQ TRADOC. Use HQ TRADOC letterhead stationery for military correspondence, annotated with the proponent's office symbol. Use personal stationery for letters (for example, CG, DCG/CoS, or DCoS letterhead). Templates are available on the TRADOC Web site at http://www.tradoc.army.mil/publications.htm. The following general guidelines apply to all staff actions:

    a. Always use editing and proofreading tools available (that is, spelling and grammar check) as an initial step in the proofreading process.

    b. Review correspondence to ensure document preparation follows guidelines in AR 25-50, is error free, and ready for Command Group signature/approval prior to submission to SGS.

    c. In order to maintain appropriate tracking through CATS, route initial actions and those returned for corrections through CGAC/SGS. Do not take actions directly to Command Group offices.

    d. If the CG, DCG/CoS, or DCoS returns an action directly to the AO or director, bypassing SGS, the recipient will alert SGS to the action's status and location. Use documents stored in the TKE Actions Library to edit or correct the correspondence if required. If the CG, DCG/CoS, or DCoS requires a response, forward through SGS.

    e. Provide SGS an electronic copy of action by uploading it in your organization's folder of the TKE Web site in accordance with Appendix H. SACO will make administrative corrections, but will return staff actions requiring substantive changes or containing inordinate amount of errors for rewrite and/or corrections. Upload the corrected documents to your organization's folder and notify SGS they are resubmitted. Remove older versions so only one working document is maintained. CATS will be updated to reflect return to lead with appropriate suspense.

3-2. Assembling a staff action (for actions that cannot be posted to the Actions Library)

    a. Assemble all staff actions, except RAs, as shown in Figure 3-1, below. Do not use plastic executive cover sheets. Ensure tabs are consecutive and explained in order on the TRADOC Form 5-E. Refer to Table 6 when assembling RAs.

    b. First tab (TAB A): Document requiring signature, approval, or line-thru. If the action includes a HQDA Form 5, place it at TAB A. If action is the submission of an information paper only, place the paper at TAB A. If more than one page, assemble in normal sequence. When transmitting more than one document for signature or approval with TRADOC Form 5-E, attach the separate documents as tabs A-1, A-2, A-3, etc. When multiple letters similar in content require signature, forward the TRADOC Form 5-E with only one letter for signature and a listing of other addressees/proposed salutations who will receive similar letters. Once SGS approves the letter, the document is returned to the originating staff office to prepare the remaining memorandums or letters. Entire package is returned to SGS to process for signature on the remaining correspondence.

c. Second tab (TAB B): Originating document (correspondence or tasking) that generated the action, if applicable. If TAB A is a response, TAB B contains the original correspondence that generated the action.

d. Subsequent tabs: Attach detailed background material required for complete understanding of the action or material that expands on items discussed in the body of TRADOC Form 5-E. Use succeeding tabs in the order mentioned on TRADOC Form 5-E. Use pertinent extracts of lengthy publications and reference documents, including messages.

e. Assemble any enclosure printed in landscape mode (printed along the long axis of the paper) with the head of the document to the left so that when the entire package is rotated clockwise, the enclosure is right side up. Most common enclosures are paper copies of briefing slides.
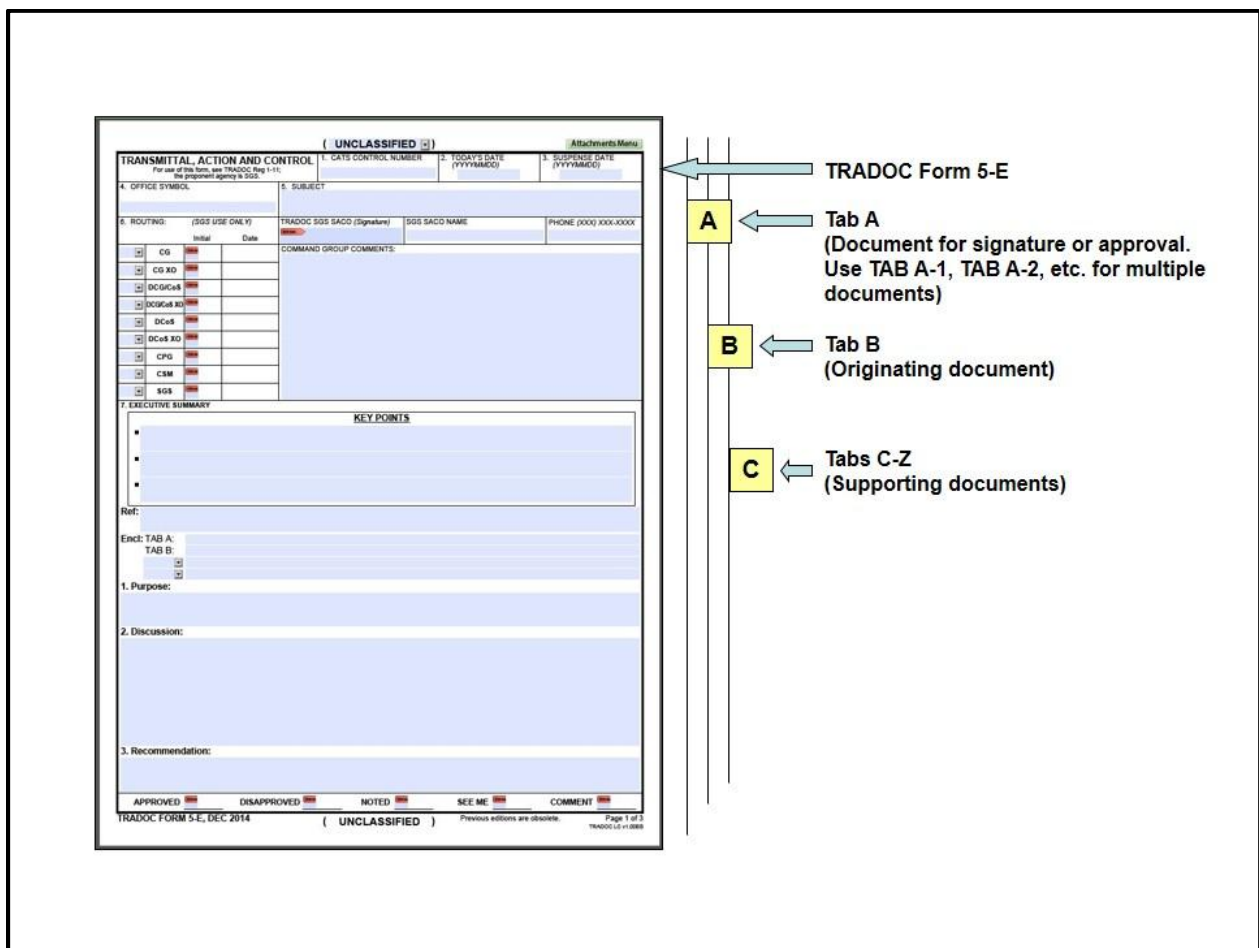

Figure 3-1. Assembling a hard copy staff action

3-3. TRADOC Form 5-E
TRADOC Form 5-E (Transmittal, Action and Control) accompanies staff actions processed for Command Group information, signature, or approval. The current version of this form is posted on the TRADOC Web site. Use of TRADOC Form 5-E ensures correct tracking of staff actions within CATS and provides an official record of approvals/disapprovals. The CGAC retains a file copy. Pay special attention when preparing TRADOC Form 5-E because it is more than just an administrative tool to track, record, and file. Ensure the information is well thought out and succinct so the CG, DCG/CoS, or DCoS can quickly review a summary of the details they need to know at their level before taking the requested action. Obtain the appropriate coordination and approval/release signature(s) within your organization before forwarding to SGS. A well-prepared TRADOC Form 5-E eliminates the need to return the package for corrections and ensures speedy processing through the Command Group and signature/approval of the action without questions. See Appendix D for instructions on completing TRADOC Form 5-E.

3-4. TRADOC Form 5-E-1
TRADOC Form 5-E-1 (Generic Transmittal, Action and Control) is available to all TRADOC organizations for internal staffing and internal transmission of actions. It will not be used to transmit actions to SGS for processing to the TRADOC Command Group. The current version of TR Form 5-E-1 is posted on the TRADOC Web site.

3-5. Point paper
Use a point paper to provide assessment, recommendations, and discussion points in outline form. It features short, to the point, easy to read bullet phrases. Use a point paper when the reader has a thorough knowledge of the subject. Figure 3-2, below, provides instructions on preparing a point paper. Minor variations in the point paper format are acceptable, if needed, to better present the information.

MAJ R. Sample
ATCS-XE/2513
8 Aug 15

POINT PAPER

SUBJECT: Point Paper Preparation

1. **Purpose:** To provide sample point paper format.

2. **Assessment:** Identify stakeholders and implications of his/her position on topic or issue. Consider impact to operations, organizations, resources, public opinion, etc.

3. **Recommendation(s):** Based on the **assessment**, provide the recommended position or course of action. N/A (if not applicable).

4. **Discussion Points:**

• Font: Arial 12. Margins: 1 inch for the top, bottom, left, and right.

• Use bullet statements to outline discussion points supporting paragraphs 2 and 3 above. Short, to the point, easy to read.

• One page preferred. However, if two or more pages, place page number at bottom center beginning on the second page, 1 inch from edge.

Figure 3-2. Sample point paper

3-6. Executive summary

Use EXSUMs to provide information, updates, and interim responses to the Command Group. Whenever possible, use EXSUMs instead of information papers.

   a. Procedures. Requests for EXSUMs are tasked in accordance with procedures in paragraph 2-1k.

   b. EXSUM format (see Figure 3-3). The TRADOC EXSUM format matches the HQDA EXSUM format shown in DA Memo 25-52, Staff Action Process and Correspondence Policies, paragraph 16.

      (1) Do not exceed 15 lines.

      (2) The EXSUM will be one paragraph, marked with the appropriate classification in bold centered at the top and bottom of the page. A separate classification for the title is also required.

      (3) In the first sentence, state reason for EXSUM. Do not use or refer to attachments in the EXSUM. Spell out all acronyms when first used.

   c. Begin typing the originator's name and contact information at the center of the page as shown in Figure 3-3.

   d. Type "APPROVED BY: Rank/Mr./Mrs./Ms. Surname" one line below originator's name and contact information.

   e. DCSs and chiefs of special staff offices and organization command groups will forward EXSUMs, via e-mail, to the CG (and the CG XO), DCG/CoS (and the DCG/CoS XO), or DCoS (and the DCoS XO). Provide cc to SGS to ensure tracking system is updated.

(CLASSIFICATION)

<u>1</u>

EXECUTIVE SUMMARY

<u>1</u>

ES152060
01 Mar 15

<u>1</u>

(U) PREPARATION OF AN EXECUTIVE SUMMARY. (U) (originator's office symbol)
An executive summary (EXSUM) is prepared in Arial 12 with one-inch margins. The
EXSUM should begin with the overall classification one inch from the top and bottom of
the page. Place the words EXECUTIVE SUMMARY centered and one line down from
the classification. The tasker number (if applicable) and the date are two lines down
from EXECUTIVE SUMMARY. The subject is uppercase, underlined and marked with a
security classification. The originator's office symbol will appear in parentheses after
the security classification, followed by the body of the text. An EXSUM should contain
no more than 15 lines and synthesize the essential elements of information necessary
to answer the recipient's question. The first sentence will identify the purpose of the
correspondence (EXSUMs are self-initiated or respond to someone's question.)
Acronyms should always be spelled out the first time they appear, followed by the
acronym in parentheses. Ensure the originator is identified and the EXSUM approved
as shown below. Type the name of the approval authority below the originator's name
and telephone number to indicate approval by principal, deputy, or director.

<u>1</u>
<u>2</u>
<u>3</u>
<u>4</u>

Originator's full name/office symbol/phone
Originator's e-mail address

<u>1</u>

APPROVED BY: BG Brian Xxxxxx

(CLASSIFICATION)

Figure 3-3. **External executive summary (EXSUM) format**

3-7. Decision memorandum

Use a decision memorandum to obtain decisions from the Command Group. Prepare this special-purpose action in informal memorandum format. Do not exceed two pages, excluding supporting documents.

a. General. AR 25-50 directs the use of 1-inch margins for the informal memorandum. The memorandum content should represent the complete situation, without relying on enclosures. Summarize issues and reserve enclosures for a detailed analysis or explanation of the summary presented in the memorandum. Identify enclosures contained at tabs in the body of the decision memorandum. Use TRADOC Form 5-E when submitting decision memorandums to the Command Group. Keep information in the TRADOC Form 5-E brief, with a purpose statement, short background summary, and coordination.

b. Format of the decision memorandum (see Figure 3-4).

(1) Office symbol. Type the office symbol of the proponent office at the left margin, one inch below the top of the page.

(2) Date. Type or stamp the date of the decision memorandum at the right margin on the same line as the office symbol.

(3) Address. Address the decision memorandum FOR the person making the decision. Include appropriate members of the chain of command on the THRU lines. At a minimum, actions for the Commander, TRADOC will go through the DCoS and DCG/CoS.

(4) Paragraph 1, Decision. Paragraph 1 states: For DECISION.

(5) Paragraph 2, PURPOSE. In one concise sentence state the action to be taken (for example, "To gain CG approval of the issues developed at the TRADOC Commanders' Conference held at Fort Eustis, 23-24 Oct 12").

(6) Paragraph 3, RECOMMENDATION(S). This paragraph contains specific recommendations; for example, "CG sign the enclosed memorandum at TAB A-1." Under each recommendation type:

"APPROVED_____ DISAPPROVED_____ SEE ME_____"

(7) Paragraph 4, BACKGROUND. This paragraph explains the origin of the action and conveys assumptions and facts necessary to understand the recommendation. Present facts as a chronological summary of actions or events leading to or bearing on the issue.

(8) Paragraph 5, DISCUSSION. This paragraph lists/assesses the alternatives considered. Assess the alternatives considered for the decision in terms of advantages and disadvantages. Include documents that support the recommendation as enclosures at tabs. Summarize their key points in the decision memorandum.

(9) Paragraph 6, IMPACT. This paragraph indicates impact of the recommended decision. A staff action may have an impact on personnel, equipment, funding, stationing, etc. Identify individuals or organizations the recommendation impacts, and to what extent. If none, state "No impact."

(10) Paragraph 7, COORDINATION. This paragraph indicates with whom and when the action was staffed. Indicate concurrence/nonconcurrence by lining through the word that does not apply. Type or write the rank, name, and title of the individual who gave the feedback on the blank to the left of CONCUR/NONCONCUR. Type or write the date the individual provided feedback in the blank before DATE. Prepare each line as follows:

ORG_____CONCUR/NONCONCUR _____DATE

(11) Paragraph 8, Point of Contact. Include POC name/rank, title, telephone number, and e-mail address.

(12) Second page. If a decision memorandum is longer than one page, at the top of all continuation pages, type the office symbol at the left margin, 1 inch from the top edge of the paper, and the subject line on the next line below the office symbol. Begin typing the text on the third line below the subject phrase.

Office Symbol   8 Aug 15

MEMORANDUM THRU

Deputy Chief of Staff
Deputy Commanding General/Chief of Staff

FOR TRADOC Commanding General

SUBJECT: Decision Memorandum Format

1. For DECISION.

2. PURPOSE. To obtain…

3. RECOMMENDATION(S). CG sign memorandum at TAB A-1.

APPROVED_____   DISAPPROVED_____   SEE ME_____

4. BACKGROUND.

5. DISCUSSION.

    a. Course of Action (COA) 1: (Advantages/Disadvantages)

    b. COA 2: (Advantages/Disadvantages)

    c. COA 3: (Advantages/Disadvantages)

6. IMPACT.

7. COORDINATION.

    TRADOC DCS, G-8 _____   CONCUR/NONCONCUR_____DATE
    TRADOC DCS, G-1/4 _____   CONCUR/NONCONCUR_____DATE

8. POC is Mr. Jones, organization, (757) 501-xxxx, joe.p.jones.civ@mail.mil.

Encl   MICHAEL M. SMITH
                                                       Major General, U.S. Army

Figure 3-4. Decision memorandum format

3-8. Information paper
Use an information paper to provide the reader pertinent facts in a clear and concise format.
Figure 3- 5 provides format and instructions for preparing an information paper. TRADOC
information paper format is the same as HQDA information paper format. Note the authority
block begins at the center of the page and one line below the last paragraph.

INFORMATION PAPER

ATCS-XS
30 Aug 15

SUBJECT: Information Paper Format

1. Purpose: To provide guidance on the preparation and use of an information paper.

2. Facts:

a. An information paper provides facts in a clear and concise format.

b. Include the subject and the purpose. Paragraphs will contain only essential facts
concerning the subject. There is one line between the title "INFORMATION PAPER"
and the office symbol. There is one line between the date and the subject line. Do not
"bold" any text.

c. Information papers are self-explanatory and will not refer to enclosures, except for
tabular data, charts, or photographs.

d. Information papers should not exceed one page in length. If a continuation page
is unavoidable, number pages starting on page 2, bottom center. Do not repeat the
subject line, title, or date on the second page.

e. Information papers do not require signature, but must include the AO's name and
telephone number at the bottom of the page. Type the AO's information on the second
line below the last paragraph. Type an approval line below AO's name and number to
indicate directorate approval by principal, deputy, or director. Begin typing at the center
of the page.

f. Avoid using acronyms and abbreviations, except those that are familiar outside
the Army. Avoid using classified information when it does not contribute to
understanding the issue.

g. Information papers should not include a decision statement, ask for a decision,
include recommendations, or courses of action.

h. An information paper is forwarded under cover of a TRADOC Form 5-E.

Mr. John Brown/(757) 501-1234
Approved by: COL Paul C. Swift

Figure 3-5. Sample information paper

3-9. Position paper
Use a position paper to define an organization's position or policy on an issue and promotes or defends a position. See Figure 3-6 for format and preparation instructions.

30 Aug 15

POSITION PAPER

Title (word, phrase, or question defining the issue)

1. **Background**. Short overview that does not overshadow the position paragraph below. If the sheet is one of many collected for a common purpose, consolidate the background in a single document and eliminate from the individual sheets. There are two lines between the date and the title "POSITION PAPER." There is one line between "POSITION PAPER" and the title line. Type the AO's information two lines below the last paragraph. Type an approval line below AO's name and number to indicate directorate approval by principal, deputy, or director. Right justify the AO contact information and "APPROVED BY" lines.

2. **Position**. Sentence or short paragraph stating organization's policy or position on the issue.

3. **For the Position**. Supporting facts and arguments sequenced, labeled, and subdivided.

4. **Against the Position**. Summary of each argument against the position. Be accurate when representing opposing views.

5. **Rebuttals**. Summary of rebuttals to opposing arguments. Ideally, rebuttals will reinforce the position.

6. **Sources**. List sources:

    a. AO (name, office, phone).

    b. Subject matter experts.

    c. Supporting documents.

    d. Related point or position papers.

    e. If using only one source, label this paragraph specifically (for example, Point of Contact).

LTC Johnson/ATCS-XS/1234
APPROVED BY: COL Brown

Figure 3-6. Sample position paper

3-10. Star note

    a. Only GOs use star notes, normally for brief personal replies or to convey congratulations, appreciation, welcome, regrets, etc. Prepare the star note according to the personal preference of the GO signing the note. Include appropriate information in the TRADOC Form 5-E; for example, "PURPOSE: To obtain CG's signature on star note (TAB A) to Mr. Jonathan (John) E. Doe for his selection as TRADOC Employee of the Year." The preparer may also put first name/nickname on small adhesive notes on each letter within the package. Star notes are normally one page in length. See Figure 3-7 for a sample CG star note with formatting instructions.

    b. Use Arial 12 with at least one-inch margins and center text on the page for framing. Do not date the star note prior to signature, but leave space for it when typing. After signature, center the civilian-style date, for example, August 10, 2009, two lines below printed return address. Indent paragraphs five spaces and begin typing at the sixth space.

    c. Do not use abbreviations in the address or signature blocks. Exceptions permitted for: state names, DC, U.S., Mr., Mrs., Dr., Jr., Sr., 2nd, II, III, Ret., and compass points (NE, NW, SE, and SW).
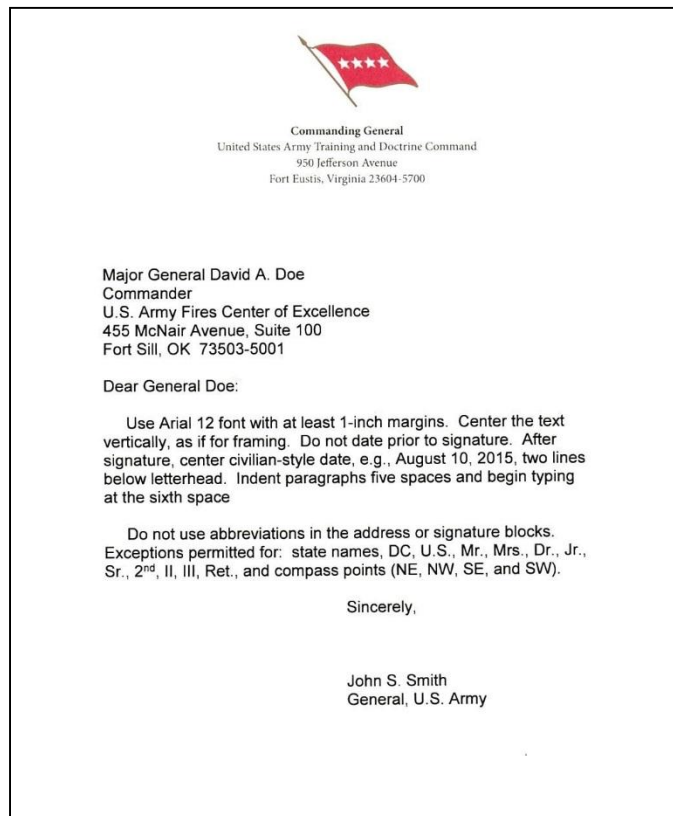

Figure 3-7. Sample CG star note

3-11. TRADOC policy letters and delegations of authority

a. TRADOC policy letters are statements the CG signs that apply to all TRADOC activities, schools, and HQ staff offices. These letters (memo format is used) express the commander's intent or position on selected topics of concern (such as anti-harassment and equal opportunity (EO)).

b. Delegations of authority are statements the CG signs authorizing a subordinate to perform a duty or responsibility otherwise reserved for the CG.

c. Staff elements will forward policy letters and delegations of authority under cover of a TRADOC Form 5-E, through the SGS for CG approval. Policy letters and delegations must be coordinated through the SJA. Once the CG approves, SGS will consecutively number the policy letters and maintain an index of the policy letters and delegations. All policy letters and delegations of authority are posted on the TRADOC Web site.

d. Policy letters and delegations of authority will be reviewed when a new CG assumes command. The issuing staff element will review their policy letters and delegations and ensure the information is still valid and current. Some policy letters may require earlier review based on the subject matter and separate regulations that govern their functional area. Policy letters are effective until superseded or rescinded.

e. Policy letters will not be used as substitutes for issuing or revising publications stating TRADOC-wide policy and procedures, IAW AR 25-30, paragraph 3-38a.

Chapter 4
Conferences and Briefings

4-1. TRADOC Conferences
TRADOC conferences will be conducted in accordance with TRADOC Policy Letter 16, TRADOC Conference and Competition Event Policy.

4-2. Headquarters (HQ) TRADOC Conference room locations and responsible staff offices

a. DCSs and chiefs of special staffs are responsible for scheduling conferences and briefings via the Conference Room Scheduler.

b. The Office of the Commanding General approves requests for the Command Conference Room. Requests for the Command Conference Room will be submitted via the Conference Room Scheduler.

c. ESO approves requests for the Morelli Auditorium. Requests for the Morelli Auditorium will be submitted via the Conference Room Scheduler. For scheduled events hosted by the CG, DCG/CoS, or DCoS that require protocol support, send requests to Chief, ESO.

4-3. Procedures for scheduling conferences/briefings requiring command group participation

a. DCSs and chiefs of special staffs are responsible for notifying the CG of short-notice taskings from DA and other sources to provide briefings to senior officials. To obtain Command Group input as early in the process as possible, coordinating staff will forward details and outline via e-mail to CG's scheduler, preferably within 24 hours of receiving the mission. As required, CG will attend CSA briefings.

b. Chiefs of staff offices will obtain DCoS approval before conducting conferences or briefings requiring Command Group participation.

c. Meetings, conferences, or symposiums involving the Command Group will begin no earlier than 0830 to avoid conflicts with physical training schedules.

d. When arranging conferences and briefings, AOs will:

(1) Coordinate with Command Group schedulers and/or XOs to arrange the date, time, and location of conferences/briefings.

(2) Coordinate with G-33 to preclude scheduling conflicts with the TEC.

(3) Reserve appropriate conference rooms via the Conference Room Scheduler.

(4) Submit a TRADOC Form 5-E for DCG/CoS approval of all conferences or briefings requiring expenditure of HQ TRADOC funds. TRADOC Form 5-E will include:

(a) The date, time, and location of the conference or briefing.

(b) Attendance requirements.

(c) Name or title of chair.

(d) Purpose of conference or briefing.

(e) Security classification.

(f) Title, order of presentation, and time set aside for each part of the conference or briefing.

(g) Special instructions (for example, prebriefing requirements, attendee allocations, etc.).

(h) Uniform requirements.

(i) A request for names of attendees to be provided to the AO.

(5) Prepare a message or memorandum for DCoS signature to announce the conference or briefing when attendees include personnel from organizations outside HQ TRADOC.

e. Staff offices making presentations during conferences and briefings will provide their own personnel to operate equipment and flip slides.

f. The lead staff office for organizing a conference or briefing for the Command Group will provide a note taker to record taskings and issues that surface during the conference/briefing

g. The lead staff office will provide a seating chart for the CG when the CG holds a VTC or desk-side VTC. See Figs 4-1 and 4-2 for diagrams of seating charts.

h. Payment of conference fees for locally-hosted conferences:

(1) Each DCS will provide the conference host with a list of attendees prior to the conduct of the conference.

(2) Subject to the applicable dollar threshold for the cardholder, the government purchase card may be used to pay for conference room rental expenses. The purchase card dollar threshold varies among cardholders. The card will not be used to purchase food or refreshments. If for any reason the card is not accepted, contact the Agency Program Coordinator for Fort Eustis at DSN 826-5709, x2249, (757) 878-5809, x2249 for assistance in providing applicable material category code to the vendor to allow the transaction to go through, or for information on accommodation check procedures.

(3) The host will provide TRADOC Deputy Chief of Staff, G-8, (Resource Management) Budget Directorate, a summary list of costs, broken out by directorate.

(4) The TRADOC DCS, G-8 will locally reprogram the funds from the applicable DCS/activity to reimburse the host.

(5) Use of government funds to pay for food or refreshment items is extremely restricted. Violation of these restrictions can result in personal liability and/or a violation of the Antideficiency Act. Conference planners should consult with their servicing SJA office regarding the purchase of food and refreshments for consumption at conferences.

(6) Any contract for conference facilities is subject to the review process provided in TRADOC Regulation 5-14.

4-4. Preparing visual aids

a. A briefing template is available in the Staff Action Officer Resource Center under "TRADOC Templates."

b. Logos, banners, slogans (for example, Victory Starts Here!), frames, and other nonessential graphics will appear on the cover slide only. Subsequent slides will contain only briefing material.

c. Do not use background tints and other features that burn memory/bandwidth and make slides hard to read when projected.

d. Ensure each chart or graph has the BLUF, conveys a single idea or thought, and is simple and straightforward.

e. Any slide should immediately communicate the intent to the audience within 30 seconds.

f. For audiences outside of the military, assume the audience has no military experience. Avoid use of Army acronyms. Graphics must stand alone to convey an effective message.

g. Number briefing slides using "__ of __" format, e.g., "2 of 15." Place numbers at bottom center or bottom right of the slide. Do not number the first slide.

h. Number presentation slides in the order they are displayed. For dual-screen projection, place "L" or "R" after the number to specify left or right screen as viewed from the audience. To allow easy change or reordering, annotate numbers on the viewgraph frame rather than the transparency itself.

i. Mark classified slides at top and bottom in accordance with AR 25-55 and AR 380-5. Ensure classification is clearly visible during the presentation.

j. Text of visual aids should not repeat the verbal presentation.

k. If more than one map is shown on a single visual aid, use the same scale.

l. Provide color copies of slides to visiting dignitaries, GOs, civilian equivalents, and above. All other attendees receive black and white copies.

m. Do not distribute paper copies of slides/conference materials to multiple attendees. Transmit material via e-mail.

(1) Ensure all files are created with approved Army software.

(2) As a general rule, upload files over 500 kilobytes to AKO and provide the AKO address for users to access the files.

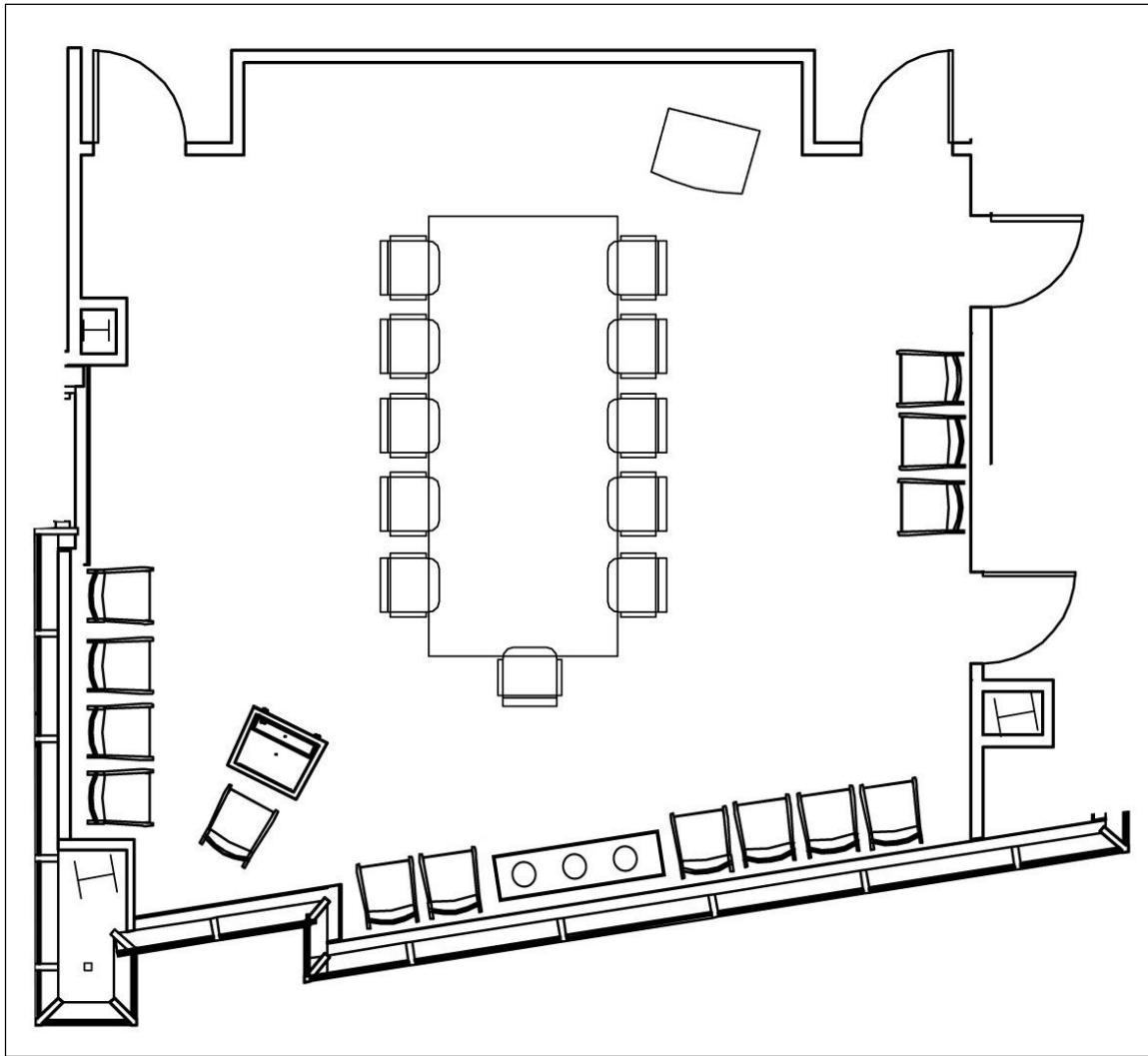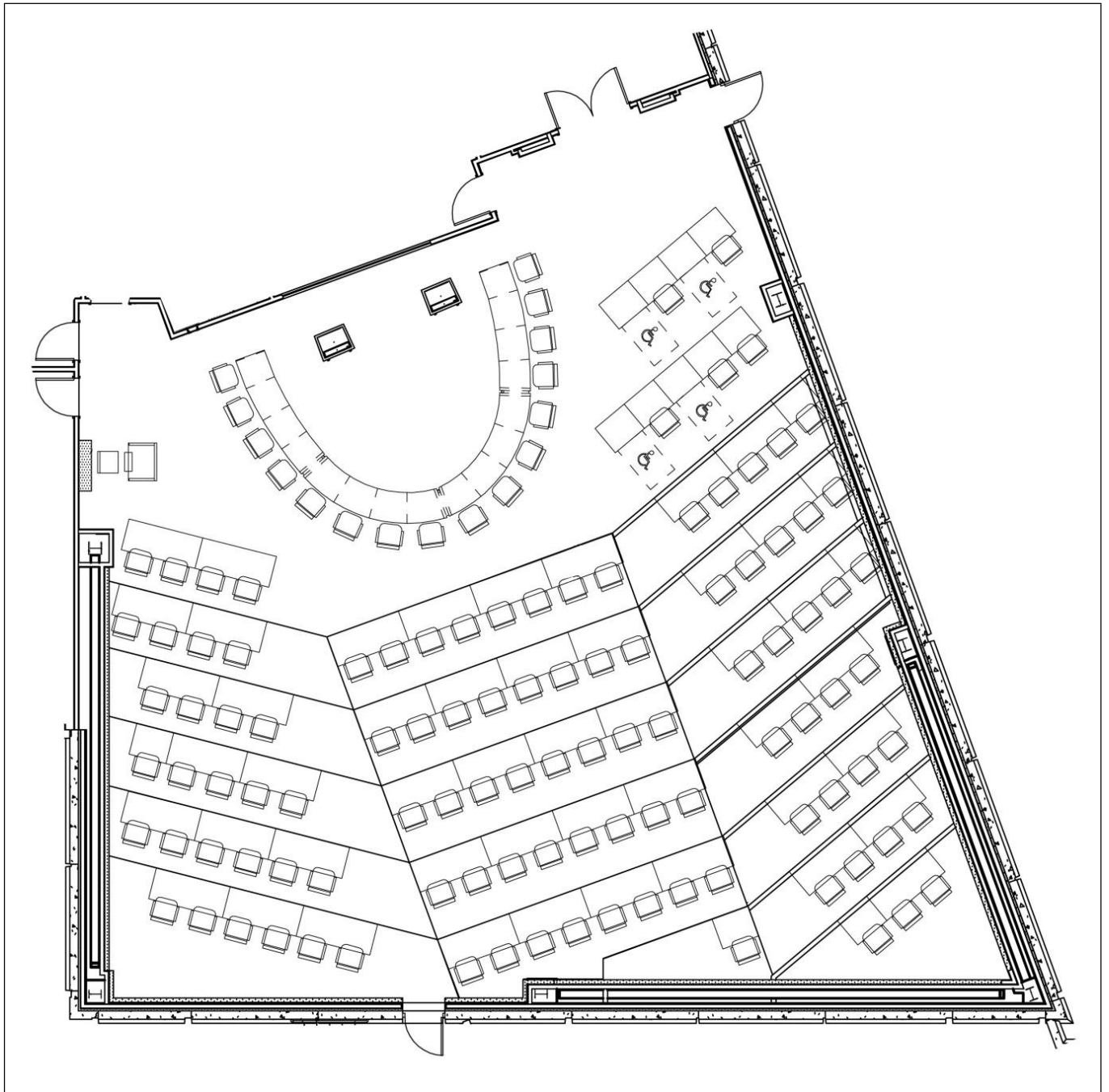**Figure 4-1. Diagram of Command Conference Room**

Figure 4-2. Diagram of Morelli Auditorium

4-5. Tracking taskings
Lead agency for the conference (for example, TRADOC Senior Leaders Conference, Former
TRADOC Commanders Conference, RC GO Conference) will have responsibility for tracking,
collating, and updating the Command Group on status of conference taskings on a periodic basis.

Chapter 5
Use of Department of Defense (DOD) Enterprise E-mail

5-1. E-mail

a. DOD provides e-mail service to enable Soldiers, government civilians, selected contractors (as per terms of each particular contract) to accomplish their work efficiently and effectively. This e-mail service is provided for official purposes and non-official use is subject to restrictions.

b. AOs should use e-mail to quickly, efficiently, and effectively accomplish tasks, but care must be taken not to bypass command channels for any actions that should be routed through the chain of command. TRADOC AOs should employ discretion when using e-mail to communicate and AO must be conscious of the time it takes others to access, analyze, and act upon e-mails. Unnecessary e-mails distract recipients from other more important tasks, consume network resources, and contribute to inefficiency. Use caution in using "reply all" vice "reply" on responses. Only include as addressees those who need the information contained in an e-mail or who need to take action on an e-mail. AOs should use the TO, cc, and blind copy address lines appropriately. TO addressees should be considered "action" addresses; cc should be considered "for information" addressees.

c. TRADOC AOs should use judgment regarding to whom e-mails are addressed. Commanders, directors, and other senior leaders should not be distracted from other tasks by e-mails pertaining to routine matters. Such e-mails should be sent to the receiving organization's administrative staff or to an organizational e-mail address – not to the commander or director of the organization. AOs should also not assume that sent e-mails will be immediately read by the recipient(s). For short suspense actions AOs will follow up with a telephone call to ensure those who need to take action are aware.

d. The ability to digitally sign and encrypt e-mails enables certain capabilities. Digital signatures on e-mails provide a means to determine the exact originator of a particular message, a capability commonly referred to as non-repudiation. Encrypted e-mails can only be open and read by those with access to a private decryption key associated with the recipient. Currently the Public Key Infrastructure (PKI) to enable digital signing and encrypting of e-mails is available on non-secure internet protocol router network (NIPRNET).

(1) An e-mail must be sent encrypted if it contains sensitive information. Sensitive information includes, but is not limited to, FOUO information, personally identifiable information, information protected by the Freedom of Information Act and the Privacy Act of 1974 (to include the Health Insurance Portability and Accountability Act).

(2) All e-mails sent from an Army owned system or account that contain an active (embedded) hyperlink (uniform resource locator web address or e-mail address) and/or attachment must be digitally signed with an approved DOD PKI certificate. This applies to e-mails originating on workstations physically connected to the network, virtually connected wireless devices (for example, two-way e-mail devices, personal digital assistants, etc.), and remote workstations (such as connected using a virtual private network). Additionally, e-mails when considered official business (constituting orders, promulgating policy, or committing

resources) should be digitally signed. See TRADOC's Common Access Card (CAC)/Public Key Infrastructure (PKI) User's Guide for more information.

e. TRADOC organizations should use the Army's approved e-mail bannering tool to help ensure e-mails containing sensitive information are appropriately labeled. Those originating e-mails should also use descriptive subject lines and descriptive filenames on attachments that include such terms as FOUO in order to provide a ready indication of the contents of the e-mail and any attachments.

f. AOs should avoid unnecessary attachments. Attachments are difficult to read by those accessing e-mail from a mobile device. E-mails with attachments are to be digitally signed; therefore, unnecessary attachments result in unnecessarily digitally signed e-mails. When an attachment contains information that is sensitive as outlined in paragraph 5d(1) above, the e-mail should be encrypted. If information can be placed directly in the body of a message, vice in an attached file, then do so.

g. AOs should use the out of office assistant tool (located on the tool menu under FILE), to provide status and alternate POC information during absences in excess of 1 normal duty day.

5-2. Organizational Messaging Service (OMS) and Automated Message Handling System (AMHS)

a. OMS provides the ability to exchange official information between the military services, DOD agencies, Combatant Commanders (COCOMs), non-DOD U.S. government activities and the Intelligence Community. OMS is available on both NIPRNET and secure internet protocol router network (SIPRNET).

b. Subordinate organizations, special activities, FOAs, schools and centers, and HQ TRADOC will maintain, and actively monitor, OMS accounts on both NIPRNET and SIPRNET.

c. Messages. TRADOC organizational account users prepare and release OMS messages electronically via the DOD Enterprise OMS/AMHS on the Pentagon Web site at https://www.amhs.army.pentagon.mil. Follow procedures below when preparing AMHS traffic the Command Group will release:

(1) Organizational messages. Follow guidance outlined in paragraph 3-2 to package staff actions containing AMHS messages for Command Group approval/release, and process the same as other actions. When forwarding TRADOC Form 5-E for Command Group release, include "ADMINISTRATIVE INSTRUCTIONS" recommending mode to send message (for example, "Once approved, recommend sending signed message, but not encrypted (nor signed and encrypted)").

(a) To send "Personal For" organizational messages, list addressees in the text of the message, in grade order, with names in alphabetical order within each grade. The only exception is when two addressees are grouped by the same organizational account (address).

(b) When it is important to emphasize the releaser of a message (in addition to the office symbol on the FROM line in the text) use "SIGNED" before beginning the message text (for example, SIGNED GEN SMITH). When preparing messages for the Command Group to release to subordinate activities that are directive in nature, use "SENDS" (for example, CG TRADOC SENDS). Always include the suspense in parentheses after the subject on messages that contain a suspense date in the body of the message.

(c) Once approved, a designated user with release authority for the FROM organizational account is responsible for dispatching the message using OMS/AMHS software. Once dispatched, a copy of the message is printed from the "sent items" folder and placed in the package behind tab A. Then, the entire package, with TRADOC Form 5-E showing approval, is uploaded to the lead organization's folder and notification made to SGS to close action in CATS.

5-3. Organizational e-mail accounts

a. Using individual e-mail accounts (accounts assigned to specific person with that person's name as the account name) to transmit official e-mails causes a number of complications. E-mail accounts created for organizations alleviate many of these complications. Organizational accounts are not group accounts or address lists, although the accounts can be configured to provide similar functionalities. A specific individual must be responsible for each account and the responsible individual will control shared access to the account. This shared access can be enabled without sharing the password for the account. Organizational e-mail accounts can be found on the HQ TRADOC SACO Points of Contact roster and the TRADOC SGS/G-3 Points of Contact roster. Both rosters are available on the Staff Action Officer Resource Center SharePoint site under the "Telephone Information, Rosters and Directories" heading.

b. Subordinate organizations, special activities, FOAs, schools and centers, and HQ TRADOC will obtain and actively monitor organizational e-mail accounts on NIPRNET and SIPRNET. For the accounts on NIPRNET, organizations will obtain PKI certificates in order that others may send encrypted e-mails to organizational accounts.

5-4. Use of calendars within e-mail
AOs should use the calendar function within e-mail to manage their daily schedules. This will allow others to easily plan and coordinate meetings. AOs should set calendar permissions to allow the maximum feasible ability to view individual schedule information by others on the local installation network. AOs should freely share their schedules with other AOs within their organization.

Chapter 6
HQ TRADOC Special/Ethnic Observances and Recurring Events

6-1. Tasking
SGS is responsible for tasking TRADOC special/ethnic observances and recurring events (for example, special/ethnic observances, TRADOC Organization Day, and other official events). Table 1 lists the schedule of recurring HQ TRADOC events and responsible staff offices. The tasking timelines for special/ethnic observances are listed in Table 3.

Table 6-1. HQ TRADOC Recurring Events

Other HQ TRADOC Recurring Events						
	Event	Date	2015	2016	2017	2018
1	Army Emergency Relief *	May	733rd MSG	733rd MSG	733rd MSG	733rd MSG
2	HQ TRADOC Organization Day (Responsibility rotates between DCS, G-1/4; DCS, G-2; DCS, G-3/5/7; DCS, G-6; DCS, G-8; and Army Capabilities Integration Center (ARCIC).)	Jun	G-8	G-3/5/7	G-1/4	G-2
3	Savings Bond Campaign *	Jun	733rd MSG	733rd MSG	733rd MSG	733rd MSG
4	Noncommissioned officer/Soldier of the Year Competition	Aug	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7
5	Combined Federal Campaign **NOTE: *When TRADOC CG serves as Honorary Chairman, DCS, G-1/4 has oversight and intraservice coordination responsibilities.*	Sep-Nov	733rd MSG	733rd MSG	733rd MSG	733rd MSG
*DCS, G-8 is the HQ TRADOC proponent for Garrison-hosted events 1 and 3.						
**DCS, G-1/4 is the HQ TRADOC proponent for Garrison-hosted event 5.						

6-2. Special/ethnic observances:

a. Special/ethnic observances are:

Dr. Martin Luther King, Jr., Birthday

African American/Black History Month
Women's History Month
Days of Remembrance
Asian Pacific Heritage Month
Women's Equality Day
National Hispanic Heritage Month
National Native American Indian Heritage Month

b. Responsibility for TRADOC-sponsored observances lies with the designated TRADOC DCS, ARCIC, or Command Group. Non-TRADOC sponsored observances are within the responsibility of the identified command. Ethnic/Special Observance Schedule (Table 2) is published annually by the JBLE EO Office and coordinated with each command.

c. Future support for identified observances will be on a rotating basis among ARCIC and each DCS. TRADOC will provide support for a minimum of two events each year in order to comply with guidance contained in AR 600-20. Tasking will be posted 3 years in advance in order to provide sufficient planning time for execution.

Table 6-1 - Ethnic/Special Observance Schedule for CY 2015-2017

Special/Ethnic Observance	CY 15	CY 16	CY 17
MLK Birthday Observance (January)	TRADOC HQ G-6	128th Avn Bde	733d MSG
Black History Month (1-28 February)	7th Bde	TRADOC HQ ARCIC	TRADOC HQ G-8
Women's History Month (1-31 March)	TRADOC HQ G-3/5/7	7th Bde	MEDDAC
Days of Remembrance (15-22 April)	MEDDAC	TRADOC HQ G-1/4	7th Bde
Asian/Pacific Islander Heritage Month (1-31 May)	128th Avn Bde	ATSC	TRADOC HQ G-2
Women's Equality Day (26 August)	TRADOC HQ G-1/4	597th TC Bde	93d Sig Bde
Hispanic Heritage Month (15 September to 15 October)	733d MSG	93d Sig Bde	TRADOC HQ G-3/5/7
Native American Heritage Month (1-30 November)	93d Sig Bde	TRADOC HQ QAO	128th Avn Bde

d . Mandatory members of TRADOC-sponsored special/ethnic observance committees will include a representative from Command Diversity Office (CDO), PAO, and ESO. TRADOC SJA will provide an attorney to serve as a legal advisor to the respective committee.

e. TRADOC ESO provides protocol support for all TRADOC-sponsored observances.

f. AOs will provide IPR minutes to the CDO no later than 7 duty days following each meeting.

6-3. Administrative guidelines for special/ethnic observances

a. To ensure timely Command Group awareness of event concepts and use of proper protocol procedures, responsible organization or special staff office will follow timelines in Table 3.

b. ARCIC and DCSs, or their deputies, will personally host the event(s) (or keynote event if a series of events).

c. TRADOC ESO will send written invitations of scheduled event(s) to all GOs/SESs and other special guests. The ESO sends electronic invitations to the XO distribution list for dissemination to the remaining staff.

d. Leadership should encourage attendance at all events and attend all functions or, at a minimum, the keynote event, if a series of events, to set the example.

e. When desiring Command Group participation (to introduce guest speaker, present recognitions, etc.), send request on a TR Form 5-E through SGS to the DCoS, DCG/CoS, or Office of the Commanding General (OCG). If none is available, request the DCG/CoS designate a representative.

f. CDO and ESO will review event plan (sequence of events, seating, program, flyers, posters, bulletins, etc.) to ensure compliance with accepted standards.

Table 6-3. Tasking timelines for special/ethnic observances

DATE	RESPONSIBLE PROPONENT OFFICE:
120 days prior to observance	• Coordinate date of event (or keynote event, if a series of events) with their TEC POC or the OCG, DCG/CoS Office, or DCoS Office to ensure no conflicts with the TEC. • Assign an AO (field grade officer or GS-13 and above) and provide the name of the AO to the CDO. The CDO will provide specific observance guidelines and oversight for all special/ethnic observances.
90 days prior to observance	Submit a plan of action/milestones to the CDO.
70 days prior to primary event	Brief event concept plan to the first GO/SES in chain of command.
60 days prior to primary event	Send the DCoS an information paper, along with the memorandum announcing scheduled events for approval/signature, under cover of a TRADOC Form 5-E. If CG, DCG/CoS, or DCoS is involved in the program, send the DCoS an information paper, as instructions state in first sentence. Coordinate concept with appropriate agencies, but, at a minimum, with CDO and TRADOC ESO. **Note:** Distribute announcement memorandum to the staff immediately upon DCoS signature.
At conclusion of observance	Provide a written after action report (AAR) in memorandum format to the DCoS with copy furnished to CDO no later than 30 days after event.

g. Coordinate CG remarks with designated CPG speechwriter. When requesting remarks from DCG/CoS or DCoS, responsible organization coordinates with their respective XO to prepare draft remarks and forwards remarks as part of RA, or separately, as directed. Brief Command Group participant(s) 1 week prior to the event(s) and forward RA at least 4-duty days prior to IPR.

h. Tasked TRADOC organizational lead will provide escorts for guest speakers/ guests of honor.

i. Coordinate with the CDO, ESO, PAO, and SJA prior to obligation of funds for fees, honoraria, or gifts for presentation to non-DOD personnel participating in the special/ethnic observance or related key events. The approval authority for the payment of fees or honoraria or the purchase of gifts for presentation to non-DOD personnel is the coordinating staff responsible for the event.

j. Appropriated funds may not be used to purchase gifts, mementos, or other tokens of appreciation for DOD personnel. A commander may use appropriated funds to purchase an informal award device (for example, coins, plaques, certificates, or similar devices with little intrinsic value) for DOD personnel in recognition of excellence in accordance with the guidelines below. The committee chairperson must coordinate in advance with the proper award authority to determine the appropriateness of providing any awards for the specific DOD personnel participating in the event.

(1) Soldiers and other military personnel. Commanders may use appropriated funds to purchase and present informal award devices to military personnel for contributions to a special/ethnic observance event when they demonstrate excellence and the achievement is unique and clearly contributes to increased effectiveness.

(2) DA civilians. Activity officials may purchase and present informal award devices to civilian employees when a monetary or higher-level honorary award is not appropriate. Informal award devices should clearly commemorate the official event and recognize excellence in performance by the employee. By definition, award devices have little intrinsic monetary (resale) value.

6-4. HQ TRADOC Organization Day

Lead responsibility for HQ TRADOC Organization Day rotates between DCS, G-1/4; DCS, G-2; DCS, G-3/5/7; DCS, G-6; DCS, G-8; and ARCIC. Initial tasking by the appropriate SACO will go out **no later than 15 December**. The lead is responsible for preparing a memorandum of instruction (MOI) and providing a concept pre-brief for DCoS approval/signature. Lead responsibilities for the event are to:

   a. Review the prior year's AAR for comments and recommendations.

   b. Organize, plan, coordinate, and execute HQ TRADOC Organization Day.

   c. Establish a TRADOC Organization Day Planning Committee with personnel from the Command Group/Personal Staff/Selected Special Staff, all DCSs (G-1/4, G-2, G-3/5/7, G-6, G-8), ARCIC, U.S. Army Center for Initial Military Training, and participating JBLE tenant organizations. Each organization will provide a primary and alternate POC to attend meetings. TRADOC SJA will provide an attorney to serve as a legal advisor to the Organization Day Planning Committee.

   d. Host and conduct regularly scheduled planning committee meetings and IPRs.

   e. Develop/finalize a TASKORD outlining the concept of operation, event rules, and safety plan for HQ TRADOC Organization Day.

   f. Collect an AAR of lessons learned and suggestions for future activities from each organization following HQ TRADOC Organization Day.

   g. Compile information from planning committee meetings, TASKORDs, and AARs and place in a binder for the lead the following year.

6-5. Coordinate with TRADOC Enterprise Calendar (TEC)
To preclude schedule and facility conflicts, coordinate all major events, symposiums, conferences, seminars, etc., with G-33 for inclusion in the TEC.

Chapter 7
TRADOC Invitational Travel Authorization (ITA) Procedures

7-1. Guidelines
This chapter prescribes ITA procedures, specific forms, and formats for use at HQ TRADOC and TRADOC schools and centers.

7-2. ITA approval authorities

a. Within HQ TRADOC, ITAs for official TDY (non-spouse travel) must be approved by the DCG/CoS. The approval authority at TRADOC core function leads, FOAs, and special activities is the senior TRADOC commander/commandant on the installation (with the exception of accompanying spouse travel as described in paragraph 7-2b.) This approval authority may not be further delegated.

b. Pursuant to Army Directive 2007-01, Policy for Travel by Department of the Army Officials, and as delegated by CG, TRADOC, ITAs for accompanying spouse travel must be approved by the DCG/CoS for all TRADOC organizations. The approval authority may not be delegated to a lower level. Other types of spouse travel may be approved in accordance with paragraph 7-2a.

7-3. Preparation of an ITA request

a. ITA request memorandums (Figure 7-1) for all official TDY not involving accompanying spouse travel as described in paragraph 7-2b, will be prepared and submitted in accordance with the Joint Travel Regulation (JTR), Appendixes E and I, and AR 600-8-105. ITA request memorandums must be signed by the approving official within the requesting organization.

(1) TRADOC subordinate organizations, FOAs, and special activities must follow approval procedures set forth by their organization.

(2) All HQ TRADOC ITA packets requesting military air will be staffed through G-3/5/7, Readiness and Flight Operations Division. G-3/5/7, Readiness and Flight Operations Division will determine if any issues in the request require further SJA review. These questioned ITA requests will be forwarded to the TRADOC Office of the Staff Judge Advocate (OSJA) for review at least 15 calendar days prior to the travel date. G-3/5/7, Readiness and Flight Operations Division will forward the ITA request package, with any legal review, through the SGS SAD for DCG/CoS approval. The ITA packet will contain:

(a) TRADOC Form 5-E (with TRADOC G-3/5/7 concur/nonconcur recorded if military air travel is requested, and with TRADOC OSJA review recorded).

(b) ITA request memorandum signed by the budget analyst (even if cost is zero) and organization's approval authority.

b. ITA request memorandums for accompanying spouse travel will be prepared and submitted in accordance with Army Directive 2007-01, and JTR (Figure 7-2). The ITA request memorandum must be signed by the funding budget analyst and spouse's sponsor. All TRADOC subordinate

organizations, FOAs, special activities, and HQ TRADOC organizations will forward the ITA packet through the G-3/5/7 Readiness and Flight Operations Division (if military air is requested) to the TRADOC OSJA for review at least 15 calendar days prior to the travel date. After review, the TRADOC OSJA will forward the ITA request package to the SGS SAD for DCG/CoS approval. The ITA package will contain:

(1) TRADOC Form 5-E (with TRADOC G-3/5/7 concur/nonconcur recorded if military air travel is requested, and with TRADOC OSJA review recorded).

(2) ITA request memorandum signed by the funding budget analyst (even if cost is zero) and spouse's sponsor.

(3) Legal review from the requesting organization's servicing legal advisor.

(4) Spouse's agenda.

Table 7-1. ITA Requests

	Non-spouse travel	Accompanying spouse travel
HQ TRADOC	Approval authority is DCG/CoS	Approval authority is DCG/CoS. No further delegation allowed.
Subordinate organizations.	Approval authority delegated to senior TRADOC commander/commandant. No further delegation allowed.	
All TRADOC organizations	Requests are signed by the traveling Soldier or GS civilian.	Requests are signed by the traveling spouse's sponsor.

DEPARTMENT OF THE ARMY
REQUESTING ORGANIZATION'S LETTERHEAD
123 HEADQUARTERS CIRCLE
FORT PATRIOT, VIRGINIA 23341-5701

REPLY TO
ATTENTION OF

Office Symbol   Date Signed

MEMORANDUM THRU (Enter organization's servicing legal office)

FOR (Enter the section responsible for issuing the ITA.)

SUBJECT: Individual Travel Authorization (ITA) Request

1. Request publishing of ITA for the individual below.

    a. Name, title or position:

    b. Mailing address:

    c. Proceed date:

    d. Itinerary. FROM (*enter location traveling from*) TO (*enter location traveling to*) and RETURN.

    e. Itinerary attached? Yes

    f. Length of travel:

    g. Point of contact: name and phone number.

    h. Modes of travel for entire visit: (Commercial air, rental car, MILAIR, POV, etc.)

    i. Purpose of travel:

    j. Estimated cost

        (a) Per diem: $0

        (b) Travel: $0

        (c) Fund cite: (if applicable. If DTS, annotate DTS line of accounting.)

                                    Analyst's signature
                                 Budget Analyst's signature block
                             (Signature required, even if cost is $0.)

Figure 7-1. ITA request memorandum

Office Symbol
SUBJECT: Individual Travel Authorization (ITA) Request

2. Justification for travel:

    a.

    b. Secure video teleconference or other means of Web-based communication are not sufficient to accomplish travel objectives because … *(Add a detailed justification to explain why other means of communication are not acceptable.)*

X Encls   Approving official's signature
                                             _____
                                             Approving official's signature block

2

Figure 7-1. ITA request memorandum, continued

DEPARTMENT OF THE ARMY
REQUESTING ORGANIZATION'S LETTERHEAD
123 HEADQUARTERS CIRCLE
FORT PATRIOT, VIRGINIA 23341-5701

REPLY TO
ATTENTION OF

Office Symbol   Date Signed

MEMORANDUM THRU TRADOC STAFF JUDGE ADVOCATE

FOR Deputy Commanding General, U.S. Army Training and Doctrine Command, 950 Jefferson Avenue, Fort Eustis, VA 23604

SUBJECT: Accompanying Spouse Travel – Spouse's name, date/place of travel

1. Reference Memorandum, Secretary of the Army, 25 Jan 07, subject: Policy for Travel by Department of the Army Officials.

2. In accordance with section 10 of referenced memorandum, the purpose of this correspondence is to request approval of accompanying spouse travel.

3. Request publishing of individual travel authorization (ITA) for individual below:

    a. Name, title or position: Mrs. Mary Smith – Spouse of General Smith

    b. Mailing address:

    c. Proceed date: (Date leaving home station.)

    d. Itinerary. FROM (*enter location traveling from*) TO (*enter location traveling to*) and RETURN.

    e. Itinerary attached? Yes

    f. Length of travel:

    g. Point of contact: (Name and phone number.)

    h. Modes of travel for entire visit: (Commercial air, rental car, MILAIR, POV, etc. If by vehicle note they will be a passenger is sponsor's vehicle)

    i. Purpose of travel:

        (1) To attend the (name of event.)

Figure 7-2. Accompanying spouse travel request memorandum

Office Symbol
SUBJECT: Accompanying Spouse Travel – Spouse's name, date/place of travel

    (2) Individual meets the eligibility requirements for ITAs found in JTR, Appendix E, paragraph A, and is NOT a non-appropriated funds official (or employee traveling on non-appropriated fund business), a contractor employee, a Federal employee (unless traveling in a leave status), or uniformed service member.

        (a) Estimated cost:

        (b) Per diem: $0 (may not be applicable)

        (c) Travel: $0

    j. Fund Cite: DTS Line of Accounting

                                                    _____
                                                        Analyst's signature
                                                          Budget Analyst
                                                (Signature required, even if cost is $0.)

4. Justification for Travel:

    a. Mrs. Smith will be accompanying GEN Smith to (name of event/responsibility at event, if any).

    b. Secure Video Teleconference or other means of Web-based communication are not sufficient to accomplish travel objectives because … *(Add a detailed justification to explain why other means of communications are not acceptable.)*

                                                    _____
                                                        Sponsor's signature
                                                    Sponsor's signature block
                                                (The sponsor MUST sign this request.)

                                    2

Figure 7-2. Accompanying spouse travel request memorandum, continued

7-4. Publication of the ITA
After the ITA is approved, the requesting organization will process the ITA in the Defense Travel System (DTS).

a. Routing lists within DTS will be set up in accordance with local procedures.

(1) Subordinate organizations, FOAs, and special activities will follow procedures set forth within their organization.

(2) HQ TRADOC organizations will follow procedures set forth by DCS, G-8 and DCS, G-1/4. The DCS, G-1/4 will serve as a reviewer in DTS prior to being routed to the assigned approving official. If assistance is needed with setting up a routing list, contact G-8, Finance and Accounting Directorate, Accounting and Financial Services Division.

b. Each organization's defense travel administrator (DTA) is responsible for creating the DTS traveler's profile (to include all mandatory information) on all individuals traveling on an ITA. The traveler must have a social security number; however due to DOD policy, the organization will contact the traveler directly to obtain social security number and banking information.

c. The organization's DTA will ensure the AO is trained and appointed in writing and the AO is aware of all ITA procedures.

d. The organization's DTA ensures a non-designated entry agent (NDEA) is trained and appointed in writing. The NDEA signs the voucher for the individual traveling on the ITA and should be familiar with all NDEA procedures and requirements.

e. When preparing the ITA, the requesting organization will enter the trip type as:

(1) E-invitational (only for non-accompanying spouse travel), or

(2) E-family trans only or e-family full travel (for accompanying spouse or other travel), which then sets up a DTS template for authorized entitlements.

f. The requesting organization will ensure that entitlements are entered correctly. For example, in most cases of accompanying spouse travel, the spouse is not entitled to per diem; it is the organization's responsibility to ensure the lodging and meals are removed from the authorization. G-1/4 will also review for accuracy and ensure all required statements are on the authorization.

g. All approval documents (approved Form 5, ITA request memo, legal review, agenda, etc.) are required to be scanned into the DTS authorization's substantiating records.

h. The ITA traveler is responsible for completing, signing, and submitting DD Form 1351-2 (Travel Voucher) to the proponent organization within 5 days of completion of travel. Receipts for all expenses will be submitted with the voucher.

i. The organization's appointed NDEA is responsible to scan and upload all supporting documents (expense receipts, airline receipts, etc.) to the substantiating records section of the voucher, then sign the voucher in DTS as T-entered.

j. After the traveler's voucher is paid, the organization DTA will detach the individual from their organization; this will ensure the availability of the individual's profile to other organizations in the event they travel on an ITA at a later date.

k. For details on preparing an ITA in DTS, refer to the Defense Travel Management Office Web site, at http://www.defensetravel.dod.mil/Docs/Training/Invitational_ Travel_Guide.pdf.

Chapter 8
TRADOC Enterprise Calendar

8-1. TRADOC Enterprise Calendar (TEC)
The TEC is a web-based Microsoft SharePoint calendar that provides information on key events affecting organizations in TRADOC. It is designed to keep the command informed of key events and to provide a leadership tool to help prevent scheduling conflicts. The online version of the TEC is the authoritative version of the TRADOC master activities calendar. The TEC is "real time" in that, once approved, all events are immediately reflected on the calendar.

8-2. Accessing the TEC

a. The TEC is located at: https://hq.tradoc.army.mil/sites/tec.

b. An AKO hosted version is available at https://ako.hq.tradoc.army.mil/sites/tec.

c. A Common Access Card is required to open the TEC.

8-3. Calendar Management

a. The TEC is managed by the G-33.

b. Each core function lead (U.S Army Combined Arms Center, ARCIC, CC, Recruiting Command, IMT), Centers of Excellence (including USACC and USAREC), direct reporting unit and school is responsible for ensuring its subordinate TEC calendar is populated and properly maintained.

c. TRADOC Specific Coordinating, Personal and Special Staff sections provide input to the TEC via the "TRADOC Staff" Subordinate TEC.

d. Commanders/commandants/directors will designate a primary and an alternate TEC contributor to input and curate their calendar data. Events will be entered on the lower echelon calendars and promoted, as appropriate, through the chain of command to higher headquarters' calendars.

e. To prevent duplicate entries, the event sponsor (or TRADOC lead) is responsible for inputting the event into the TEC and then nominating the event higher.

f. Information placed on the TEC will be classified no higher than FOUO. The calendar itself is classified as FOUO. The TEC will not contain names of, nor specific movement data for general officers or members of the senior executive service.

_____

Appendix A
References

Section I
Required Publications
ARs, DA pamphlets, and DA forms are available at http://www.apd.army.mil. TRADOC publications and forms are available at http://www.tradoc.army.mil/publications.htm.

AR 25-50
Preparing and Managing Correspondence

TRADOC Regulation 10-5
U.S. Army Training and Doctrine Command

TRADOC Regulation 10-5-1
Headquarters, U.S. Army Training and Doctrine Command

Section II
Related Publications
A related publication is a source of additional information. The user does not have to read a related reference to understand this publication.

AR 1-20
Legislative Liaison

AR 10-87
Army Commands, Army Service Component Commands, and Direct Reporting Units

AR 20-1
Inspector General Activities and Procedures

AR 25-1
Army Knowledge Management and Information Technology

AR 25-30
The Army Publishing Program

AR 25-51
Official Mail and Distribution Management

TRADOC Regulation 1-11

AR 25-55
The Department of the Army Freedom of Information Act Program

AR 25-400-2
The Army Records Information Management System (ARIMS)

AR 55-46
Travel Overseas

AR 335-15
Management Information Control System

AR 340-21
The Army Privacy Program

AR 380-5
Department of the Army Information Security Program

AR 600-8-22
Military Awards

AR 600-8-105
Military Orders

AR 672-20
Incentive Awards

DA Memo 25-52
Staff Action Process and Correspondence Policies

DA Pam 672-20
Incentive Awards Handbook

DOD 4500.54-G
Department of Defense Foreign Clearance Guide (available at https://www.fcg.pentagon.mil)

JTR
Joint Travel Regulation

TRADOC Civilian Honorary and Public Service Awards Processing Guide (available at
http://www.tradoc.army.mil/dcspil/documents/Awards/Awds_Processing_Guide.pdf)

TRADOC Memorandum 1-2
Courier Service Between Headquarters, U.S. Army Training and Doctrine Command and
Headquarters, Department of the Army

TRADOC Regulation 5-14
Acquisition Management and Oversight.

TRADOC Regulation 10-5-2
Futures Center

TRADOC Regulation 10-5-3
United States Army Accessions Command

TRADOC Regulation 10-5-4
United States Army Combined Arms Center

TRADOC Regulation 10-5-5
United States Army Combined Arms Support Command and Sustainment Center of Excellence

TRADOC Regulation 10-5-6
United States Army War College

TRADOC Regulation 10-5-7
United States Army TRADOC Analysis Center

TRADOC Regulation 10-5-8
Initial Military Training-Center of Excellence, and Change 1

TRADOC Regulation 10-5-9
Institute for Noncommissioned Officer Professional Development and United States Army
Sergeants Major Academy

TRADOC Regulation 25-35
Preparing and Publishing U.S. Army Training and Doctrine Command Administrative
Publications

TRADOC Regulation 37-2
Temporary Duty Travel Policies and Procedures

TRADOC Regulation 95-5
Flight Operations

TRADOC Supplement 1 to AR 600-8-22
Military Awards

United States Government Printing Office Style Manual (available at
http://www.gpo.gov/fdsys/pkg/GPO-STYLEMANUAL-2008/pdf/GPO-STYLEMANUAL-
2008.pdf)

Section III
Prescribed Forms and Label

TRADOC Form 5-E
Transmittal, Action and Control

TRADOC Form 5-E-1
Generic Transmittal, Action and Control

TRADOC Form 712-R-E
Request for Official OCONUS Temporary Duty Travel

Section IV
Referenced Forms

DA Form 3964
Classified Document Accountability Record

DD Form 1144
Support Agreement (SA)

DD Form 285
Postal Clerk, Unit Mail Clerk or Mail Orderly, Appointment of Military

DD Form 2501
Courier Authorization

DD Form 1351-2
Travel Voucher

DD Form 2501
Courier Authorization

HQDA Form 5
Army Staffing Form

Appendix B
Helpful Hints for Preparing Correspondence and Processing Actions

B-1. Introduction
Most information in this Appendix is found elsewhere in this publication, but also presented here as a collection of helpful hints to highlight some of the most common errors found during proofreading.

B-2. Reference materials
Use the following references to assist in preparing correspondence:

   a. AR 25-50, Preparing and Managing Correspondence

   b. DA Memo 25-52, Staff Action Process and Correspondence Policies

   c.   The Records Management and Declassification Agency's database for U.S. Army Abbreviations, Brevity Codes, and Acronyms at https://www.rmda.army.mil/abbreviation/ MainMenu.asp.

   d. The TRADOC Senior Leader Contact List (posted on the Staff Action Officer Resource Center under Telephone Directories/Rosters link, https://hq.tradoc.army.mil/ SAORC/default.aspx).

   e. United States Government Printing Office Style Manual (available on the Staff Action Officer Resource Center, https://hq.tradoc.army.mil/SAORC/default.aspx.)

   f. Staff Action Officer Resource Center, https://hq.tradoc.army.mil/SAORC/default.aspx.

B-3. Processing staff actions

   a. PURPOSE statement on TRADOC Form 5-E refers to the purpose of the form, not the purpose of the action being transmitted. It tells what you want the form to accomplish. For example: "To obtain CG signature on memo to MG Brown (TAB A) nonconcurring with his proposed changes to FM XX-X (TAB B)."

   b. RECOMMENDATION statement on TRADOC Form 5-E tells the recipient what you want him to do and is usually worded similarly to the PURPOSE statement. For example: "CG sign memo to MG Brown (TAB A) nonconcurring with his proposed changes to FM XX-X (TAB B)."

   c. Ensure the CATS control number is in block 1 on the TRADOC Form 5-E. If the action is generated by the proponent, the CGAC will assign a CATS control number with an ES prefix for tracking purposes when it is submitted to the SGS.

   d. TAB A is document requiring signature or action. When forwarding more than one action for approval/signature, use TABs A-1, A-2, A-3, etc. TAB A can also be an information paper you are sending to the Command Group.

e. TAB B is the document that generated the action. Additional background information follows, using succeeding tabs in order mentioned in TRADOC Form 5-E.

f. Always use editing and proofreading tools available (spelling and grammar check) as an initial step in the proofreading process. Review correspondence to ensure document is error free and ready for signature and dispatch prior to submission to SGS for Command Group signature.

g. Ensure SGS SACO is aware of time-sensitive actions to assist in expediting through the Command Group.

h. AOs will provide the designated organization POC an electronic copy of all documents to upload in accordance with Appendix H. The POC will make administrative corrections, but will not change the content of the documents. SACOs will retrieve the documents, make administrative corrections, but will not change the content.

i. If SGS or the Command Group returns action for corrections, ALWAYS include marked-up copy with returned package.

j. Hand-carry, or upload to Staff Actions Library, actions returned for corrections to CGAC or the appropriate SACO. Actions are logged out on CATS and must be logged back in to maintain tracking.

k. If not dated at time of signature, the CGAC dates correspondence upon Command Group signature, and original is returned to the appropriate action office for dispatch.

l. Do not send copies or internal routing slips to the Command Group.

m. All actions going to the Command Group must come through the CGAC/SGS. Do not take actions directly to Command Group offices. Do not pick up actions from the Command Group. Actions received in the Command Group without SGS approval are returned to the SGS without action. In urgent situations, if a proponent picks up an action from the Command Group, ensure SGS receives a file copy of the signed/approved/dated action and the TRADOC Form 5-E.

n. If an action requires presentation to the CG, DCG/CoS, or DCoS for signature during a briefing, provide the SGS an advanced copy of the correspondence for proofreading, editing, assignment of CATS control number, and approval prior to the briefing. Following the briefing, return a copy of both the TRADOC Form 5-E and the signed correspondence to SGS for file retention.

B-4. Coordinating Staff Actions

a. Lead organizations should consider actions from the CG's, DCG/CoS or DCoS' viewpoint. What organizations will the CG, DCG/CoS, or DCoS expect to have reviewed the action? Whose input will they want as they consider their decision?

b. Type names, titles, phone numbers, and dates of concurrence/nonconcurrence in block 9 of the TR Form 5-E. Electronic initials/signatures are not necessary, nor possible.

c. The DCS, deputy, or organization command group must sign nonconcurrences and considerations of nonconcurrence.

d. Coordinate all congressional actions with TRADOC CAO and SJA.

e. Coordinate scheduling of all conferences/major briefings with TRADOC DCS, G-3/5/7 (G-33 Current Operations) to avoid calendar conflicts.

f. Coordinate major ceremonies with ESO and G-3/5/7.

g. Coordinate Reserve/National Guard issues with Office of the DCG, U.S. Army Reserve and/or Office of the DCG, Army National Guard.

h. Coordinate with TRADOC Surgeon on health- or medical-related actions.

i. Coordinate concepts for planned administrative publications and updates to existing publications with TRADOC DCS, G-6 Publications Officer prior to the coordination process in accordance with TRADOC Regulation 25-35, paragraph 3-1.

j. Keep DCGs and CSMs informed; coordinate actions as appropriate.

B-5. Correspondence

a. Put yourself in the shoes of the person signing the action. Ensure the TRADOC Form 5-E answers the 5Ws. When preparing CG correspondence, write for 4-star eyes.

b. Write in active voice: subject, verb, then object.

c. Prepare all staff action papers using the Army effective writing "package" structure:

(1) Make reference(s) to the first paragraph.

(2) Begin the paper with the most important information.

(3) Separate the body of the paper, clearly dividing sections using paragraphs, headings, or titles.

d. Avoid overusing the pronoun "I" in official CG correspondence.

e. Avoid the use of "my" as an adjective; for example, "my staff." Use instead "the HQ staff" or "the TRADOC staff."

f. Also refer to "Helpful Hints to Survive Suspenses" prepared by G-33 Current Operations.

B-6. Tips for specific types of correspondence

   a. Letters.

      (1) Use office title instead of office symbol. NOTE: On letters the CG, DCG/CoS, or DCoS sign, the space under "REPLY TO ATTENTION OF" remains blank.

      (2) Reference letter responding to; for example, "Thank you for your May 1, 2013, letter emphasizing the importance of..."

      (3) Use civilian dates in letters; for example, January 2, 2013.

      (4) Use appropriate personal letterhead stationery; for example, CG letterhead for CG signature; DCG/CoS letterhead for DCG/CoS signature; DCoS letterhead for DCoS signature.

      (5) On one-page letters begin text five lines down from the seal in the letterhead.

      (6) Use 1-inch margins. On short letters use 1.5-inch margins.

      (7) In the salutation, use "Dear General Richardson" instead of "Dear Bill." Include addressee's first name or nickname so the GO can line-through the salutation and write in the name, if desired. Include information in the TRADOC Form 5-E. For example, PURPOSE: "CG sign letter (TAB A) to Mr. Joseph (Joe) E. Jones on his selection as TRADOC Employee of the Year;" or put first name/nickname on a small adhesive note on each letter within package.

      (8) Use "Sincerely" as the complimentary closing for same rank and below and "Very respectfully" for VCSA, CSA, and above; Members of Congress and senators; as well as retired four-star GOs.

      (9) In signature block, use upper and lowercase letters for name, as shown in Figure 2-4.

      (10) Never use "Copy Furnished" on letters. If a copy is furnished to anyone other than the addressee, place a statement in the body of the letter, preferably in the last paragraph, indicating that a copy (copies) is (are) furnished and to whom. For example, "I am forwarding a copy of this letter to (name and address)."

      (11) Submit thank you and congratulatory letters in a timely manner to optimize effect. Do not repeat congratulations/thanks in the first paragraph and then again in the last paragraph.

   b. Memorandums.

      (1) Use TRADOC letterhead stationery for formal memorandums and plain bond paper for informal memorandums.

      (2) Use the office symbol of the originating office.

(3) Type "MEMORANDUM FOR" on the third line below the office symbol. Type "SUBJECT" on the second line below the last line of the address. Begin the first paragraph of the text at the left margin on the third line below the last line of the subject.

(4) When referencing other correspondence, follow guidance in AR 25-50, paragraph 1-28 (provide type of correspondence, organization of origin, office symbol, date, and subject). For example, Memorandum, HQ TRADOC, ATCS-X, 12 Dec 15, subject: New Staff Procedures.

   c. OMS/AMHS messages.

(1) Staff actions containing OMS/AMHS messages for Command Group approval/release are packaged in accordance with guidance in paragraph 5-2, and processed the same as other actions.

(2) "ADMINISTRATIVE INSTRUCTIONS" recommending the mode to send message is included on the TRADOC Form 5-E (for example, once approved, recommend sending message signed, but not encrypted (or signed and encrypted)).

(3) Message preparers must synchronize their personal address book with the directory information tree prior to creating the OMS/AMHS message and selecting the TO and cc addressees from their personal address book. Recommend releasers do the same prior to dispatching messages.

(4) Make sure message has a SUBJECT line. To highlight PERSONAL FOR messages in organizational mailboxes, begin subject lines at the top with the words "PERSONAL FOR:" followed by appropriate subject.

(5) If PERSONAL FOR, ensure addresses and addressees match. Use the TRADOC Senior Leaders Contact List to find PERSONAL FOR addressees for subordinate commanders. (The TRADOC Senior Leader Contact List lists individuals in rank order by grade, by organization. It is available on the Staff Action Officer Resource Center.)

(6) If the message is sent signed/encrypted select the classification from the drop down list. If administrative instructions state sending the message signed, but not encrypted, include the classification at the beginning of the text.

(7) Use SENDS (for example, CG SENDS) OMS/AMHS organizational messages for emphasis when sending messages directive in nature to subordinate activities.

(8) Use SIGNED (for example, SIGNED GEN SMITH) on OMS/AMHS organizational messages when it is important to emphasize who released the message (in addition to the address on the FROM line).

(9) Upload the completed message to the TKE Actions Library in accordance with Appendix H. Name the file the same as the OMS/AMHS subject.

(10) The OMS/AMHS application automatically places the date time group below the subject line when the message is dispatched. To receive a cc with the dispatched date time group, AOs will

blind copy themselves. When referencing OMS/AMHS messages, use the date time group at the beginning of the subject line.

_____

Appendix C
Procedures and Formats for RAs

C-1. Procedures for RAs

a. The OCG determines RA requirements and forwards them to the SGS SACO. When a proponent is not identified, the SGS SACO assigns an office of primary responsibility as the HQ TRADOC staff lead. The SACO assigns CATS control numbers and notifies designated action offices via official tasker. Lead will submit readahead packet electronically in accordance with instructions in paragraphs C-2a(1)-(3) and Table 5.

b. The lead coordinates directly with external agencies and other staff offices to obtain pertinent topics and information for timely completion of RA products. For events that a member of the Command Group or external agencies schedule, the lead consolidates all input and assessments into the final RA product. Upon receipt of the tasker, lead will e-mail the name of the AO to the CG scheduler and the OCG Operations NCO. No later than **2 duty days** prior to event, the lead must e-mail the list of attendees to the CG scheduler and the OCG Operations NCO.

c. Suspense for submission of the RA to SGS is no later than **4 duty days** prior to the event. Pending GO/SES approval or receipt of information from external agencies must not delay submission; however, if the GO is TDY, the appropriate official should approve the RA prior to submission to SGS. The partial submission is vital to alert all concerned of the status and to initiate review and analysis. Include a "placeholder" page in partial submissions to identify what is pending, from whom, and date of expected completion. At a minimum, ensure executive overview is submitted on time. Upon completion of delayed items, add to the initial partial submission as an update, rather than reconstructing an entirely new submission.

d. AOs can contact the CPG upon receipt of a CG RA tasking for advice and/or recommendations to ensure an accurate, timely, and relevant product for the CG. Coordinate any required or desired "Opening Remarks" with CPG prior to submission of the RA and mention in the executive overview (first tab of RA). AO can contact the SGS office at DSN 501-5199/5202, (757) 501-5199/5202 or e-mail to usarmy-jble.tradoc.mbx.hq-tradoc-sad@mail.mil for administrative guidance or questions pertaining to RA preparation.

e. When the CG uses desktop VTC or VTC facilities, the AO will provide the CG Executive Officer with a seating chart that includes personnel in the VTC room with the CG, as well as the VTC participants (first name, last name, and position). The AO is responsible for collecting and reporting all VTC site ids/aliases to the HQ TRADOC VTC Team, via the Conference Room Scheduler (CRS). The AO is responsible for notifying all attendees of cancellations or changes in times and/or locations as they occur.

f. Upon submission of the RA to SGS, the SACO checks for format compliance and uploads the documents to a secure SharePoint portal so the command group (CG, DCG/CoS, DCoS, and CPG) can print and process accordingly.

C-2. Format

a. Composition and transmittal.

(1) CG Readaheads. All CG readaheads will be e-mailed electronically to the TRADOC SGS office. Submit readahead documents NLT 4 days prior to the event, or in accordance with the CATS suspense, via e-mail to the TRADOC SGS office. Ensure all document file names for readahead electrons are clearly named (for example, HQ TRADOC Form 5, TAB A - Executive Overview, TAB B - Briefing Slides, etc.) SGS will upload CG readaheads to a secure SharePoint portal and provide e-mail notification to the Command Group. The respective Command Group offices will print the CG, DCG, DCoS, and CPG copies of the readahead. If the readahead document changes, provide updates via e-mail to the TRADOC SGS office. SGS will upload updated documents to the secure SharePoint portal and notify the Command Group of the changes.

(2) DCG Readaheads. All DCG readaheads will be sent electronically to the DCG's office. Submit readahead documents NLT 2 days prior to the event via e-mail to the DCG's Executive Assistant and cc the DCG's XO and Aide. Action officer must also provide 1 hard copy of the readahead at the meeting or briefing to the DCG.

(3) DCoS Readaheads. All DCoS readaheads will be sent electronically to the DCoS' office. Submit readahead documents NLT 2 days prior to the event via e-mail to the DCoS' Executive Assistant and the DCoS' NCOIC and cc the DCoS' XO.

Table C-1. Configuration of Readaheads

	TAB A	TAB B	TAB C	TAB D	TAB E	TAB F
Briefings	Executive Overview	Briefings	Point and/or Information Papers			
CG Office Calls	Executive Overview	Biography (only if CG is not familiar with visitor)	Briefings (as appropriate, and with facing pages, as required)	Point and/or Information Papers	Social Schedule (as appropriate)	Visitor Template*
Conferences	Executive Overview	Agenda	Participants	Briefings		
Foreign Country Visits	Executive Overview	Itinerary	Point and/or Information Papers			
Installation Visits	Executive Overview	Briefings	Point and/or Information Papers	Biography / Biographies (as appropriate)	Social Schedule (as appropriate)	
Social Events	Executive Overview	Itinerary	Logistics			
Speaking Engagements	Executive Overview	Speech	Itinerary	Point and/or Information Papers	Logistics	
* Include visitor template for all visitors to TRADOC, except foreign visitors.						

    b. TRADOC Form 5. Forward all RAs to the SGS with a one-page TRADOC Form 5, as outlined below. The following paragraphs on the TRADOC Form 5 will include minimal information. Include expanded details in the executive overview. Subject line on TRADOC Form 5 should read exactly like the subject of the actual tasking.

        (1) PURPOSE. To complete the sentence "Prepare the CG for..." explain the 5Ws (see Figure C-1).

        (2) DISCUSSION. Include your key discussion points.

(3) COORDINATION. Ensure pertinent coordination across TRADOC in accordance with TRADOC Regulation 10-5, paragraph 2-6. Consider early contact with PAO, CPG, SJA, ESO, and SGS.

c. Table of contents. Place the table of contents as the first page under the TRADOC Form 5. See Figure C-2 for an example.

RA GUIDANCE

TRADOC FORM 5 : What is the purpose of the CG's participation in the event, visit, or brief? The answers should address the following:
  - Who is participating?
  - What is TRADOC there to accomplish?
  - When will the event take place?
  - Where will it occur?
  - Why is it important to the Nation, the Army, and TRADOC to do this and why now? (Specifics)

BLUF: Is this RA going to prepare the CG for the event? Will this RA ensure the CG is expert at representing TRADOC's position?
  - Include only essential items, using key points the CG should know before the event.
  - Ensure all pertinent issues are covered succinctly and to the point in the Overview.
  - Do not delay submission pending GO or SES approval.
  - CPG review of RA is for content and relevancy.
  - The Overview must capture all salient points found in the remainder of the RA.
  - Must include a ***Strategic Analysis*** with reference to points in following tabs in the RA (tabs are listed on the Table of Contents):
    -- Executive Overview (***required***)
    -- Itinerary (***required for visits, events***)
    -- Participants/Points of Contact (***required***)
    -- Other items (*Put briefs here*)
    -- Social Schedule (*for social events only*)
    -- Background (*only topics directly relevant to the main issue or brief; include biography only if this is the first meeting with the CG*)
    -- Logistical Requirements (*not usually required; CG's office will develop*)
    -- Visitor Template (*include for all but foreign visitors*)
    -- Work Plan (*include only if this is a prep for a major event or conference, like Requirements Review Council or Association of United States Army*)

Figure C-1. Readahead guidance

Visit of General (R) Moring
3-4 Nov 15

TABLE OF CONTENTS

Executive Overview   TAB A

Briefing   TAB B

Point Paper on Program Details   TAB C

Itinerary   TAB D

Participants/POCs   TAB E

Other Items of Interest   TAB F

Social Schedule   TAB G

Background Material   TAB H
   General (R) Moring Biography   TAB H-1
   AAR from Office Call (General Wilson and General Lewis)   TAB H-2

Logistical Requirements   TAB I

Work Plan   TAB J

Figure C-2. Readahead table of contents

C-3. Assembling RAs
Description of tabs.

a. **Executive overview (Required for all readaheads).** This is the most important part of the RA. In one to two pages, succinctly frame all primary issues and include any joint perspective and a strategic analysis. State the issue or topic and identify each stakeholder, his/her position, and both the implications of his/her position and any hidden agendas for engaging the CG. For each issue or topic, provide the response options available to the CG and the recommended TRADOC position, based on the detailed staff assessment, joint perspective, and strategic analysis. (Figure C-3 is an example of an executive overview.)

b. **Briefing(s)** (in presentation/agenda timetable sequence). If printing a hard copy, print paper slides on one side, in color, if the use of color differentiates data. Ensure briefing slides include page numbers.

c. **Point and/or information paper(s).** Include point and/or information papers only when additional details have a distinct bearing on the purpose of the event involving the CG. **Do not duplicate information contained in the executive overview or primary brief**; include only papers directly relevant to the purpose of the brief. Do not provide the CG with too much information. Use standard formats for discussion, information, point, or position papers, as appropriate for the topic(s) and event. Use decision memorandums only in exceptional cases.

d. **Itinerary.** The itinerary provides the when, where, and what in sequential order, and cross-references these events with details found at various tabs in the RA book (see example at Figure C-4). Provide full itinerary for very important persons (VIPs) while in the company of the CG. Provide short comments on persons the VIP is scheduled to meet after the CG and why. This information could impact the CG's discussion with the VIP.

e. **Participants/POCs.** List attendees, including all from TRADOC, in descending order, senior official at top. Include grade, name, title, and organization. At the bottom, list POCs with primary responsibility for actions during the event. Include office telephone numbers to reach individuals during the event (including cellular and blackberry numbers). (See example at Figure C-5.) E-mail the list to appropriate Command Group office no later than 2 duty days prior to event and provide updates on participants as they occur. If the CG is attending, include a seating chart diagram of the meeting room (see Figure 4-1 and Figure 4-2). Do not provide the CG biographies of TRADOC personnel or other GOs that the CG knows or works with routinely.

f. **Other items of interest.** In point paper format, include topics not on the itinerary, but which may occur should the opportunity present itself. Include tentative office calls and anticipated sidebar discussions. This tab should also include a list and biographical sketches of key attendees, any formal remarks, and the seating arrangement for the CG's table.

g. **Social schedule.** Include as required. If no social event, omit this tab.

h. **Background material.** Include other biographies, historical information, and other related documents (e-mail, articles, white papers, etc.). Also, include any additional papers with a distinct bearing on the purpose of the event involving the CG, but do not duplicate information contained in the primary brief.

Executive Overview
Visit of General (R) Moring
3-4 Nov 15

1. **GENERAL**. This provides an overview of the visit of General (R) Moring, Former French Army Chief of Staff.

2. **BACKGROUND**. This CSA-invited visit results from a meeting between French Army Chief of Staff and CSA on 18 Apr 15 in the Pentagon. General (R) Moring led the French Army's transformation efforts. The visit is to share lessons learned. See TAB H.

3. **RECOMMENDATIONS**. Actions or comments the CG should consider:

   a. Express that France is an extremely important ally and close friend of the U.S. Army-to-Army relations, in particular, are excellent, as evidenced by French and American Soldiers serving together in Operation Enduring Freedom.

   b. Endorse the utility of maintaining the full-time liaison and exchange personnel within the French and U.S. Armies. Highlight the key role that the French Army Senior Liaison to TR___ C and t__ TRAD__C Se___r L___ __ Fr_nch Arm____ __ keeping TRADOC a__ CD_S syr __ nized

4. **STRATE __IC A__ Al __IS**.

   a. The French-U.S. Army liaison and exchange network remains robust and very beneficial.

   b. The French/U.S. Army Staff Talks program, in existence since 1979, has conducted 27 staff talks to date. Staff talks focus on doctrine, training and education, materiel and equipment, and logistics. These areas facilitate an ongoing dialogue on transformation-related topics. The theme for the 2015 staff talks is "Future Warfighting in Military Operations in Urban Terrain by a Digitized and Reinforced Combined Arms Brigade."

5. **MOST SIGNIFICANT ISSUES**. Current U.S. objectives toward its relations with France:

   a. Encourage a strong French defense; encourage close French-NATO cooperation; and to maintain a bilateral defense relationship designed to maximize common interests around the globe.

   b. Since 2005, when the French military began its latest round of dramatic transformation, the French Army has shrunk by almost half (TAB C).

Figure C-3. Readahead executive overview

6. **ATTENDEES/PARTICIPANTS**. Principal attendees are General (R) Moring (former Chief of Staff of the French Army and creator of French Rapid Reaction Forces), Colonel Millard (Army Attaché at French Embassy in Washington, D.C., and former French Liaison Officer to HQ TRADOC). See TAB E for all participants.

7. **DATE/TIME/PLACE**. Arrival 2 Nov 15 at 1300, CG office call 1330-1430, DCG/CoS office call 1430-1445, roundtable discussion in the Command Conference Room 1500-1700, and CG-hosted dinner in the evening. Departure after a no-host breakfast on 5 Nov 15 at 0900. See TAB D for detailed itinerary, and TAB G for social schedule.

As of: 1 Nov 15
Prepared: LTC Bos/501-5669
Approved: COL Letendre/501-5690

SAMPLE

2

Figure C-3. Readahead executive overview, continued

i. **Logistics.** Include transportation details (who, what, where, when, how) and billeting information for the CG. The OCG can provide this information.

j. **Visitor template.** For visitors to HQ TRADOC (except foreign visitors), prepare a presentation slide deck that provides pertinent information for the CG, DCG/CoS, or DCoS (biography of visitor, any previous visits to HQ TRADOC, purpose of visit, others accompanying the visitor, itinerary, seating chart, command takeaways). Include a printout of the presentation slides as a part of the RA.

k. **Work plan.** This tab contains a list of all AOs contributing to the RA, the IPR schedule, and the After Action Report, which the AO compiles the week following the event. The AO is the primary user of this information, but it may be helpful when answering questions from the CG during IPRs or prebriefs.

ITINERARY
IPR – THE MARS COLONY MISSION 2015

DATE/TIME	WHAT	WHERE	TAB
19 Oct 15 0500-0630	C21 Flight	LAFB to Kennedy Space Center (KSC)	
0700-0745	Breakfast	KSC HQ Bldg Dining Facility	
0800-0930	NASA Project Status Overview	KSC HQ Bldg, Rm 21	C
0945-1030	OMB Budget Briefing	KSC HQ Bldg, Rm 21	D
1045-1145	DOD Overview	KSC HQ Bldg, Rm 21	E
1200-1300	Working Lunch	KSC HQ Bldg, Rm 46	
1300-1330	USAF Astronaut Selection Status Briefing	KSC HQ Bldg, Rm 35	F
1330-1430	Army Corps of Engineers Ma... Faci... Mo...	KS... sem... Bldg	
1445-1615	D...MI... M... /...plicati... B...fir	I...C VTC F...ility	G
1615-1700(T)	Office Call with CINCSPACE	KSC HQ Bldg, Rm 7	
1800-0100	Social/Dinner	KSC Club	H
20 Jan 0130-300	C21 Flight	KSC to LAFB	

Figure C-4. Readahead itinerary

CG, TRADOC Trip
Vint Hill Farms Station, Virginia
3-4 Nov 15

PARTICIPANTS

1. Video teleconference - After Action Review and Lessons Learned (3 Nov, 1600-1800)

GEN Xxxxx   Commander   TRADOC
LTG Xxxxx   DCG, ARCIC   TRADOC
BG Xxxxx   Dep Comdt   CGSC

2. Leader Development (4 Nov, 1130-1200)

GEN Xxxxx   Commander   TRADOC
LTG Xxxxx   DCG, ARCIC   TRADOC
MG XXXXX   DCS, G-3/5/7   TRADOC
BG Xxxxx   Dep Comdt   CGSC

3. Video teleconference - Integrating new Operational Environment into Training and Leader Development (4 Nov, 1230-1345)

LTG Xxxxx   Commander   CAC
LTG Xxxxx   DCG, ARCIC   TRADOC
MG Xxxxx   DCG, G-3/5/7   TRADOC
Mr. Xxxxx   DCS, G-1/4   TRADOC
BG Xxxxx   Dep Comdt   CGSC

POCs/Phone Numbers

XO to CG, CAC: LTC Bob Jones, DSN 552-XXXX, 913-XXX-XXXX

CGSC, Staff Group Leader, LTC Tom Davis, DSN 552-XXXX, 913-XXX-XXXX

Figure C-5. Readahead participants/POCs

Appendix D
TRADOC Form 5-E

D-1. Completing TRADOC Form 5-E
Complete TRADOC Form 5-E for CG, DCG/CoS, and DCoS correspondence (see
Figure D-1 for sample and instructions page).

D-2. Assembling the action
See Figure 3-1 for assembling the staff action in the proper order.

(UNCLASSIFIED   )

TRANSMITTAL, ACTION AND CONTROL For use of this form, see TRADOC Reg 1-11; the proponent agency is SGS.	1. CATS CONTROL NUMBER EX000000	2. TODAY'S DATE *(YYYYMMDD)* 20150622	3. SUSPENSE DATE *(YYYYMMDD)* 20150801

4. OFFICE SYMBOL ATRM-PD	5. SUBJECT TRADOC Fiscal Year (FY) 2015-2019 Program Objective Memorandum (POM) Commander's Narrative Assessment (CNA)

6. ROUTING:	*(SGS USE ONLY)*		TRADOC SGS SACO *(Signature)*	SGS SACO NAME	PHONE *(XXX) XXX-XXXX*
	Initial	Date	COMMAND GROUP COMMENTS:		
CG					
CG XO					
DCG/CoS					
DCG/CoS XO					
DCoS					
DCoS XO					
CPG					
CSM					
SGS					

7. EXECUTIVE SUMMARY

KEY POINTS

- Memorandum (TAB A) outlines the command's most critical shortfalls and concerns for the Army to consider in building the FY 15-19 POM.
- The FY15-19 POM CNA addresses our top resource issues and the commander's FY 15-19 key issues requiring additional funding.
-

Ref: N/A

Encl: TAB A: Memorandum, TRADOC FY 15-19 POM Commander's Narrative Assessment
      TAB B: CAC DCG Statement of Nonconcurrence
      TAB C: ARCIC Dir Statement of Nonconcurrence
      TAB D: G-3/5/7 DCS Comments

1. Purpose:
Obtain CG's signature on memorandum at TAB A forwarding the FY15-19 POM CNA to the CSA.

2. Discussion:

   a. The purpose of the CNA is to give each Army commander the opportunity to provide an assessment of their command's resource posture and the shortfalls in meeting the Army's goals and objectives.

   b. The FY 15-19 POM CNA addresses our top resource issues (military/civilian manpower and base funding shortfalls) and the commander's FY 15-19 key issues requiring additional funding: leader development, initial military and functional training, training the 13 Aviation brigades, training support, and current and future Army capabilities.

   c. Specific details of each of the issues addressed in the FY 15-19 POM CNA have been forwarded to the HQDA staff through the TRADOC G-8.

3. Recommendation:
CG sign memorandum at TAB A forwarding the FY15-19 POM CNA to the CSA.

APPROVED _____	DISAPPROVED _____	NOTED _____	SEE ME _____	COMMENT _____

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Figure D-1. Sample TRADOC Form 5-E

(UNCLASSIFIED)

8. LEAD AGENCY STAFF COORDINATION			CATS CONTROL NUMBER:	EX000000	
TITLE	INITIAL	TYPE OR PRINT NAME			DATE (YYYYMMDD)
Chief	KH	Ms. Karen Henderson			20150701
Director	KH	Mr. Keith Howell			20150701
PRINCIPAL	KH	Mr. Kenneth Hubbard, DCS, G-8			20150714
ACTION OFFICER (Signature)	HESSMER.KATHERINE.S.1042011653	Ms. Karen Smith/Senior Analyst/501-0000			20150701
(Name/Title/Phone Number/E-mail)	kxxxx.x.sxxxx.civ@mail.mil				

RECOMMENDATION FOR COORDINATING STAFF:

9. STAFF COORDINATION

CONCUR	NON-CONCUR	AGENCY	NAME (TITLE, LAST NAME)	PHONE (XXX) XXX-XXXX	DATE (YYYYMMDD)	REMARKS
		SJA				
☐	☒	CAC	Mr. White	(913) 684-0000	20150629	See statement TAB B
☐	☒	ARCIC	Mr. Brown	(757) 501-0000	20150626	See statement TAB C
☒	☐	G-3/5/7	BG Black	(757) 501-0000	20150625	See comment TAB D
☒	☐	G-1/4	Mr. Greene	(757) 501-0000	20150622	
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					

10. REMARKS BY SGS: ☐ RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION

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Figure D-1. Sample TRADOC Form 5-E, continued

INSTRUCTIONS

PARENTHESES AT TOP FORM:

Fill in classification (UNCLASSIFIED, FOUO, etc.)

Block 1. CATS CONTROL NUMBER:

If the action has been assigned a tasker number by the G-33 Tasking Office or SGS Staff Actions Division, enter that number.

Block 2. TODAY'S DATE:

Enter today's date. The Army standard date format: YYYYMMDD. Example: 20140210.

Block 3. SUSPENSE DATE:

Use format: YYYYMMDD.
If the action is responding to an external suspense, enter the date of the assigned suspense. If the suspense date is established internally, enter that date.

Block 4. OFFICE SYMBOL:

Enter the office symbol of the agency responsible for the action. Example: (ATFC-Y).

Block 5. SUBJECT:

Enter the primary subject line of the action. The subject on the TRADOC Form 5 should match the subject used in the assigned tasker. Use upper and lower case letters and unbolded font.

Block 6. ROUTING: *(TRADOC SGS use only.)*

The TRADOC SGS will complete this block.

Block 7. EXECUTIVE SUMMARY:

Key Points: The key points are the pieces of salient information that the CG, DCG/CoS, and/or DCoS need to know about this action. Write them at senior Army leaders' level. These are the points your principal or deputy want to convey to the CG, DCG/CoS, and/or DCoS. Each key point area allows you two lines (164 characters/spaces) to express your thought with a maximum of three key points.
Ref: List all references, e.g., CSA tasker; meeting; e-mail; etc. If none, state N/A.
Encl: List all enclosures and tabs. Explain what is included within the packet. If none, state N/A. For example: Enclosures: TAB A: Memorandum for CG's signature. TAB B: CSA tasking, and so on. If the packet has more than four tabs list them linearly separated by commas or semicolons within the "TAB A" and "TAB B" designated spaces. If necessary, continue in the undesignated space within the Encl section.
1. Purpose: Provide a short, clear statement describing the purpose (e.g., to obtain the CG's signature on the memorandum at TAB A).
2. Discussion: Summarize the information and provide a current status, if applicable. Why are you telling this to the CG, DCG/CoS, and/or DCoS? What should the CG, DCG/CoS, and/or DCoS know and discuss? Describe the task, its origin, issue, and requirements. Provide a fact-filled background and comment. This discussion should tell the story on an action without prompting questions. The final approval authority should fully understand why the action is necessary. Be concise.
3. Recommendation: Provide a brief statement of the desired action by the final approving authority and explain why it is the best option. For example: CG approve action and sign the memorandum at TAB A. Block 7 allows the CG, DCG/CoS, and/or DCoS to approve, disapprove, and/or comment on the action.

Block 8. LEAD AGENCY STAFF COORDINATION *(Lead agency use only.)*

These blocks are designated for the internal approval chain within the lead agency. Possible entries could include branch chief, division chief, director, deputy, or DCS. The appropriate releasing authority (Cdr, DCS, or Director) should electronically sign and date the action once they have released/approved it for forwarding to the next appropriate office for disposition.
The command/coordinating staff will electronically initial or sign and date. His/her electronic initials or signature represents concurrence with the contents of the form and the final product to be submitted to SGS for CG, DCG/CoS, and/or DCoS review.
ACTION OFFICER *(Name/Title/Phone Number/E-Mail):* Enter the responsible person's name, rank and/or position title, office phone number, and e-mail address. This information is especially important to ensure any questions can be quickly directed to the appropriate POC. The action officer will electronically sign.
FILE LOCATION: N/A
SACO'S NAME *(Name/Phone Number/E-Mail):* Enter the SACO's name, office phone number, and e-mail address. The SACO will electronically sign.
RECOMMENDATION FOR COORDINATING STAFF: This block allows for recommendations to the coordinating staff. For example, DCS, G-3/5/7 approve memorandum at TAB A by electronically initialing block 8.

Block 9. STAFF COORDINATION:

When staffing an action for review and comment, include each office and POC's information that the action is being staffed with, and include instructions for the addressees to indicate their concurrence by checking the corresponding block and returning it to the originator. If concurrence indicates "concur with comments," include comments at appropriate tab.

Block 10. REMARKS BY TRADOC SGS: *(TRADOC SGS use only.)*

The TRADOC SGS will complete this block.

RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION: SGS will use this block to identify all actions being returned for additional information.

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Figure D-1. Sample TRADOC Form 5-E, continued

Appendix E
Zone Improvement Plan (ZIP)+4 Address Format

E-1. Mandatory lines of address

An address must contain three mandatory lines (DOD activity name line; delivery address line; and city, state, and ZIP code line) but may include up to five lines. The United States Postal Service limits the DOD activity name line to 48 characters, including spaces. If using abbreviated DOD activity names, ensure the abbreviated name is clear and understandable to all parties concerned. Examples of addresses are shown in Figures E-1 through E-3. Note: District of Columbia will be abbreviated as DC. See Figure E-1 below.

   a. Outgoing delivery address: All delivery addresses will use ZIP+4 values.

DOD ACTIVITY NAME LINE   OFFICE OF THE SECRETARY OF THE ARMY
DELIVERY ADDRESS LINE   101 ARMY PENTAGON
CITY STATE ZIP CODE+4   WASHINGTON DC 20310-0101

Figure E-1. Example of an outgoing (delivery) three-line ZIP+4 address

OFFICE NAME LINE   OFFICE OF THE DCS G-3/5/7
ATTENTION LINE   ATTN ATTG ZA
DOD ACTIVITY NAME LINE   TRADOC
DELIVERY ADDRESS LINE   950 JEFFERSON AVENUE
CITY STATE ZIP CODE+4   FORT EUSTIS VA 23604-5711

Figure E-2. Example of an outgoing (delivery) five-line ZIP+4 address

   b. Return address: The "DEPARTMENT OF THE ARMY" is the first line of the return address. All return addresses will show ZIP+4 values (23604-5700).

DEPARTMENT OF THE ARMY   DEPARTMENT OF THE ARMY
OFFICE NAME LINE   OFFICE OF THE DCS G-6
ATTENTION LINE   ATTN ATIM II
DOD ACTIVITY NAME LINE   TRADOC
DELIVERY ADDRESS LINE   661 SHEPPARD PLACE
CITY, STATE, ZIP CODE+4   FORT EUSTIS VA 23604-5733
OFFICIAL BUSINESS ACCOUNT #   OFFICIAL BUSINESS 40 06

Figure E-3. Example of a return ZIP+4 address

E-2. Optional lines of address

a. The two additional lines are optional and, if used, MUST appear above the mandatory three lines:

1st line:	Office name line *(OPTIONAL)*
2d line:	Attention line (individual's name, office symbol) *(OPTIONAL)*
3d line:	DOD activity name line *(MANDATORY)*
4th line:	Delivery address line *(MANDATORY)*
5th line:	City, state, ZIP code + 4 *(MANDATORY)*

Figure E-4. Optional and mandatory lines of address

b. Format the mailing address with a uniform left margin, with all characters typed or machine printed in UPPERCASE letters. The United States Postal Service automation equipment cannot read hand printing and rubber stamps; therefore they are not authorized. Leave all punctuation out of the address format, except for the hyphen in the ZIP code. *NOTE:* Allow only one space between state and ZIP code.

E-3. HQ TRADOC City Designation. When preparing a return label for official mail, use Fort Eustis as the city name. Do not use Joint Base Langley-Eustis.

Appendix F
Headquarters, Department of the Army (HQDA) Form 5

F-1. Use of HQDA Form 5

Staff actions going to the SA, CSA, USA, VCSA, or Director of the Army Staff must include a HQDA Form 5 at TAB A. This form functions as the 'transmittal' for the response. It summarizes the action, identifies the originating office, and includes coordination and approval for release.

F-2. Completing HQDA Form 5

Complete HQDA Form 5 using the instructions on page 3 of the form (see Figure F-1).

F-3. Assembling the action

Include the HQDA Form 5 under TAB A of the TRADOC Form 5-E when assembling the staff action (see Figure 3-1).

(UNCLASSIFIED)

ARMY STAFFING FORM For use of this form, see DA Memo 25-52; the proponent agency is AASA.	1. TRACKING NUMBER HQDA ECC #	2. TODAY'S DATE (YYYYMMDD) 20141215	3. SUSPENSE DATE (YYYYMMDD) 20150105

4. LEAD STAFF AGENCY

TRADOC

5. SUBJECT
Must match subject line on the control sheet (if responding to a tasker).

6. ROUTING: (*ECC USE ONLY*)

	Initial	Date
SA		
CSA		
USA		
VCSA		
AASA		
DAS		
SMA		
DUSA		
VDAS		

ECC POC *(Initial)* | ECC *(Rank, Name, Phone No.)* | DIR, ECC *(Initial)*

COMMENTS:

7. Origin: Requirement from - SA ✓ CSA USA VCSA Staff Initiated

OSD Congress CJCS/JS Other _____

Meeting/Forum/Other: State what meeting, forum, directive initiated this action, e.g., CSA, TRADOC, CAPE discussion, 21 Apr 14, Gardner Conference Room (3D684)

8. What is in this packet?

TAB A: The document for signature or information is placed at TAB A.

TAB B: Place supporting documents here, e.g., tasker control sheet

TAB C: Continue tabs, if needed.

9. Action seeks senior leader Signature Approval Guidance ✓ Information Only Other _____

Recommendation to senior leader: Submitted for information in response to CSA's request for follow-up.

10. Key areas impacted: Funding Equipment Personnel ✓ Training Strategy

Policy Congressional Legal ✓ Other e.g., Leader development

11. Key point(s) the senior leaders should get from this action:

▪ Place the most important points you want to make to the senior leader here.

▪ Maximum is two lines.

12. Additional information:

a. Remember you are writing as if you are the CG writing to the CSA (or other senior leader.) Keep that perspective in mind.

b. Summarize or amplify the information provided in the key points above. The discussion should tell the story on an action without leaving holes that will make the senior leader come back with questions.

c. There is no continuation sheet to this to the HQDA Form 5

13. Senior Leader/Decision/Comments:

APPROVED _____ DISAPPROVED _____ NOTED _____ SEE ME _____ COMMENT _____

HQDA FORM 5, NOV 2012 (UNCLASSIFIED) PREVIOUS EDITIONS ARE OBSOLETE. Page 1 of 3
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Figure F-1. Sample HQDA Form 5

(UNCLASSIFIED)

14. LEAD AGENCY STAFF COORDINATION	LEAD STAFF AGENCY:	TRADOC	TRACKING NO.:	HQDA ECC #

TITLE	INITIAL	TYPE OR PRINT NAME	DATE (YYYYMMDD)
Director, ARCIC		LTG H. R. McMasters	
PRINCIPAL ONLY		GEN David G. Perkins, CG, TRADOC	
ACTION OFFICER (Signature) (Name/Title/Phone No./Email/Office Symbol)		TRADOC Action Officer's name and contact information goes here.	
SACO (Signature) (Name/Title/Phone No./Email)			

RECOMMENDATION FOR STAFF PRINCIPAL:

15. STAFF COORDINATION

CONCUR	NON-CONCUR	AGENCY	NAME (TITLE, LAST NAME)	PHONE (XXX) XXX-XXXX	DATE (YYYYMMDD)	REMARKS
		OGC				
		OTJAG				
✓		G-3/5/7	Name of DA G-3/5/7	(111) 111-1111	20141128	
✓		CPA	Name of Ch, Public Affairs	(222) 222-2222	20141127	

16. REMARKS BY ECC:

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Figure F-1. Sample HQDA Form 5, continued

PRIVACY ACT STATEMENT

DATA REQUIRED BY THE PRIVACY ACT STATEMENT OF 1974

AUTHORITY:	DA MEMO 25-52
PRINCIPAL PURPOSE(S):	To respond to questions from Army senior leaders regarding this action.
ROUTINE USES:	Information furnished will not be disclosed to agencies outside of DOD.
DISCLOSURE:	Disclosure of personally identifiable information is voluntary. However, this form cannot be processed without coordination and point of contact information.

INSTRUCTIONS

PARENTHESES AT TOP AND BOTTOM OF FORM: Select a classification (UNCLASSIFIED or FOUO) from the drop down menu. If for the Army's senior leadership (SA, CSA, USA and VCSA), use a minimum classification of FOUO (default). If using a classified SIPRnet system, select a classification (FOUO, CONFIDENTIAL or SECRET).

Block 1. TRACKING NUMBER:

a. If the action has been assigned a tracking number by ECC/OJDA, enter that number.

b. If the action has been assigned a tracking number by the activity Staff Action Control Office (SACO), enter that number along with the ECC/OJDA tracking number (if applicable).

c. When this form is being used as a read ahead coversheet, select from the drop down list "READ AHEAD COVERSHEET" in lieu of a tracking number.

Block 2. TODAY'S DATE: Enter today's date. The Army standard date format is YYYYMMDD (for example, 20120426). This allows for HQDA Tracking System searches by a calendar date.

Block 3. SUSPENSE DATE: The format is YYYYMMDD.

a. If the action is responding to an external suspense, enter the date of the assigned suspense.

b. If the suspense date is established internally, enter that date.

Block 4. LEAD STAFF AGENCY: Select from the drop down menu the office responsible for generating the response to the requested action.

Block 5. SUBJECT: Enter the primary subject line of the action. The subject on the HQDA Form 5 should match the subject used in the HQDA Tracking System (use upper and lower case).

Block 6. ROUTING: (ECC USE ONLY) or (OJDA USE ONLY): The ECC POC or OJDA POC will complete the routing block. Select whether this action is to be routed through the ECC or OJDA from the drop down menu. This selection will also affect **ECC/OJDA POC and DIR, ECC** as well as block 16.

Block 7. Origin: Requirement from: Select only one block indicating the individual or organization prompting the submission of this HQDA Form 5.

Meeting/Forum/Other: Examples: Directed by the CSA at the 26 Apr XX Morning Update; the SA asked for this information at the 26 Apr XX GA update.

Block 8. What is in the packet? List all enclosures/TABs. Explain what is included within the packet. If none, state N/A (for example, TAB A: Memorandum for SA signature. TAB B: DOD tasking and ECC tasking).

Block 9. Action seeks senior leader: Select the most appropriate box defining the desired action by the final approval authority. Two lines are provided to clearly state/indicate the recommendation to the final approval authority and indicate where the senior leader should sign or initial (for example, to obtain the SA's signature on the memorandum at TAB A: approve this action by initialing in block 13 at the bottom of this page).

Block 10. Key areas impacted: Check all boxes that apply. If "other" is checked, specify accordingly.

Block 11. Key point(s) the senior leaders should get from this action: The key points are the salient information that the SA, CSA, USA and VCSA need to take away from the action and are written at the Army senior leaders' level. These are the key points your Principal Official or Deputy wants to convey to the Army's senior leaders. Each key point area allows essentially two lines to express your key point with a maximum of two key points.

Block 12. Additional information: Summarize the information and provide a current status, if applicable. Why are you telling this to the senior leader? What should the senior leader know and discuss? Describe the task, origin of the action, issue and the requirement. Provide fact-filled background and comment. This discussion should tell the "story" on an action without "begging questions." The final approval authority should fully understand why this action is necessary.

Block 13. Senior Leader/Decision/Comments: This space allows the SA, CSA, USA and VCSA to approve, disapprove or comment on the action.

Block 14. LEAD AGENCY STAFF COORDINATION (Lead Staff Agency Use Only): These blocks are designated for the internal approval chain within a Staff. Possible entries could include Branch, Division, Director and Deputy. The appropriate releasing authority should electronically sign and date the action once they have released/approved for forwarding to the next appropriate office for disposition.

The Staff Principal will electronically sign and date. His or her electronic signature represents concurrence with the contents of the HQDA Form 5 and the final product to be submitted to ECC/OJDA for the Army's senior leaders to review. **Note: ONLY THE PRINCIPAL will sign in this space.** If the Principal Official is not available, the next most senior individual will initial in the space immediately above the "Principal Only" space and indicate "FOR" and clearly enter his or her name and title.

ACTION OFFICER (Name/Title/Phone No./Email/Office Symbol): Enter the responsible action officer's name, rank and/or position title, office phone number and email address. This information is especially important to ensure any questions related to the action can be quickly directed to the appropriate point of contact avoiding delay in processing the action. Action Officer will electronically sign.

SACO (Name/Title/Phone No./Email): Enter the responsible SACO's name, rank and/or position title, office phone number and email address. This information is especially important to ensure any questions related to the action can be quickly directed to the appropriate POC avoiding delay in processing the action. SACO will electronically sign.

RECOMMENDATION FOR STAFF PRINCIPAL: This block allows for recommendations to the Staff Principal (for example, G-3/5/7 approves the memorandum at TAB A by electronically signing block 14).

Block 15. STAFF COORDINATION: When staffing an action for review and comment, include each office and POC information that the action is being staffed with and include instructions for the addressees to indicate their concurrence by checking the appropriate block and returning to the originator. If concurrence indicates "concur with comments," then include comments at appropriate tab. Note that space is allocated for OGC and OTJAG who can make their recommendation (No Legal Objection (NLO) or Legal Objection (LO) w/comment) in the REMARKS section.

Block 16. REMARKS BY ECC (ECC use only); or SERVICES COORDINATION (OJDA selection): The ECC POC will complete the REMARKS BY ECC block. Lead Agency Action Officers will complete the SERVICES COORDINATION block.

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Figure F-1. Sample HQDA Form 5, continued

Appendix G
Public Distribution Lists

G-1. Command Group E-mail distribution lists
The Command Group E-mail Distribution Lists include frequently used distribution lists such as **Commanders/Commandants-TRADOC**, **Chiefs-TRADOC**, **XO-TRADOC**, **SGS-TRADOC** and **TRADOC Staff Principals**. These distribution lists are located on the global address list.

G-2. Guidance for using Command Group E-mail distribution lists
The **Commanders/Commandants–TRADOC** distribution list should be used only by GOs and SESs. The **Chiefs–TRADOC** distribution list should be used by assistant deputy chiefs of staff or their equivalents. The **SGS-TRADOC** and **XO-TRADOC** distribution lists may be used by anyone. Used together, these two lists are the best tools for distributing information to all of TRADOC.

Appendix H
Uploading Documents to the Actions Library Web site

H-1. Title TRADOC Form 5-E and supporting documents

   a. If a CATS number is assigned:

      (1) Title the TRADOC Form 5-E with the CATS number and Form 5 (for example IN509059 Form 5).

      (2) Title each supporting document as "TAB" and labeled respectively (for example TAB A - One Time Review of SSN Use and Justification).

   b. If a CATS number is not assigned:

      (1) Title the TRADOC Form 5-E as Form 5 and the subject (for example Form 5 - One Time Review of SSN Use and Justification).

      (2) Title each support document as "TAB" and the subject (for example TAB A - One Time Review of SSN Use and Justification Memorandum).

   c. The first tab "TAB A" is always the document requiring the recipient's action or attention, such as signature (or approval) in accordance with paragraph 3-2.

H-2. Upload TRADOC Form 5-E and supporting documents
Designated organization POCs will electronically upload the digitally signed TRADOC Form 5-E and supporting documents to the TKE Actions Library (See Figure H-1 for image of the actions library.) Notify SGS at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil that documents are uploaded.
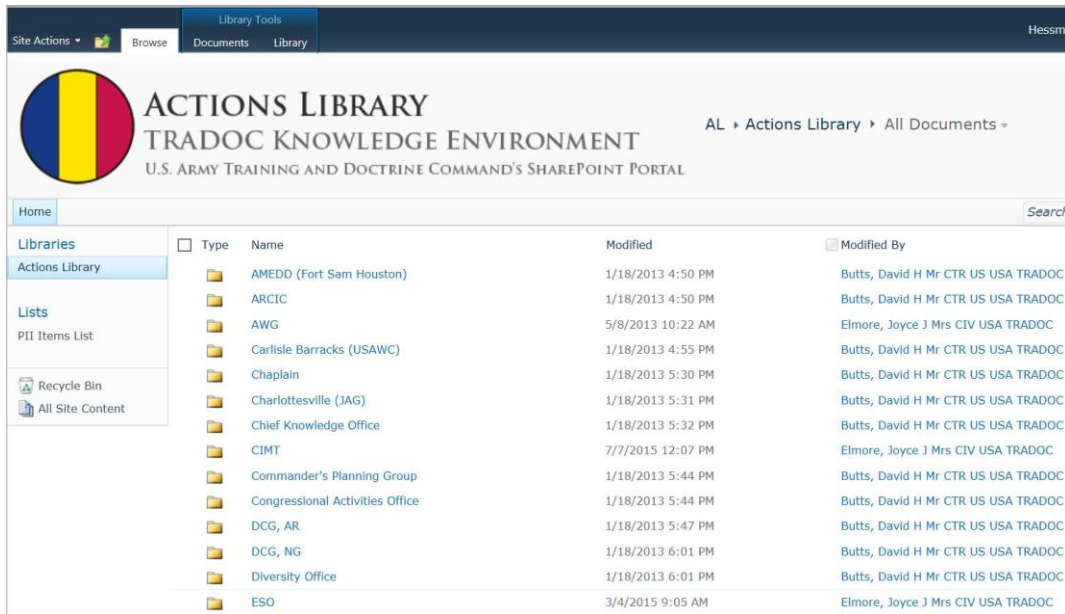
Figure H-1. Actions library

H-3. Personally Identifiable Information (PII).

Documents with PII will be placed in the PII Items List. This particular list is set up with restricted permissions in order to safeguard PII. Only individuals with the need to know can view all documents in the PII Items List. Those who upload documents in this list will only be able to see the specific documents they upload. Detailed instructions to upload to the PII list click on "All Site Content" then "Announcements."

H-4. Organization folders

Each TRADOC organization has a folder where designated POCs will upload tasking documents consisting of the TRADOC Form 5-E and supporting documents. Click your organization title to access your organization's actions library (see Figure H-2).

Figure H-2. Organization folders in Actions Library

H-5. Creating a new sub-folder

a. Create a new sub-folder to hold the documents to be uploaded. Click the "Documents" tab which will reveal the "New Folder" icon. Click the New Folder icon. (see Figure H-3).
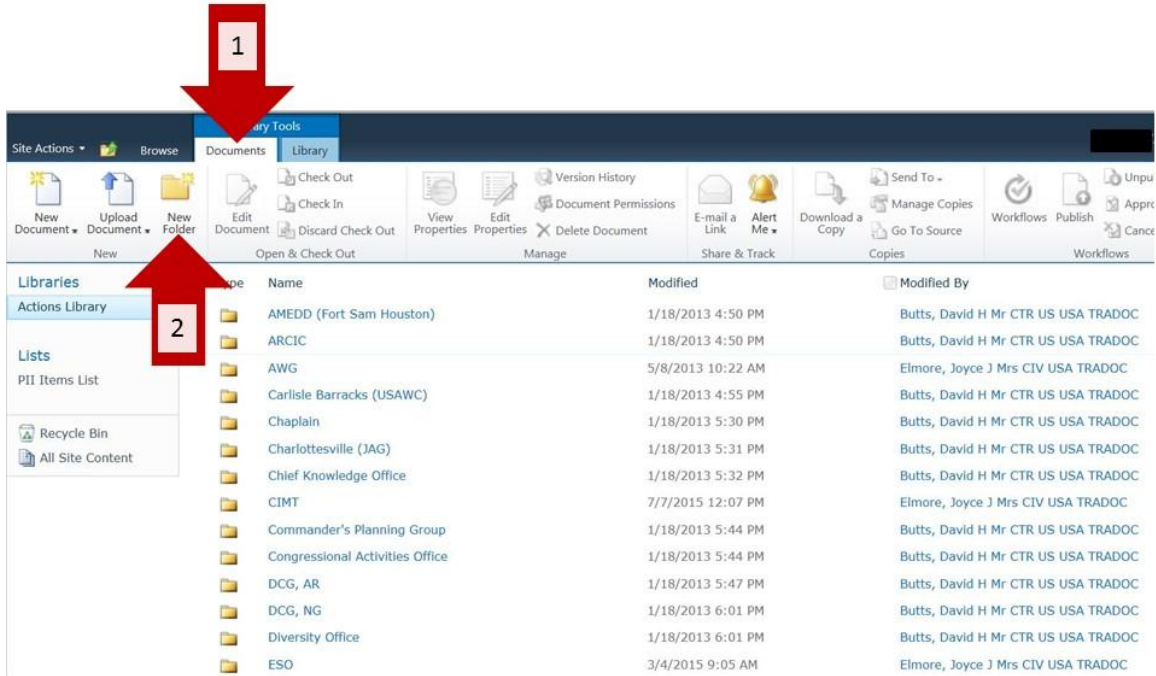

Figure H-3. Creating a new sub-folder

b. Title the new sub-folder using the CATS number (if assigned) and the tasking subject name (for example: IN509059 - One Time Review of SSN Use and Justification) (see Figure H-4).
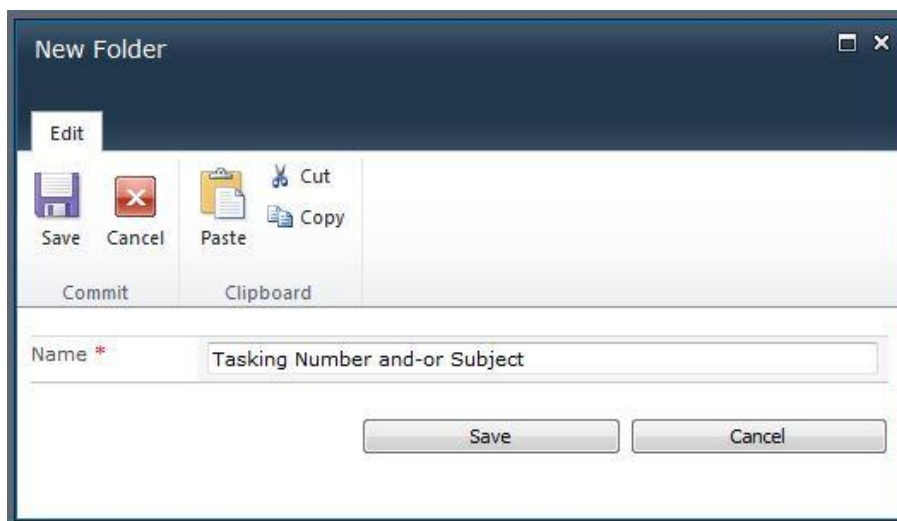

Figure H-4. Titling a new action folder

c. Click OK and the screen will refresh to show the new action folder (see Figure H-5).
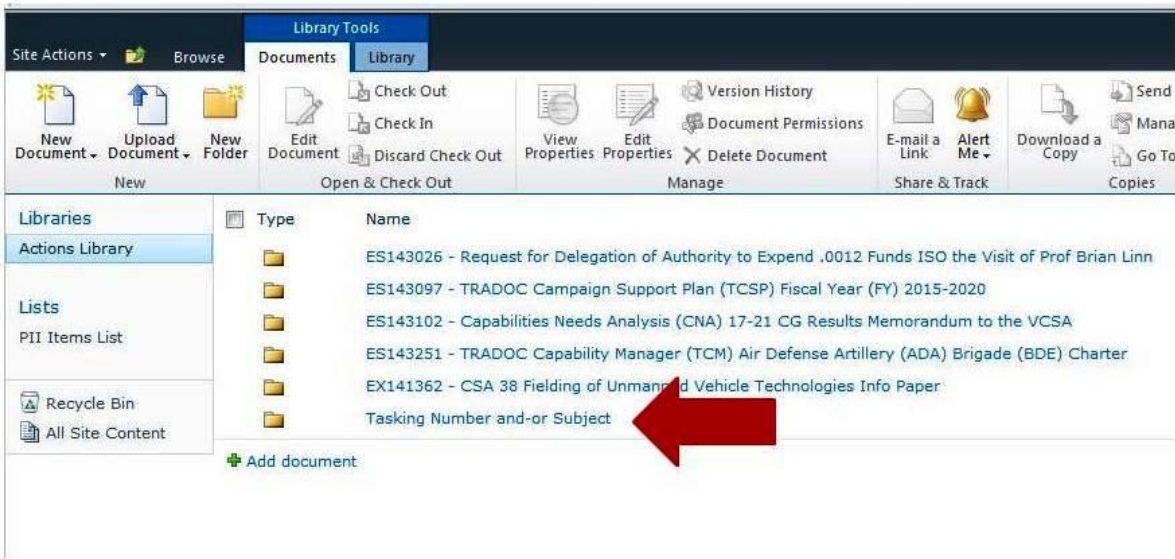

Figure H-5. New action folder is added

H-6. Uploading document(s)

a. Click on the new folder link and then on the ''Add document'' link (see Figure H-6). This will bring up a ''browse'' window (see Figure H-7).
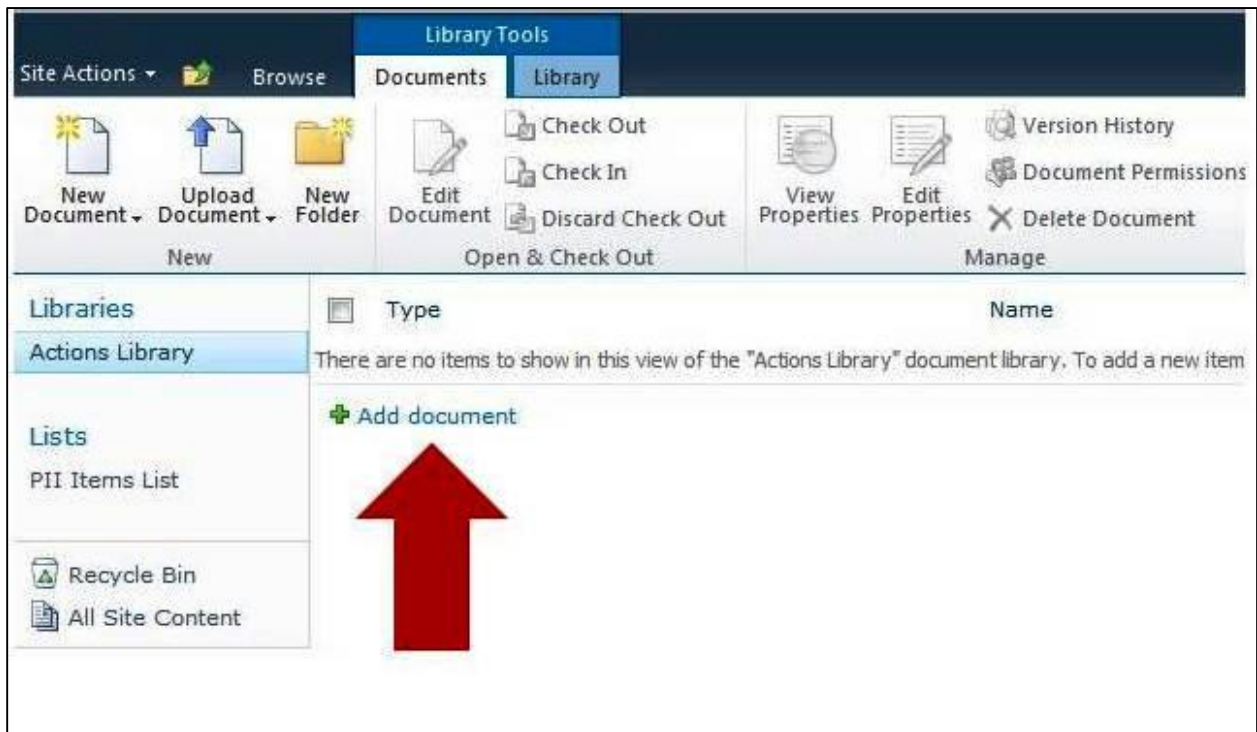

Figure H-6. Add a document to the folder

b. Click on the "Browse…" button to navigate to the document you want to upload. You can upload multiple documents at one time by clicking the "Upload Multiple Documents" link. Click "OK" after the "Name" populates. Make sure the "Overwrite existing files" box is checked. (see Figure H-7).
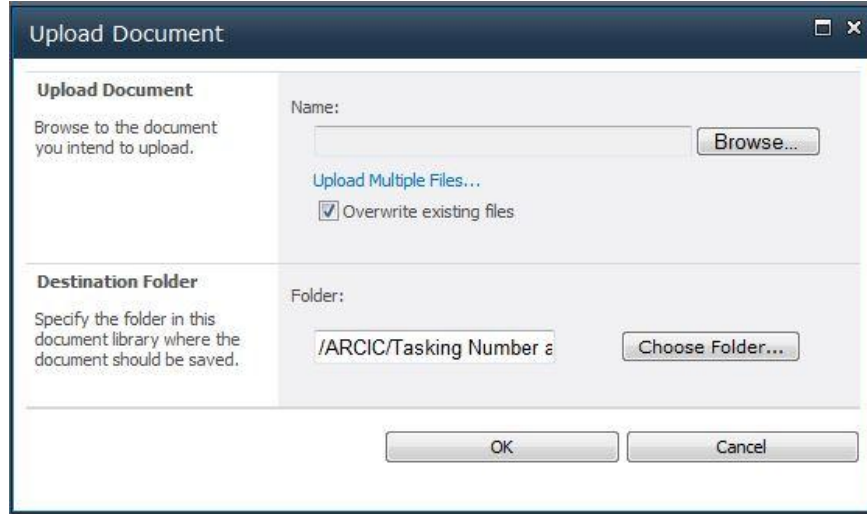

Figure H-7. Upload one or more documents

c. To upload a document, navigate to it in the drive in which it is stored and click "Open" (see Figure H-8).
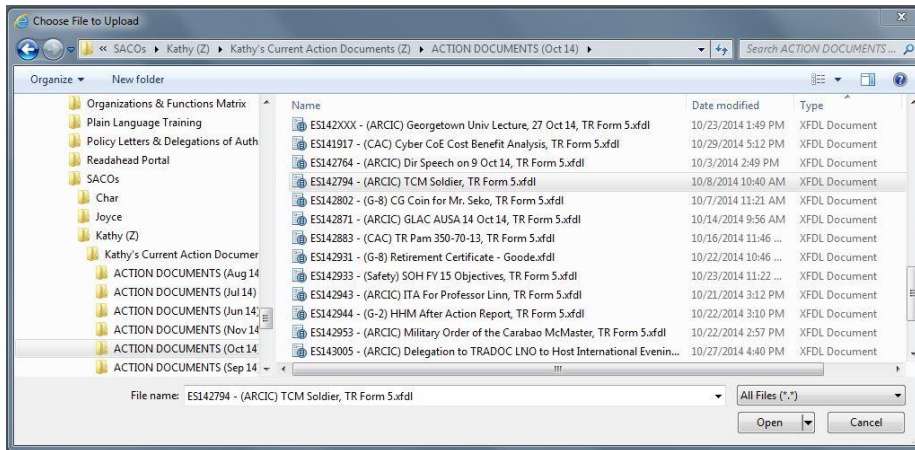

Figure H-8. Choose document(s)

d. The document(s) will be uploaded and the screen will return to the main window of the document library. Figure H-9 shows the TRADOC Form 5-E in the titled action folder.
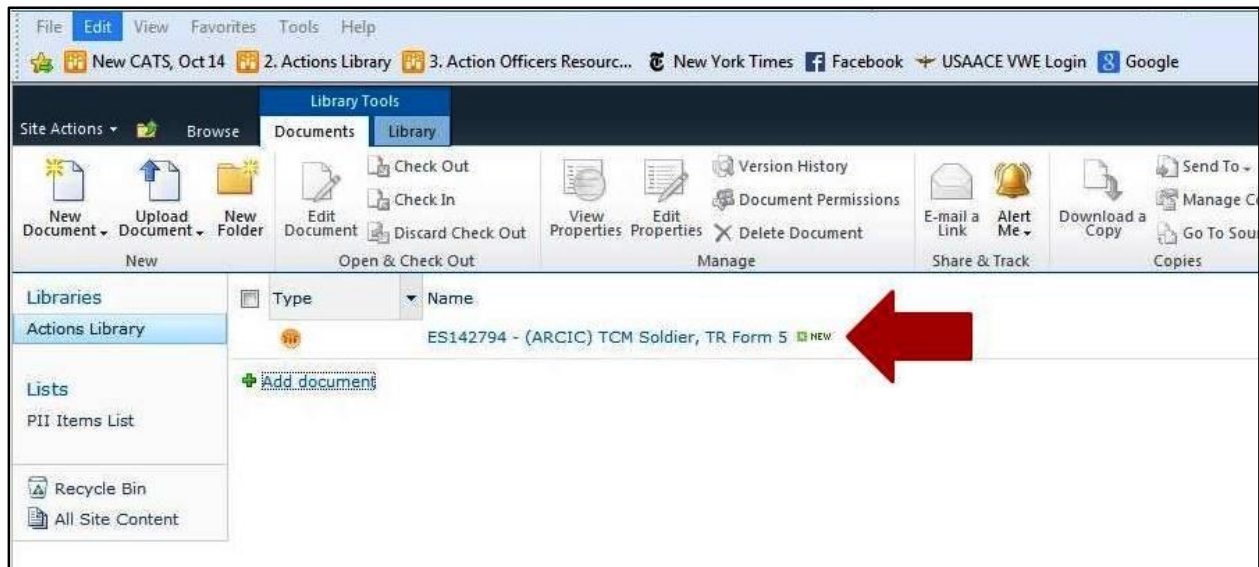

Figure H-9. Selected document is added to action folder

e. Close the browser when finished.

f. E-mail SGS that the documents have been uploaded. SGS mailbox address is usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil. Or notify G-33 at usarmy-jble.tradoc.mbx.eustis-g33-tasking@mail.mil. Title the subject line of the e-mail with the CATS number (if assigned) and the subject title (for example Subject: IN509059 - One Time Review of SSN Use and Justification).

g. Staff Actions Division SACOs will delete closed actions from Actions Library after 30 days.

Glossary

Section I
Abbreviations and Acronyms

AAR   after action report
ACOM   Army command
AKO   Army Knowledge Online
AMHS   Automated Message Handling System
AO   action officer
AR   Army regulation
ARCIC   Army Capabilities Integration Center
BLUF   bottom line up front
CAC   U.S. Army Combined Arms Center
CAO   Congressional Activities Office

CATS	Command Action Tracking System
cc	courtesy copy
CDO	Command Diversity Office
CFL	core function lead
CG	commanding general
CGAC	Command Group Actions Center
CoE	Center of Excellence
CoS	chief of staff
CPG	commander's planning group
CS	chief of staff (CATS Control Number Prefix)
CSA	Chief of Staff, Army
DA	Department of the Army
DCG	deputy commanding general
DCoS	Deputy Chief of Staff (TRADOC)
DCS	deputy chief of staff
DCS, G-1/4	Deputy Chief of Staff, Personnel and Logistics
DCS, G-2	Deputy Chief of Staff, Intelligence
DCS, G-3/5/7	Deputy Chief of Staff, Operations, Plans, and Training
DCS, G-6	Deputy Chief of Staff, Command, Control, Communications, and Computers
DCS, G-8	Deputy Chief of Staff, Resource Management
DCS, G-9	Deputy Chief of Staff, Engagement
DOD	Department of Defense
DSN	Defense Switch Network
DTA	defense travel administrator
DTS	Defense Travel System
ES	external suspense (CATS control number prefix for actions generated by proponent)
EX	G-33 external tasking prefix
ESO	Executive Services Office
EXSUM	executive summary
FOUO	for official use only
FOA	field operating activities
G-33	Deputy Chief of Staff, G-3/5/7 Current Operations
GO	general officer
HQDA	Headquarters, Department of the Army
HQ	headquarters
IN	G-33 internal tasking prefix
IPR	in-process review
JTR	Joint Travel Regulation
MOA	memorandum of agreement
MOU	memorandum of understanding
NIPRNET	non-secure internet protocol router network
OCG	Office of the Commanding General
OMS	Organizational Messaging Service
OP	G-33 operational tasking
OSJA	Office of the Staff Judge Advocate
PAO	Public Affairs Office

PII	personally identifiable information
POC	point of contact
PKI	Public Key Infrastructure
RA	readahead
RC	Reserve component
SA	Secretary of the Army
SACO	staff action control officer
SAD	Staff Actions Division
SES	senior executive service
SGS	Secretary of the General Staff
SIPRNET	secure internet protocol router network
SJA	staff judge advocate
SLA	service level agreement
SME	subject matter expert
SOOB	Staff Officer Orientation Briefing
TASKORD	tasking order
TDY	temporary duty
TEC	TRADOC Enterprise Calendar
TKE	TRADOC Knowledge Environment
TRADOC	U.S. Army Training and Doctrine Command
USA	Under Secretary of the Army
VCSA	Vice Chief of Staff, Army
VIP	very important person
VTC	video teleconference
XO	executive officer
ZIP	zone improvement plan

Section II
Terms

This section contains no entries.

Section III
Special Abbreviations and Terms

5Ws
Who, what, when, where, and why

Assist
Offices/activities that help or support the lead in preparing the final tasking deliverable.

Designated organization POC(s)
The designated administrative individual, or team, within subordinate organizations, special activities, FOAs, schools and centers, and HQ TRADOC who interacts with the SGS SAD and G-33 on behalf of their organization.

Lead
Office/activity with the responsibility for preparing, coordinating, and submitting a final tasking deliverable by the assigned suspense date. This includes identifying and acquiring required resources (for example personnel, funding, facilities, etc.) for mission accomplishment.

Mission analysis
Evaluation and assessment to determine the specified, implied, and essential tasks; reason for GO involvement; identify critical facts and assumptions and available resources. Mission analysis is performed to varying degrees at different levels when completing an action (see fig 2-3). For example, TRADOC Operations (G-33) provide a mission statement to responsible organizations (lead and assists), including the 5Ws, purpose, action, and reason based on a brief version of mission analysis using available information with minimal or no research. At the subject matter expert level, specified or implied tasks are developed further.

Proponent
The proponent is the organization (command or staff) responsible for initiating, preparing, and coordinating actions and correspondence.

Subordinate Organizations
Refers to all core function leads (Army Capabilities Integration Center, U.S. Combined Arms Center, U.S. Army Cadet Command, U.S. Army Recruiting Command, and U.S. Army Center for Initial Military Training), special activities, field operating activities, schools, and centers.

Tasking or Tasker
Any action originating from higher HQ; TRADOC CG; TRADOC activities or subordinate commands; HQDA; other services; outside agencies; Congress; the White House; and the general public that requires resources (personnel, equipment, funds) or policy/program decisions that is disseminated to a lead organization/staff office for analysis, review, and reply. Organizations/staff offices assigned as assists report to the lead for the action. Taskings are monitored through a tracking system that assigns control numbers and suspense dates.