Department of the Army
Headquarters, United States Army
Training and Doctrine Command
Fort Monroe, Virginia 23651-1047

***TRADOC Regulation 1-11**

10 June 2009

Administration

STAFF PROCEDURES

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History. This publication 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 agencies that prepare correspondence for HQ TRADOC.

Proponent and exception authority. The proponent of this regulation is the Office of the Secretary of the General Staff. 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 agency, 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

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*This regulation supersedes TRADOC Regulation 1-11, dated 17 July 2006, and rescinds TRADOC Form 30-R-E and TRADOC Form 31-R-E, dated 17 July 2006.

endorsed by the commander or senior leader of the requesting activity and forwarded through their higher HQ to the policy proponent.

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 Office of the Secretary of the General Staff (ATCS-XS), 33 Ingalls Road, Fort Monroe, VA 23651-1067.

Suggested improvements. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to the Office of the Secretary of the General Staff (ATCS-XS), 33 Ingalls Road, Fort Monroe, VA 23651-1067.

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

Summary of Change

TRADOC Regulation 1-11
Staff Procedures

This rapid action revision, dated 10 June 2009-

o Changes Headquarters, United States Army Training and Doctrine Command staff activities' titles to G-staff elements to align with principal offices at Headquarters, Department of the Army.

o Changes term to identify all Headquarters, United States Army Training and Doctrine Command staff offices to deputy chiefs of staff and chiefs of special staff offices throughout the regulation.

o Removes chapter on military aircraft and refers readers to regulations governing military air travel and courier pouch (paras 1-4b(2) and 1-4b(3)).

o Updates internal and external tasking charts (figs 2-1 and 2-2) and adds chart outlining external tasking process for subordinate commands and affiliated agencies (fig 2-3).

o Prescribes procedures for use of Headquarters, Department of the Army Form 5 (Army Staffing Form) (para 2-3b(12) and app D).

o Requires action officers to prepare letters of appreciation/commendation within 15 days of event (previously within 30 days of event) (para 2-3b(16)).

o Identifies memorandums of agreement/memorandums of understanding between Headquarters, United States Army Training and Doctrine Command staff organizations and organizations external to United States Army Training and Doctrine Command as documents requiring Deputy Commanding General/Chief of Staff approval (para 2-5d).

o Prescribes United States Army Training and Doctrine Command Form 712-R-E (Request for Official OCONUS Temporary Duty Travel) for use by Headquarters, United States Army Training and Doctrine Command personnel (para 2-5o).

o Adds United States Army Maneuver Support Center and Centers of Excellence to United States Army Training and Doctrine Command distribution used for correspondence (fig 2-7).

o Changes level of approval for urgent suspenses of less than 30 days from Deputy Commanding General/Chief of Staff to the grade of colonel, general schedule Department of the Army civilian in the grade of 15, or equivalent (para 2-8b).

o Updates procedures for processing congressional inquiries (para 2-8g).

o Changes United States Army Training and Doctrine Command standard font from Courier or Courier New 12 to Arial 12 for consistency with Headquarters, Department of the Army (para 2-14).

o Prescribes United States Army Training and Doctrine Command Form 5, Transmittal, Action and Control that supersedes United States Army Training and Doctrine Command Form 30, Transmittal, Action and Control and United States Army Training and Doctrine Command Form 31, Transmittal, Action and Control (para 3-3).

o Clarifies that an information paper should not include a decision statement (fig 3-6).

o Discontinues the discussion paper format, the information paper format suffices in its place (para 3-7).

o Updates Headquarters, United States Army Training and Doctrine Command/Fort Monroe tenant conference facilities (table 4-1).

o Adds suggestions for recognizing contractors performing valuable work (para 5-2d).

o Prescribes guidance for processing military and civilian evaluations that require United States Army Training and Doctrine Command Commanding General or Deputy Commanding General action (chap 6).

o Prescribes guidance for organizational e-mail account configuration (para 7-3).

o Codifies 30-day suspense for submitting an after action report at the conclusion of special/ethnic observances (table 9-1).

o Prescribes payment of fees and purchase of recognition items for speakers/ participants for special/ethnic observances (para 9-3i).

o Prescribes procedures for processing individual travel authorizations requiring Deputy Commanding General/Chief of Staff approval (chap 10).

o Adds information and instructions on the United States Army Training and Doctrine Command Master Activities Calendar, and the TRADOC Master Planning Calendar (chap 11).

o Prescribes the requirement of a visitor template for all visitors to United States Army Training and Doctrine Command to complete (except foreign visitors) as an addition to readaheads (para C-3j).

o Prescribes the District of Columbia abbreviation as DC, when used in an address (para E-1).

o Adds guidance on accessing public distribution lists (app H).

o Changes procedure for organizations on Fort Monroe to submit correspondence going to the Command Group for approval/signature. Designated organization point of contact will upload electronic versions of staff actions IAW appendix I.

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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 signature, and compliance with established policies. Enforce policies, regulations, and instructions governing correspondence for TRADOC.

(3) Serve as primary tasking authority for all non-operational taskers generated by the Commanding General (CG) and Deputy Commanding General (DCG)/Chief of Staff (CoS) to include CG and Chief of Staff (CS) taskers. 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 (see para 2-8).

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

(6) Maintain the SGS Web site (http://www.tradoc.army.mil/sgs/).

(7) Conduct monthly staff officer orientation briefing (SOOB).

(8) Provide protocol support to TRADOC events hosted by the TRADOC CG and DCG/CoS.

(9) Provide protocol advice to the staff and subordinate commands and organizations on protocol-specific matters.

(10) Schedule the TRADOC Command Conference Room (CCR) and Morelli Auditorium (see para 4-1a).

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) actions not generated by the TRADOC Command Group (see para 2-3d) in accordance with (IAW) TRADOC Regulation 10-5, chapter 12.

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

(3) Designate a primary and alternate courier to transport the HQ TRADOC Priority Mail Pouch (see TRADOC Memo 1-2).

c. The DCS, G-1/4 will process awards IAW chapter 5.

d. The DCS, G-2 Special Security Office (SSO) will provide guidance on and store Eyes Only messages (see para 7-2c(2)).

e. DCSs and Chiefs of Special Staff will-

(1) Encourage incoming personnel to review DCG/CoS Web site (http://www.tradoc.army.mil/cofs/) 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.

f. The Chief, Congressional Activities Office (CAO) will monitor and provide assistance on all congressional actions (see paras 2-8g and B-4c). See the CAO Web site for additional guidance and information (http://www.tradoc.army.mil/cong/).

g. The Director, Fort Monroe Directorate of Human Resources (Military) will-

(1) Control and process incoming/outgoing classified mail/correspondence (see para 8-1).

(2) Distribute incoming/outgoing mail/correspondence (see para 8-2a).

h. The Chief, Fort Monroe Public Affairs Office (PAO) will provide protocol support for Women's Equality Day, Prisoner of War (POW)/Missing in Action (MIA) Recognition Day, and National Disabilities Month (see para 9-2).

i. Executive officers (XOs) and SGSs at major subordinate organizations (MSOs), special activities and field operating activities, schools and centers, and HQ TRADOC will-

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

(2) Appoint designated organization POCs.

(3) Provide a designated organization POC list (name, e-mail address, and phone number) to the TRADOC SGS (Staff Actions Division) (SAD) and update as necessary.

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

j. Designated organization POCs will upload documents to the TKE Web site (for CG CS, IN, EX, OP taskers, and ES actions) IAW appendix I.

k. Action officers (AOs) will prepare and process TRADOC correspondence in compliance with regulatory guidance.

Chapter 2
Staff Policy and Procedures

2-1. Correspondence

Army Regulation (AR) 25-50 prescribes policies, procedures, and standard formats for preparing and processing Army correspondence. It is available on the Army Publishing Directorate (APD) Web site at http://www.apd.army.mil/pdffiles/r25_50.pdf. This regulation prescribes guidance specific to TRADOC.

a. Prepare correspondence for DCG/CoS signature, unless directed otherwise.

b. Prepare correspondence for CG and/or DCG/CoS signature in final form.

c. Use TRADOC letterhead stationery and the proponent's office symbol for all formal memorandums for Command Group signature. Use CG and DCG/CoS letterhead stationery for letters to civilians, members of congress, and dignitaries. Use office titles in lieu of office symbols on DCG/CoS letters. Do not use either office titles or office symbols on CG's letters; the space under "Reply to the Attention Of" should remain blank. Electronic letterhead templates are available on the TRADOC Web site (http://www.tradoc.army.mil/Publications.htm).

d. Present the authorized slogan **Victory Starts Here!** as the last paragraph in letters, memoranda, or messages of a complimentary, positive nature going to individuals and/or higher or subordinate commands. Use of the slogan is optional; 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 (Transmittal, Action and Control) for all correspondence (hard copy or electronic) going to the Command Group.

h. Staff offices must route actions through the SGS, who will assign a CATS control number, proof and edit, and forward the correspondence to the Command Group. Actions received at the Command Group without prior SGS approval will be returned to the SGS without action. Ensure you provide the SGS a copy of the action to be presented for CG or DCG/CoS signature for review prior to a briefing so SGS can proofread. Provide a copy of signed correspondence and TRADOC Form 5 to the SGS for official files following the briefing IAW appendix I.

i. Command Group Action Center (CGAC) will date correspondence the Command Group signs (if not dated at time of signature) and return the correspondence to the appropriate staff office for mailing/dispatch. A copy of the correspondence will be scanned and placed in the CATS tasker library. Proponents are responsible to maintain their records IAW AR 25-400-2.

j. Provide executive summaries (EXSUMs) and/or tasker updates to SGS on TRADOC Form 5. SGS will review and forward to Command Group. Type EXSUMs on TRADOC Form 5 in the discussion section of block 7 (instead of attaching it as a tab). Upload TRADOC Form 5 (containing the EXSUM and appropriate digital signatures) to the TKE Web site IAW appendix I. E-mail TRADOC SGS at monr.atcs@conus.army.mil when TRADOC Form 5 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 or DCG/CoS, 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) CG XO.

(c) Assistant Chief of Staff (ACoS).

(d) DCG/CoS XO.

(e) SGS or Deputy SGS to track response/close tasker.

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

(a) ACoS.

(b) DCG/CoS XO.

(c) SGS or Deputy SGS to track response/close tasker.

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

l. Ensure interim policy or procedural guidance messages or memorandums are coordinated and incorporated into the publication within 6 months of issuance, IAW 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 will accompany all CG correspondence, whether for information, signature, or approval (see para 3-3).

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. 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 SGS via e-mail at monr.atcs@conus.army.mil, who will forward to the CG, and CC the DCG/CoS. 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 2-1j.

(2) For detailed actions requiring more than 5 duty days to complete, upload TRADOC Form 5 (containing the EXSUM and appropriate digital signatures) to the TKE Web site IAW appendix I. E-mail TRADOC SGS at monr.atcs@conus.army.mil when TRADOC Form 5 has been uploaded, be sure to include EXSUM title in the subject line. TRADOC SGS will then forward it to the CG, with CC to individuals listed in paragraph 2-1j(1). Provide current status and way ahead with milestones to complete the tasking.

(3) When delivering responses to CG actions to SGS, maintain positive control to ensure expeditious processing through the DCG/CoS to the CG by the suspense date.

e. To provide CG proposed draft e-mail responses for dispatch:

(1) Send draft e-mail, along with e-mail address of recipient, to the CG's XO, with a CC to TRADOC SGS at monr.atcs@conus.army.mil and DCG/CoS.

(2) Use the following guidelines when preparing draft e-mails for the CG:

(a) Short, personal introduction to the addressee. Example: "Sir, appreciate you taking the time to visit Fort Victory yesterday. The Soldiers and instructors enjoyed your talk, and I understand the question and answer session was very well received. Amos Halftrack indicated you had some questions about the classroom renovation, and I would like to take a few moments to outline what TRADOC is doing to address your concerns."

(b) Bottom line up front (BLUF). State the answer as TRADOC sees it, up front, to prevent wasting the addressee's time. Example: "The classrooms you saw are the last scheduled for renovation. Completion is contingent upon Department of the Army (DA) releasing $15 million (M), currently withheld."

(c) Analysis. This key piece is not simply a history lesson, but explains why the CG should become personally involved. As applicable, address the implications for the Army of accepting or rejecting the TRADOC position. Example: "Release of $15M by 14 May 07 is essential to fully realize our vision of 21st century classrooms throughout TRADOC. Of the $50M invested in classroom renovation since 2005, $7.5M was provided from within TRADOC's already limited budget. We absorbed this level of funding in the past, with some painful tradeoffs in the length and content of the Officer Basic Course, as well as Advanced Noncommissioned Officers' Course. Funding the final $15M from within the TRADOC budget will force us to either further reduce instructor contact hours in both courses or eliminate the field training exercise from Officer Basic Course. Either option is unacceptable, since it will provide the field inadequately trained graduates."

(d) Restate the answer, elicit addressee's support (if applicable), and end with a short, personal close. Example: "In conclusion, the key to resolving classroom renovation issues at Fort Victory is DA's release of $15M by 14 May 09. I stand ready to discuss this further with you as you desire."

f. 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.

2-3. Staff action process

a. Coordinating staff and MSOs representatives will review the daily CATS Status Report to monitor suspense dates for their respective taskers and ensure they are met on time.

b. AOs 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 of ES actions prior to processing actions.

(2) Prior to attending the SOOB, review documents on the DCG/CoS Web site (https://tradocsecapps.army.mil/events/cofs/cofsdocsres.htm or https://tradocsecapps.monroe.army.mil/events/cofs/), 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. 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) If the organization assigned as lead believes the tasker is outside of their area of responsibility, they will, within 2 duty days of receipt of tasker, contact the XO of the organization they consider the appropriate lead via e-mail (with a CC to the TRADOC SGS) and 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 identified as manager of the tasker) of their acceptance/rejection. Transfer must occur within 3 duty days of the initial assignment of the tasking. If after 3 days no agreement is reached, Chief, SAD will determine the lead.

(5) Provide maximum help to subordinate commands/activities. Ensure instructions to subordinate commanders are clear, concise, and leave no doubt of the objectives. Act on subordinate commander requests or recommendations promptly. If review of the subordinate command request or recommendation results in disapproval, 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 school's perspective. Explain action fully and in a positive manner, pointing out alternatives, if available. Disapprovals/negative responses to subordinate activities and/or other commands outside of TRADOC require CG and/or DCG/CoS approval.

(6) 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.

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

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

(9) Complete coordination with MSOs, special activities and field operating activities, schools and centers, HQ TRADOC organizations, and other Army commands (ACOMs) IAW TRADOC Regulation 10-5 and paragraph 2-11. Ensure coordinating

office is commensurate with level of signature. Include directorate, point of contact (POC), date and concur or nonconcur on TRADOC Form 5. 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.)

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

(11) Ensure the distribution is appropriate (see para 2-12).

(12) Ensure staff action includes a completed TRADOC Form 5. Staff actions in response to HQDA taskers must also include HQDA Form 5 (Army Staffing Form) located at the APD Web site (http://www.apd.army.mil/pub/eforms/pureedge/hqda5.xfdl).

(13) Obtain approval of the proper authority within respective directorate or MSO.

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

(15) Provide their designated organization POC an electronic copy of all documents to upload IAW appendix I. Designated organization POC will make administrative corrections, but will not change the content of the correspondence.

(16) Prepare letters of appreciation/commendation expeditiously (within 15 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 letter or memorandum through the SGS to the Command Group for signature. Include a complete list of addressees in mailing format, with proposed salutations for approval. Once approved, the action is returned to the proponent to complete the remaining letters/memorandums. Upload the entire package and notify SGS for signatures on the remaining correspondence.

(b) Prepare Command Group invitations to major events early enough so they may be mailed 30 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.

(17) Determine method of delivery of signed correspondence or other information to addressees, based on sensitivity of contents, suspense dates, etc., to ensure expeditious receipt of correspondence (see para 8-3). Options include e-mail, fax,

regular mail, express mail, and courier (to the Pentagon). See appendix H 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 and CC the counterparts. On actions requiring chiefs of staff attention due to subject matter/sensitivity, CC the **Chiefs-TRADOC** distribution list.

(b) E-mail critical and/or strategic-level actions to the TRADOC DCS front office and/or Assistant Deputy Chief of Staff (ADCS) or Chief of Special Staff Office to dispatch via the **Commanders/Commandants-TRADOC** or **Chiefs-TRADOC** distribution lists, with CC to the **SGS-TRADOC** distribution list. AOs are responsible for ensuring delivery and receipt of actions.

(c) When forwarding requests for information/taskers to the **TRADOC Staff Principals** distribution list, CC the **XO-TRADOC** list for tracking purposes.

(d) When the CG or DCG/CoS signs correspondence with a command-directed suspense for subordinate activities, an implied task for the DCS is to follow through with an EXSUM informing the CG or DCG/CoS of the status or that the deadline was met and mission is complete. Submit the EXSUM to the TRADOC SGS at monr.atsc@conus.army.mil with the TRADOC Form 5. The SGS will forward to the Command Group.

(18) Upload a copy of the final response IAW appendix I when a direct reply is received and notify TRADOC SGS. For example, actions addressed to a HQDA agency that result in a direct reply to the proponent.

(19) Maintain and manage life-cycle recordkeeping requirements for the record copy of correspondence and electronic records IAW AR 25-400-2.

(20) While coordinating documents, mark draft versions with the “For Official Use Only” (FOUO) designation IAW AR 25-55, paragraph 4-100. Exemption 5 applies to draft documents, as they are predecisional and a deliberative part of the decisionmaking process. Mark draft documents FOUO IAW 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. Remove FOUO markings from correspondence before uploading the electronic file IAW appendix I.

c. Proponents will upload documents associated with CG and CS taskers, or ES actions for Command Group approval/signature IAW appendix I. SACOs will make required administrative corrections, but will not change the content.

d. Chief, SAD, OSGS will:

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

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

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

(b) Assign staff lead/assist(s) and immediately e-mail the CG and DCG/CoS taskers/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 original to AO for dispatch.

(7) Schedule and conduct monthly SOOBs in order to familiarize newly assigned AOs with staff procedures. Maintain essential information related to the HQ organization on the DCG/CoS SOOB Web site for AO review and reference.

(8) Schedule and conduct XO breakfasts every other month to provide forum for enhanced communication between staff sections.

(9) Provide support for large group and small group staff meetings as prescribed by CG and DCG/CoS.

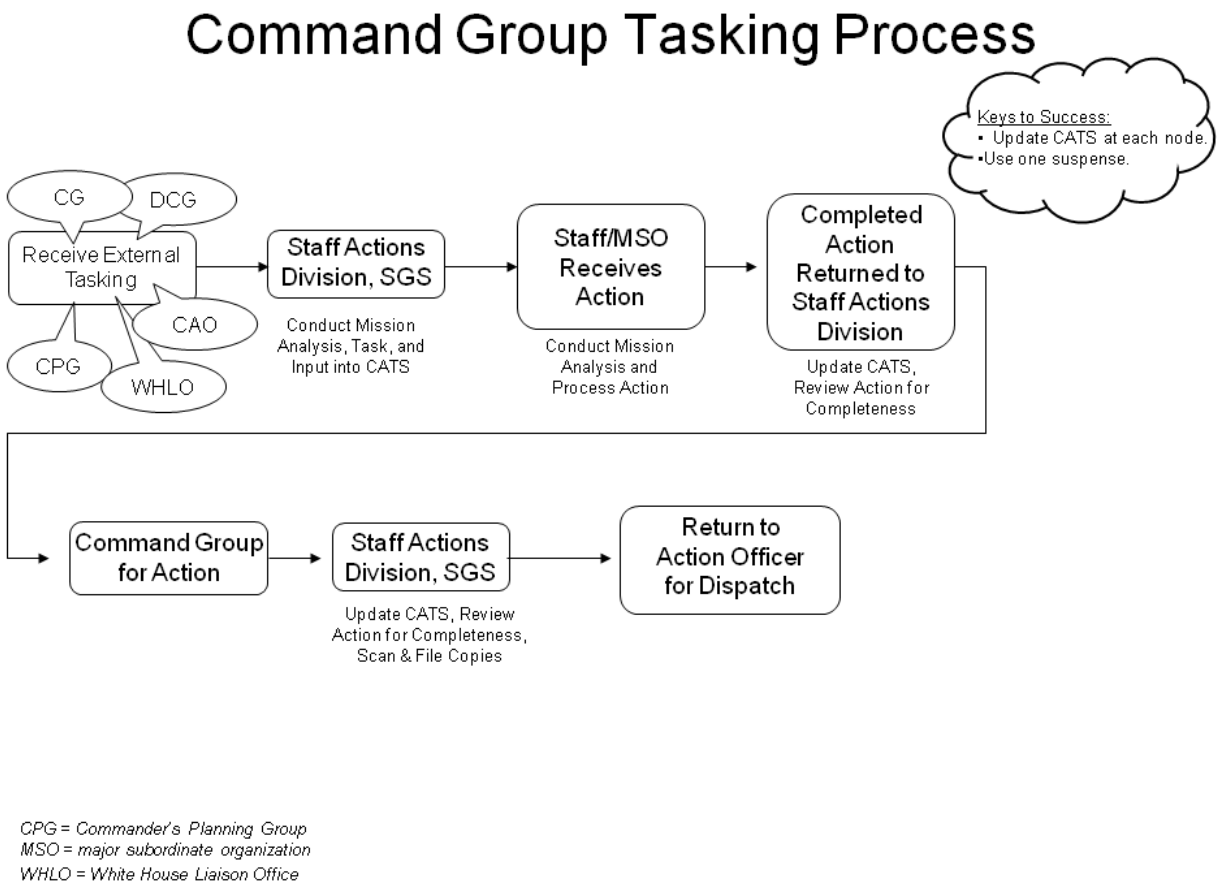


Figure 2-1. Command Group tasking process

e. G-33 will:

(1) Process and track OP and organizational taskers until completed, to include:

(a) EX taskers (originating outside TRADOC to elements within TRADOC, except for White House and congressional inquiries.

(b) IN and OP taskers:

- Originating within TRADOC, except TRADOC CG, DCG/CoS, or commander's planning group (CPG) actions.
- External to originator's organization that require significant resources, involve changes in policy, generate new policy, or require formal concurrence/ comment. Examples are a TRADOC MSO tasking another; a TRADOC MSO tasking the HQ TRADOC staff; a TRADOC MSO/HQ TRADOC tasking a special activity; or a HQ TRADOC staff office tasking another HQ TRADOC staff office.

(c) Figures 2-2, 2-3, and 2-4 are flow charts of the EX and IN tasking process. See TRADOC Regulation 10-5, paragraph 12-1b for additional information.

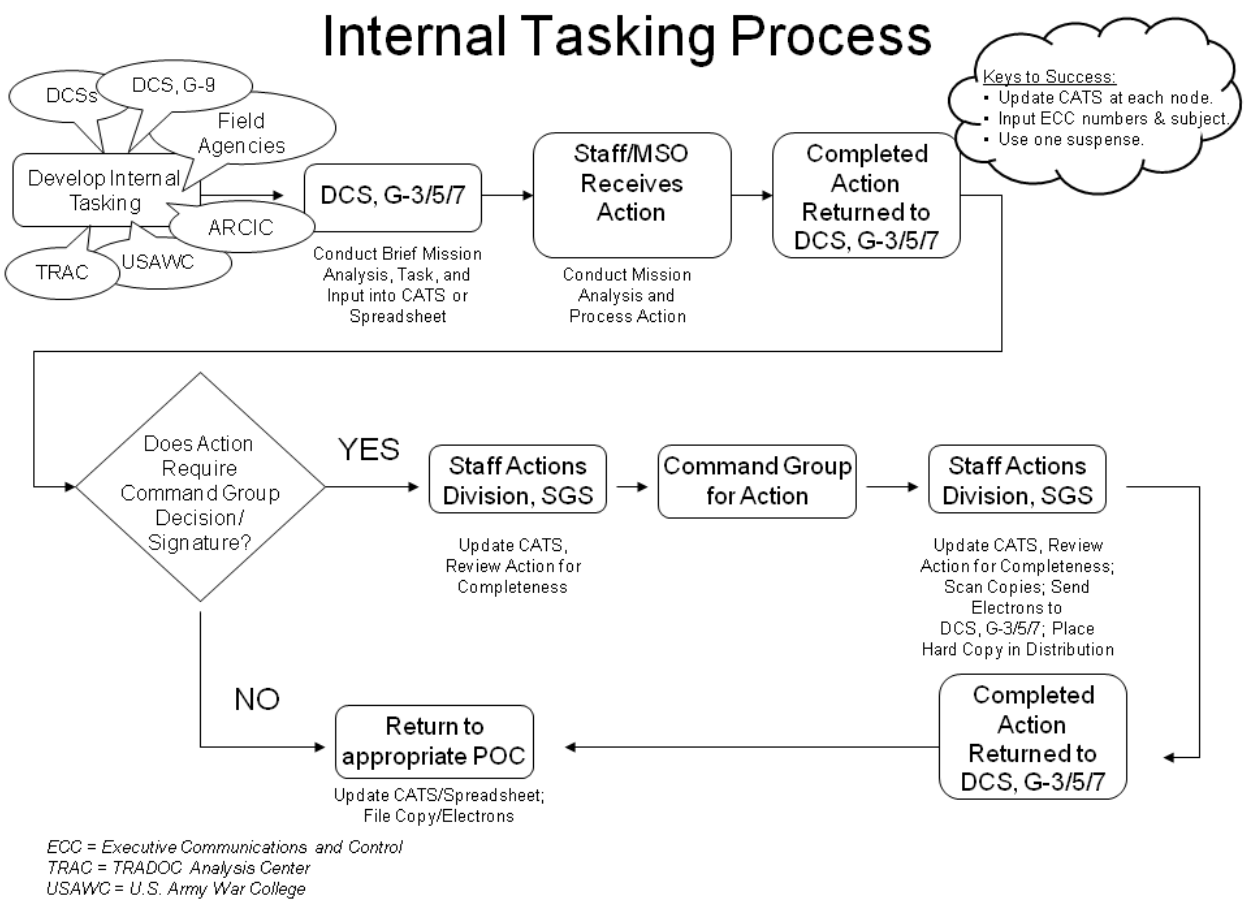


Figure 2-2. DCS, G-3/5/7 Current Operations (G-33) internal tasking process

(2) Receive the complete tasking in the current TRADOC tasking order (TASKORD) format from the originator of the tasking.

(3) Conduct brief mission analysis, scan, assign staff lead/assists, and immediately dispatch taskings to respective designated organization POCs, coordinating staff, and AO (if known) via e-mail tasking, to include CATS control number, lead and assist organizations, and initial suspense date.

(4) Disseminate taskings within 1 duty day of receipt.

(5) Follow up with a phone call to the tasked office to confirm receipt and AO's acknowledgement of the short suspense for quick-turnaround taskers (less than 1 week). Once received, AOs will comply with staffing procedures in paragraph 2-3b.

(6) Monitor correspondence to ensure appropriate actions are taken.

(7) Review all correspondence for administrative completeness and correctness, appropriate coordination, proper level of signature, and compliance with established policies.

(8) Ensure TRADOC responses to Executive Communications and Control (ECC) taskers are faxed or e-mailed to the ECC and the AO provides an approved copy to the G-33 for filing.

(9) Keep appropriate electronic file copies of all completed actions in CATS Tasker Library, update CATS to close action, and return original to originator for dispatch/filing.

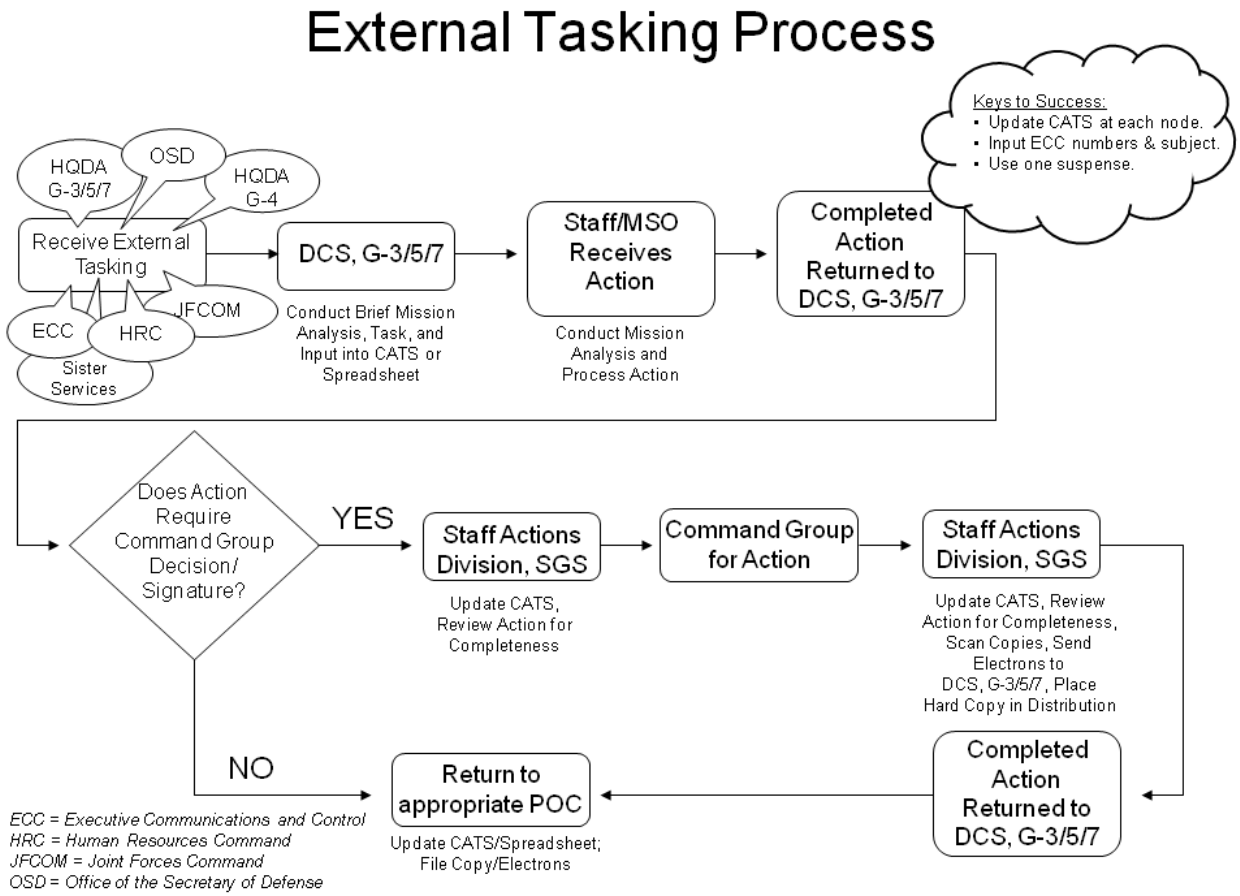
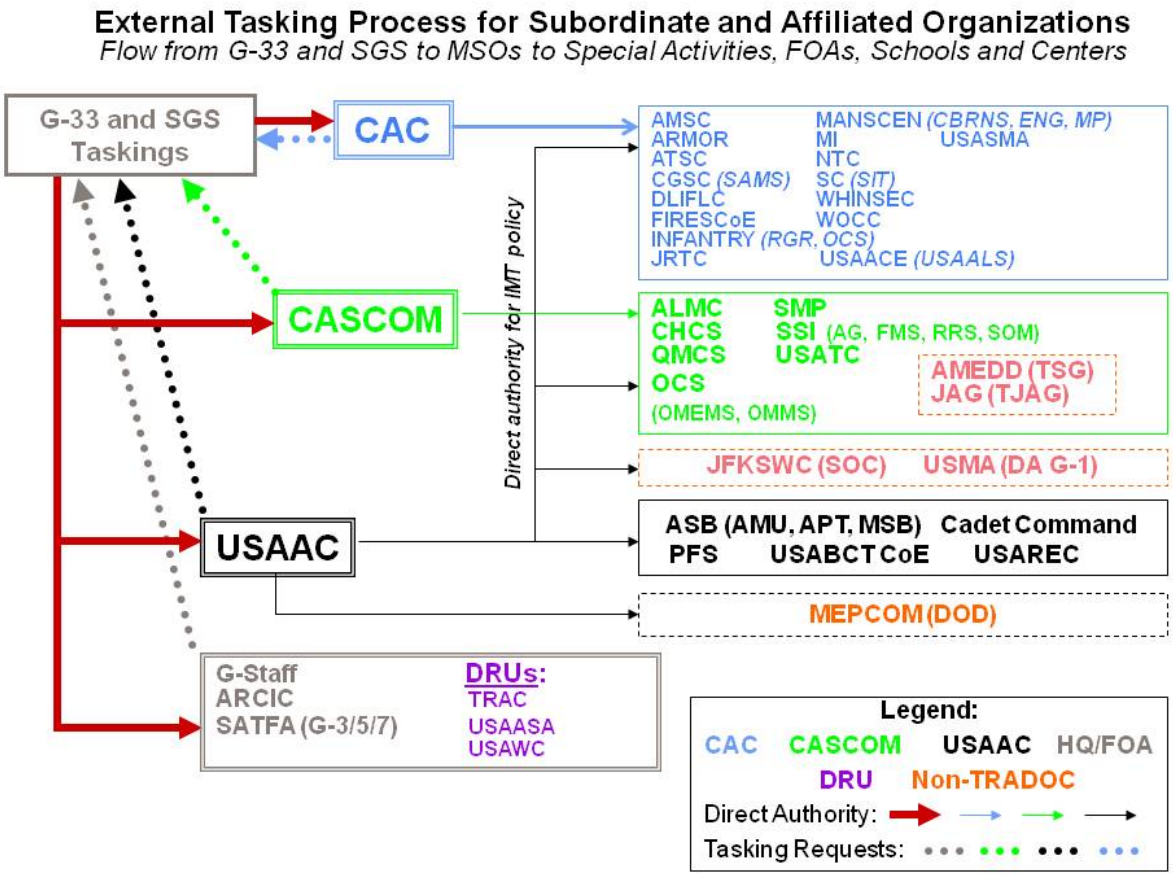


Figure 2-3. G-33 external tasking process



Key:

ADA	*Air Defense Artillery*
AG	*Adjutant General*
ALMC	*Army Logistics Management College*
AMEDD	*Army Medical Department Maintenance School*
AMSC	*Army Management Staff College*
AMU	*U.S. Army Marksman Unit*
APT	*U.S. Army Parachute Team*
AR	*Armor*
ASB	*Accessions Support Brigade*
AWC	*Aviation Warfighting Center*
CAC	*U.S. Army Combined Arms Center*
CGSC	*Command and General Staff College*
CHCS	*Chaplain Center and School*
CBRNS	*U.S. Army Chemical, Biological, Radiological, and Nuclear School*
DLIFLC	*Defense Language Institute Foreign Language Center*
DSS	*Drill Sergeant School*
ENG	*U.S. Army Engineer School*
FIRES CoE	*Fires Center of Excellence*
FMS	*Financial Management School*
FOA	*Field Operating Agency*
IMT	*Initial Military Training*
JAG	*Judge Advocate General*
JFKSWC	*John F. Kennedy Special Warfare Center*
JRTC	*Joint Readiness Training Center*
MANSCEN	*U.S. Army Maneuver Support Center*
MEPCOM	*Military Entrance Processing Center*
MI	*Military Intelligence*
MP	*Military Police*
MSB	*Mission Support Brigade*
NTC	*National Training Center*
OCS	*Ordnance Center and Schools*
OMEMS	*Ordnance Munitions and Electronic*
OMMS	*Ordnance Mechanical Maintenance School*
QMCS	*Quartermaster Center and School*
RNG	*Ranger*
RRS	*Recruiting and Retention School*
SAMS	*School for Advanced Military Studies*
SATFA	*Security Assistance Training Field Activity*
SC	*U.S. Army Signal Center*
SIT	*School of Information Technology*
SMP	*School of Military Packaging*
SOC	*Special Operations Command*
SOM	*School of Music*
TJAG	*The Judge Advocate General*
TRAC	*TRADOC Analysis Center*
USAAC	*U.S. Army Accessions Command*
USAALS	*U.S. Army Aviation Logistics School*
USAACE	*U.S. Army Aviation Center of Excellence*
USAASA	*U.S. Army Aeronautical Services Agency*
USABCT CoE	*U.S. Army Basic Combat Training Center of Excellence*
USAREC	*U.S. Army Recruiting Command*
USASMA	*U.S. Army Sergeants Major Academy*
USAWC	*U.S. Army War College*
USMA	*U.S. Military Academy*
USATC	*U.S. Army Transportation Center*
WHINSEC	*Western Hemisphere Institute for Security Cooperation*
WOCC	*Warrant Officer Career College*

Figure 2-4. External tasking process for subordinate and affiliated organizations

f. Lead organizations will:

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

(2) Construct the tasking following the current TRADOC TASKORD format.

(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 12).

(4) Use the Telephone Directories/Rosters provided at SGS SAD Web site 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) Coordinate and approve requests for extension and CC G-33 at monr.eoctasking@conus.army.mil on all extension requests and status.

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

h. Procedures to request transfer of lead:

(1) Within 2 duty days of receipt of tasker if the organization assigned as lead believes the tasker is outside of their area of responsibility, they will contact the XO of the organization they consider the appropriate lead via e-mail (with a CC to the G-33 Tasking Office at monr.eoctasking@conus.army.mil) and 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 monr.eoctasking@conus.army.mil) of their acceptance/rejection. Transfer must occur within 3 duty days of the initial assignment of the tasking.

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

(3) If the tasked organization cannot gain concurrence from the new organization within 3 duty days, TRADOC DCS, G-3/5/7 will make the final decision on the organization to assume the lead for completing the tasker.

i. Requesting extensions.

(1) When proponents cannot meet suspenses, they will request an extension via e-mail citing control number, subject, and rationale for extension to theG-33 Tasking Office at monr.eoctasking@conus.army.mil. Base the rationale for requesting an extension upon AO/subject matter expert (SME) analysis of the tasker and what is required to prepare the response. (For example, requesting data from the field,

coordination, availability of DCS/coordinating staff for approval, etc.) For actions with an external suspense, proponents will ensure the external suspense is extended based upon coordination between the AO/SME and the external POC before requesting G-33 extension. Early-on coordination between the HQ TRADOC AO/SME and the external POC facilitates clear communication and understanding of the required action and timeline.

(2) Interim responses are encouraged and will contain acknowledgment of the requirement/request, plan of action/approach, milestones, and an estimated date of completion.

2-4. Readaheads (RAs)
RAs are a special type of staff action forwarded with the TRADOC Form 5 (see para 3-3), 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. See appendix C for procedures to prepare RAs.

2-5. Command Group notification, review, or approval
Proponents will notify the Command Group of these specific items of interest requiring Command Group notification, review, approval, and/or signature include:

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

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

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

d. Memorandums of agreement/understanding between HQ TRADOC staff organizations and organizations external to TRADOC require DCG/CoS approval.

e. Correspondence to and from:

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

(2) Any commander or deputy commander of an Army command (ACOM), Chief of Staff, Army (CSA); or Vice Chief of Staff, Army (VCSA).
Note: Responses for CSA and VCSA also require a HQDA Form 5.

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

(4) TRADOC commanders or school commandants.

f. Nonconcurrences and disapprovals.

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

(2) Disapproval of actions proposed by subordinate commands (see para 2-3b(5)).

g. 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 DCG/CoS approval. 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.

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

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

j. Reports of significant financial or property irregularities.

k. Serious accidents or incidents involving members of the command or occurring at MSOs, special activities, field operating activities, schools and centers, and HQs TRADOC IAW TRADOC Regulation 1-8.

l. 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).

m. Assignment, reassignment, or relief-for-cause actions involving senior officers or noncommissioned officers (NCOs).

n. 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.

o. Requests for approval of outside continental United States (OCONUS) or conference travel. See Department of Defense (DOD) 4500.54-G, Department of Defense Foreign Clearance Guide (https://www.fcg.pentagon.mil/), and AR 55-46, chapter 8, for guidance on submitting requests for OCONUS or conference travel.

(1) 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 DCS, G-1/4 (ATBO-BP) at least 60 days prior to travel.

(2) 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.

(3) Coordinating staff will notify the TRADOC CG of the reason and intent for all OCONUS temporary duty travel (TDY). The CG or DCG/CoS may want to meet with coordinating staff prior to their departure.

(4) Traveler must verify current Antiterrorism Level I awareness training and completion of area of responsibility brief for country destined for travel IAW AR 525-13.

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

q. Recommended decorations and awards.

2-6. Authority line

a. When a person other than the commander signs military correspondence expressing the will of the commander, an authority line is necessary.

b. Command correspondence is military correspondence the CG does not sign that contains command decisions, policy, official recommendations, suspense dates, taskings directed to subordinate commands, or addressed outside TRADOC. Such correspondence will bear a "FOR THE COMMANDER" authority line with the DCG/CoS signature block.

c. Omit the authority line when there is a phrase in the text such as "The Commanding General received your 2 Jan 06 memorandum, and asked that I respond on his behalf."

d. DCSs and chiefs of special staff offices may sign technical correspondence totally within their area of responsibility. Technical correspondence cannot establish policy or impose suspenses and remains within TRADOC. DCSs and chiefs of special staff offices may delegate signature authority for technical correspondence within their organization. When delegated, use an authority line to show for whom the person is signing; for example, FOR THE DEPUTY CHIEF OF STAFF, G-1/4.
Note: In most instances, technical channel correspondence is "informational in nature" between counterparts.

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 2-5 for CG and DCG/CoS signature blocks.

b. Use "Sincerely" as the complimentary closing on all letters addressed to military and civilian equivalents or subordinates that the CG and DCG/CoS 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. The CG begins PERSONAL FOR messages to the CSA with "Sir, …" and uses "Very respectfully" as the complimentary closing. The CG generally does not use a complimentary closing on VCSA or counterpart PERSONAL FOR messages.

2-8. Suspenses

a. The Chief, SAD, OSGS, designates the proponent for all CG and CS taskers, and ES actions. G-33 designates the proponent for IN, EX, and OP taskers.

b. Urgent suspenses of less than 30 days require approval by a colonel or civilian of equivalent grade (except those higher HQ directs).

c. For suspense information regarding CG actions, see paragraph 2-2c.

d. Items for DCG/CoS approval, information, review, or signature are generally assigned a suspense of 10 duty days and a CS CATS control number.

e. When staff offices cannot meet suspenses, AOs or designated representatives will submit control number, subject, and rationale for extension to SGS at monr.atcs@conus.army.mil. Base the rationale for requesting a suspense extension upon AO/SME analysis of the tasker 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. 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.

CG

Military Correspondence	**Nonmilitary Correspondence**
MARTIN E. DEMPSEY General, U.S. Army Commanding	Martin E. Dempsey General, U.S. Army Commanding

CG (for Memorandum of Understanding)

_____
MARTIN E. DEMPSEY
General, U.S. Army
Commanding General
U.S. Army Training and Doctrine
Command

_____
(Date)

CG (for letter using CG letterhead)

Martin E. Dempsey
General, U.S. Army

DCG/CoS

Military Correspondence	**Nonmilitary Correspondence**
DAVID P. VALCOURT Lieutenant General, U.S. Army Deputy Commanding General/ Chief of Staff	David P. Valcourt Lieutenant General, U.S. Army Deputy Commanding General/ Chief of Staff

If the title requires more than one line, continue it on the third line, aligning the first character underneath the third character of the second line.

DCG/CoS (for letter using DCG/CoS letterhead)

David P. Valcourt
Lieutenant General, U.S. Army

Figure 2-5. CG and Deputy Commanding General/Chief of Staff signature blocks

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 taskers, 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) 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 SGS SACO and CAO AO 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) Delegate signature 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 Executive Office of the Headquarters, DA-level 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 monr.atcs-ca@conus.army.mil.

2-9. Note taking and suspenses

a. CG taskers. 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 offices, in coordination with the CPG, will, within 2 duty days, e-mail a summary of significant issues that arose to the SGS for dissemination, with CC to the CG XO, ACoS, and CPG. Highlight only significant CG guidance, decisions, and taskings and provide the who, what, when, where, and why (5Ws) of the event. Ensure you include the type of deliverable (for example, EXSUM, briefing, memorandum, decision memorandum, etc.). See chapter 4 for guidance on conferences and taskings.

(1) CG calendar event (office, Morelli, video teleconference (VTC), etc.). Staff lead, in coordination with CPG, submits an e-mail summary of CG decisions, taskings, and/or guidance to SGS within 2 duty days.

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

(3) CG-directed conference. Staff lead submits a summary not later than (NLT) 5 duty days in memorandum format for DCG/CoS to send to all commanders/coordinating staff (see paras 4-4 and 4-5).

(4) CG installation visits. The CPG representative compiles a comprehensive trip report to include CG decisions, taskings, and/or guidance and submits it for CG approval within 10 duty days of return from travel.

(5) CG attendance at CSA conferences. Staff lead sends a staff representative to take notes/capture taskings, unless relieved of responsibility prior to event. When the CPG Chief is present, he or she will forward CG-directed taskers, decisions, and guidance to the SGS for dissemination, with copies furnished to the CG XO, ACoS, and CPG.

(6) CG discussions en route. Recipient of decisions, taskings, and/or guidance sends an e-mail within 2 duty days to CPG Chief and SGS.

b. DCG/CoS taskers. Responsible staff offices will serve as note takers and, in coordination with the ACoS, e-mail to the 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.

2-10. Staff assistance

All taskers 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/ACoS level.

2-11. Coordination

a. Examine actions from the CG’s viewpoint and thoroughly coordinate to pull all pieces of the action together. Do not limit coordination to horizontal staffing. For example, coordinate actions impacting initial military training with the DCG, Initial Military Training; actions with legal ramifications (such as policy letters/delegations of authority, or invitational travel authorizations) with the staff judge advocate (SJA); and actions impacting NCOs/Soldiers with the TRADOC Command Sergeant Major. An action may also require coordination with subordinate and higher HQ. Ensure

coordinating offices are commensurate with the level of signature; for example, Command Group correspondence requires DCS, ADCS, or special coordinating staff level coordination. For subordinate commands, coordinate action with the respective TRADOC counterpart POC(s) and include that coordination on the TRADOC Form 5 to reduce overall processing time at HQ TRADOC.

b. Staff coordination of actions requiring CG approval and/or signature require priority handling and take precedence over routine actions. Staff sections are given 24 hours to provide their position (concurrence/nonconcurrence) on CG actions.

c. For routine actions, give activities a reasonable period of time (for example, 72 hours) to provide their position (concurrence/nonconcurrence), within the constraints of the suspense date. Request extensions to allow for required coordination. If a coordinating activity fails to submit concurrence/nonconcurrence within a reasonable period and the action comes due, submit the action to the DCG/CoS with an explanation for not achieving/completing coordination.

d. Contact the SGS and/or ACoS with questions on signature/approval authority of ES Command Group actions prior to processing actions.

e. Use telephone calls, e-mail, desktop VTC, TKE portal, and briefings to coordinate actions. To expedite coordination:

(1) Use TRADOC Regulation 10-5 to determine offices with which to coordinate (http://www.tradoc.army.mil/tpubs/regs/tr10-5.pdf). Coordinate thoroughly before submitting an action for approval or dispatch. Make every effort to resolve nonconcurrences.

(2) Establish and maintain early liaison with other AOs.

(3) Notify all interested staff offices of online document location for simultaneous staffing.

(4) Lead agency coordinating staff will initial and date TRADOC Form 5, block 8 to indicate their internal chain of approval. Possible entries could include branch chief, division chief, deputy, and director. The appropriate releasing authority should electronically sign and date the action once they have approved it for forwarding to the next appropriate office.

(5) When staffing an action for review and comment, include the respective organization’s chief or their representative's information on TRADOC Form 5, block 9. Each chief or representative will indicate their concurrence by checking the corresponding block and returning it to the originator. If the chief or representative nonconcurs with comments, include those comments at an appropriate tab. All staff actions going to the Command Group must either show coordination or on the rare occasion no coordination is required, include the statement "Coordination not required" on TRADOC Form 5, block 7, discussion section.

(6) DCSs and chiefs of special staff offices, or their deputies, who nonconcur with an action will prepare a statement of nonconcurrence, in memorandum format, listing all pertinent facts and attach it as a tab to the TRADOC Form 5. The chief or deputy who originated the staff action will personally contact the nonconcurring office chief and attempt to resolve the difference(s). If the nonconcurrence is not resolved, the originating action office will prepare a consideration of nonconcurrence in memorandum format and attach it as the last tab to the staff action. The originating AO will address each nonconcurrence separately based on its own merit; however, prepare only one consideration of nonconcurrence. DCSs and special staff office chiefs or their deputies will sign all nonconcurrences and considerations of nonconcurrence (see fig 2-6).

(7) Conditional concurrences are not authorized. Proponents will work to satisfy conditions before sending an action forward. If not resolved satisfactorily, the coordinating office will nonconcur.

(8) Concurrence with comment is only allowed to provide additional information, not to set conditions for concurrence.

f. 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, block 7, discussion section. Coordinate staff actions with RC impact with Office of the DCG, U.S. Army Reserve/Office of the DCG, Army National Guard. 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.

g. Coordinate all congressional actions with CAO and SJA prior to signature and dispatch. For further guidance, see Congressional Handbooks on the TRADOC Web site at http://www.tradoc.army.mil/Publications.htm.

h. Conduct internal and external staff coordination electronically. Internal and external staff coordination conducted electronically will be executed as extensively as hard copy staffing. Indicate on TRADOC Form 5, as appropriate, the office, rank, last name, position, concur/nonconcur, and date of coordination.

OFFICE SYMBOL (Date)

MEMORANDUM FOR RECORD

SUBJECT: CONSIDERATION OF NONCONCURRENCE

1. The first sentence will read: "I have personally discussed this matter with XXXXXXXXX, 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

h. To preclude schedule and facility conflicts, coordinate all major events, symposiums, conferences, seminars, etc., with G-33 for inclusion in the TRADOC Master Activities Calendar (TMAC).

i. Coordinate all actions impacting strategic communications with PAO, CPG, and CAO.

2-12. 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. When the CG signs correspondence going to higher HQ, do not show copies furnished to subordinates. Internal distribution or copies furnished may be listed on the file copy.

b. When addressing correspondence to all MSOs, special activities, field operating activities, schools and centers, and HQ TRADOC type distribution list as shown in figure 2-7.

Commander
U.S. Army Accessions Command
U.S. Army Combined Arms Center
U.S. Army Combined Arms Support Command
U.S. Army Maneuver Support Center
Centers of Excellence

Commandants, TRADOC Schools

Director
Army Capabilities Integration Center
U.S. Army TRADOC Analysis Center
U.S. Army Aeronautical Services Agency

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

Figure 2-7. Distribution list for correspondence addressed to TRADOC subordinate activities, and deputy chiefs of general and chiefs of special staff offices

c. The TRADOC Principal Commanders and Key Staff Officers Roster identifies TRADOC subordinate activities and key HQ coordinating staff and is located at https://tradocsecapps.army.mil/events/sgs/SgsDocsRes.htm (requires AKO logon).

d. To determine correct addresses use:

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

(2) TRADOC Message Address and Mailing List (MAML). SGS SAD posts monthly MAML updates at the SGS SAD Web site under Telephone Directories/Rosters (requires AKO logon).

2-13. 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.

2-14. Type font and size
Use Arial font, size 12 for all correspondence.

2-15. Identification of point of contact (POC)
POC information is generally placed in the last paragraph of the correspondence: military rank or civilian prefix, name, DSN and commercial telephone numbers, and e-mail address. For example, "Point of contact is Mr. Sample, Office of the DCS, G-1/4, DSN 680-XXXX, (757) 788-XXXX, joe.a.sample@us.army.mil." Do not include POC statements on correspondence going to CSA or higher.

2-16. Distinguished visitors

a. Visits to HQ TRADOC. Proponents request DCG/CoS approval for visits to HQ TRADOC and major events, via the weekly DCG event briefing. (See chapter 9 or 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 Division (ESD), OSGS, the staff lead will attend the 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 and/or DCG/CoS, as appropriate and conduct in-progress 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 TMAC.

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

b. General officers (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 ESD, OSGS via e-mail to monr.tradocesd@conus.army.mil.

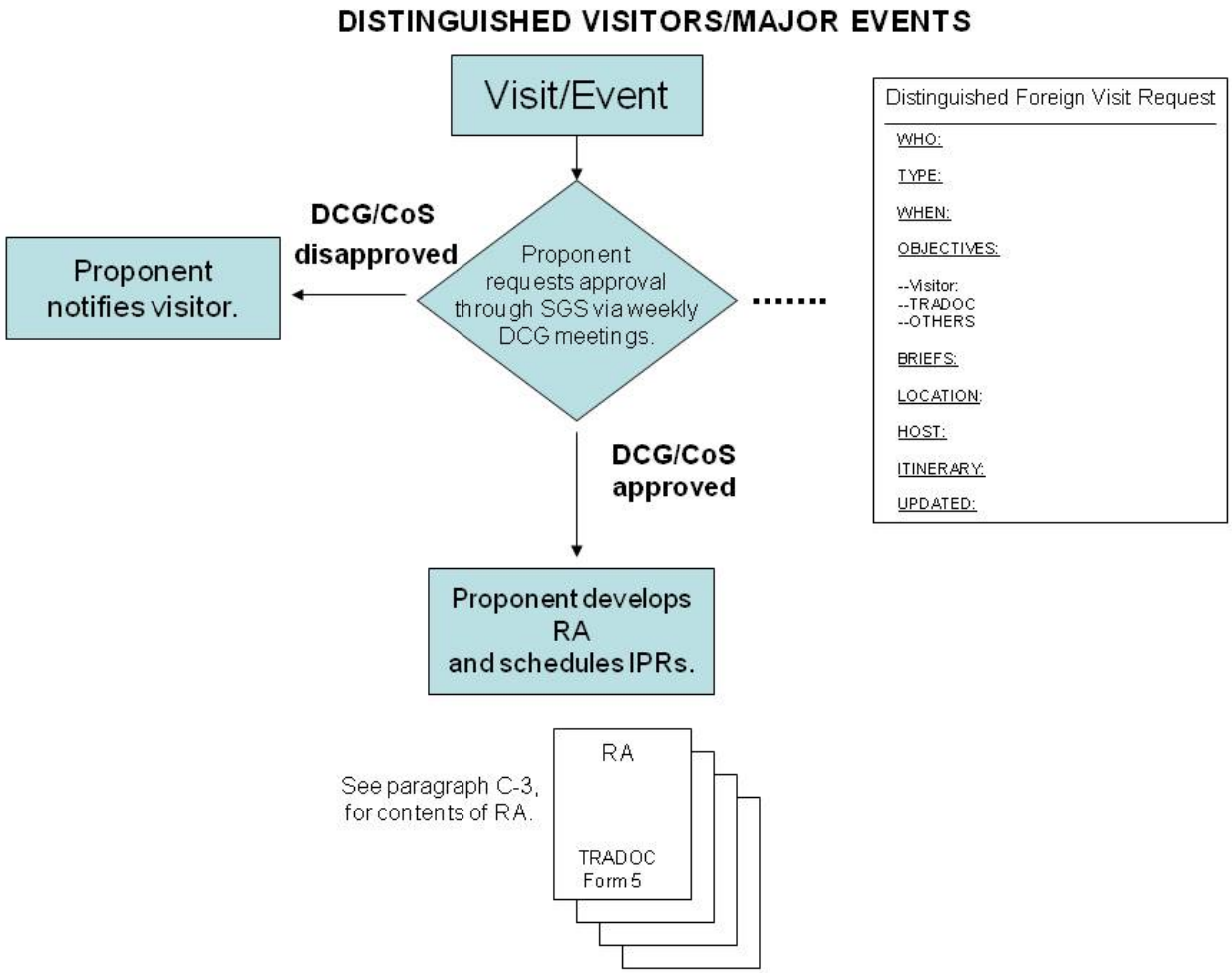


Figure 2-8. Distinguished visitors/major events

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 or DCG/CoS letterhead). Do not change or modify electronic or printed letterhead stationery IAW AR 25-30, paragraph 7-7. 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 proofing tools available (that is, spelling and grammar check) as an initial step in the proofing process. 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.

b. Use the correct font (see para 2-14), and ensure headers, footers, and page numbers are in the same font as the text.

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. Provide SGS an electronic copy of action by posting it in the CATS document library or TRADOC Knowledge Environment (TKE) Web site IAW appendix I. SACO will make administrative corrections, but return staff actions requiring substantive changes or containing inordinate amount of errors for rewrite and/or corrections. Resubmit corrected documents to SGS with the marked-up copy folded over and included at the back of the package. CATS will be updated to reflect return to lead with appropriate suspense.

3-2. Assembling a staff action

Assemble all staff actions, except RAs, as shown in figure 3-1, below. Include signature flags in packages requiring signature. Do not use plastic executive cover sheets. It is not mandatory to use "A" as the first tab, but ensure tabs are consecutive and explained in order on the TRADOC Form 5. Refer to figure C-1 when assembling RAs.

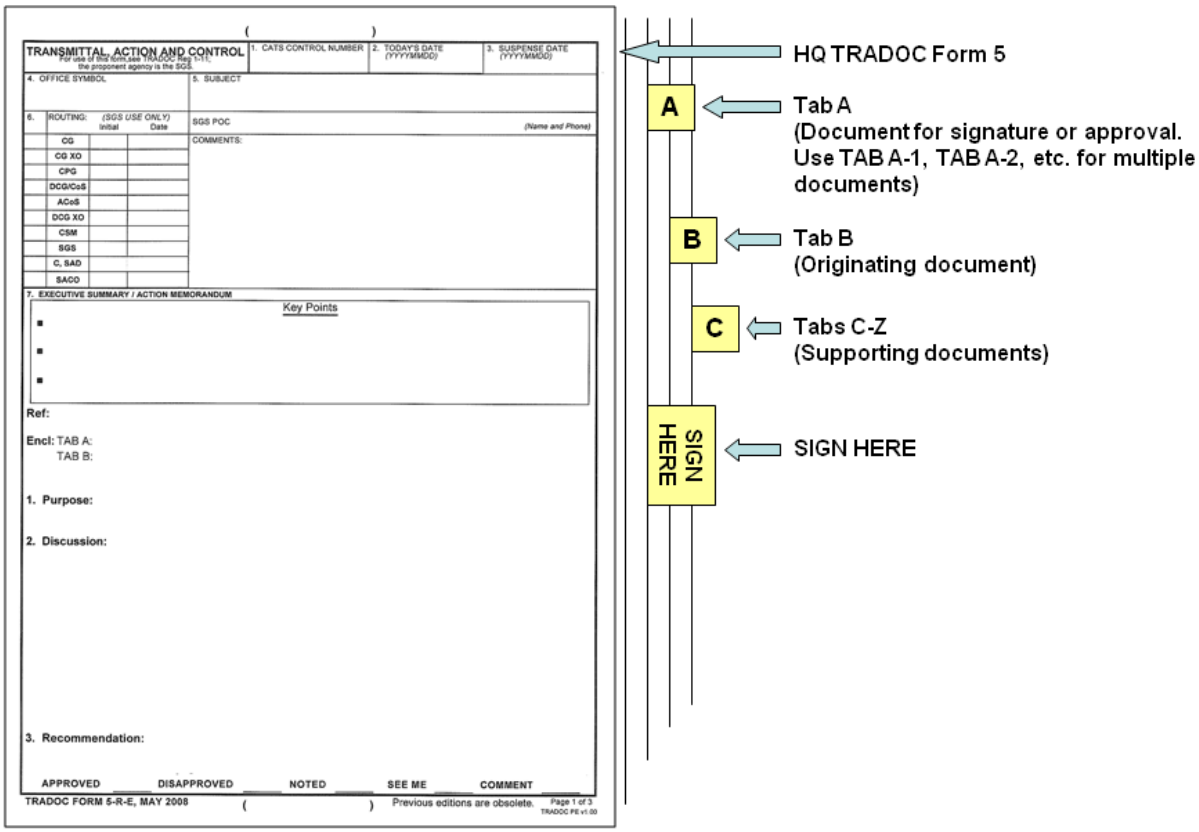


Figure 3-1. Assembling a staff action

a. First tab: Original document requiring signature (or approval). If more than one page, assemble in normal sequence and place signature flag to mark signature page. When transmitting more than one document for signature or approval with TRADOC Form 5, 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 with only one letter for signature and a listing of other addressees/proposed salutations who will receive similar letters. Once the 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 for signature on the remaining correspondence.

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

c. 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. Use succeeding tabs in the order mentioned on TRADOC Form 5. Use pertinent extracts of lengthy publications and reference documents, including messages.

d. 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.

3-3. TRADOC Form 5

TRADOC Form 5 accompanies staff actions processed for Command Group information, signature, or approval. The current version of this form is posted on the TRADOC Web site (http://www.tradoc.army.mil/tpubs/TRADOCforms.htm). Use of TRADOC Form 5 ensures correct tracking of staff actions within CATS and provides an official record of approvals/disapprovals. The CGAC retains an official file copy. Pay special attention when preparing TRADOC Form 5 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 and/or DCG/CoS can quickly review a summary of the details they need to know at their level before taking the requested action. Obtain the appropriate approval/release signature(s) within your organization before forwarding to SGS. A well-prepared TRADOC Form 5 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.

3-4. 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 point papers 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 Feb 09

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. NA (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

3-5. Executive summary

Use e-mail EXSUMs to provide information, updates, and interim responses to the Command Group. Although not intended to replace all other staff papers, the EXSUM provides important information to the Command Group in a timely manner. Whenever possible, use EXSUMs instead of information papers. See figures 3-3 and 3-4 for format.

a. Procedures. Requests for EXSUMs are tasked IAW procedures in paragraph 2-1j.

b. Internal/external EXSUM formats. Format for internal EXSUM (see fig 3-3).. Format for external EXSUM (for higher HQ) (see fig 3-4). Right justify the POC information and the “approved by” information.

(1) Do not exceed 15 lines. Use Arial 12 font.

(2) The EXSUM will be one paragraph, marked with the appropriate classification. 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.

6 Apr 09

(U) UNIT PHYSICAL FITNESS. (U) Considerable resources are programmed in the future budget years, all designed to improve the overall health and lifestyle of our Soldiers and their Families. The program stresses a total approach concept and is not limited to strict conditioning. Too often, commanders fall into the trap of competing with one another on how far or fast their unit can run. While running is an integral part of fitness, it is not the only element. It is not the Army's intent to measure fitness by 9-mile runs in 90 minutes. Fitness is measured by overall health of the command. The new Soldier Physical Fitness Center at Fort Benning, GA, is the proponent. Graduates will provide commanders technical fitness expertise.
PROVIDE MEMO _____

MAJ Sample/ATTG-I/1234
APPROVED BY: COL Conner

Figure 3-3. Internal executive summary (EXSUM) format

Sir,

EXSUM below responds to your question in 6 Aug 08 e-mail, subject: Unit Physical Fitness, “Tell me about the program.”

V/R
John

6 Apr 09

(U) UNIT PHYSICAL FITNESS. (U) Considerable resources are programmed in the future budget years, all designed to improve the overall health and lifestyle of our Soldiers and their Families. The program stresses a total approach concept and is not limited to strict conditioning. Too often, commanders fall into the trap of competing with one another on how far or fast their unit can run. While running is an integral part of fitness, it is not the only element. It is not the Army’s intent to measure fitness by 9-mile runs in 90 minutes. Fitness is measured by overall health of command. The new Soldier Physical Fitness Center at Fort Benning, GA, is the proponent. Graduates will provide commanders technical fitness expertise.
PROVIDE MEMO _____

MAJ Sample/ATTG-I/1234
APPROVED BY: LTC Bravo

Figure 3-4. External EXSUM format (from Command Group to higher HQ)

c. Type "PROVIDE MEMO_____" after last sentence. Recipient will check here if more information is desired in memo format.

d. Right justify name of AO/office symbol/telephone number two lines below the last line (internal format only).

e. Type "APPROVED BY: Rank/Mr./Mrs./Ms. Surname" on line below AO name. DCSs and chiefs of special staff offices and organization command groups will forward EXSUMs, via e-mail, to the CG (and the CG’s XO) or DCG/CoS (and the DCG/CoS XO). Provide CC to TRADOC SGS to ensure tracking system is updated.

3-6. Decision memorandum

Use a decision memorandum, when directed, to obtain decisions from Command Group or higher HQ. 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. Use Arial 12 font. When read, the memorandum should represent the complete situation, without reference to 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 when submitting decision memorandums to the Command Group. Keep information in the TRADOC Form 5 brief, with a purpose statement, short background summary, and coordination.

b. Format of the decision memorandum (see fig 3-5).

(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 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 Monroe, 23-24 January 2009").

(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, and telephone number.

(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.

OFC SYMBOL Date

MEMORANDUM THRU 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 for this action is (name, agency/activity, xxx-xxxx).

Encl

XXXX X. XXXXXXX
Major General, U.S. Army
XXXX XXXXX

Figure 3-5. Decision memorandum format

3-7. Information paper

Use an information paper to provide the reader pertinent facts in a clear and concise format. Figure 3-6 provides format and instructions for preparing an information paper.

30 May 09

INFORMATION PAPER

SUBJECT: Information Paper Format

1. **Purpose**. To provide guidance on the preparation and use of an information paper. Font: Arial 12.

2. **Facts**.

a. An information paper provides facts in a clear and concise format. The format may be altered to meet a specific need. Include the subject and the purpose. Paragraphs will contain only essential facts concerning the subject. There are two lines between the date and the title “INFORMATION PAPER.” There is one line between “INFORMATION PAPER” and the subject line.

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

c. 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.

d. Information papers do not require signature, but must include the AO's name and telephone number in the lower right corner. 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.

e. 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.

f. Information papers should not include a decision statement.

MAJ Kennedy/ATCS-XS/1234
APPROVED BY: COL Bradford-Jones

Figure 3-6. Sample information paper

3-8. 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 3-7 for format and preparation instructions.

30 May 09

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 subject 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.

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

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

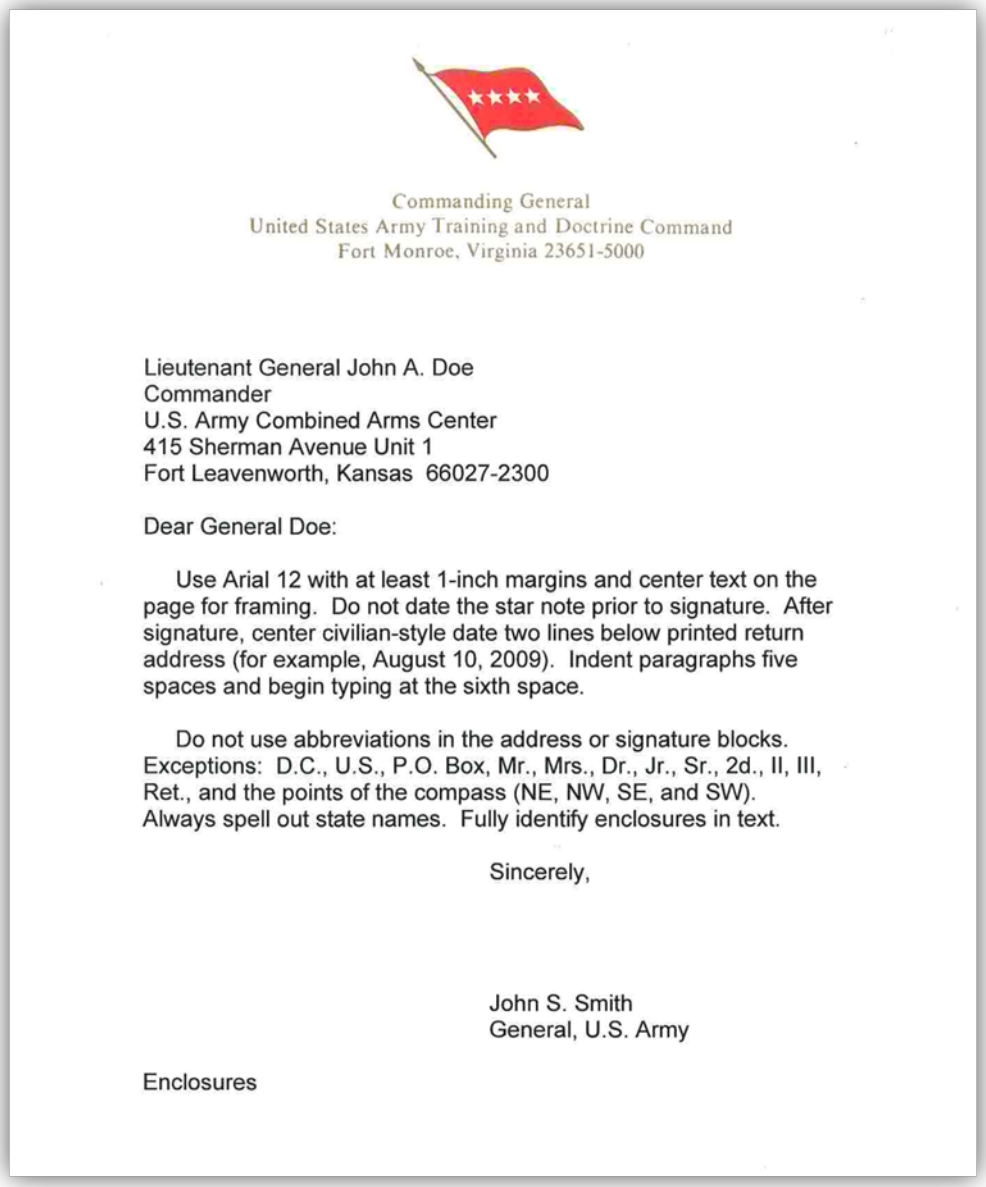
Figure 3-7. Sample position paper

3-9. 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 letter. Include appropriate information in the TRADOC Form 5, for example, “PURPOSE: To obtain CG 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 fFigure 3-8 for a sample CG star note with formatting instructions.
Note: Cover the embossed print on the star stationery with an adhesive note before feeding the stationery through a laser printer to prevent reprinting of the embossed area.

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: DC, U.S., P.O. Box, Mr., Mrs., Dr., Jr., Sr., II, III, Ret., and the points of the compass (NE, NW, SE, and SW). Always spell out the state names in star notes. Fully identify enclosures in text.



Commanding General
United States Army Training and Doctrine Command
Fort Monroe, Virginia 23651-5000

Lieutenant General John A. Doe
Commander
U.S. Army Combined Arms Center
415 Sherman Avenue Unit 1
Fort Leavenworth, Kansas 66027-2300

Dear General Doe:

Use Arial 12 with at least 1-inch margins and center text on the page for framing. Do not date the star note prior to signature. After signature, center civilian-style date two lines below printed return address (for example, August 10, 2009). Indent paragraphs five spaces and begin typing at the sixth space.

Do not use abbreviations in the address or signature blocks. Exceptions: D.C., U.S., P.O. Box, Mr., Mrs., Dr., Jr., Sr., 2d., II, III, Ret., and the points of the compass (NE, NW, SE, and SW). Always spell out state names. Fully identify enclosures in text.

Sincerely,

John S. Smith
General, U.S. Army

Enclosures

Figure 3-8. Sample CG star note

3-10. TRADOC policy letters

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

b. Staff elements will forward policy letters under cover of a TRADOC Form 5, coordinated through the SJA, for CG approval. Once the CG approves, SGS will consecutively number and maintain an index of the policy letters for publishing on the TRADOC Web site at http://www.tradoc.army.mil/sgs/CMDPolicyLetters/PolicyLtrsRestr.htm.

c. Policy letters are effective for 2 years from the published date. The issuing staff element will then review the policy letter 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.

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

Chapter 4
Conferences and Briefings

4-1. Conference room locations and responsible staff offices

a. ESD is responsible for scheduling conferences and briefings held in the CCR, building 37, and the Morelli Auditorium, building 133. For scheduled events the CG or DCG/CoS hosts, send requests for protocol support to Chief, ESD.

b. DCSs and chiefs of special staffs are responsible for scheduling conferences and briefings in their respective conference rooms (see table 4-1).

4-2. Procedures for conferences/briefings

a. DCSs and chiefs of special staffs are responsible for notifying the CG of short-notice taskers 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, preferably within 24 hours of receiving the mission. As required, CG will attend CSA briefings.

b. Chiefs of staff offices will obtain DCG/CoS 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.

Table 4-1
HQ TRADOC/Fort Monroe tenants conference facilities

Facility	Location	Contact DSN 680-plus extension or commercial (757) 788-extension	Seats	Facility Clearance	Equipment Capability
Morelli Auditorium	Bldg 133	ESD x4403	75	Secret	Dual screen rear projector, television (TV) with video cassette recorder (VCR) and cable, multimedia, VTC capability, one networked dual video desktop computer, two video connections and two network connections in front of stage.
Morelli reservation form at http://www.tradoc.army.mil/sgs/scheduler.aspx					
VTC Facility (STUDIO A)	Building (Bldg) 266 19 Tidball Road	Director of Information Management x3744/3037	75	Secret	Rear projector wide-screen video wall; four 61" dual plasma screens; viewgraph transparency; VTC with Internet access; cable TV; secure telephone equipment conference phone; 7 cameras on front wall, 1 on rear wall; 3' x 5' mobile interactive display board; and podium.
Directorate of Resource Management Conference (Conf) Room	Bldg 105	Directorate of Resource Management x2006	50	Unclass-ified	Single screen liquid crystal display with projector and VCR.
Fitness Center Classroom	Bldg 171	Fitness Center x3090	40	Unclass-ified	Ceiling-mounted projector/pull-down wall-mounted screen.
Cadet Command Main Conf Room	Bldg 56	Cadet Command x4523	34*	Unclass-ified	Full-featured VTC, single screen and digital projector, dual flat-panel monitors, TV/VCR remote-controlled environment, cable TV, and computer.
*14 seats at the table (horseshoe) and 20 seats around the perimeter of the room.					
G-1/4 / Installation Management Command NE Conf Rm	Bldg 5A 1st floor	DCS, G-1/4 / Installation Management Command NE x5011/x5014	30	Unclass-ified	Double screen front double projector VTC, TV with digital video disk (DVD), VCR, and cable.
G-8 Conf Room	Bldg 5G 1st floor	DCS, G-8 x4214/5/6	30	Unclass-ified	Single screen, Polycom VTC floor and cable.
ACA-NR Conf Rm	Bldg 10 2nd Floor	ACA-NR x2305/x4008	20-25	Unclass-ified	Picture Tel VTC capability; conf phone; portable projector.
G-3/5/7 Conf Room	Bldg 161	DCS, G-3/5/7 x5710	24	Unclass-ified	Dual 65" plasma screens; one camera, single screen front-projector viewgraph transparency (VGT), DVD, cable TV, LAN cable, electronic whiteboard, conference phone, Picture Tel VTC and laptop with speaker jacks for integration into the conf room system.
G-3/5/7 Bldg 11 Conf Room	Bldg 11	DCS, G-3/5/7 X5710	10	Unclass-ified	
G-1/4 Conf Room	Bldg 5G 3rd Floor	DCS, G-1/4 x5197/x5011	23	Unclass-ified	Single screen - front projection; VTC.
G-1/4 Conf Room	Bldg 5E 3rd Floor	DCS, G-1/4 x5197x5011	22	Unclass-ified	Single screen front projector, VCR and DVD, LAN connection.
G-6 Conf Room	Bldg 162	DCS, G-6 x2528	22	Unclass-ified	Dual plasma screen, VTC with Internet access. conf telephone.

Table 4-1
HQ TRADOC/Fort Monroe Tenants Conference Facilities (cont.)

Facility	Location	Contact DSN 680-plus extension or commercial (757) 788-extension	Seats	Facility Clearance	Equipment Capability
CCR	Bldg 37 DePuy Hall	ESD x4403	20	Unclass-ified	Dual screen, DVD, conference telephone VCR and cable unclassified VTC capability, one networked computer, laptop video connection.
CCR reservation form at http://www.tradoc.army.mil/sgs/scheduler.aspx					
VTC Facility (STUDIO B)	Bldg 266 19 Tidball Road		20	Secret	61" plasma screens; viewgraph transparency; VTC with Internet access; cable TV; STE conf phone; one camera on front wall, 2 on rear wall; 3' x 5' mobile interactive display board; and podium.
Coast Artillery Rm	Bldg 77	Post HQ x3241	20	Unclass-ified	None. (NOTE: No food or drink. Garrison Commander has priority.)
Army Capabilities Integration Center (ARCIC)/G-9 Conf Room	Bldg 133	ARCIC/G-9 x4428	18	Unclass-ified	Dual screen plasma displays, computer-driven Polycom iPower 9000 codec; DVD/VHS direct-replay, integrated teleconference system.
**Command Sensitive Compart-mented Information (SCI) Conf Room	Bldg 133 Room 210	SSO x3630/x2315	15	Top Secret (TS)/ SCI	Dual monitor PC VGT, DVD and VCR, unclas single point-to-point VTC. JWICS (TS) single point-to-point and gateway VTC. **To use conference room, attendees must have TS/SCI clearance.
IAPD Conf Room	Bldg 139 Room 101	IAPD x3310	15	Unclass-ified	Single-screen, front-projection VGT, DVD/VHS, Polycom VTC, cable TV.
IG Main Conference Room	Bldg 10	OIG x4217	14	Unclass-ified	Single screen front projector, TV with VCR and cable. LAN connection. Printing, dri-erase board.
PAO Conference Room	Bldg 27 x3333	PAO	10	Unclass-ified	Dual flat-screen plasma screens/TV. VTC with Internet/VCR/DVD and cable, electronic interactive display board, two laptop connections, and conference phone.
SJA Conference Room	Bldg 10	SJA x2302	6***	Unclass-ified	Flat screen TV with VCR/DVD & cable. LAN connection, electronic whiteboard, and conference phone.
*** seats available around the table; additional 14 chairs around the perimeter of the room.					
Bay Breeze Community Center**** Morale, welfare, and recreation (MWR)(Operating hours 0800-1600.)					
Main Ball Room	Bldg 185 490 Fenwick	Fort Monroe MWR x5656	200	Unclass-ified	Data lines, screens, microphone, podium available.
Chesapeake North	Bldg 185 490 Fenwick	Fort Monroe MWR x5656	60-80*****	Unclass-ified	Data lines, screens, microphone, podium available.
Casemate	Bldg 185 490 Fenwick	Fort Monroe MWR x5656	50-70*****	Unclass-ified	Data lines, screens, microphone, podium available.
Chesapeake South	Bldg 185 490 Fenwick	Fort Monroe MWR x5656	30-50*****	Unclass-ified	Data lines, screens, microphone, podium available.
****NOTE: No food or beverages from outside. Refreshment and meal options available (break, breakfast, lunch and dinner).					
*****Capacity dependent on seating configuration.					

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. CG and DCG/CoS Calendar Event Request Forms are located at the SGS Web site.

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

(3) Coordinate with ESD to reserve the CCR or Morelli Auditorium using the conference room reservation form at http://www.tradoc.army.mil/sgs/scheduler.aspx.

(4) Submit a TRADOC Form 5 for DCG/CoS approval of all conferences or briefings requiring expenditure of HQ TRADOC funds. TRADOC Form 5 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 that names of attendees are provided to the AO.

(5) Prepare a message or memorandum for DCG/CoS 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 (see para 4-4).

g. The lead staff office will provide a seating chart for the CG when the CG holds a VTC or desk-side VTC. See figures 4-1 and 4-2 for examples 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 for the purchase of food or refreshments. If for any reason the card is not accepted, contact the Agency Program Coordinator for Fort Monroe at DSN 826-5708, (757) 878-5809 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 DCS, G-8 Budget Directorate, HQ Activities Division a summary list of costs, broken out by directorate.

(4) The TRADOC DCS, G-8 HQ Activities Division 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.

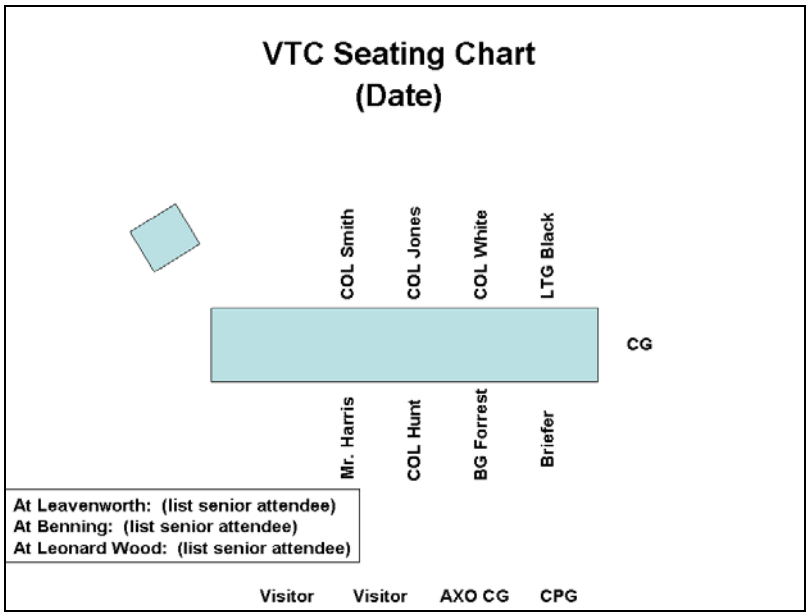


Figure 4-1. Seating chart for video teleconference (VTC) and desk-side VTC

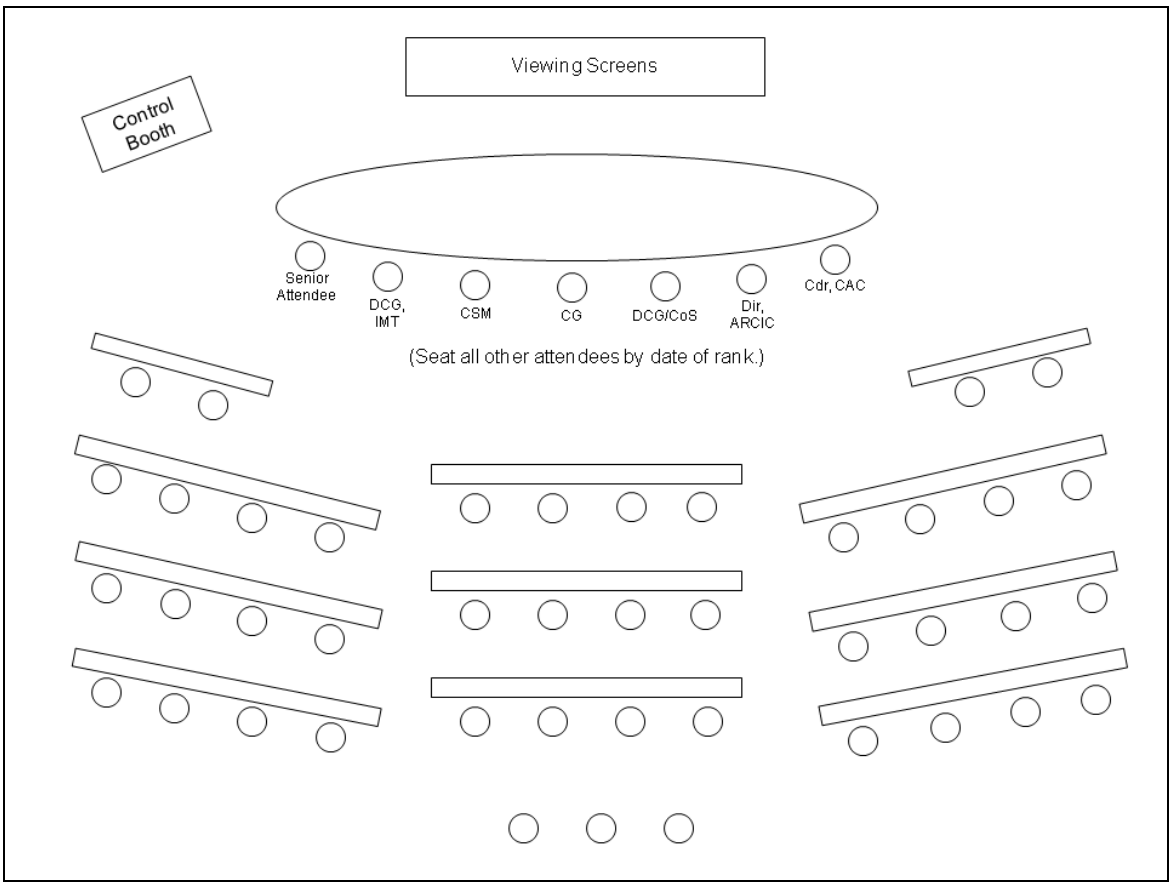


Figure 4-2. Seating chart for VTC facility

4-3. Preparing visual aids

a. When preparing visual aids, consider equipment limitations of conference room used (see table 4-1).

b. Guidelines.

(1) 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.

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

(3) Ensure each chart or graph has the BLUF, conveys a single idea or thought, and is simple/straightforward.

(4) Any slide should immediately communicate the intent to the audience within 30 seconds.

(5) 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.

(6) 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/reordering, annotate numbers on the viewgraph frame rather than the transparency itself.

(7) Mark classified slides at top and bottom IAW AR 25-55 and AR 380-5. Ensure classification is clearly visible during the presentation.

(8) Text of visual aids should not repeat the verbal presentation.

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

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

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

(a) Ensure all files are created with approved Army (Army Gold Master) word processing, e-mail, and presentation software and have similar format.

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

4-4. Tasking memorandums

Tasking memorandums for DCG/CoS signature will include significant discussions and taskers. Indicate proposed lead and assist agency(s) for each tasker.

a. Address tasking memorandums to DCSs and chiefs of special staff offices; HQ TRADOC; and any commanders; commandant; or agencies tasked during the conference/briefing.

b. Submit for DCG/CoS signature under TRADOC Form 5. For a conference/briefing the CG attended, coordinate with the CPG.

c. Include the following paragraphs, in order:

(1) Purpose. Brief statement of purpose of memorandum, including conference/briefing title, date(s), location, and principal attendees; for example, "Purpose. Summarize significant dialogue, issues, decisions, and taskings from TRADOC Family Team Building Conference, 2-11 Jan 09, Fort Monroe. Conference attended by LTG Smith and MG Brown."

(2) Objectives. Brief statement of conference/briefing objectives.

(3) Summary of significant discussion. Discuss each issue/tasking in a separate subparagraph. At the end of each subparagraph, indicate action required and recommended action/assist agency, if any (for example, "(INFO)" or "(LEAD: TRADOC DCS, G-8; ASSIST: TRADOC DCS, G-3/5/7)." If an action/assist agency for an issue is not identified during a conference/briefing, use TRADOC Regulation 10-5 to determine appropriate action/assist agencies.

(4) A POC line indicating note taker rank, name, e-mail address, office symbol, and telephone number.

4-5. Tracking taskers
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 taskers on a periodic basis.

Chapter 5
Awards

5-1. Military awards
Follow AR 600-8-22 and TRADOC Supplement 1 to AR 600-8-22 guidance to recommend Soldiers for military awards.

a. Submit a complete DA Form 638 to TRADOC, DCS, G-1/4 (ATBO-BP) via e-mail to monr.tradocawards@us.army.mil prior to presentation date as follows:

(1) For allied Soldiers, Legion of Merit, Meritorious Service Medal, Army Commendation Medal, and Army Achievement Medal at least 150 days.

(2) Distinguished Service Medal at least 90 days.

(3) Legion of Merit and below at least 60 days.

(a) All Distinguished Service Medal recommendations must be e-mailed with narrative, proposed citation, and proposed memorandum for TRADOC CG signature.

(b) Commander, U.S. Army Combined Arms Center, U.S. Army Combined Arms Support Command, or USAAC (as appropriate) must endorse all recommendations for the Distinguished Service Medal before e-mailing to HQ TRADOC.

b. Supervisors will anticipate and plan to ensure awards are submitted in a timely manner. Nominations requiring less than the specific timeframe must have a memorandum of lateness addressed to TRADOC CG stating specific reason for late submission.

c. An information packet on preparation of senior leader and spouse awards is available on the TRADOC Website (http://www.tradoc.army.mil/publications.htm).

5-2. Honorary and public service awards
Follow AR 672-20, DA Pamphlet 672-20, and TRADOC Supplement 1 to AR 672-20 guidance to recommend civilians for honorary and public service awards.

a. Submit a completed DA Form 1256 to HQ TRADOC DCS, G-1/4 Incentive Awards Review Board Executive Secretary (ATBO-C) electronically at monr.atbo-awards@conus.army.mil prior to presentation date as follows:

(1) Decoration for Exceptional Civilian Service Award and other awards requiring Secretary of the Army approval at least 90 days.

(2) Meritorious Civilian Service, Distinguished Civilian Service Award, and Secretary of the Army Public Service Award at least 60 days.

(3) All nominations must include a statement that award is being presented at retirement ceremony (if applicable) of (name) and presentation date; or (nominee) and (name of military spouse) are transferring and presentation date is (date). Nominations requiring less than the specific timeframe must have a memorandum of lateness addressed to TRADOC CG stating specific reason for late submission.

b. Approval authority for the following awards applies to civilian personnel assigned to HQ TRADOC only; subordinate activities must follow guidance provided in TRADOC Supplement 1 to AR 672-20.

(1) Superior Civilian Service Award and Outstanding Civilian Service Award: Any DCS in the rank of major general and above or SES equivalent may approve.

(2) Commander's Award for Civilian Service and Commander's Award for Public Service: Any DCS or chief of special staff in the grade of colonel and above or civilian equivalent GS-15 and above may approve.

(3) Achievement Medal for Civilian Service and Certificate of Appreciation for Patriotic Civilian Service: Any DCS or chief of special staff in the grade of lieutenant colonel and above or civilian equivalent (GS-13/14) and above may approve.

c. On all honorary and public service awards, complete Part II of the DA Form 1256, in which the local equal employment opportunity (EEO) and civilian personnel officers, or their designees, verify there are no past/outstanding EEO complaints or adverse actions against the recommended individual. If a complaint exists, the commander/ activity principal must include a statement along with the DA Form 1256 stating "the nomination is not inconsistent with attainment of EEO and affirmative action goals and/or disciplinary/adverse personnel action will not reflect adversely on DA." (See AR 672-20, para 2-2 for additional guidance.)

d. Honorary awards to contractors. It is DOD policy not to recognize contractors with honorary awards unless the contribution is substantially beyond that specified or implied by the terms of the contract and the recognition is clearly in the public interest – a very high standard. AR 672-20, chapter 9, recognizes this very high standard and generally prohibits recognizing Army contractors with honorary and public service awards. If performance by contractor personnel is deemed to meet the DOD standard, then recognition of a nominal value (for example, letter of appreciation or a unique certificate) may be appropriate. Any such recognition must first be coordinated with the cognizant contracting officer, who will send it to the contractor. Also, obtain legal counsel regarding the propriety of any honorary award action involving a contractor. Prior coordination is required because the contracting officer may be taking action to correct deficiencies in the contractor's performance. The Government must communicate clearly and with one voice to enforce contract performance.

5-3. Nominations for competitive awards

a. Solicitations for nominations are processed through G-33 to task out to organizations. See paragraph 2-3d(2) for guidance on preparing the TASKORD that accompanies the package. Address correspondence and/or e-mail to organizations soliciting nominations from subordinate organizations for ACOM level competitive awards. Forward through organization SGSs to ensure Command Group awareness of the requirement and tracking of suspense for timely submission of nominees to higher HQ and/or other affiliated organizations.

b. When preparing Command Group staff actions forwarding TRADOC nominations for award competitions, for example, Presidential Rank Awards, Federal Energy Conservation Awards, Society of American Military Engineers Awards, Association of the United States Army Awards, etc., include the following information in the TRADOC Form 5:

(1) The regulatory guidance (AR, TRADOC regulation, or letter of instruction) covering the specific award. You may include excerpts from regulations in the staff action for background or clarity purposes.

(2) Method used to obtain nominations.

(3) Method used to select the best-qualified nominee to represent TRADOC.

(4) Last year's TRADOC nominee/winner and how they finished in higher-level competition.

(5) Summary of nominations received (numeric) and relative strength of those nominations.

(6) TRADOC nominee and a synopsis of the nomination.

Chapter 6
Evaluations

6-1. General
Military and civilian evaluations requiring CG/DCG action are due to the TRADOC SGS Administrative Division NLT the through date of evaluation.

6-2. Military evaluations

a. Process all military evaluations IAW AR 623-3 and DA PAM 623-3.

b. Evaluations should be sent to TRADOC SGS Administrative Division using the AKO Forms Portal for review and processing.

6-3. Civilian evaluations
Total Army Performance Evaluation System evaluations are processed IAW AR 690-400. National Security Personnel System (NSPS) evaluations are processed electronically through the NSPS Performance Appraisal Application. See Performance Appraisal Application User Guide for instructions.

Chapter 7
Use of E-mail and the Defense Message System (DMS)

7-1. E-mail

a. The Army 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), but not on secure internet protocol router network (SIPRNET) or other DOD networks.

(1) All e-mails sent must be encrypted if it contains sensitive information. Sensitive information includes, but is not limited to, FOUO 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 emails 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 emails 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.

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. If information can be place 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), to provide status and alternate POC information during absences in excess of one normal duty day.

7-2. DMS

a. The DMS is the system of record to be used for transmitting official record messages. DMS is available on both NIPRNET and SIPRNET. DOD use of DMS has

decreased over the past several years, but DMS is still used within the Army to transmit all Army activities (Army general message address) (ALARACT) messages and other official messages.

b. MSOs, special activities, field operating activities, schools and centers, and HQ TRADOC will maintain, and actively monitor, DMS accounts on both NIPRNET and SIPRNET.

c. Messages. TRADOC organizational account users prepare and release messages electronically via the Army Enterprise DMS/Modernization Automated Message Handling System (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.

(a) 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 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)”). In addition to the hardcopy message at tab A, include an electronic copy that can be edited.

(b) 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). See TRADOC MAML at the SGS SAD Web site (under Telephone Directories/Rosters link). “Personal For” messages are sent to an addressee’s organizational DMS address.

(c) 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.

(d) Once approved, a designated user with release authority for the FROM organizational account is responsible for dispatching the message using DMS/AMHS software. Recommend designated releasers synchronize their personal address books prior to release/dispatch of message. If there is no date time group (DTG) in the DTG field, click on the little calendar and click the desired DTG. To confirm delivery, recommend releasers select "delivery report for all recipients." Once dispatched, a copy of the message is printed from the "sent items" and placed in the package behind tab A. Then, the entire package, with TRADOC Form 5 showing approval, is forwarded to the CGAC for clearing in CATS and returned to the proponent.

(e) The DTG is automatically placed at the beginning of the subject line when the message is dispatched. A CC will automatically be generated and a copy will be received in your AMHS/inbox within a few minutes after release. When referencing messages, use the DTG at the beginning of the subject line.

(2) Eyes Only messages.

(a) General. The Army Privacy Communications System, commonly referred to as Eyes Only or backchannel messages, is not intended for routine correspondence. Only use Eyes Only messages when transmitting sensitive compartmented information (SCI) from one recipient to another.

(b) Users. Only those personnel with appropriate security clearance may send or receive Eyes Only messages. Persons authorized to send Eyes Only messages are:

(i) GO and promotable colonels.

(ii) SESs.

(iii) Other individuals the CSA or Director of the Army Staff specifically authorize.

(c) Due to the classification level, only the TRADOC DCS, G-2 SSO Sensitive Compartmented Information Facility, room 210, building 133, can prepare Eyes Only messages. Ensure the following information is included:

(i) Name, grade, duty title, and location of originator and addressees.

(ii) Delivery instructions; that is, immediate or next duty day, etc.

(d) Each GO authorized to send and receive Eyes Only messages will provide the SSO with a list of names and after duty hours telephone numbers of their staff members with SCI access, approved to screen Eyes Only messages addressed to them with immediate delivery instructions. If the GO does not want their Eyes Only messages screened, then they may provide the SSO their personal after duty hours number.

(e) Due to their classification level, the SSO must store all incoming and outgoing Eyes Only messages and drafts in the Sensitive Compartmented Information Facility.

(f) Contact the TRADOC DCS, G-2 SSO at DSN 680-2315/3630, (757) 788-2315/3630 during duty hours and TRADOC Emergency Operations Center DSN 680-2256, (757) 788-2256 after duty hours for further guidance on Eyes Only messages.

7-3. 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.

b. MSOs, special activities, field operating activities, 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-mail to organizational accounts.

c. The underlying simple mail transport protocol addresses will be configured IAW guidance provided by Army Network Enterprise Technology Command. Underlying addresses will consist of the major organization name, an optional qualifying name, and an office symbol, for example “tradoc.atim@us.army.mil” or “tradoc.g6-ops.atim-o@us.army.mil”. The corresponding address display name should be similarly configured such as “TRADOC G-6 ATIM” or “TRADOC G-6 Ops ATIM-O.”

7-4. 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 8
Mail and Distribution

8-1. Mailroom information

Fort Monroe Directorate of Human Resources (Military) is responsible for processing incoming/outgoing correspondence. The Fort Monroe Mail and Distribution (M&D) Center and Classified Mailroom are located in building 183, 102 McNair Drive. Hours of operation are 0800-1630, Monday through Friday. The M&D Center provides proper processing of all unclassified incoming and outgoing official mail and correspondence, (except DMS/AMHS message traffic). The Classified Mailroom handles incoming and outgoing classified official mail and correspondence.

8-2. Incoming mail and correspondence

a. Incoming mail and correspondence for distribution is dispensed through distribution bins accessed within the M&D Center.

b. Staff sections are required to pick up the mail and distribution at least twice a day, once in the morning and once in the afternoon. Mail is sorted and placed in the bins daily from 1200-1300. United States Postal Service (USPS) express mail may arrive throughout the day.

c. Only authorized personnel may pick up mail. Under no circumstances will M&D Center personnel surrender mail to unauthorized individuals. Contact the M&D Center at DSN 680-4004, (757) 788-4004 to receive instructions for authorizing personnel to pick up mail and distribution.

d. Established activities that are deactivated/transferred must provide the official mail manager with a memorandum of this action, signed by the organization chief.

e. The USPS and M&D Center personnel will deliver all mail marked "FIRST CLASS - POSTMASTER: DO NOT FORWARD/ADDRESS CORRECTION REQUESTED" to the Classified Mailroom for processing.

8-3. Outgoing mail and correspondence

a. Forward unclassified correspondence to DCSs and chiefs of special staffs or their designated representatives for forwarding to the M&D Center for dispatch.

b. The proponent staff agency is responsible for packaging outgoing correspondence and delivering mail to the M&D Center. Address labels must comply with street address/zone improvement plan (ZIP)+4 standards (see app E).

c. All outgoing mail must indicate the preparing organization's mail accumulator code on the front, upper left corner of the envelope or mailing label (beneath the return address). The M&D Center will return outgoing mail to the originator for correction if received without properly annotated mail accumulator codes or typed address does not comply with street address/ZIP+4 standards.

d. To ensure fast and efficient delivery of mail sent to HQDA and all addresses in the Pentagon, properly address envelopes using HQ TRADOC Label 1001 (Pouch Mailing Label.) See figure 8-1. The originating office must address and place all mail sent to HQDA and Pentagon addresses in an official envelope, including mass distribution (for example, orders, modification tables of organization and equipment, etc.), and deliver to the M&D Center NLT 1400 daily. Per HQDA, under no circumstance is classified mail dispatched through HQ TRADOC pouch. For additional information on the courier service, see TRADOC Memo 1-2 at http://www.tradoc.army.mil/tpubs/memos/m1-2.htm.

HQ TRADOC LABEL 1001, Sep 80
Replaces ATAG Label 1004, Mar 79, which is obsolete

FROM: HQ TRADOC (_____
(Office Symbol)

_____
(Action Officer) (Extension)

TO: VIA POUCH
THRU: TRADOC Liaison Office
Pentagon

FOR: _____
(Office)

_____
(Attention Line)

_____
(Addressee's Name)

_____
(Addressee's Telephone Number)

Figure 8-1. HQ TRADOC Label 1001

8-4. Special handling mail (classified material)
Hand-carry all HQ TRADOC special handling mail to the Classified Mailroom for appropriate processing. The Fort Monroe Directorate of Human Resources (Military) is responsible for proper control and processing of all incoming/outgoing classified mail and distribution.

a. Incoming classified correspondence. Individuals retrieving classified distribution from the Classified Mailroom must have a DD Form 285 (Postal Clerk, Unit Mail Clerk or Mail Orderly, Appointment of Military) and a memorandum on file at the M&D Center. The agency DCS, ADCS, and/or chief of special staff office signs the memorandum designating a primary and alternate(s) to retrieve classified distribution. Designated individuals must possess at least a SECRET security clearance. In addition, each appointee must have a DD Form 2501 (Courier Authorization) signed by the unit security manager. The Classified Mailroom will distribute classified distribution only to the organization's designated courier. Agency administrative offices are responsible for distribution to their divisions.

b. Outgoing classified correspondence.

(1) Proponent delivers all outgoing SECRET correspondence to the Classified Mailroom with properly prepared DA Form 3964 (Classified Document Accountability Record), in triplicate per addressee, completed plain white mailing labels (two per addressee and two per return address), and envelops or other mailing containers.

(2) Process all outgoing CONFIDENTIAL correspondence as above, with the exception of DA Form 3964, which is not required.

(3) The Classified Mailroom is responsible for initiating any required tracer actions. The proponent agency will confer with the Classified Mailroom where late, lost, misplaced, or suspected compromise may exist.

(4) Hand-carry all outgoing classified correspondence sent through the USPS (registered mail) to the Classified Mailroom for processing. The Classified Mailroom is the only HQ TRADOC agency authorized to dispatch classified material.

8-5. Express mail

a. Use USPS express mail only when next day delivery is absolutely essential to meet mission requirements. Do not use express mail for the sole purpose of meeting a suspense date.

b. Use informal memorandum to request express mail service to the Chief, M&D Center. The administrative officer (on file with the official mail manager) must sign and submit the request to the M&D Center before 1330 to ensure next-day delivery. Acceptance of express mail on Friday requires special arrangements to have a person available on Saturday at the addressee's office to accept custody of the mail.

c. Deliver all outgoing express mail to the M&D Center unsealed to ensure contents are unclassified official government business.

Chapter 9
Headquarters (HQ) TRADOC and Fort Monroe Special/Ethnic Observances and Recurring Events

9-1. Tasking

The SGS is responsible for tasking TRADOC and Fort Monroe special/ethnic observances and recurring events at Fort Monroe (for example, special/ethnic observances, TRADOC Organization Day, and other official events). Table F-1 lists the schedule of special/ethnic observances and other recurring HQ TRADOC and Fort Monroe events and responsible staff offices.

9-2. Special/ethnic observance committees

a. Mandatory members of special/ethnic observance committees include a representative from the TRADOC EO Office, the Fort Monroe EO/EEO Offices, Fort Monroe PAO, Fort Monroe Plans and Training, and TRADOC ESD. TRADOC SJA will provide an attorney to serve as a legal advisor to the respective committee.

(1) Fort Monroe PAO provides protocol support for Women's Equality Day, POW/MIA Recognition Day, and National Disabilities Month.

(2) TRADOC ESD provides protocol support for all other observances listed in appendix F.

b. AOs will provide IPR minutes to the TRADOC and Fort Monroe EO Offices NLT 7 duty days following each meeting.

9-3. 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 9-1.

b. DCSs and chiefs of special staff offices or their deputies will personally host the event(s) (or keynote event if a series of events).

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

Table 9-1
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 TMAC POC or the Office of the Commanding General (OCG) or DCG/CoS Office to ensure no conflicts with the TMAC. • Assign an AO (field grade officer or GS-13 and above) and provide the name of the AO to the TRADOC EO Office and the Fort Monroe EO/EEO Offices. These offices will provide specific garrison observance guidelines, and provide baseline funding and oversight for all special/ethnic observances.
90 days prior to observance	Submit a plan of action/milestones to the TRADOC EO Office and the Fort Monroe EO/EEO Offices.
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 DCG/CoS an information paper, along with the memorandum announcing scheduled events for approval/signature, under cover of a TRADOC Form 5. If it's a Fort Monroe-sponsored event (such as Women's Equality Day), send a memorandum announcing scheduled events for approval/signature to garrison commander. If CG or DCG/CoS is involved in the program, send the DCG/CoS an information paper, as instructions state in first sentence. Coordinate concept with appropriate agencies, but, at a minimum, with TRADOC EO Office and Fort Monroe EO/EEO Offices and TRADOC ESD, OSGS or Fort Monroe PAO. **Note:** Distribute announcement memorandum to the staff immediately upon DCG/CoS signature.
At conclusion of observance	Provide a written AAR in memorandum format to the DCG/CoS with copy furnished to TRADOC EO Office and Fort Monroe EO/EEO Office NLT 30 days after event.

d. When desiring Command Group participation (to introduce guest speaker, present recognitions, etc.) send request first to the OCG, then the DCG/CoS. If neither is available, request the DCG/CoS designate a representative.

e. TRADOC EO Office and TRADOC ESD, OSGS or Fort Monroe PAO and EO Office will review event plan (sequence of events, seating, program, flyers, posters, bulletins, etc.) to ensure compliance with accepted standards.

f. Coordinate CG remarks with designated CPG speechwriter. When requesting remarks from DCG/CoS, responsible organization or special staff office 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.

g. Coordinate with the Fort Monroe PAO to provide escorts for guest speakers/guests of honor.

h. Coordinate with the TRADOC EO Office; TRADOC ESD; Fort Monroe PAO and EO Office; and TRADOC 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.

i. 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 IAW 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 an EO 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.

9-4. HQ TRADOC Organization Day

Lead responsibility for HQ TRADOC Organization Day rotates between DCS, G-1/4; DCS, G-3/5/7; DCS, G-8; and ARCIC/G-9, with the other three DCSs as assists. Initial tasking by the appropriate SACO will go out **NLT 15 December**. The lead is responsible for preparing a memorandum of instruction (MOI) and providing a concept pre-brief for DCG/CoS 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, all DCSs (G-1/4, G-2, G-3/5/7, G-6, G-8, and ARCIC/G-9,) special staff, USAAC, U.S. Army Cadet Command, and participating Fort Monroe 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 an MOI 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, MOIs, and AARs and place in a binder for the lead the following year.

Chapter 10
TRADOC Invitational Travel Authorization (ITA) Procedures

10-1. Guidelines
This chapter prescribes ITA procedures, specific forms, and formats for use at HQ TRADOC and TRADOC schools and centers.

10-2. ITA approval authorities

a. ITAs for official TDY (non-spouse travel) must be approved by the DCG/CoS for HQ TRADOC organizations. The approval authority at TRADOC schools/centers is delegated to the senior TRADOC commander on the installation.

b. ITAs for accompanying spouse travel must be approved by the DCG/CoS for all TRADOC organizations to include the schools/centers. The approval authority may not be delegated to a lower level.

10-3. Preparation of an ITA request

a. ITA request memorandum for all official (non-spouse travel) will be prepared and submitted IAW with The Joint Federal Travel Regulations (JFTR), volume 1, appendix E, part 1; Joint Travel Regulation (JTR), Volume 2; and AR 600-8-105 (see figure 10-1 for format). ITA request memorandum must be signed by the approving official within the requesting organization.

(1) TRADOC MSOs, special activities, field operating activities, schools and and centers must follow approval procedures set forth within their organization.

(2) All HQ TRADOC ITA packets will be forwarded to the TRADOC SJA for review at least 15 days prior to the travel date. After the SJA's review, the ITA packet will be forwarded through the TRADOC SGS (Staff Actions Division) for the required DCG/CoS approval. The ITA approval packet will contain:

LETTERHEAD OF REQUESTING OFFICE

OFFICE SYMBOL DATE

MEMORANDUM THRU TRADOC STAFF JUDGE ADVOCATE

FOR **(ENTER THE SECTION RESPONSIBLE FOR ISSUING ITA)**

SUBJECT: Invitational Travel Authorization (ITA) Request

1. Request publishing of ITA for the below individual:

a. Name/Title or position:

b. Mailing Address:

c. Proceed date:

d. Itinerary attached: YES

e. Length of travel:

f. Point of contact: Name/phone Number

g. Modes of travel for entire visit:

h. Purpose of travel:

(1)

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

i. Estimated Cost:
Per Diem: $0 (may not be applicable)
Travel: $0

j. Fund Cite: (if applicable)

_____
Budget Analyst

2. Justification for travel:

X Encls

_____
Signature Block for
Approving Official

Figure 10-1. ITA request memorandum

(1) TRADOC Form 5 (with a coordination line for TRADOC SJA to concur/nonconcur).

(2) ITA request memorandum signed by the budget analyst and organization's approval authority.

b. ITA request memorandum for accompanying spouse travel will be prepared and submitted IAW Army Directive 2007-01, JFTR, and JTR (see fig 10-2). The ITA request memorandum must be signed by the funding budget analyst (if applicable) and spouse's sponsor. All TRADOC MSOs, special activities, field operating activities, schools and and centers, and HQ TRADOC organizations will forward the ITA packet to the TRADOC SJA for review at least 15 days prior to the travel date. After review, the TRADOC SJA will forward the ITA request package through the SGS (Staff Actions Division) for DCG/CoS approval. The ITA package will contain:

LETTERHEAD OF REQUESTING OFFICE

OFFICE SYMBOL DATE

MEMORANDUM THRU TRADOC STAFF JUDGE ADVOCATE

FOR **(ENTER THE SECTION RESPONSIBLE FOR ISSUING ITA)**

SUBJECT: Accompanying Spouse Travel – **Name of spouse, date/place of travel**

1. Reference memorandum, Secretary of the Army, 25 January 2007, subject: Policy for Travel by Department of the Army Officials.

2. In accordance with paragraphs 10, 11, and 12 of referenced memorandum for Spouses Travel, the purpose of this correspondence is to request approval of accompanying spouse travel.

3. Request publishing of ITA for the below individual:

k. Name/Title or position:

l. Mailing Address:

m. Proceed date:

n. Itinerary attached: YES

o. Length of travel:

p. Point of contact: Name/phone Number

q. Modes of travel for entire visit:

r. Purpose of travel:

(1)

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

s. Estimated Cost:
Per Diem: $0 (may not be applicable)
Travel: $0

t. Fund Cite: (if applicable)

_____
Budget Analyst

4. Justification for travel:

_____
X Encls Signature Block for Sponsor

Figure 10-2. Accompanying spouse travel request memorandum

(1) TRADOC Form 5 (with a coordination line for TRADOC SJA and TRADOC, DCS, G-3/5/7 Flight Operations if utilizing military air to concur/nonconcur).

(2) ITA Request Memorandum signed by the funding budget analyst and spouses sponsor.

(3) SJA review (TRADOC MSOs, special activities, field operating activities, schools and centers).

(4) Agenda for subject trip.

10-4. 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 IAW local procedures.

(1) MSOs, special activities, field operating activities, schools and centers will follow procedures set forth within their organization.

(2) HQ TRADOC organizations will follow procedures set forth by DCG, G-8 and DCG, G-1/4. Each organization will contact G-1/4, Adjutant General, Military Personnel Actions Office, DSN 680-5096/5087, (757) 788-5096/5087. 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, DSN 680-5183/3447, (757) 788-5183/3447.

b. Each organization is responsible to ensure the following procedures are used when processing ITAs in DTS:

(1) Non-Spouse Travel: The organization defense travel administrator (DTA) must complete a user profile (to include all mandatory information) on all individuals traveling on an ITA. The traveler must have a social security number; however due to new DOD policy, the organization will contact the traveler directly to obtain social security number and banking information .

(2) Accompanying Spouse Travel: A separate profile is not required if the traveler is a dependent of a DOD uniformed member or civilian employee ; the dependent is automatically given the same profile information as their sponsor.

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

d. The organization 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-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. 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.

h. The organization's appointed NDEA is responsible to scan and upload all supporting documents (to include ITA request, legal review, approval document, and receipts) to the substantiating records section of the voucher, then sign the voucher in DTS as T-entered.

i. 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.

j. For details on preparing an ITA in DTS, refer to the DTS Website at http://www.defensetravel.osd.mil/dts/site/index.jsp.

Chapter 11
TRADOC Calendars

11-1. TRADOC Master Activities Calendar (TMAC)

The TMAC is a web-based 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 prevent scheduling conflicts.

a. The TMAC is accessible to any Army user with a common access card. The TMAC is always current, as all approved items are immediately reflected in the calendar. Information contained on the calendar is classified as FOUO and will not contain movement data for GOs or members of the SES.

b. MSOs, special activities, field operating activities, schools and centers, and HQ TRADOC will designate a TMAC contributor to publish items to the TMAC. Instructions for access to the TMAC, and for designating a calendar contributor, are in appendix 1 to annex C of the TRADOC Campaign Plan.

11-2. TRADOC Master Planning Calendar (TMPC)
The TMPC is a calendar created at HQ TRADOC based on selected input from the users in the field. The calendar features key events that impact multiple TRADOC entities, or are of high visibility or importance.

a. The TMPC is accessible to any user with a common access card. The TMPC is published each Friday and reflects all changes, additions, and deletions posted to the TMAC from the previous week. The TMPC is a rolling 24-month calendar. Detailed information on individual events is available by accessing that specific event on the TMAC.

b. Criteria for evaluation of events for placement on the TMPC are as follows:

(1) HQ TRADOC-sponsored conferences, symposiums, or meetings. Examples: TRADOC Senior Leaders Conference, TRADOC Force Protection Conference, Quarterly Futures Review, Quarterly Executive Safety Council, RC GO Conference, and Quarterly Leader Development Review.

(2) Major DA-sponsored events requiring TRADOC input, attendance, or interest. Examples: 4-Star Conference, Army Training Leader Development Conference, Training General Officer Steering Committee events, CSA Futures Session, CSA Combat Training Centers Conference/Update.

(3) Major DA recognized association/organization events.

(4) Significant MSO events. Examples: Intermediate Level Education Opening Ceremony and International Day, U.S. Army War College and Intermediate Level Education Graduations, TRADOC Doctrine and Concepts Conference, USAAC Summit, Aviation Senior Leader Conference, school and center changes of command.

(5) Major TRADOC sponsored or TRADOC attended exercises, simulations and wargames. Examples: Unified Quest, Army Evaluation Task Force events, Omni Fusion, Armor Warfighting Seminar, continuity of operations exercise.

(6) Major Fort Monroe events. Examples: Semi-monthly retirement ceremonies, special observances, TRADOC Organization Day, CG holiday reception.

(7) Major holidays (Federal or otherwise) and training holidays.

(8) Holiday block leave period (formerly Exodus).

(9) Any other event that will significantly engage the leadership’s time, attendance, interest or attention. Examples: Presidential inauguration, base realignment and closures milestones.

c. Instructions for access to the TMPC are in the TRADOC Campaign Plan, tab A to appendix 1 to annex C.

11-3. Instructions on accessing and inputting to the TMAC and the TMPC

a. TMAC.

(1) Calendar viewing. A common access card is required to open the TMAC. Access it from the bottom left menu column on the TRADOC Web site.

(2) Calendar entries. Commanders identify POCs who are given contributor rights by the calendar administrator.

b. TMPC.

(1) Calendar viewing. A common access card is required to open the TMPC. Access it from the bottom left menu column on the TRADOC Web site.

(2) Calendar entries. Events are pulled directly from the TMAC.

11-4. Calendar management
The TMAC and TMPC are managed by the G-33.

Appendix A
References

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

AR 25-50
Preparing and Managing Correspondence

AR 25-52
Authorized Abbreviations, Brevity Codes, and Acronyms

TRADOC Regulation 10-5
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

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 Pam 672-20
Incentive Awards Handbook

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

JFTR

JTR

TRADOC Memo 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 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 600-8-2
Military Awards

TRADOC Supplement 1 to AR 672-20
Incentive Awards

United States Government Printing Office Style Manual (available at http://www.gpoaccess.gov/stylemanual/browse.html)

Section III
Prescribed Forms and Label

HQ TRADOC Label 1001
Pouch Mailing Label

TRADOC Form 5-E
Transmittal, Action and Control

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

Section IV
Referenced Forms

DA Form 638
Recommendation for Award

DA Form 1256
Incentive Award Nomination and Approval

DA Form 3964
Classified Document Accountability Record

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 (http://www.apd.army.mil/pdffiles/r25_50.pdf).

b. DA Pam 25-50, paragraph 4a references the AAO database (https://www.rmda.army.mil/abbreviation/MainMenu.asp).

c. The MAML (posted on the SGS Web site under Telephone Directories/Rosters link).

d. United States Government Printing Office Style Manual (see http://www.gpoaccess.gov/stylemanual/browse.html).

e. Staff guidance folder in e-mail under "All Public Folders"--"Monroe Public Folders."

B-3. Processing staff actions

a. PURPOSE statements on TRADOC Form 5 will state action to take in one concise sentence (for example, “CG or DCG/CoS (as appropriate) sign memo (TAB A) to MG Brown nonconcurring with his proposed changes to FM XX-X (TAB B)”).

b. Ensure the CATS control number is in block 1 on the TRADOC Form 5. If the action is generated by the proponent, the CGAC will assign an ES control number for tracking purposes. If AO questions appropriate signature/approval authority of ES action, precoordinate with SGS and/or ACoS prior to processing action.

c. 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.

d. Tab B is the document that generated the action. Additional background information follows, using succeeding tabs in order mentioned in TRADOC Form 5.

e. Always use editing and proofing tools available (spelling and grammar check) as an initial step in the proofing process. Peruse correspondence to ensure document is error free and ready for signature and dispatch, prior to submission to SGS for Command Group signature. United States Government Printing Office Style Manual, 2008, Washington, DC.

f. Ensure signature flags are included in packages requiring signature. DO NOT USE PLASTIC EXECUTIVE COVER SHEETS.

g. Ensure SGS SACO is aware of time-sensitive actions to assist in expediting through the Command Group. If action requires a red folder the reason must be included.

h. AOs will provide the designated organization POC an electronic copy of all documents to upload IAW appendix I. 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 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 system.

k. Use Arial font, size 12 for all correspondence.

l. Ensure font in the headers and footers matches the font used in the text.

m. 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.

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

o. AOs must route all actions going to the Command Group through the CGAC/SGS. Do not take actions directly to or from Command Group offices. Actions received in the Command Group without SGS approval are returned to the SGS without action.

(1) If an action requires presentation to the CG or DCG/CoS for signature during a briefing, provide the SGS an advance copy of the correspondence for proofing, editing, assignment of CATS control number, and approval prior to the briefing. Following the briefing, return a copy of both the TRADOC Form 5 and the signed correspondence to SGS for file retention.

(2) In emergency situations, if a proponent picks up an action from the Command Group, ensure SGS receives a file copy of the signed/approved action and the TRADOC Form 5.

B-4. Coordination

a. Show name, title, and date on TRADOC Form 5. Actions received in SGS without this information will be returned to the AO for clarification.

b. The DCS, deputy, or organization command group must sign nonconcurrence/ considerations of nonconcurrence.

c. Coordinate all Congressional actions with TRADOC CAO and SJA.

d. Coordinate all conferences/major briefings with TRADOC DCS, G-3/5/7 (ORMD) to avoid conflicts with the TMAC.

e. Coordinate major ceremonies with ESD, OSGS, and Post (Plans and Training).

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

g. Coordinate medical actions with TRADOC Surgeon/U.S. Army Medical Command, as appropriate.

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

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

B-5. Helpful hints
The following hints apply to all correspondence:

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

b. Write in active voice—subject, verb, and object.

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

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

(2) Begin the paper with the "bottom line up front."

(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."

B-6. Tips for specific types of correspondence
The following guidelines are provided for specific types of correspondence.

a. Letters.

(1) Use office title instead of office symbol. NOTE: On letters the CG signs, the space under "REPLY TO THE ATTENTION OF" remains blank.

(2) Reference letter responding to; for example, "Thank you for your May 1, 2007, letter emphasizing the importance of..."

(3) Use civilian dates in letters; for example, January 2, 2009.

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

(5) Center text on page so letter is framed on the page.

(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. 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 2-5.

(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 affect. 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 1-31 (provide type of correspondence, organization of origin, office symbol, date, and subject). For example, Memorandum, HQ TRADOC, ATCS-X, 12 Dec 05, subject: New Staff Procedures.

(5) Do not show copies furnished to subordinate commanders on CG memorandums to higher HQ.

(6) If a memorandum's distribution list is the only text on the second page, add: "Distribution (see next page)" two lines below the end of the signature block. See figures B-1 and B-2 for distribution sample.

DEPARTMENT OF THE ARMY
ORGANIZATIONAL NAME/TITLE
STANDARDIIZED STREET ADDRESS
CITY, STATE, AND ZIP+4 CODE

REPLY TO
ATTENTION OF

OFFICE SYMBOL

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Preparing a SEE DISTRIBUTION Addressed Memorandum with all the Distribution Listed on the Second Page

1. Use the *SEE DISTRBUTION* format when more than five addresses are required.

2. When spacing does not allow listing distribution on the first page, the complete distribution list may be typed on the second page.

3. Type the word *DISTRIBUTION* on the second line below the last line of the signature block. On the third line below the last line of the signature block, type *see next page* enclosed in parenthesis.

a. Xxxxxxxxxxxxxxxxxxxxxxxxxx.

b. Xxxxxxxxxxxxxxxxxxxxxxxxxx.

(1) Xxxxxxxxxxxxxxxxxxxxxxxxx.

(2) Xxxxxxxxxxxxxxxxxxxxxxxxx.

4. On page 2, on the third line under the subject line, type *DISTRIBUTION:* and list the addresses starting on the forth line.

AUTHORITY LINE:

Encl

JANE D. SMITH
MAJ, SC
Chief, Operations Division

DISTRIBUTION
(see next page)

Figure B-1. DISTRIBUTION: (see next page) signature page

OFFICE SYMBOL
SUBJECT: Preparing a SEE DISTRIBUTION Addressed Memorandum with all the Distribution Listed on the Second Page

DISTRIBUTION:
DCS, G-1 (DAPE-ZA)
DCS, G-2 (DAMI-ZA)
DCS, G-3/5/7 (DAMO-ZA)
DCS, G-4 (DALO-ZA)
US ARMY MATERIEL COMMAND
US ARMY FORCES COMMAND

2

Figure B-1. DISTRIBUTION: (see next page) (cont.)

c. DMS/AMHS messages.

(1) Staff actions containing DMS/AMHS messages for Command Group approval/release are packaged IAW guidance in paragraph 3-2, and processed the same as other actions.

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

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

(4) For quick reference of DMS/AMHS organizational account addresses for HQ TRADOC coordinating staff and commanders/commandants, use the MAML at the SGS SAD Web site under the Telephone Directories/Rosters link.

(5) 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.

(6) If PERSONAL FOR, ensure addresses and addressees match. Use the MAML to find PERSONAL FOR addressees for subordinate commanders. (The MAML lists individuals in rank order by grade, but within the same grade, names are listed alphabetically.)

(7) Classification is automatically inserted at the beginning of the text if the message is sent signed/encrypted. If administrative instructions state sending the message signed, but not encrypted, include the classification at the beginning of the text.

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

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

(10) Upload the completed message to the TKE Web site IAW appendix I. Name the file the same as the DMS/AMHS subject.

(11) The DMS/AMHS application automatically places the DTG at the beginning of the subject line when the message is dispatched. To receive a CC with the dispatched DTG, AOs will blind copy themselves. When referencing DMS/AMHS messages, use the DTG at the beginning of the subject line.

Appendix C
Procedures and Formats for RAs

C-1. Procedures for RAs

a. The OCG or DCG 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 encrypted e-mail.

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. No later than 2 days prior to event, the lead must e-mail reply with the name of the AO to all concerned. Suspense for submission of the RA to SGS is NLT 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, insure 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.

c. AOs can contact the CPG upon receipt of a CG RA tasking for advice and/or recommendations to ensure an accurate, timely, and usable 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 680-2684, (757) 788-2684 or monr.atcs@conus.army.mil for administrative guidance or questions pertaining to RA preparation.

d. When the CG uses desktop VTC or VTC facilities, the AO will provide OCG a seating chart. Include 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 notifying all attendees of cancellations or changes in times and/or locations as they occur.

e. Upon submission of the RA to the SGS, the SACO checks for format compliance and distributes to the appropriate offices (CG, DCG/CoS, and CPG).

C-2. Format

a. Composition. All CG events require three copies of the RA in three-ring white binders--the original for the CG, and one copy each for the DCG/CoS and CPG. Package and tab the two additional copies the same as the original, with a copy of the TRADOC Form 5 on the front of each book. Provide electrons on a CD for the executive overview. Refer to table C-1, below, for configuration of RAs. It is not

necessary to begin tabs with “A,” but keep tabs in alphabetical/numerical sequence. Top document is always the TRADOC Form 5.

Table C-1
Configuration of RAs

	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 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(s) (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 tasker.

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

(2) DISCUSSION. Include your key discussion points.

(3) COORDINATION. Ensure pertinent coordination across TRADOC IAW TRADOC Regulation 10-5, paragraph 2-6. Consider early contact with PAO; SJA; ESD, and OSGS.

c. Table of contents. Place the table of contents as the first page within the binder. 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. RA guidance

Visit of General (R) Moring
30-31 April 2009

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. RA table of contents

C-3. Assembling RAs
Description of tabs.

a. **Executive overview.** 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. (Fig C-3 is an example of an executive overview.)

b. **Briefing(s)** (in presentation/agenda timetable sequence). Print paper slides on one side, in color, if the use of color differentiates data. Punch three-ring binder holes at the top of the page for slides in landscape orientation or on the left side for portrait orientation. 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 fig 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 pager numbers). (See example at fig C-5.) E-mail the list to appropriate Command Group office NLT 2 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 fig 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.

Visit of General (R) Moring
30-31 January 2009

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 April 2008 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 DESERT STORM and in the Balkans.

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 TRADOC and the TRADOC Senior Liaison to French Army play in keeping TRADOC and CDES synchronized.

4. **STRATEGIC ANALYSIS**.

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 2009 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 1997, when the French military began its latest round of dramatic transformation, the French Army has shrunk by almost half (Tab C).

Figure C-3. RA 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 30 January 2008 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 31 January 2008 at 0900. See Tab D for detailed itinerary, and Tab G for social schedule.

As of: 12 Dec 07
Prepared: LTC Bos/5669
Approved: COL Letendre/5690

2

Figure C-3. RA executive overview (cont.)

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 or DCG/CoS (biography of visitor, any previous visits to HQ TRADOC, purpose of visit, others accompanying the visitor, itinerary, seating chart, command takeaways). (See http://www.tradoc.army.mil/tpubs/regs/r1-11_files/visitortemplate.ppt for the slide deck template.) 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 2009

DATE/TIME	WHAT	WHERE	TAB
19 Jan			
0500-0630	C21 Flight	LAFB to Kennedy Space Center	
0700-0745	Breakfast	KSC HQ Bldg Dining Facility	
0800-0930	NASA Project Status Overview	HQ Bldg, Rm 21	
0945-1030	OMB Budget Brief	HQ Bldg, Rm 21	
1045-1145	DOD Overview	HQ Bldg, Rm 21	
1200-1300	Working Lunch	HQ Bldg, Rm 46	
1300-1330	USAF Astronaut Selection Status	HQ Bldg, Rm 35	
1330-1430	Army Corps of Engineers Martian Facility Model	KSC Vehicle Assembly Bldg	
1445-1615	DOTMLPF Model Application	VTC Facility	
1615-1700(T)	Office Call with CINCSPACE	HQ Bldg, Rm 7	
1800-0100	Social/Dinner	KSC Club	G
20 Jan 0130-300	C21 Flight	KSC to LAFB	I

Figure C-4. RA itinerary

CG Trip
Vint Hill Farms Station
3 Nov 09

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, Commander CAC, LTC Bob Jones, DSN 552-XXXX, 913-XXX-XXXX

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

Figure C-5. RA participants/POCs

Appendix D
TRADOC Form 5

D-1. Completing TRADOC Form 5
Complete TRADOC Form 5 for CG and DCG/CoS correspondence (see fig 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.

( )

TRANSMITTAL, ACTION AND CONTROL For use of this form, see TRADOC Reg 1-11; the proponent agency is the SGS.	1. CATS CONTROL NUMBER	2. TODAY'S DATE (YYYYMMDD) 20090608	3. SUSPENSE DATE (YYYYMMDD)
4. OFFICE SYMBOL ATCS-XE	5. SUBJECT Approval of TRADOC (TR) 1-11, Staff Procedures		

6. ROUTING: (SGS USE ONLY)	Initial	Date	TRADOC SGS (Name and Phone)
CG			COMMAND GROUP COMMENTS:
CG XO			
CPG			
DCG/CoS			
ACoS			
DCG XO			
CSM			
SGS			
C, SAD			
SACO			

7. EXECUTIVE SUMMARY

Key Points

- TR 1-11 provides TRADOC-specific guidance for staff procedures, and supplements AR 25-50, Preparing and Managing Correspondence.
- TR 1-11 follows Army standards cited in AR 25-50 and prescribed by Headquarters, Department of the Army (HQDA).
- Complete summary at TAB B.

Ref: N/A

Encl: TAB A: Revised TR 1-11
TAB B: Summary of change

1. Purpose:
To obtain DCG/CoS approval of the revised TR 1-11 (TAB A).

2. Discussion:
TR 1-11 was last updated in July 2006. This revision brings it in line with HQDA practices and updates several internal procedures.

Block 9, Staff Coordination (continued)
CONCUR, SJA, LTC Barrister, x1234, 20090604
CONCUR, TRADOC Publications Officer, Ms. Pubs, x1222, 20080605

3. Recommendation:
DCG/CoS indicate approval by initialing below. Upon approval, the Deputy Chief of Staff, G-6 will authenticate and publish this regulation.

APPROVED _____ DISAPPROVED _____ NOTED _____ SEE ME _____ COMMENT _____

TRADOC FORM 5-E, JUN 2009 ( ) Previous editions are obsolete. Page 1 of 3
TRADOC PE v1.00

Figure D-1. Sample TRADOC Form 5

( )

8. LEAD AGENCY STAFF COORDINATION			CATS CONTROL NUMBER:	
TITLE	INITIAL	TYPE OR PRINT NAME		DATE (YYYYMMDD)
Ch, SAD		Mr. Director		20090601
PRINCIPAL		Mr. Principal, TRADOC SGS		20090602
ACTION OFFICER (Name/Title/Phone Number/E-mail)		Ms. SACO, TRADOC SACO, x1223, k.SACO@us.army.mil		
FILE LOCATION:	For internal use by proponent.			
SACO's NAME (Name/Phone Number/E-mail)		N/A		

RECOMMENDATION FOR COORDINATING STAFF:

SGS approve revision of TR 1-11 by electronically initialing in block 8.

9. STAFF COORDINATION

CONCUR	NON-CONCUR	AGENCY	NAME (TITLE, LAST NAME)	PHONE	DATE (YYYYMMDD)	REMARKS
X		CAC	LTC Cac	DSN 552-1234	20090528	
X		CASCOM	MAJ Cascom	DSN 654-4560	20090529	
X		USAAC	LTC Usaac	x2300	20090529	
X		MANSCEN	COL Manscen	DSN 456-3333	20090526	
X		TRAC	LTC Trac	DSN 123-4567	20090529	
X		DCS, 1/4	Mr. Admin-Log	x2245	20090529	
X		DCS, G-3/5/7	Ms. Intel	x2345	20090529	
X		DCS, G-6	COL Im	x5679	20090528	
X		DCS, G-8	COL Dollars	x1456	20090528	
X		ARCIC	LTC Futures	x2378	20090528	
X		CAO	Ms. Congress	x3456	20090527	
X		QAO	Mr. Quality	x4567	20090529	
X		IRAC	Ms. Internal-Review	x5678	20090529	
X		Safety	Mr. Safety	x6789	20090529	
X		EEO	Mrs. Opportunity	x7890	20090529	
X						

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

TRADOC FORM 5-E, JUN 2009 ( ) Page 2 of 3

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Figure D-1. Sample TRADOC Form 5 (cont.)

INSTRUCTIONS

PARENTHESES AT TOP OF FORM:
Fill in classification (UNCLASSIFIED, FOUO, etc.)

Block 1. TRACKING 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. Use the Army standard date format: YYYYMMDD. Example: 20090212.

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 and/or DCG need to know about this action. Write them at the senior Army leaders' level. These are the points your principal or deputy want to convey to the CG/DCG. 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? What should the CG/DCG 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 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, and deputy. The appropriate releasing authority 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 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: It is important to be able to retrieve a file for corrections and annotations in the event that the originating action officer is not available. Enter the file path to reflect where the correspondence was saved on the server. NOTE: This applies to unclassified documents only.
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, 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 (cont.)

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 USPS limits the DOD activity name line to 48 characters, to include spaces. If using abbreviated DOD activity names, ensure the abbreviated name is clear and understandable to all parties concerned. An example of a three-line address is shown in figure E-1.
Note: District of Columbia will be abbreviated as DC as shown in figure E-1.

OFFICE OF THE SECRETARY OF THE ARMY
101 ARMY PENTAGON
WASHINGTON, DC 20310-0101

Figure E-1. Example of a three-line ZIP+4 address

E-2. Optional lines of address

a. The two additional lines are optional and 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 *(MANDATORY)*

b. Format the mailing address with a uniform left margin, with all characters typed or machine printed in UPPERCASE letters. The USPS 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.

Appendix F
Schedule of Special/Ethnic Observances and Recurring Events

The schedule of special/ethnic observances and other recurring HQ TRADOC and Fort Monroe events and responsible staff offices is listed in table F-1.

Table F-1
Schedule of special/ethnic observances and recurring events

HQ, TRADOC and Fort Monroe Special/Ethnic Observances						
	Event	**Date**	**2009**	**2010**	**2011**	**2012**
1	Dr. Martin Luther King Birthday	Jan	DCS, G-2 and DCS, G-6	DCS, G-6	DCS, G-6	DCS, G-6
2	African American History Month	Feb	DCS, G-1/4	DCS, G-1/4	DCS, G-1/4	DCS, G-1/4
3	Women's History Month	Mar	ARCIC/G-9	ARCIC/G-9	ARCIC/G-9	ARCIC/G-9
4	Holocaust Remembrance Day	Apr	USAAC	DCS, G-2	DCS, G-2	DCS, G-2
5	Asian Pacific Heritage Month	May	DCS, G-8	DCS, G-8	DCS, G-8	DCS, G-8
6	Women's Equality Day	Aug	Garrison HQ	Garrison HQ	Garrison HQ	Garrison HQ
7	Hispanic Heritage Month	Sep	U.S. Army Cadet Command	ARCIC/G-9	ARCIC/G-9	ARCIC/G-9
8	Native American Heritage Month	Nov	DCS, G-3/5/7	DCS, G-3/5/7	DCS, G-3/5/7	DCS, G-3/5/7
Other HQ, TRADOC and Fort Monroe Recurring Events						
	Event	**Date**	**2009**	**2010**	**2011**	**2012**
1	Army Emergency Relief *	May	Garrison HQ	Garrison HQ	Garrison HQ	Garrison HQ
2	HQ TRADOC Organization Day (Responsibility rotates between DCS, G-1/4; DCS, G-3/5/7; DCS, G-8; and ARCIC/G-9.)	Jun	DCS, G-8	ARCIC/G-9	DCS, G-3/5/7	DCS, G-1/4
3	Savings Bond Campaign *	Jun	Garrison HQ	Garrison HQ	Garrison HQ	Garrison HQ
4	NCO/Soldier of the Year Competition	Aug	DCS, G-3/5/7	DCS, G-3/5/7	DCS, G-3/5/7	DCS, G-3/5/7
5	POW/MIA Recognition Day	Sep	Garrison HQ	Garrison HQ	Garrison HQ	Garrison HQ
6	Combined Federal Campaign **NOTE: *When TRADOC CG serves as Honorary Chairman, DCS, G-1/4 has oversight and intraservice coordination responsibilities.*	Sep-Nov	Garrison HQ	Garrison HQ	Garrison HQ	Garrison HQ
7	National Disabilities Month	Oct	Garrison HQ	Garrison HQ	Garrison HQ	Garrison HQ

*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 6.

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

G-1. Use of HQDA Form 5
Actions originating from HQDA requiring TRADOC response must include the HQDA Form 5. This form functions as the 'transmittal' for the response. It summarizes the action, identifies the originating office, and includes coordination and approval for release.

G-2. Completing HQDA Form 5
Complete HQDA Form 5 using the instructions on page 3 of the form (see fig G-1).

G-3. Assembling the action
Include the HQDA Form 5 under tab A of the TRADOC Form 5 when assembling the staff action (see fig 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)	3. SUSPENSE DATE (YYYYMMDD)
4. OFFICE SYMBOL (Office symbol of originator/author/SME)	5. SUBJECT Must match subject line on the tasker (upper and lower case, unbolded)		

6. ROUTING: (ECC USE ONLY)	Initial	Date	ECC PQC (Rank, Name, Phone) DIR: ECC
SA			COMMENTS:
CSA			
USA			
VCSA			(Comments from Senior Leaders of the Department of the Army only.)
AASA			
DAS			
SMA			
DUSA			
VDAS			

7. EXECUTIVE SUMMARY / ACTION MEMORANDUM

Key Points

- Place the most important points to the Senior Leaders of the Department of the Army here.
- Maximum one sentence or two lines per bullet.
-

Ref: Provide details of what generated this action (ECC tasker, message, e-mail, memorandum, or meeting that initiated the requirement).

Encl: TAB A: The document for signature or the first piece of support documentation.
TAB B: The next piece of supporting documentation (ECC tasker of other backup documents).
TAB C: Continue tabs as needed.

1. Purpose:
Provide a brief statement as to why the action officer is staffing this action (recommendation or information).

2. Discussion:

a. Summarize or amplify the information provided in the Key Points above. Provide current status of issue (if applicable). The discussion should tell the "story" on an action without "begging questions." The final authority should fully understand why this action is necessary.

b. If this discussion block offers sufficient space to convey the information, present as an EXSUM. There is no continuation page for this form. If more space is needed, in lieu of an EXSUM, prepare a one-page Action/Info Memorandum or an Info/Discussion Paper at TAB A and use this space to describe the details or highlights of the document. Action officers should make every attempt to limit all information to one page. DO NOT COPY FROM THE DOCUMENT AT TAB A.

3. Recommendation:
If for information, state "Information Only." If a decision is required, identify the final approving authority and the desired action. For example, "CSA sign memorandum at TAB A."

APPROVED _____ DISAPPROVED _____ NOTED _____ SEE ME _____ COMMENT _____

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Figure G-1. Sample HQDA Form 5

(UNCLASSIFIED)

8. LEAD AGENCY STAFF COORDINATION		TRACKING NUMBER: (HQDA ECC#)	
TITLE	INITIAL	TYPE OR PRINT NAME	DATE (YYYYMMDD)
Branch		Branch Chief, LTC/GS-14	
Division		Division Chief, COL/GS-15	
Director		The Director, BG/SES	
Deputy		The Deputy, MG/SES	
PRINCIPAL		GO Principal, LTG/SES or DCG/CofS)	
ACTION OFFICER *(Name/Title/Phone Number/E-mail)*		(name/title/phone number/e-mail of originator/subject matter expert)	
FILE LOCATION:			
SACO's NAME *(Name/Title/Phone Number/E-mail)*		(HQ TRADOC SGS or G-3 Tasking SACO)	

RECOMMENDATION FOR STAFF PRINCIPAL:

This block allows for recommendations to the Staff Principal (i.e., G-3/5/7 approves the memorandum at TAB A by initialing Block 8.)

9. STAFF COORDINATION

CONCUR	NON-CONCUR	AGENCY	NAME *(TITLE, LAST NAME)*	PHONE	DATE (YYYYMMDD)	REMARKS
☒	☐	Office	LTC Action Officer	XXX-XXXX		
☒	☐	Office	MAJ Action Officer	XXX-XXXX		
☒	☐	Office	CPT Action Officer	XXX-XXXX		
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					

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

HQDA FORM 5, OCT 2007

(UNCLASSIFIED)

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Figure G-1. Sample HQDA Form 5 (cont.)

INSTRUCTIONS

PARENTHESES AT TOP OF FORM:

Parentheses at top of form: Fill in classification (UNCLASSIFIED, FOUO, etc.) If for the Executive Office Headquarters (EOH), a classification of FOUO will be used as a minimum. If using a classified SIPR system then can use (CONFIDENTIAL, SECRET) classification .

Block 1. TRACKING NUMBER:

a. If the action has been assigned a tracking number by ECC, 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 tracking number (if applicable).

Block 2. TODAY'S DATE:

Enter today's date. The Army standard date format is YYYYMMDD. Example: 20071015. This allows for tracking system searches by a standard 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. OFFICE SYMBOL:

Enter the office symbol of the agency responsible for the action. Example: (DAMO-FMP)

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/lower case, unbolded).

Block 6. ROUTING:

(ECC USE ONLY): The ECC POC will complete this block.

Block 7. EXECUTIVE SUMMARY/ACTION MEMORANDUM:

Key Points: The key points are the salient information that the EOH member needs to take away from the action and are written at the Senior Army Leaders' level. These are the key points your Principal or Deputy want to convey to the EOH members. Each key point area allows you essentially two lines to express your key point (164 spaces) with a maximum of three key points.

Ref: List all references, e.g., OSD tasker; meeting; e-mail; etc. If none, state N/A.

Encl: List all enclosures/TABs. Explain what is included within the packet. If none, state N/A (for example, Enclosures: TAB A: Memorandum for SecArmy signature. TAB B: DOD tasking and ECC tasking, and so on).

1. Purpose: Provide a short and clear statement of purpose (e.g., to obtain the SecArmy'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 EOH? What should the EOH 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.

3. Recommendation: Provide a brief statement defining the desired action by the final approval authority and explain why this is the best option (e.g., SecArmy approve action and sign the memorandum at TAB A.) Block 7 allows the EOH member to approve, disapprove, 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 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 for EOH review.

ACTION OFFICER ***(Name/Title/Phone Number/E-Mail)***: 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.

FILE LOCATION: It is important to be able to retrieve a file for corrections and annotations in the event that the originating action officer is not available. Enter the file path to reflect where the correspondence was saved on the server in order that an alternate POC may retrieve the file and make any necessary annotations. NOTE: This applies to unclassified documents only.

SACO'S NAME ***(Name/Title/Phone Number/E-Mail)*** **:** 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 8).

Block 9. 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.

Block 10. REMARKS BY ECC ***(ECC use only):***

The ECC POC will complete this block.

RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION: ECC will use this block to identify all packets being returned to the Staff for additional information requirements.

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Figure G-1. Sample HQDA Form 5 (cont.)

Appendix H
Public Distribution Lists

H-1. Command Group distribution lists
The Command Group Distribution Lists include frequently used distribution lists such as **Commanders/Commandants-TRADOC**, **Chiefs-TRADOC**, **XO-TRADOC**, and **SGS-TRADOC**. To use these distribution list you must first add them to your address book.

H-2. Guidance for using Command Group 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.

H-3. How to add public distribution lists to an address book
To add any public distribution list, including the Command Group distribution lists, follow these steps: Open e-mail and opt to view the folder list. Scroll down and expand "Public Folders" and then expand "All Public Folders." Scroll down to and expand "Monroe Public Folders." Expand the "Contacts" folder and select "Command Group Distribution Lists." "Right click" on the mouse and select "Properties." Select the "Outlook Address Book" tab and place a check mark in the "Show this folder as an e-mail Address Book" box. Click OK. The distribution list will then appear in your address book.

Appendix I
Uploading Documents to TRADOC Knowledge Environment (TKE) Web site

I-1. Title TRADOC Form 5 and supporting documents

a. If a CATS number is assigned:

(1) Title the TRADOC Form 5 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 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 original document requiring signature (or approval) IAW paragraph 3-2a.

I-2. Upload TRADOC Form 5 and supporting documents

Designated organization POCs will electronically upload the digitally signed TRADOC Form 5 and supporting documents to the TKE Web site at https://cac.tkeportal.army.mil/sites/al/Actions Library/Forms/AllItems.aspx?View=%7b756B3844%2d2612%2d43B7%2d9807%2dE201BDFA186B%7d. (See fig I-1 for screenshot of the actions library.)

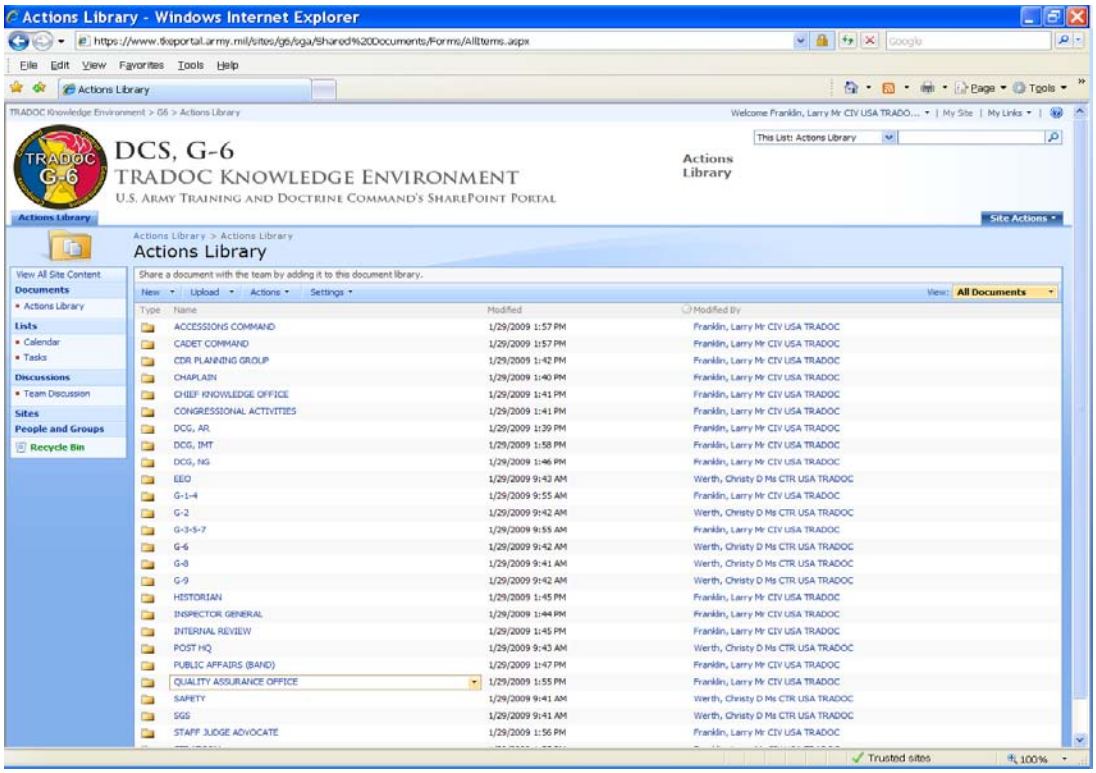

Figure I-1. Actions library

I-3. Organization folders

Each TRADOC organization has an organization folder where designated organization POCs will upload tasker consisting of the TRADOC Form 5 and supporting documents.

a. Click organization title in order to access organization actions library (see fig I-2).

b. Add an action folder in order to keep tasker documents together (see para I-3).

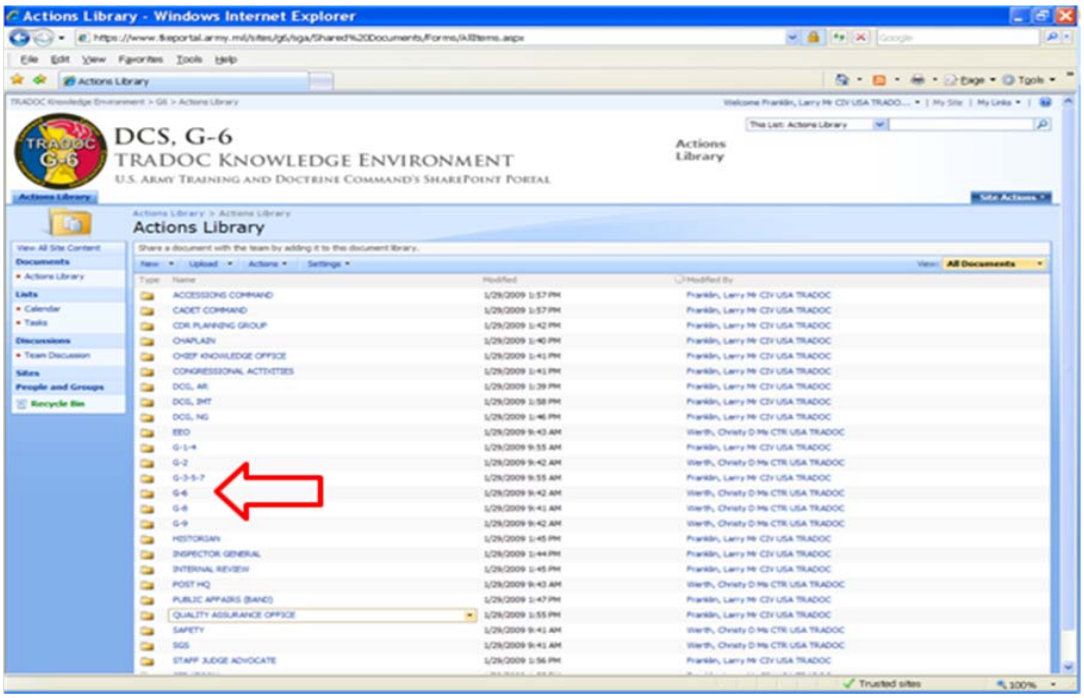

Figure I-2. Organization actions library

I-4. Instructions for adding a new folder

a. To add a new action folder in the organization folder click the new dropdown menu and click new folder (see fig I-3).

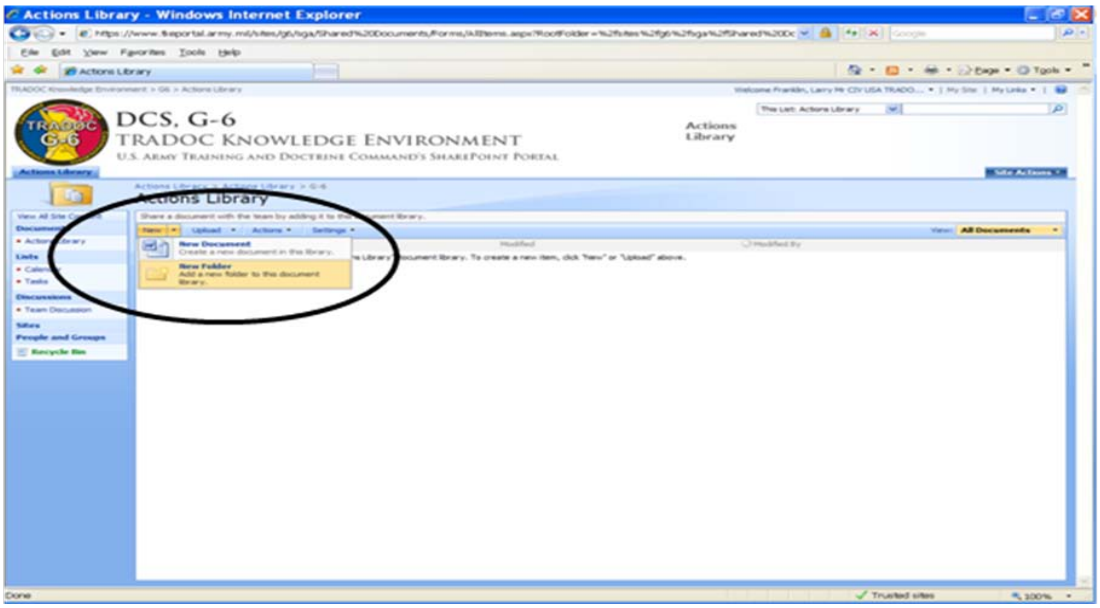

Figure I-3. Add new action folder

b. Title the new action folder the CATS number (if assigned) and the tasker subject name (for example: IN509059 One Time Review of SSN Use and Justification) (see fig I-4).

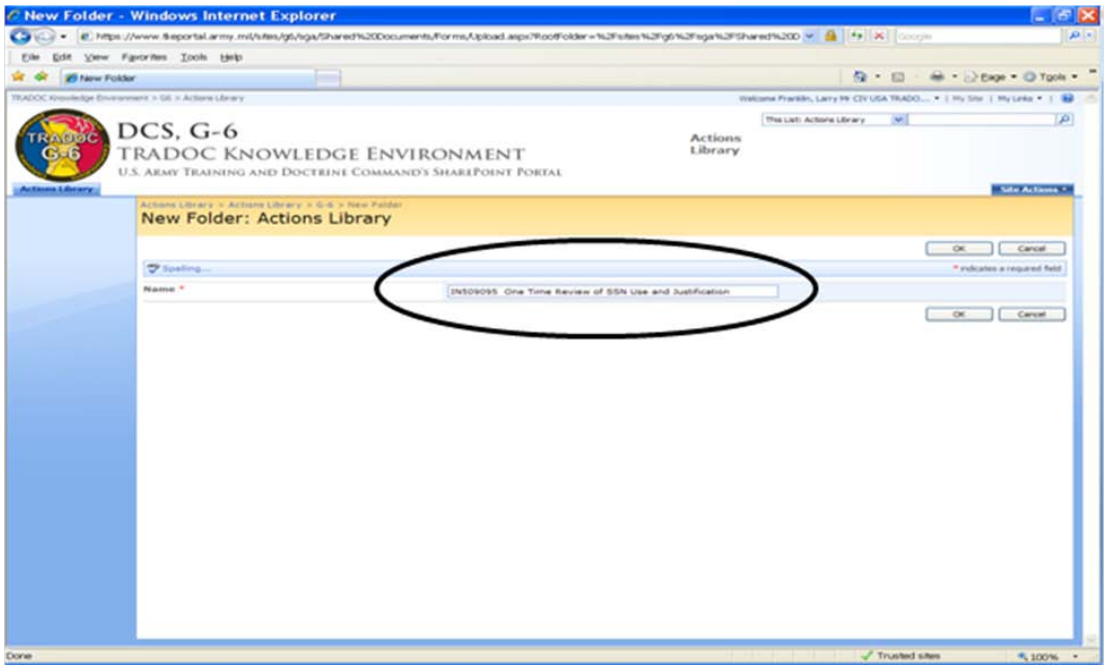

Figure I-4. Title new action folder

c. Click OK and the screen will refresh to show the new action folder (see fig I-5).

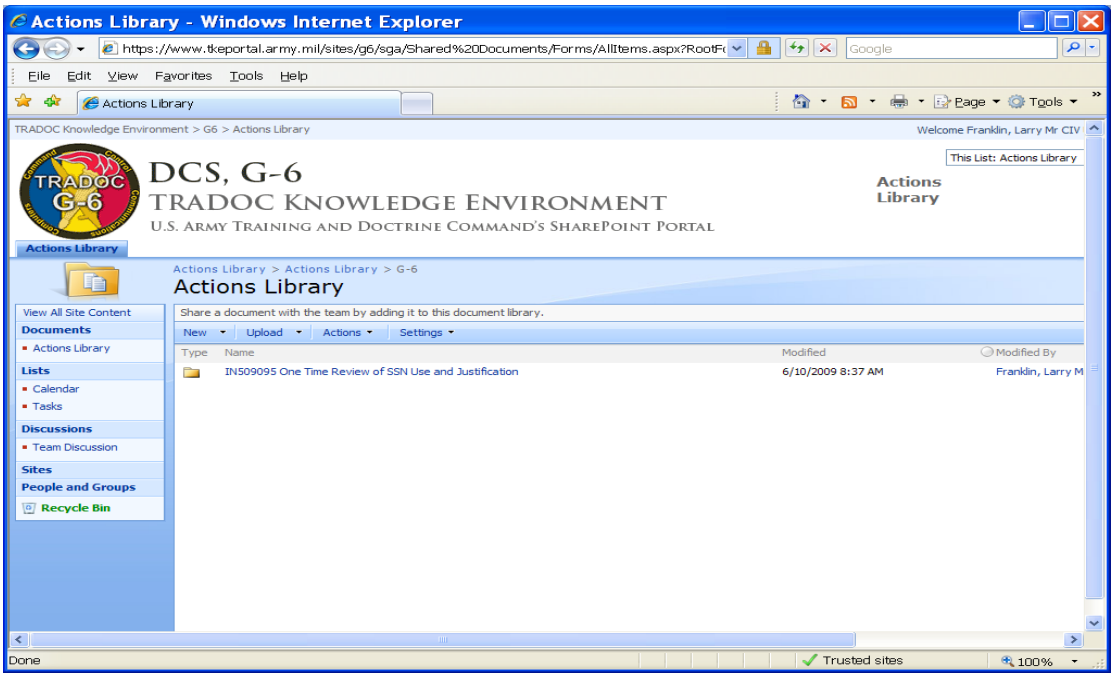

Figure I-5. New action folder

I-5. Uploading document(s)

a. Click on the new action folder (see fig I-5). To upload document(s) into the new action folder, click on upload document (to upload single document) or upload multiple documents (to upload multiple documents) (see fig I-6).

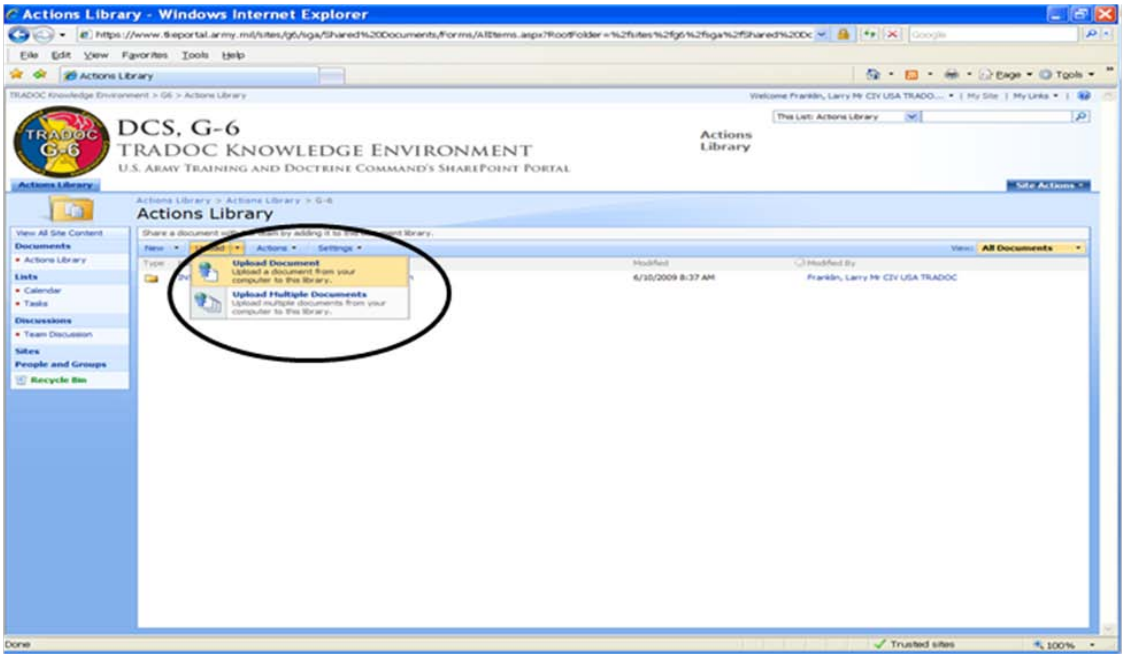

Figure I-6. Upload document or multiple documents

b. Click on browse to upload (single file) or upload multiple files (multiple files) (see fig I-7.)

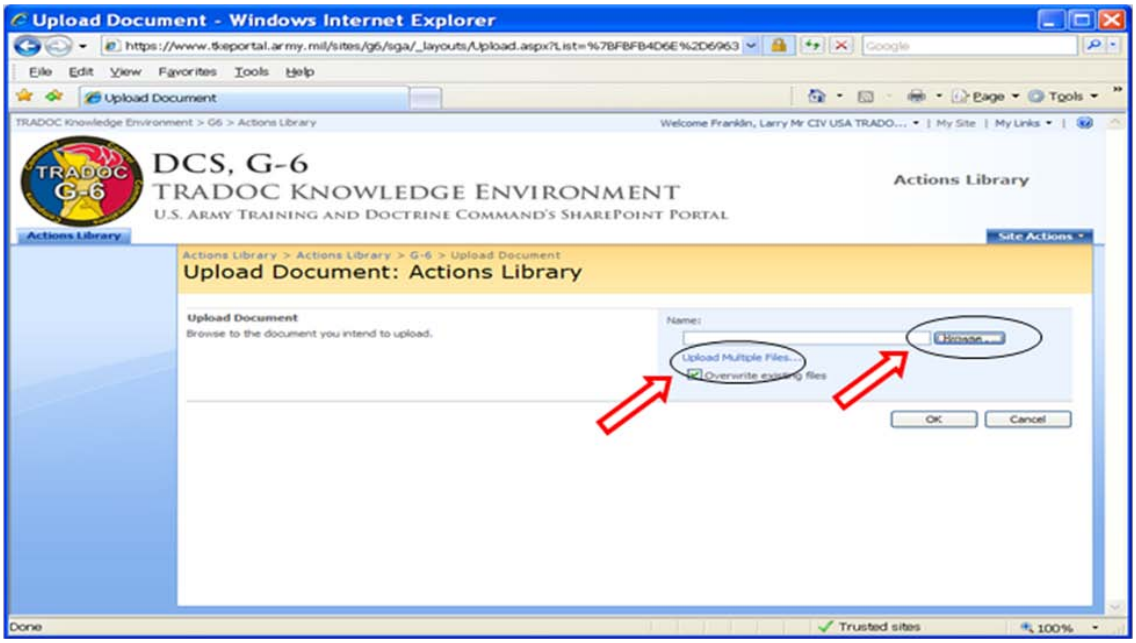

Figure I-7. Upload document(s)

c. To choose the file to upload, navigate to the desired document and click open (see fig I-8).

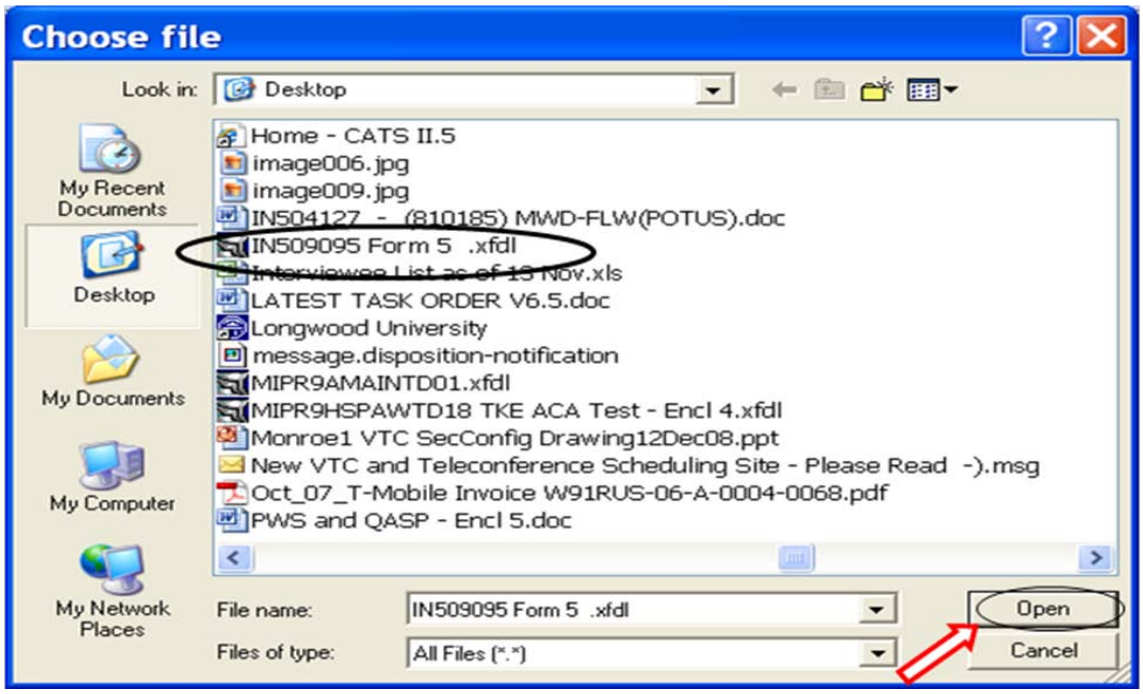

Figure I-8. Choose document(s)

d. The document information will automatically fill in the name block. Ensure the overwrite existing files is checked and click OK (see fig I-9).

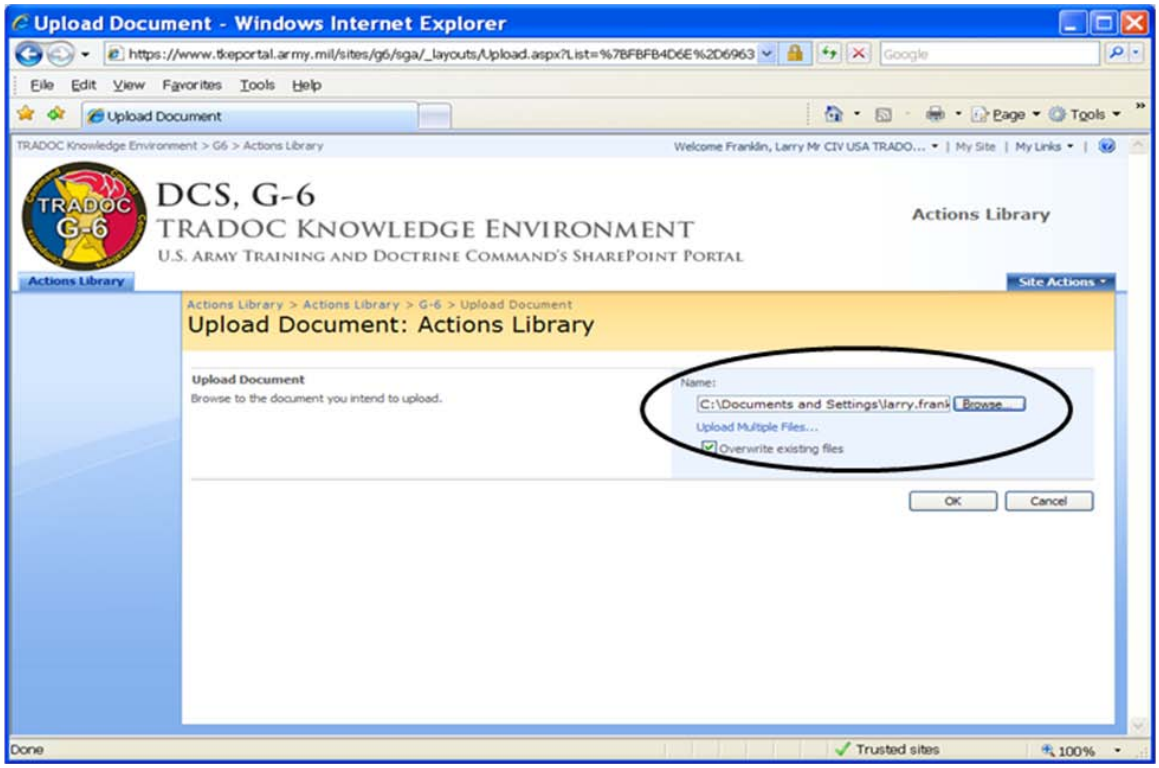

Figure I-9. Posting document(s)

e. The document(s) will be uploaded (see fig I-10 for the TRADOC Form 5 and supporting tabbed documents in the titled action folder) and the screen will return to the main window of the document library.

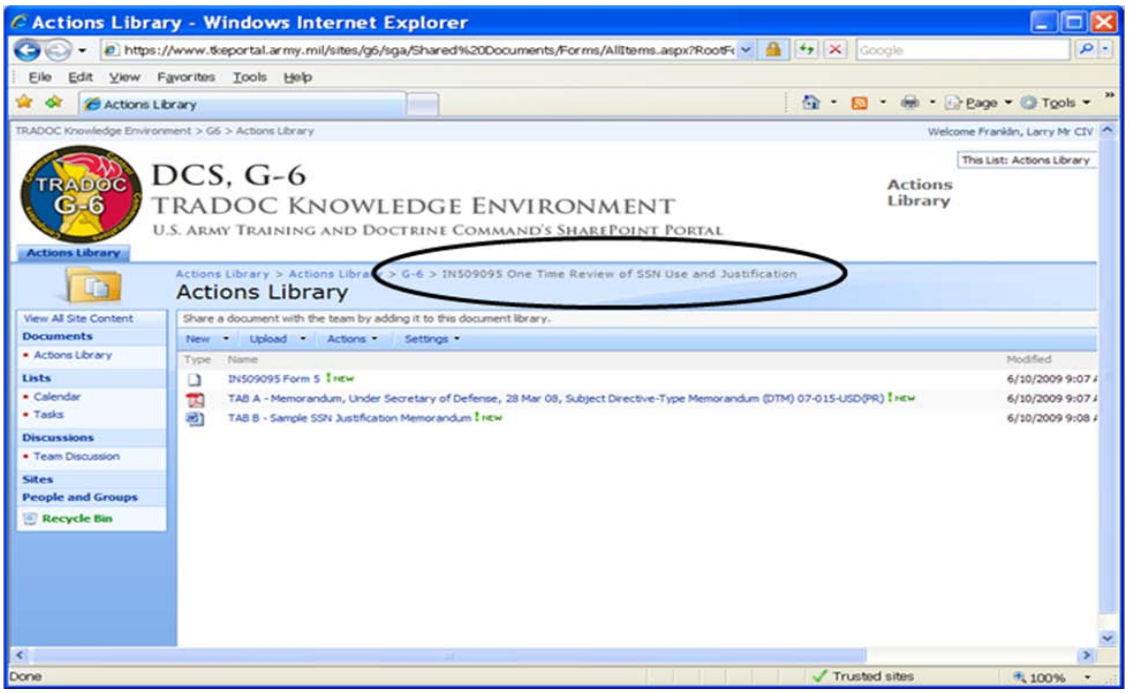

Figure I-10. TRADOC Form 5 and supporting documents (titled "TAB")

f. Close the browser when finished.

g. Make notification via e-mail that the tasker TRADOC Form 5 and supporting documents have been uploaded to SGS at monr.atcs@conus.army.mil or G-33 at monr.eoctasking@conus.army.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).

Glossary

Section I
Abbreviations

AAO	Army Addresses and Office Symbols Online
AAR	after action report
ACoS	assistant chief of staff
ACOM	Army command
ADA	Air Defense Artillery
ADCS	assistant deputy chief of staff
AG	Adjutant General
AKO	Army Knowledge Online
ALARACT	all Army activities (Army general message address)
ALMC	Army Logistics Management College
AMEDD	Army Medical Department Maintenance School
AMHS	Automated Message Handling System
AMSC	Army Management Staff College
AO	action officer
APD	Army Publishing Directorate
APT	Army Parachute Team
AR	Army regulation
ARCIC	Army Capabilities Integration Center
ASB	accessions support brigade
AVL	Aviation Logistics
BLUF	bottom line up front
CAC	U.S. Army Combined Arms Command
CAO	Congressional Activities Office
CATS	Command Action Tracking System
CBRNS	U.S. Army Chemical, Biological, Radiological, and Nuclear School
CC	courtesy copy
CCR	command conference room
CG	commanding general
CGAC	Command Group Actions Center
CGSC	Command and General Staff College
CHCS	Chaplain Center and School
COA	course of action
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
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, Concepts Development, Experimentation, and Requirements Determination
DLIFLC	Defense Language Institute Foreign Language Center
DMS	Defense Message System
DOD	Department of Defense
DSN	Defense Switch Network
DSS	Drill Sergeant School
DTA	defense travel administrator
DTG	date time group
DTS	Defense Travel System
DVD	digital video disk
ECC	Executive Communications and Control
EEO	equal employment opportunity
ENG	U.S. Army Engineer School
EO	equal opportunity
ES	external suspense (CATS Control Number Prefix for actions generated by proponent)
EX	G-33 external tasker
ESD	Executive Services Division
EXSUM	executive summary
FA	Field Artillery
FAX	facsimile
FIRESCoE	Fires Center of Excellence
FOUO	for official use only
FMS	Financial Management School
FOA	Field Operating Agency
FORSCOM	U.S. Army Forces Command
G-33	Deputy Chief of Staff, G-3/5/7 Current Operations
GO	general officer
HQDA	Headquarters, Department of the Army
HQ	headquarters
IAW	in accordance with
IMT	Initial Military Training
IN	G-33 internal tasker
IPR	in-process review
JAG	judge advocate general
JFKSWC	John F. Kennedy Special Warfare Center
JRTC	Joint Readiness Training Center
JFTR	Joint Federal Travel Regulation
JTR	Joint Travel Regulation
M	million
M&D	mail and distribution
MAML	Message Address and Mailing List
MANSCEN	U.S. Army Maneuver Support Center
MEPCOM	Military Entrance Processing Center

MI	Military Intelligence
MIA	missing in action
MP	Military Police
MOI	memorandum of instruction
MSB	Mission Support Brigade
MSO	major subordinate organization
MWR	morale, welfare, and recreation
NCO	noncommissioned officer
NDEA	non-designated entry agent
NIPRNET	non-secure internet protocol router network
NLT	not later than
NTC	National Training Center
OCG	Office of the Commanding General
OCS	Ordnance Center and Schools
OCONUS	outside continental United States
OP	G-33 operational tasker
OMEMS	Ordnance Munitions and Electronic
OMMS	Ordnance Mechanical Maintenance School
OSGS	Office of the Secretary of the General Staff
PAB	personal address book
PAO	Public Affairs Office
POC	point of contact
PKI	Public Key Infrastructure
POW	prisoner of war
QMCS	Quartermaster Center and School
RA	readahead
RC	reserve component
reg	regulation
RNG	Ranger
RRS	Recruiting and Retention School
SA	Secretary of the Army
SACO	staff action control officer
SAD	Staff Actions Division
SAMS	School for Advanced Military Studies
SATFA	Security Assistance Training Field Activity
SC	Signal Center
SCI	sensitive compartmented information
SCIF	Sensitive Compartmented Information Facility
SES	senior executive service
SGS	secretary of the general staff
SIPRNET	secure internet protocol router network
SIT	School of Information Technology
SJA	staff judge advocate
SME	subject matter expert
SMP	School of Military Packaging
SOC	Special Operations Command
SOM	School of Music
SOOB	staff officer orientation briefing

SSO	Special Security Office
TASKORD	tasking order
TDY	temporary duty travel
TJAG	The Judge Advocate General
TMAC	TRADOC Master Activities Calendar
TRAC	TRADOC Analysis Center
TRADOC	U.S. Army Training and Doctrine Command
USAAC	U.S. Army Accessions Command
USAACE	U.S. Army Army Aviation Center of Excellence
USAALS	U.S. Army Aviation Logistics School
USAASA	U.S. Army Aeronautical Services Agency
USABCT CoE	U.S. Army Basic Combat Training Center of Excellence
USAREC	U.S. Army Recruiting Command
USASMA	U.S. Army Sergeants Major Academy
USATC	U.S. Army Transportation Center
USAWC	U.S. Army War College
USMA	U.S. Military Academy
USPS	United States Postal Service
VCR	video cassette recorder
VCSA	Vice Chief of Staff, Army
VGT	viewgraph transparency
VIP	very important person
VTC	video teleconference
WHINSEC	Western Hemisphere Institute for Security Cooperation
WOCC	Warrant Officer Career College
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 tasker deliverable.

Designated organization POC(s)
The designated administrative individual, or team, within MSOs, special activities, field operating activities, schools and centers, and HQ TRADOC who interacts with the SGS SAD and G-33 on behalf of their organization.

Eyes Only

The Army Privacy Communications System, commonly referred to as Eyes Only or backchannel messages.

Lead
Office/activity with the primary responsibility for preparing, coordinating, and submitting a final tasker 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 figs 2-2 and 2-3). For example, TRADOC Operations (G-33)s 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 lead organization (command or staff) responsible for initiating, preparing, and coordinating actions and correspondence.

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. Taskers are monitored through a tracking system that assigns control numbers and suspense dates.

( )

TRANSMITTAL, ACTION AND CONTROL For use of this form, see TRADOC Reg 1-11; the proponent agency is the SGS.	1. CATS CONTROL NUMBER	2. TODAY'S DATE *(YYYYMMDD)*	3. SUSPENSE DATE *(YYYYMMDD)*
4. OFFICE SYMBOL	5. SUBJECT		

6. ROUTING: *(SGS USE ONLY)*		Initial	Date	TRADOC SGS *(Name and Phone)*
	CG			COMMAND GROUP COMMENTS:
	CG XO			
	CPG			
	DCG/CoS			
	ACoS			
	DCG XO			
	CSM			
	SGS			
	C, SAD			
	SACO			

7. EXECUTIVE SUMMARY

Key Points

-
-
-

Ref:

Encl: TAB A:
TAB B:

1. Purpose:

2. Discussion:

3. Recommendation:

APPROVED _____ **DISAPPROVED** _____ **NOTED** _____ **SEE ME** _____ **COMMENT** _____

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8. LEAD AGENCY STAFF COORDINATION			CATS CONTROL NUMBER:
TITLE	INITIAL	TYPE OR PRINT NAME	DATE (YYYYMMDD)
PRINCIPAL			
ACTION OFFICER (Name/Title/Phone Number/E-mail)			
FILE LOCATION:			
SACO's NAME (Name/Phone Number/E-mail)			

RECOMMENDATION FOR COORDINATING STAFF:

9. STAFF COORDINATION

CONCUR	NON-CONCUR	AGENCY	NAME (TITLE, LAST NAME)	PHONE	DATE (YYYYMMDD)	REMARKS
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
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☐	☐					

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

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INSTRUCTIONS

PARENTHESES AT TOP OF FORM:
Fill in classification (UNCLASSIFIED, FOUO, etc.)

Block 1. TRACKING 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. Use the Army standard date format: YYYYMMDD. Example: 20090212.

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 and/or DCG need to know about this action. Write them at the senior Army leaders' level. These are the points your principal or deputy want to convey to the CG/DCG. 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? What should the CG/DCG 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 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, and deputy. The appropriate releasing authority 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 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: It is important to be able to retrieve a file for corrections and annotations in the event that the originating action officer is not available. Enter the file path to reflect where the correspondence was saved on the server. NOTE: This applies to unclassified documents only.
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, 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.

Request for Official OCONUS Temporary Duty Travel *(ALL BLOCKS MUST BE COMPLETED)*		Date 8th June 2009
TO: DEPUTY CHIEF OF STAFF, G-1/4 (ATBO-BP) 5C NORTHGATE ROAD FORT MONROE VA 23651-1048	THRU: (Installation/Activity OCONUS Program Manager)	FROM: (Requester's section and DSN Number

1. Traveler(s): (Indicate name, SSN, rank/grade, title, organization/installation/activity to which assigned, office symbol of traveler, security clearance, citizenship, date and place of birth, date and place of naturalization, if applicable, and country to be visited.)

2. Purpose of Visit:

Facility/Unit name and address of Conference/Meeting/Training Camp for each country being visited:

3. Travel directed by: **Point of Contact and DSN number:**

4. Date and nature of INVITATION on which visit is based, if applicable:

- ☐ **Travel/country clearance has been granted per:**
- ☐ **Travel/country clearance has not been granted.**
- ☐ **If travel/country clearance requested by another ACOM, identify message requesting clearance:**

5. Proposed itinerary: (Include day-by-day itinerary with estimated dates of arrival and departure, UNITS TO BE VISITED.)

6. Alternate visit dates if visit cannot be accommodated at preferred time:

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7. Will trip involve:

YES NO

☐ ☐ a. Meeting with foreign personnel? If so, identify as outlined below.

☐ ☐ b. US Embassy personnel? If so, identify as outlined below.

If Yes to either of the above, indicate name, grade and position of key personnel to be visited.

8. Will trip involve:

YES NO

☐ ☐ Disclosure of classified information and, if disclosure to foreign nationals is proposed, indicate the security classification of material and authority for disclosure.

9. Local support desired (Check appropriate blocks):

☐ Hotel accommodations ☐ Transportation ☐ Briefings ☐ Other

☐ Classified courier requirements ☐ Security guards for aircraft ☐ Onward Bookings

☐ Requested by other means

10. If request is submitted less than 60 days prior to departure date, state the reason for late submissions and furnish complete justification why trip cannot be conducted at a later date. (If additional space is needed, continue in remarks column)

11. List in each category below the point of contact. (Indicate name, grade, organization, office symbol, commercial and DSN number.)

TRADOC Installation/Activity:

Overseas point of contact information for each country:

Staff Action Office for this visit:

Any other:

12. Classified material (AR 380-5)

YES NO

a. Will traveler be handcarrying classified material while in travel status? ☐ ☐

b. Approval to handcarry classified material must be obtained from the Local Security Official.

13. Remarks: (use this item for continuation of items requiring additional space. Separate sheet of plain bond paper may be used and attached to this form if necessary. Continuation must be crossed-referenced by item number.)

14. Typed name, grade and title of authenticating authority:	15. Signature:

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