Department of the Army
Headquarters, U.S. Army
Training and Doctrine Command
Fort Eustis, Virginia 23604-5700

*TRADOC Regulation 1-11

29 March 2024

Administration

Staff Procedures

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History. This is an expedited revision to TRADOC Regulation 1-11. The portions affected by this revision 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, U.S. Army Training and Doctrine Command. It also provides responsibilities and procedures for scheduling conferences and briefings.

Applicability. This regulation applies to all U.S. Army Training and Doctrine Command organizations that prepare correspondence for Headquarters, U.S. Army Training and Doctrine Command.

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

TRADOC Regulation 1-11

Army management control process. This regulation does not contain management control provisions.

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

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

Distribution. This regulation is available in electronic media only at the U.S. Army Training and Doctrine Command Administrative Publications website (https://adminpubs.tradoc.army.mil).

Summary of Change

TRADOC Regulation 1-11
Staff Procedures

This expedited revision, dated 29 March 2024 -

o Adds the Command Sergeant Major where all command group leaders are mentioned.

o Replaces the TRADOC Form 5 (Transmittal, Action and Control) with the My Response section of the electronic Tasker system for routine actions, taskers, and awards throughout.

o Updates correspondence figures, links, and instructions throughout.

o Reorganizes and rearranges paragraphs throughout.

o Updates responsibilities (para 1-4) and staff policies (para 2-1).

o Updates distribution list for correspondence (figure 2-1).

o Updates the operational tasking process (para 2-5).

o Updates the support agreement guidance (para 2-22).

o Adds procedure to request a command group coin (para 3-9).

o Adds the Center of Military History to the invitational travel authority delegation (table 7-1).

o Provides an overview of Senior Army Spouse Travel (figure 7-3).

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Chapter 1
Introduction

1-1. Purpose
This regulation prescribes administrative policy and staff procedures for processing correspondence and staffing actions through Headquarters (HQ), U.S. Army Training and Doctrine Command (TRADOC).

1-2. References
See appendix A.

1-3. Explanation of abbreviations and terms
See the glossary.

1-4. Responsibilities

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

     (1) Serve as the key advisor to the command group on administrative policies and staff action management.

     (2) Establish policy, procedures, and formats for preparing and coordinating correspondence and other administrative actions.

     (3) Serve as primary tasking authority and Enterprise Task Management Software Solution (ETMS2) task manager for command group taskings. Command Group taskings are taskings directed by the Commanding General (CG), Deputy Commanding General (DCG)/Chief of Staff (CoS), Executive Deputy to the Commanding General (EDCG), Deputy Chief of Staff (DCoS), and/or Command Sergeant Major (CSM). Command Group taskings include taskings from the Commander's Planning Group (CPG) collected from meetings, briefings, and TRADOC senior leader directives.

     (4) Serve as the primary TRADOC tasking authority and ETMS2 task manager for White House and congressional inquiries.

     (5) Process all staff actions, awards, correspondence, and tasking responses requiring CG, DCG/CoS, EDCG, DCoS, and CSM decision, approval, review, or signature.

     (6) Review all correspondence, actions, and taskers prior to forwarding to the command group for administrative completeness and correctness, proper format and assembly, appropriate coordination, proper level of signatures, and compliance with established policies.

     (7) Package, upload in ETMS2, and track internally-generated staff actions addressed to Headquarters, Department of the Army (HQDA) to include all command group correspondence and actions addressed to the Sergeant Major of the Army (SMA) or higher.

     (8) Complete the ETMS2 My Response section for actions and taskings approved by the command group and addressed to HQDA.

(9) Operate the Command Group Action Center (CGAC) as a repository of actions and documents signed by the Command Group.

(10) Distribute and track official mail addressed to the command group and actions generated by the command group.

(11) Assign staff responsibility for and task TRADOC-led reoccurring events (such as Decentralized Organization Day) and other actions/events as directed by the Command Group.

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

(13) Manage TRADOC policy letters and delegations of authority.

(14) Maintain internal TRADOC email distribution lists (commanders/commandants, chiefs, staff principals, executive officers (XOs), SGSs, and senior commanders).

(15) Conduct bi-monthly Staff Officer Orientation Briefings (SOOB) to familiarize newly assigned action officers (AOs) with staff procedures.

(16) Conduct the quarterly SGS/XO Meeting to provide a forum for enhanced communication between staff sections.

(17) Conduct the quarterly SGS Synchronization Meeting to provide a forum for enhanced communication between HQ TRADOC SGS and subordinate command SGSs.

(18) Upload CG readaheads to designated portal.

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

(1) Serve as the ETMS2 functional sponsor overseeing ETMS2 updates and training.

(2) Serve as the proponent for ETMS2 Business Practices and Rules, published on the SAORC SharePoint site at https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-SGS/SitePages/Staff-Action-Officer-Resource-Center.aspx.

(3) Serve as the primary TRADOC tasking authority and ETMS2 task manager for TRADOC-initiated operational taskings and orders.

(4) Serve as the primary TRADOC tasking authority and ETMS2 task manager for all taskings, orders, and actions initiated by HQDA and external commands and agencies (i.e. U.S. Army Materiel Command, U.S. Army Forces Command, etc.).

(5) Maintain TRADOC ETMS2 dashboards to enable task management, to include timely acceptance, prioritization, and suspense compliance.

(6) Serve as the office of primary responsibility (OPR) for reoccurring TRADOC tasking meetings.

(7) Receive and process all requests for military aircraft travel (see TRADOC Regulation (TR) 95-5 for flight operations).

(8) Manage the TRADOC Enterprise Calendar (TEC) and TRADOC contributions to HQDA calendars.

(9) Oversee TRADOC support agreements.

c. Unit Commanders, Commandants, and Directors, and HQ, TRADOC DCSs and directors of personal and special staff will:

(1) Monitor TRADOC ETMS2 dashboards to meet suspense dates for assigned taskings.

(2) Ensure the use of the ETMS2 Task Management Tool, per paragraph 2-1a.

(3) Ensure principal or principal deputy approval in ETMS2 on all staff actions and taskers that require TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) review or approval, per paragraph 2-1j.

(4) Ensure all administrative tasks and actions are routed through proper tasking authorities in ETMS2.

(5) Designate primary and alternate ETMS2 managers for your organization. ETMS2 managers are an administrative individual, or team, who interacts with SGS and G-33 Tasking Office on behalf of their organization. They include Central Tasking Offices (CTOs), G-33 Tasking Specialists, Staff Action Control Officers (SACOs), and other individuals assigned the duty by their organization, who process, assign, manage, track, coordinate, and approve assigned tasks and actions. Ensure ETMS2 managers participate in reoccurring TRADOC-led task synchronization meetings.

(6) Designate a primary and an alternate TEC contributor to input calendar data. Events will be populated on the lower echelon calendars and promoted, as appropriate, through the chain of command to higher headquarters' calendars.

(7) Ensure the unit or organization's phone roster is updated monthly at https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-SGS-Directory.

(8) Require action officers to review the resources available on the SAORC.

(9) Ensure newly assigned personnel (military and civilian) to the HQ, TRADOC Staff attend the first available SOOB within 60 days of arrival. Contractor employees may be directed to attend the SOOB if their organization's commander or director determines that the individual contractor employee's attendance would support the tasks listed in the Contract Performance Work Statement.

d. The Director, Congressional Activities Office (CAO) will monitor and provide assistance on all congressional actions. Additional guidance and information on CAO functions and

services is available at https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-CAO/SitePages/Home.aspx.

    e. Organization ETMS2 Managers will:

        (1) Be the administrative individual, or team, within subordinate organizations, special activities, field operating activities (FOA), schools and centers, and HQ TRADOC who interact with SGS and G-33 Tasking Division on behalf of their organization. They include Central Tasking Offices (CTOs), G-33 Tasking Specialists, Staff Action Control Officers (SACOs), and other individuals assigned the duty by their organization.

        (2) Process, assign, manage, track, coordinate, and approve assigned tasks and actions entering or leaving their organization in ETMS2.

        (3) Assign and suspense subordinate offices of coordinating responsibility (OCRs) and AOs, as required.

        (4) Monitor TRADOC ETMS2 dashboards to meet suspense dates for assigned taskings.

        (5) Accept taskings, submit requests for reconsideration or extension (paras 2-7 and 2-8), and complete taskings on behalf of their organization in ETMS2.

        (6) Ensure SGS is aware of time-sensitive actions to facilitate quick turnaround and tracking.

        (7) Be familiar with AR 25-50, HQDA Policy Notice 25-52, TR 10-5 series, TRADOC ETMS2 Business Practices and Rules, and this regulation.

        (8) Participate in reoccurring TRADOC-led task synchronization meetings.

    f. OPRs will:

        (1) Be responsible for all aspects of completing staff actions, taskings, and orders on time.

        (2) Be familiar with AR 25-50, HQDA Policy Notice 25-52, TR 10-5 series, TRADOC ETMS2 Business Practices and Rules, and this regulation.

        (3) Lead the mission analysis, including a timeline for completion, for all aspects of assigned taskings, actions, and orders.

        (4) Identify, task, and suspense additional OCRs in ETMS2, if required, within 1-workday of initial task assignment.

        (5) Ensure direct and full coordination of assigned staff actions and taskings with organizations, directorates, and stakeholders (OCRs) that have expertise in the matter or have equities in or are impacted by the action (see para 2-6).

        (6) Organize, provide guidance, and execute every aspect of product preparation.

(7) Prepare tasker responses in ETMS2 according to the guidelines in the ETMS2 Business Practices and Rules and paragraph 3-3. Obtain a legal review in ETMS2 on the final draft of documents after all staffing is complete. Obtain principal or principal deputy approval in ETMS2 on all staff actions and taskers that require TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) review or approval.

(8) Submit meeting readaheads (see para 2-17).

(9) Provide a notetaker and publish a post-meeting Executive Summary (EXSUM) for assigned meetings (see paras 2-18 and 2-19).

g. AOs will:

(1) Become familiar with AR 25-50, HQDA Policy Notice 25-52, TR 10-5 series, TRADOC ETMS2 Business Rules, and this regulation. Follow regulatory guidance to determine action required, level of approval, and appropriate signature for the action.

(2) Attend the SOOB and ETMS2 Training Courses within first 60 days of arrival to HQ, TRADOC.

(3) Conduct a thorough mission analysis of assigned actions, taskings, and orders. Develop a timeline to meet the required suspense. Consider the issue, why TRADOC is involved, if a TRADOC Senior Leader needs to review this action, staff recommendations, implications for accepting or rejecting the staff recommendations, and assessment of supporting and background information.

(4) Draft all required documents for the action or tasking. Ensure content is consistent with similarly approved staff actions and cites applicable policies and references.

(5) Directly and fully coordinate assigned staff actions and taskings with organizations, directorates, and stakeholders (OCRs), both inside and outside TRADOC, that have expertise in the matter, have equities in, or are impacted by the action (see para 2-6).

(6) Prepare tasking responses in ETMS2 according to the guidelines in the ETMS2 Business Practices and Rules and paragraph 3-3.

(7) Obtain a legal review if required in ETMS2 on the final draft of documents after all staffing is complete (see para 2-1n).

(8) Obtain approval of the proper authority within respective directorate or subordinate organization. Principal or principal deputy level approval is required in ETMS2 (see para 2-1m).

(9) Upload a copy of the final response in ETMS2 when a direct reply is received to an open action or tasking and notify SGS. For example, actions addressed to an agency that result in a direct reply to the proponent.

1-5. Records management requirements
The records management requirement for all record numbers, associated forms, and reports required by this publication are addressed in the Records Retention Schedule–Army (RRS–A). Detailed information for all related record numbers, forms, and reports are located in Army Records Information Management System (ARIMS)/RRS–A at https://www.arims.army.mil. If any record numbers, forms, and reports are not current, addressed, and/or published correctly in ARIMS/RRS–A, see DA Pamphlet 25-403 for guidance.

Chapter 2
Staff Policies and Procedures

2-1. Policy

a. ETMS2 is the official task management tool used by TRADOC to task, develop, coordinate, approve, and distribute taskings and actions. Use of ETMS2 is mandatory and enforces version control and accountability by providing a single official location for the most current version of products, a record of coordination and approval, and the ability to track progress. The use of ETMS2 is required for all actions, orders, and tasks to include associated approvals, coordination signatures, and legal opines unless an Army/DOD System of Record, such as Integrated Personnel and Pay System-Army, provides an equivalent approval framework at the enterprise level. In instances where requirements for a timely response justify hand carrying a copy to senior leaders, ETMS2 should be used to create a tasker, with all relevant documents, for version control and accountability.

b. Organization ETMS2 Managers manage taskings and/or actions for their organization. They receive and further assign incoming taskings and actions and release all outgoing taskings and actions to SGS or G-33 Tasking Division.

c. SGS serves as the primary TRADOC tasking authority and TRADOC ETMS2 task manager for command group taskings, White House and congressional inquiries, and internally-generated staff actions. Organization ETMS2 managers send responses directly to SGS, per the ETMS2 Business Practices and Rules.

d. G-33 Tasking Division serves as the primary TRADOC tasking authority and TRADOC ETMS2 task manager for operational taskings and orders, and actions, taskings, and orders generated by HQDA and external Army commands (ACOM), Army service component commands (ASCC), or Agencies. Organization ETMS2 managers send responses to G-33 who then sends them to SGS if they require a command group review per the ETMS2 Business Practices and Rules.

e. All taskings initiated through SGS or G-33 Tasking Division identify an Organization ETMS2 Manager/OPR and staff directorates and/or subordinate commands or activities that may need to provide assistance (OCRs) to the Organization ETMS2 Manager/OPR. The initial tasking may not identify any or all required OCRs. Organization ETMS2 Managers and OPRs may identify, task, and suspense additional OCRs in ETMS2. Requests for transfer of responsibilities should be handled at the lowest level and as per paragraph 2-6.

f. All staff actions and taskings must be fully coordinated with organizations, directorates, and stakeholders (OCRs) that have expertise in the matter, have equities in, or are impacted by the action. The OCR approving authority for subordinate organizations is the chief of staff or higher, unless otherwise specified in ETMS2. The OCR approving authority for HQ TRADOC directorates are the DCS, assistant DCS, director, or deputy director, unless otherwise specified in ETMS2. The OCR approver's name, date of approval, comments, concur or non-concur, and digital signature must be annotated in the ETMS2 My Response section.

g. All staff actions, awards, and taskings going to the command group are processed through SGS per TRADOC ETMS2 Business Practices and Rules. A TRADOC Form (TF) 5 is required for anything routed outside of ETMS2.

h. Final staffing packages are sent by the organization ETMS2 manager to the G-33 Tasking Division or SGS only after they are complete, in final form (not a draft), fully coordinated, legally reviewed, have a principal/deputy chop, are tabbed and labeled, comply with all aspects of this regulation and the TRADOC ETMS2 Business Practices and Rules, and have a complete ETMS2 My Response section (see para 3-3).

i. G-33 Tasking Division conducts quality assurance and quality control (QA/QC) of operational taskings and orders, and actions, taskings, and orders generated by HQDA, prior to forwarding to SGS or HQDA. G-33 Tasking Division returns packages that do not meet QA/QC requirements to the Organization ETMS2 Manager/OPR for revision.

j. SGS conducts final QA/QC prior to forwarding a staffing package to the command group. QA/QC includes proofreading, minor editing, minor formatting, confirming required coordination, confirming delegation, and confirming compliance with all aspects of this regulation and the TRADOC ETMS2 Business Practices and Rules. SGS does not draft original documents or change content of existing documents. SGS returns packages that do not meet QA/QC requirements to the G-33 Tasking Division or Organization ETMS2 Manager/OPR for revision.

k. Actions received at the command group without prior SGS approval will be returned to the SGS for processing and compliance with regulations and the ETMS2 Business Practices and Rules.

l. Organization ETMS2 managers/OPRs have two-thirds of the time (from initial assignment to the overall TRADOC suspense) to work taskings. TRADOC Senior Leaders have one-third of the time to review (unless otherwise specified or coordinated). For actions and tasking requiring TRADOC Senior Leader approval, the TRADOC Senior Leader Approval Process (SLAP) requires 5 workdays from SGS approval to SLAP completion (unless otherwise specified or coordinated). Any action or tasking submitted for SLAP with less than 5 workdays for SLAP approval requires justification in the ETMS2 My Response Section or a letter of lateness.

m. All staff actions, awards, and taskings prepared for TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) review or approval require subordinate principal or principal deputy approval. For subordinate commands, the principal is the CG or Director, and the principal deputies are the DCG, DtCG, or Deputy Director.

(1) A principal or principal deputy approval means the principal or deputy's digital signature is in ETMS2 and/or their wet or digital signature is on the main document of the action. The principal or principal deputy's approval must also be on all required supporting documents (i.e., as the information paper approving official, decision memorandum signatory, memorandum line-through initials, etc.).

(2) For internally generated staff actions and taskings only, the principal or deputy's XO and executive assistant (EA) may digitally sign the ETMS2 approval block for the principal or deputy as long as it comes with a statement that specifically states the principal approved. No further delegation is authorized.

n. All staff actions and taskings require a legal review if they affect people (i.e., ethics, rights, employment, investigations, equal opportunity, performance, congressional responses, etc.), money (i.e., contracts, invitational travel orders, etc.), or policy (i.e., policy letters, policy compliance, exceptions to policy, publications, etc.). Legal reviews are conducted in ETMS2 on the final draft of documents and after all staffing is complete. If the content of an action changes significantly after the first legal review, then the accuracy of the legal review may be jeopardized and another legal review is required. OPRs will specifically state if all legal objections were addressed in the final documents in the My Response section in ETMS2.

o. All staff actions, awards, and taskings must be marked with the classification or designation per DODM 5200.01, Volume 2; DODI 5200.48; AR 25-55; AR 380-5, and applicable security classification guide(s) as it relates to policy and the protection of information.

p. Staffing policy exceptions.

(1) Actions prepared by the immediate offices, planning groups, and initiatives groups of the CG, DCG/CoS, EDCG, DCoS, and CSM.

(2) Actions that the CG, DCG/CoS, EDCG, DCoS, or CSM have instructed staff directorates or units to submit directly to their offices, such as short-fused requests for information.

(3) Actions pertaining to general officers (GOs) and sensitive actions, such as Inspector General or legal correspondence.

(4) Sensitive military personnel actions, such as promotion selection boards, promotion review boards, special selection boards, and black book assignments.

(5) Actions pertaining to civilian personnel hiring, hiring freezes, voluntary early retirement authority, and voluntary separation incentive payment within HQ TRADOC.

(6) Actions of special interest. Provide to SGS for review and determination of the appropriate review by the CG, DCG/COS, EDCG, DCOS, or CSM.

2-2. Correspondence and staff actions
AR 25-50, HQDA Policy Notice 25-52, and this regulation prescribe policies, procedures, and standard formats for preparing and processing Army and TRADOC correspondence.

a. Process.

(1) Correspondence and staff actions are initiated in ETMS2 by the staff directorate or subordinate unit authoring the action per the TRADOC ETMS2 Business Practices and Rules.

(2) The initiator of the staff action identifies required coordination chops (OCRs) in ETMS2 utilizing the Manage Assignments function.

(3) OCRs provide concurrence or non-concurrence in ETMS2 within 2 workdays (unless otherwise specified) (see para 2-1f).

(4) The initiator of the staff action incorporates feedback from staffing and/or coordination and submits the action for legal review in ETMS2 (see para 2-1n).

(5) The initiator of the staff action incorporates feedback from the legal review and submits the action for principal/principal deputy approval (see para 2-1m).

(6) The initiator of the staff action completes the My Response section (see para 3-3), uploads final documents, and sends the action to SGS.

(7) SGS processes the staff action for command group approval.

(8) SGS distributes the final approved staff action per paragraph 2-4a.

b. Prepare correspondence for CG, DCG/CoS, EDCG, DCoS, and CSM signature in final form (not a draft).

c. Correspondence signed by the command group is dated by the SGS (if not dated at time of signature).

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

e. Use the phrase "Army position" in oral or written communications only when the SECARMY, CSA, or individuals delegated this authority in writing by the SECARMY and CSA approve the position.

f. Use the phrase "TRADOC position" in oral or written communications only when the action is processed through SGS to the CG, DCG, or EDCG for review, approval, and signature.

g. As a general rule, respond in like form. For example, use a memorandum to respond to a memorandum and a personal letter to respond to a personal letter.

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

i. Use properly filled out ETMS2 My Response section for all correspondence, actions, awards, and taskings going to the command group (see para 3-3).

j. Returns and rework. Always use the documents SGS posted in ETMS2 for your rewrite or corrections. These documents contain edits to your original submission. Do not use your original documents.

k. TRADOC organizations will not use multiple-addressee correspondence, memorandums of instruction, policy memorandums, electronic messages (including all Army activities messages), and standard operating procedures as substitutes for issuing, changing, or revising Army TRADOC-wide policy and administrative publications per AR 25-30.

l. Letters of appreciation or commendation. Prepare expeditiously (within 15 calendar days of the event). For actions that require sending a number of different letters or invitations, the following guidelines will expedite the process: when sending the same letter to multiple recipients, submit one draft letter or memorandum to SGS for review. Once reviewed, the action is returned to the proponent to complete the remaining letters or memorandums. Upload the entire package in ETMS2 and notify TRADOC SGS Staff Actions Division (SAD) (usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil) for signatures.

m. Letterhead.

(1) Use TRADOC letterhead stationery for all formal memorandums for command group signature. Do not alter letterhead.

(2) Use command letterhead for internal memorandum correspondence and decision memorandums. Letterhead is not required for memorandums for record, memorandums of agreement, or memorandums of understanding.

(3) Use CG, DCG/CoS, EDCG, or DCoS letterhead stationery for letters. Do not use office titles or office symbols on CG, DCG/CoS, EDCG, or DCoS letters. See AR 25-50 for guidance on preparing letters.

(4) Electronic letterhead templates are available on the SAORC at https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-SGS/SitePages/Staff-Action-Officer-Resource-Center.aspx.

2-3. Congressional inquiries

a. Ensure inquiries are processed expeditiously. Send guidance inquiries or questions concerning responding to or processing congressional inquiries to CAO at usarmy.jble.tradoc.mbx.hq-tradoc-cao@army.mil.

b. In coordination with CAO, SGS will task and track congressional inquiries. 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.

c. OPRs will staff and coordinate response with agencies listed as assists when appropriate, as well as the local OSJA for legal review. Staff all draft replies with CAO AO and CC the TRADOC SGS SAD prior to final signature.

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

e. Tasked inquiries have a 5-workday 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.

f. 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.

g. Delegation of signature authority for routine inquiries is typically at the O-6/GS-15 level. Signature by position is appropriate when the tasked office does not have a O-6/GS-15 available for signature (for example, CoS). For inquiries that have SA, USA, CSA, or VCSA interest, CAO may recommend a higher signature level (for example, CG, DCG, EDCG).

2-4. Correspondence and staff action distribution

a. Correspondence signed by the command group:

(1) When in response to HQDA taskings in ETMS2, is scanned and uploaded to the tasker by SGS. SGS completes the tasker in ETMS2, notifies G-33 Tasking Division of completion, emails the Organization ETMS2 Manager/OPR and AO the scanned documents, and places the hardcopies in distribution to the Organization ETMS2 Manager/OPR.

(2) When in response to internally generated actions addressed to SMA or higher, are packaged, uploaded in TRADOC and HQDA ETMS2, forwarded to HQDA, and tracked to completion by SGS.

(3) When in response to internally generated actions that are addressed to subordinate organizations and/or HQ TRADOC, they are emailed to those organizations by SGS.

b. Distribution of all other actions are the responsibility of the lead organization.

c. Distribution list for correspondence

(1) 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.

(2) See figure 2-1 for distribution list to all TRADOC subordinate activities and deputy chiefs of general staff and chiefs of special staff offices.

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DISTRIBUTION:
Commander
     U.S. Army Combined Arms Center
     U.S. Army Combined Arms Support Command
     U.S. Army Center for Initial Military Training
     Centers of Excellence
     U.S. Army Soldier Support Institute
Commandants, TRADOC Schools
Director, U.S. Army Center of Military History
Deputy Chiefs of General Staff and Chiefs of Special Staff Offices,
     HQ TRADOC
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Figure 2-1. Distribution list for correspondence

d. To determine correct addresses use:

(1) U.S. Army Addresses and Office Symbols Online database.

(2) TRADOC Command Directory. SGS SAD maintains the command directory at the SAORC at https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-SGS-Directory.

e. Email Distribution Lists.

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

(2) Email critical and/or strategic-level actions to the TRADOC DCSs and chiefs of special and personal staff offices via the TRADOC Staff Principals distribution list. Only staff principals should use this list.

2-5. Command Group tasking process

a. SGS is responsible for processing and tracking all TRADOC command group taskings.

b. Command Group taskings are taskings directed by the CG, DCG/CoS, EDCG, DCoS, or CSM. Command Group taskings are also taskings from the CPG developed from meetings, briefings, and TRADOC senior leader directives. See figure 2-2 for the command group tasking process.

c. Actions requiring CG approval and/or signature take precedence over other actions and must be handled as priorities. See paragraph 2-8 for suspense guidance on CG taskings, rewrites, and requests for information (RFIs).
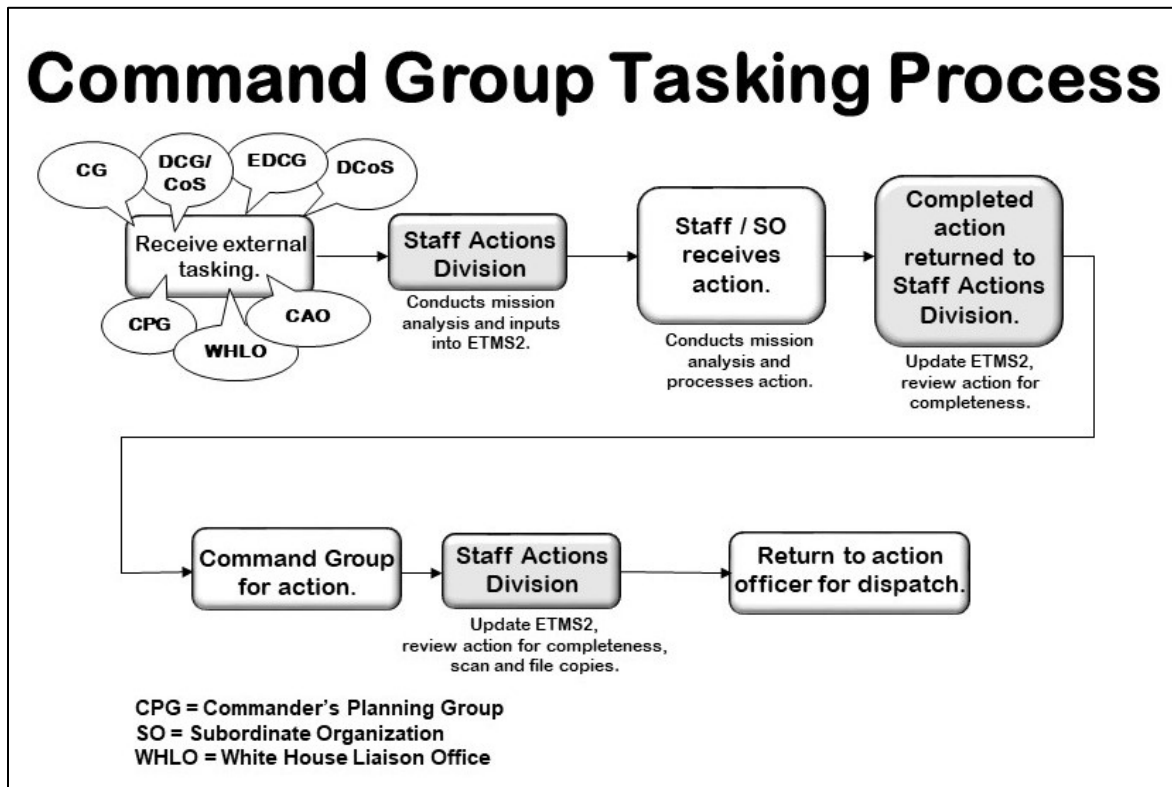
Figure 2-2. Command group tasking process overview

2-6. Operational tasking process
G-33 Tasking Division serves as the primary TRADOC tasking authority, ETMS2 task initiator, and ETMS2 task manager for operational taskings and orders, and actions, taskings, and orders generated by HQDA and external ACOMs, ASCCs, or Agencies.

　　a. Internal TRADOC taskings originate from a unit or organization within TRADOC. Internal taskings are tasked to organizations external to the originator's organization and require significant resources, involve changes in policy, generate new policy, or require formal concurrence or comment.

　　b. ETMS2 taskings are required when directing another organization, to include a TRADOC subordinate organization tasking another, a TRADOC subordinate organization tasking the HQ TRADOC staff, a TRADOC subordinate organization/HQ TRADOC tasking a special activity, or a HQ TRADOC staff office tasking another HQ TRADOC staff office.

　　c. The ETMS2 Business Practices and Rules establish the procedures for drafting, publishing, and completing operational taskings and orders. See Figure 2-3 for the operations tasking process and Figure 2-3.1 for the operations orders process.

　　　(1) The instructions for taskings follow the HQDA 6-paragraph standard for ETMS2 instructions: (1) POC for questions regarding this tasker, (2) Purpose, (3) Deliverable, (4) Background, (5) Short Suspense, and (6) Assignments, and are per the ETMS2 Business Practice and Rules.

(2) The format for TRADOC orders is the standard FM 5-0 operations order format and they are processed per the ETMS2 Business Practice and Rules.

(3) Draft taskings require a O-6/GS-15 approval in ETMS2 if the overall suspense is greater than or equal to 15 to 30 days from the proposed publishing date. Draft taskings require a GO/SES approval in ETMS2 if the overall suspense is less than or equal to 14 days from the proposed publishing date.

d. TR 500-2 establishes, assigns, and describes policies, responsibilities and procedures for individual augmentation (IA). The regulation also provides IA support request procedures for TRADOC staff, subordinate elements, centers, schools, and commands.
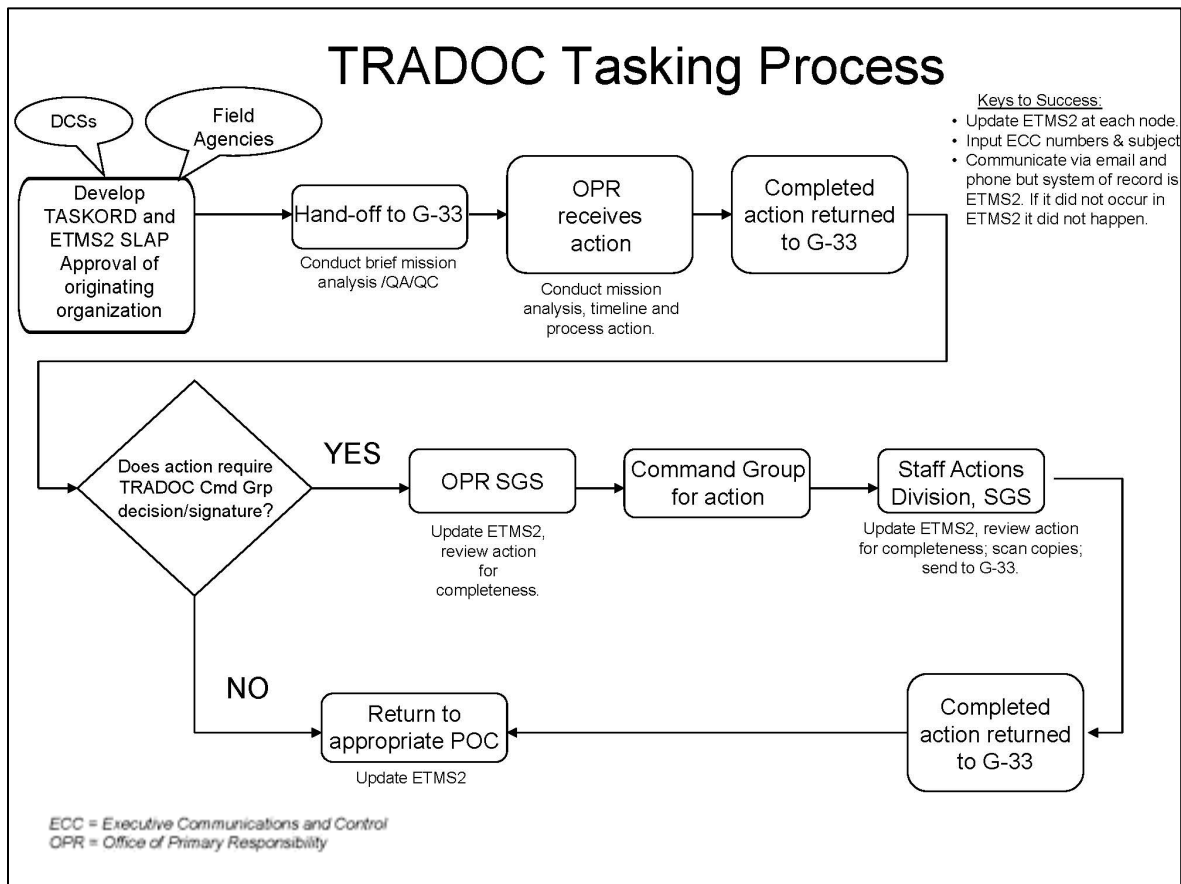
Figure 2-3. Deputy Chief of Staff, G-3/5/7 Current Operations tasking process overview
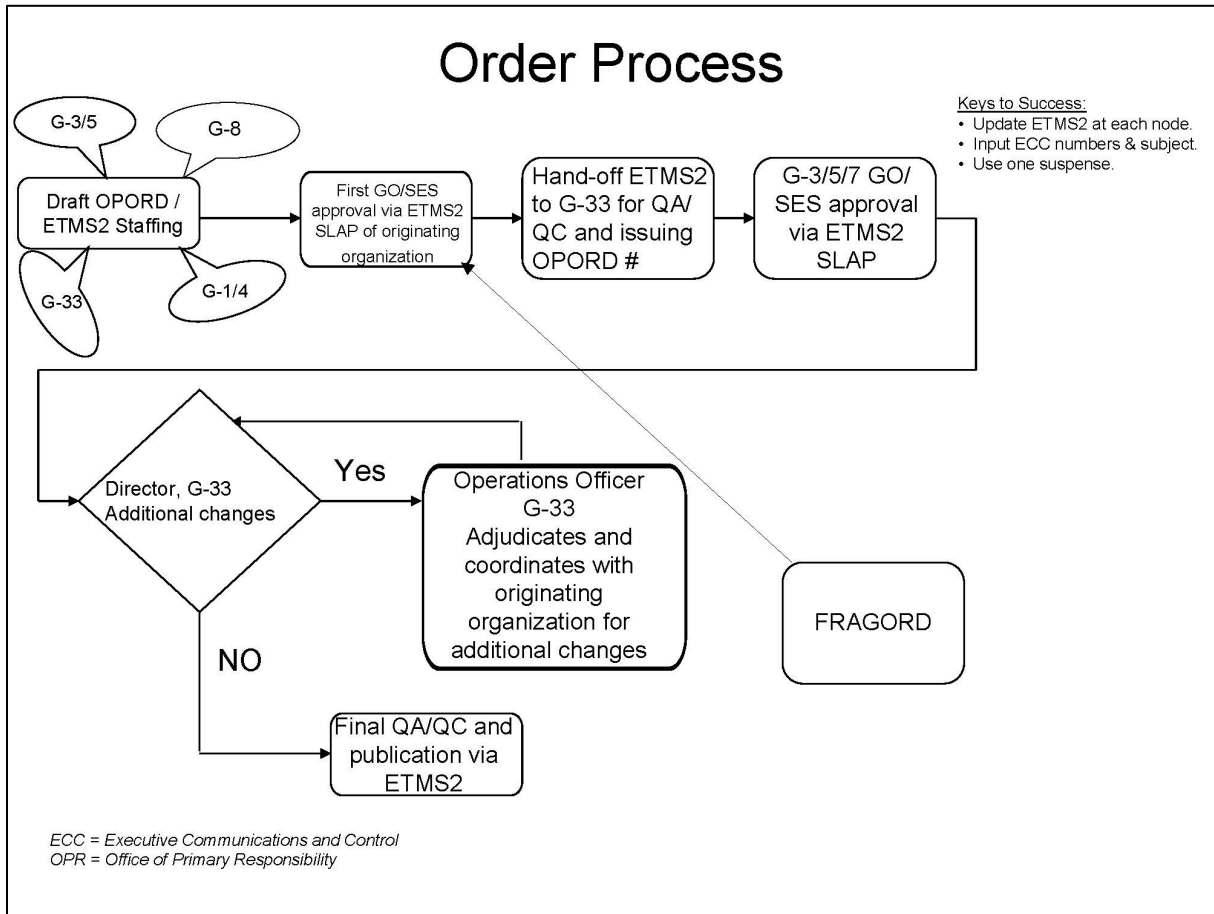
Figure 2-3.1. Operations orders process overview

2-7. Procedures to request transfer of OPR

a. If the assigned Organization ETMS2 Manager believes a tasking is outside their area of responsibility, within 1 workday of receipt of the tasking, the Organization ETMS2 Manager will email the CTO POCs of the organization they consider the appropriate OPR. The email will include detailed justification for transfer of OPR.

b. The gaining organization has 1 workday to assess the request for OPR change and reply to the originating organization of their acceptance or rejection. Transfer must occur within 3 workdays of the initial assignment of the tasking.

c. If the gaining organization accepts the OPR, G-33 Tasking Division (for G-33 initiated taskings) or SGS (for SGS initiated taskings) will retask the action to the new OPR and notify all concerned.

d. If the tasked organization cannot gain concurrence from the new organization within 3 workdays, TRADOC G-33 Current Operations Director or TRADOC SGS will make the final decision on the organization to assume the OPR for completing the tasking.

e. Carbon Copy (CC) the G-33 Tasking Division mailbox (usarmy.jble.tradoc.mbx.eustis-g33-tasking@army.mil) on all email communication on taskings originating in G-33. CC the

SGS (usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil) on all email communication for taskings originating in SGS.

2-8. Requesting extensions

a. Organization ETMS2 Managers may request a suspense extension for taskings via the ETMS2 extension request function within 2 workdays of task assignment. Extension requests must specify the rationale to support justification of the extension and the estimated date of completion. Organization ETMS2 Managers/OPRs should base the rationale on the mission analysis of the requirements to provide a complete response.

b. Interim responses are encouraged and will contain acknowledgment of the requirement or request, plan of action or approach, milestones, and an estimated date of completion.

c. Only the SGS, in coordination with the command group, may grant extensions for command group taskings.

2-9. Suspenses

a. For actions and tasking requiring TRADOC Senior Leader approval, Organization ETMS2 Managers and OPRs have two-thirds of the time (from initial assignment to the overall TRADOC suspense) to work the action. TRADOC Senior Leaders have one-third of the time to review (unless otherwise specified or coordinated).

b. For actions and tasking requiring TRADOC Senior Leader approval, the TRADOC SLAP requires 5 workdays from SGS approval to SLAP completion (unless otherwise specified or coordinated).

c. Organization ETMS2 Managers and OPRs will accept or request reassignment of ETMS2 tasks within 1 workday of assignment.

d. Organization ETMS2 Managers and OPRs will identify, task, and suspense additional OCRs (if required) in ETMS2 within 1 workday of initial task assignment.

e. Organization ETMS2 Managers and OPRs will provide concurrence/non-concurrence for staff actions in ETMS2 within 2 workdays (unless otherwise specified).

f. TRADOC OSJA will provide a legal opine, if required, in ETMS2 within 7 workdays (unless otherwise coordinated).

g. Organization ETMS2 Managers and OPRs will resubmit actions returned from the command group for rewrite, in ETMS2 to SGS, within 1 workday (unless otherwise coordinated or specified).

h. Organization ETMS2 Managers and OPRs will answer TRADOC Senior Leader RFIs within 3 workdays (unless otherwise coordinated or specified).

i. The CG, DCG/CoS, EDCG, DCoS and CSM offices direct the suspense date for command group taskings. If not specified, TRADOC SGS will assign a 15 workday suspense.

j. OPRs for CG-attended meetings have a 2 workday suspense to provide an email summary of CG decisions, taskings, and/or guidance to SGS (see para 2-19e.).

k. Submit TRADOC CG meeting readaheads to SGS no later than 2 workdays prior to the meeting and visit readaheads no later than 4 workdays prior to the visit.

2-10. Coordinating staff actions and taskings
All staff actions and taskings must be fully coordinated with organizations, directorates, and stakeholders (OCRs), both internal and external to TRADOC, that have expertise in the matter, have equities in, or are impacted by the action.

a. The use of the ETMS2 is required for approvals, coordination signatures, coordination comments, and legal opines.

b. Coordination procedures.

(1) Consult TR 10-5 and TR 10-5-1 for functional responsibilities across TRADOC.

(2) Consider actions from the TRADOC Senior Leader viewpoint. What organizations will they expect to have reviewed the action? Whose input will they want to consider in making their decision?

(3) Coordinate with all organizations having expertise in the matter or that are impacted by the action. Often an action crosses several disciplines and includes lateral, subordinate, and higher-level organizations and staff.

(4) Coordinate actions that involve training, education, operational plans, and operations with TRADOC G-3/5/7.

(5) Coordinate actions that impact TRADOC budget and resources with TRADOC G-8.

(6) Coordinate support agreements with TRADOC G-3/5/7, G-8 (if manpower or funding impacts), and TRADOC OSJA.

(7) Coordinate all actions that involve people (i.e., ethics, rights, employment, investigations, equal opportunity, performance, congressional responses, etc.), money (i.e., contracts, invitational travel orders, etc.), or policy (i.e., policy letters, policy compliance, exceptions to policy, publications, etc.) with TRADOC OSJA.

(8) Coordinate actions that involve leader development with U.S. Army Combined Arms Center and TRADOC G-3/5/7.

(9) Coordinate actions that impact strategic communications with the Chief, Communication Directorate (COMMDIR), CPG, CAO, and G-3/5/7.

(10) Coordinate actions having an environmental impact with TRADOC G-1/4 and TRADOC G-3/5/7.

(11) Coordinate congressional actions with TRADOC CAO and OSJA.

(12) Coordinate health or medical-related actions with TRADOC G-1/4, Surgeon's Office.

(13) Coordinate actions with U.S. Army Reserve/Army National Guard impacts or issues with Office of the DCG, U.S. Army Reserve and/or Office of the DCG, Army National Guard.

(14) Coordinate new and changes to existing administrative publications and delegations of authority with the TRADOC OSJA and TRADOC G-6 Publications Control per TR 25-35.

(17) Coordinate actions with initial military training, holistic health and fitness (H2F), drill sergeants, reception battalion, or Army Training Center – Fort Jackson impacts with the Center for Initial Military Training (CIMT).

(15) Coordinate actions involving U.S. Army Futures Command with G-3/5/7.

(16) Coordinate scheduling of all conferences and major briefings with G-33 Tasking Division to avoid conflicts on the TEC.

(17) Coordinate major ceremonies with G-3/5/7 and ESO.

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

2-11. Staff action disapproval and coordination non-concurrence

a. Non-concurrence to actions proposed by HQDA or other ACOMs require TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) approval.

b. Disapproval of actions from TRADOC Subordinate Commands.

(1) If a review of a subordinate command's request or recommendation results in non-concurrence and recommendation of disapproval, the staff principal or deputy must discuss the decision with the affected organization before forwarding the action to the command group for final action/signature. The discussion should include explaining reasons for non-concurrence fully and point out alternatives, if available.

(2) All final disapproval responses to subordinate commands require TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) approval.

c. Coordination (OCR) non-concurrences.

(1) Only a principal or a principal deputy may sign non-concurrences and considerations of non-concurrence. OCRs will enter non-concurrences with supporting documentation in ETMS2.

(2) OPRs will make every effort to resolve non-concurrences. If the OPR rejects the suggestions of the non-concurring organization, the OPR will prepare a consideration of non-concurrence memorandum. The memorandum will address each non-concurrence separately based on its own merit. The memorandum is uploaded to ETMS2 once signed by the principal or principal deputy as the last tab of the staff action.

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

2-12. Command Group notification, review, or approval
Proponents will notify the command group of these specific items of interest that require command group notification, review, approval, and/or signature:

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

b. Outgoing correspondence making personal reference to a TRADOC Senior Leader (i.e. "CG Sends") or any correspondence using first person in reference to a TRADOC Senior Leader. Only the CG, DCG/CoS, EDCG, or DCoS may release such correspondence.

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

d. Correspondence to and from:

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

(2) SA, USA, CSA, VCSA, or any commander or deputy commander of an ACOM.

e. Non-concurrences and disapprovals.

(1) Non-concurrence of actions proposed by higher HQ or other ACOMs.

(2) Disapproval of actions proposed by subordinate commands.

f. TRADOC administrative publications that establish new policy, revise existing policy, delegate authority, or assign responsibility (i.e., TRADOC supplements to ARs, regulations, circulars, and memorandums) require the appropriate level of approval after OSJA and G-6 Publications Control coordination. See AR 25-30, DA Pamphlet 25-40, and TR 25-35, for additional instructions on preparing and coordinating administrative publications. Publish new policies, a major change to existing policies or delegations of authority in the appropriate publication medium.

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

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

i. Reports of significant financial or property irregularities.

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

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

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

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

n. See paragraph 2-22 for requests for approval of outside the continental United States (OCONUS) temporary duty (TDY) or overseas conference travel.

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

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

2-13. Signature blocks and complimentary closings

a. See AR 25-50, for guidelines on signature blocks and complimentary closings. Signature blocks begin at the center of the page (3.25 inch tab stop), on the fifth line below the authority line or last line of text. See figure 2-4 for generic CG, DCG/CoS, EDCG, DCoS, and CSM signature blocks.

b. Use "Sincerely" as the complimentary closing on all letters addressed to military and civilian equivalents or subordinates that the CG, DCG/CoS, EDCG, DCoS, and CSM signs. Use "Respectfully" when addressing the President.

c. Current CG, DCG/CoS, EDCG, DCoS, and CSM signature blocks are available at the SAORC.

COMMANDING GENERAL

Military correspondence,
such as memorandums
(Use TRADOC letterhead.)

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

For Memorandums of Understanding/Agreement

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

_____
        (Date)

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

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

DEPUTY COMMANDING GENERAL/CHIEF OF STAFF

Military correspondence,
such as memorandums
(Use TRADOC letterhead.)

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

For Memorandums of Understanding/Agreement

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

_____
        (Date)

Nonmilitary correspondence,
such as letters to civilians, star notes
(Use DCG's letterhead, 3-star note paper.)

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

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

EXECUTIVE DEPUTY TO THE COMMANDING GENERAL

Military correspondence,
such as memorandums
(Use TRADOC letterhead.)

   JOHN A. SMITH, JR.
   Executive Deputy to the
     Commanding General

Nonmilitary correspondence,
such as letters to civilians, SES notes
(Use EDCG's letterhead, SES note paper.)

John A. Smith, Jr.
Executive Deputy to the
   Commanding General

DEPUTY CHIEF OF STAFF

Military correspondence,
such as memorandums
(Use TRADOC letterhead.)

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

Nonmilitary correspondence,
such as letters to civilians, star notes
(Use DCoS's letterhead, 2-star note paper.)

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

For Memorandums of Understanding/Agreement

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

   _____
         (Date)

COMMAND SERGEANT MAJOR

Military Correspondence,
such as memorandums
(Use TRADOC letterhead.)

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

Nonmilitary Correspondence,
such as letters to civilians

John A. Smith. Jr.
Command Sergeant Major, U.S. Army

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

2-14. Abbreviations and acronyms

Use acronyms in correspondence except when writing to individuals or organizations not familiar with their use. The first time an abbreviation, brevity code, or acronym (ABCA) is used in text, spell it out and follow it with the abbreviation in parentheses. Thereafter, use the acronym. For Army-approved ABCAs, see the database at https://armypubs.army.mil/abca. See the U.S. Government Publishing Office Style Manual or the Army Publishing Directorate's ABCA Directory for examples of acceptable capitalization of meanings of abbreviations, brevity codes, and acronyms.

2-15. Type font and size

Use Arial font, size 12 for all correspondence.

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

2-17. Rename subject of line and title to scanned documents
When emailing scanned documents as attachments, users will rename the subject line and title to indicate the content of the document. Scanners automatically assign generic subject lines and titles to links (for example, .pdf, .jpg, .tif, and .xps) scanned documents.

2-18. Readaheads

    a. Readaheads are a special type of staff action, tasked on short notice (less than 10 workdays), that require immediate action. Readaheads prepare the CG for trips, visits of military or civilian dignitaries, or briefings.

    b. A complete readahead is critical to the success of CG calendar events. Include only essential items, using three to four key points the CG should know before the meeting. As the CG has limited time to review a readahead, ensure all pertinent issues are covered succinctly in the executive overview.

Note. Readaheads must be written to inform the CG's needs, not just cover background information.

    c. All readaheads must contain an executive overview. See appendix C, for how to prepare readaheads.

    d. Submit TRADOC CG meeting readaheads to SGS no later than 2 workdays prior to the event (the goal is 4 workdays) and visit readaheads no later than 4 workdays prior to the event.

2-19. Note-taking and suspenses for Commanding General forums
OPRs record any guidance, taskings, and/or observations the CG or senior leaders provide in various venues (for example, during meetings, video teleconferences (VTCs), visits, conferences, discussions enroute, etc.).

    a. The meeting OPR designates an AO to record notes and taskings issued by the CG at the meeting.

    b. Prior to adjournment, the OPR confirms the list of taskings by the CG.

   c. See figure 2-5 for notes and tasking memorandum format. Significant guidance, decisions, and taskings and the who, what, when, where, and why (5Ws) of the event are annotated in the memorandum.

    d. Upon approval by principal or principal deputy, send final memorandum to SGS for tasking of any official taskers.

e. Responsibilities and Suspenses.

(1) CG calendar event (office, Morelli auditorium, VTC, etc.). Upon approval by staff principal or principal deputy, staff lead submits an email summary of CG decisions, taskings, and/or guidance to SGS within 2 workdays.

(2) CG VTC with all commanders (with no staff lead). The CPG representative submits an email summary of decisions, taskings, and/or guidance to SGS within 2 workdays.

(3) CG-directed conference. Staff lead submits a summary not later than 5 workdays in memorandum format for DCG/CoS to send to all commanders/coordinating staff.

(4) CG installation visits. The installation representative/lead compiles a comprehensive trip report to include CG decisions, taskings, and/or guidance and submits it to SGS with CC to CG XO and CPG Chief within 2 workdays of return from travel.

(5) CG attendance at CSA conferences. CG's XO and/or a designated representative will record taskings and forward them to SGS for dissemination.

(6) CG discussions enroute. Recipient of decisions, taskings, and/or guidance sends an email within 2 workdays to SGS with CC to CG XO and CPG Chief.

2-20. Note-taking and suspenses for Deputy Commanding General/Chief of Staff, Executive Deputy to the Commanding General, and Deputy Chief of Staff forums

a. DCG/CoS taskings. Responsible OPR will serve as notetaker and email SGS a summary of significant issues and taskings directed by the DCG/CoS during any venue (for example, meetings, VTCs, visits, conferences, discussions enroute, etc.) for dissemination within 2 workdays. Prior to adjournment the lead will confirm the list of taskings by the DCG/CoS. See figure 2-5 for notes and tasking memorandum format.

b. EDCG taskings. Responsible OPR will serve as note taker and email SGS a summary of significant issues and taskings directed by the EDCG during any venue (for example, meetings, VTCs, visits, conferences, discussions enroute, etc.) for dissemination within 2 workdays. Prior to adjournment the lead will confirm the list of taskings by the EDCG. See figure 2-5 for notes and tasking memorandum format.

c. DCoS taskings. Responsible OPR will serve as note taker and email SGS a summary of significant issues and taskings directed by the DCoS during any venue (for example, meetings, VTCs, visits, conferences, discussions enroute, etc). To ensure unity of effort and maintain visibility, responsible staff lead will, within 2 workdays, email a summary of significant issues that arose to SGS for dissemination, with CC to the CG XO, DCG XO, EDCG XO, DCoS XO, and CPG Chief. Prior to adjournment, the lead will confirm the list of taskings by the DCoS. See figure 2-5 for notes and tasking memorandum format.

DEPARTMENT OF THE ARMY
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND
950 JEFFERSON AVENUE
FORT EUSTIS, VIRGINIA 23604-5700

Your Directorate's Office Symbol (ARIMS RN)   10 October XXXX

MEMORANDUM FOR Secretary of the General Staff, 950 Jefferson Avenue, Fort Eustis, VA 23604

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

1. Provide a brief synopsis of the meeting that the CG or DCG/CoS attended (Who, What, When, Where, Why).

2. Objectives. Clearly state meeting objectives.

3. Tasker Recap. Identify taskers, if any, that come from the meeting to update the CG or DCG/CoS on status, or answer a question, etc. Ensure that the tasker is clear and concise and includes subject, deliverable, recommended lead, assist(s) and suspense date.

    a. Provide briefing to the CG outlining plans for the Annual Modernization Guidance Update (LEAD: G-3/5/7; ASSIST: CKO; S: 21 Nov XX).

    b. Provide CG an EXSUM listing holistic solutions to the 11B mechanized skillset crisis (LEAD: MCoE; ASSIST: G-3/5/7, FCoE; S: 28 Mar XX).

    c. Provide CG an information paper identifying ways to assist or fix the recruiting challenge in the 98th Training Command (LEAD: USAREC; ASSIST: G-3/5/7, ARNG, MCoE; S: 11 Dec XX).

    d. Relook recent tax applied to CoEs/Activities and identify OSD fenced programs that were impacted. E-mail feedback to DCG, with potential on return of taxed funds to CoEs (LEAD: G-8; S: 5 Nov XX).

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

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

Your Directorate's Office Symbol (ARIMS RN)
SUBJECT: Title of Meeting, Location, and Date(s)

5. Point of contact is LTC James Smith, Your Directorate, DSN 501-xxxx, (757) 501-xxxx, james.i.smith.mil@mail.mil.

                                            FELICIA R. JONES
                                            COL, AG
                                            Respective Title

CF:
XO, CG
XO, DCG
XO, DCoS
Chief, CPG
Lead
Assists

2

Figure 2-5. Memorandum format for CG notes and taskings, continued

2-21. Distinguished visitors

Distinguished visitor (DV) visits to HQ TRADOC. The DV visit approval authority is the DCG/CoS. DV visit requests are approved during regularly scheduled visit update briefings with the DCG/CoS. If a visit requires a lead assigned prior to a regularly scheduled meeting with the DCG/CoS, the visit request will be coordinated through the DCoS. The request will include the type of visit/event, objectives, visitor's biography, and 5Ws. See TRADOC Memorandum 1-16

for additional DV information. Along with ESO, the staff lead will attend the regularly scheduled meeting with the DCG/CoS and brief all aspects of the visit or event. See figure 2-6 for flow chart of the overall process.

a. Upon DCG/CoS approval:

(1) If there is command group involvement, the staff lead will prepare a readahead for the CG, DCG/CoS, EDCG, and/or DCoS, as appropriate, and conduct in-process reviews (IPRs) as required.

(2) If there is no command group involvement, the staff lead will prepare a readahead for the host and conduct IPRs as required.

(3) Ensure the visit or event is added to the TEC.

b. Upon DCG/CoS disapproval, proponent will notify all concerned.

c. 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 DVs through installation protocol channels on a weekly basis to ESO via email at usarmy.jble.tradoc.mbx.hq-tradoc-eso@army.mil.

d. Member of Congress and professional staffer visits to subordinate command and/or activities. Electronically report initial notification of congressional visitors to the CAO via email at usarmy.jble.tradoc.mbx.hq-cao@army.mil. After the visit, submit an EXSUM via the "Reporting Contacts with Congress" feature on the CAO website.
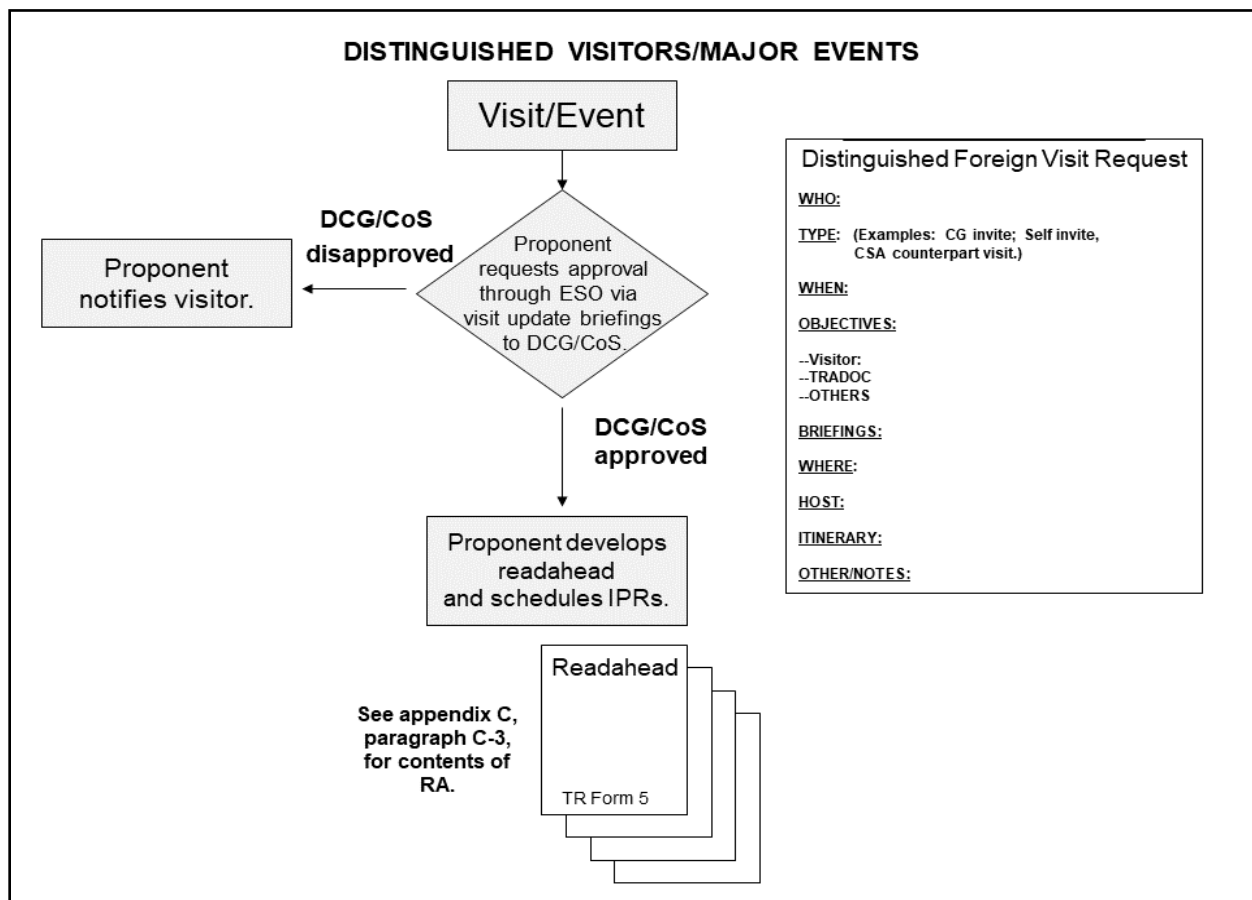
Figure 2-6. Distinguished visitors/major events

2-22. Support agreements

 a. TRADOC G-3/5/7 has oversight of all TRADOC support agreements (SAs): memorandums of agreement (MOAs), FS Forms 7600A (United States Government General Terms & Conditions (GT&C)) and memorandums of understanding (MOUs).

 (1) Follow the U.S. Treasury Department's Bureau of Fiscal Service guidance at https://www.fiscal.treasury.gov/g-invoice/ and Army guidance posted in the Army G-Invoicing Program channel within Army 365 at https://dod.teams.microsoft.us/l/channel/19%3adod%3a4d279d03a8c1407e8f03350fe739b4c3%40thread.tacv2/General?groupId=3ad3aabf-7bfb-4e2e-b115-576e6c1f4d64&tenantId=fae6d70f-954b-4811-92b6-0530d6f84c43. See DoDI 4000.19 and AR 25-50 for required content and formatting in the development of SAs.

 (2) MOA. An MOA is used to document agreements and execute or deliver support with or without reimbursement between any two or more parties. When an SA involves reimbursement, an MOA can be used in addition to an FS Form 7600A to further detail terms and conditions.

 (3) FS Form 7600A. An FS Form 7600A is used to document the General Terms and Conditions of SAs involving an Office of the Secretary of Defense (OSD) or DoD Component that require payment from one party to another.

(4) MOU. An MOU is used to document a mutual understanding between any two or more parties that does not contain an expectation of payment, and under which the parties do not rely on each other to execute or deliver on any responsibilities.

b. TRADOC organizations creating SAs will:

(1) Complete SA coordination at their organization-level G-3/5/7, G-8, OSJA, and other staff elements as appropriate followed by coordination with TRADOC G-3/5/7, Priorities Analysis and Requirements Directorate (PARD), mailbox USARMY JB L-E TRADOC List TR-HQ-G3-5-7-PARD at usarmy.jble.tradoc.list.tr-hq-g3-5-7-pard@army.mil.

(2) Submit SAs that require the HQ TRADOC-level staffing and approval to TRADOC G-3/5/7 PARD (see table 2-1). Upon receipt, PARD will review prior to SA owners staffing SAs with HQ TRADOC OSJA, G-8, and the approval authority, as necessary.

(3) Use an existing Enterprise Level Agreement (ELA) FS Form 7600A posted in the Army G-Invoicing Program channel within Army 365 at https://dod.teams.microsoft.us/l/channel/19%3adod%3a4d279d03a8c1407e8f03350fe739b4c3%40thread.tacv2/General?groupId=3ad3aabf-7bfb-4e2e-b115-576e6c1f4d64&tenantId=fae6d70f-954b-4811-92b6-0530d6f84c43. These ELAs are to be combined with an FS Form 7600B (United States Government Order Form) or military interdepartmental purchase request for a direct-cite or direct-charge. If no ELA FS Form 7600A exists and/or does not fit within the ELA FS Form 7600A scope/terms, then create a separate FS 7600A using the same staffing procedures listed in paragraphs 2-22b(1) and (2).

(4) Observe the requirement of table 2-1 for approval and signatory authorities as delegated by the CG, TRADOC and final acknowledgement authorities.

Table 2-1
Support agreement threshold matrix

APPROVAL LEVEL	AGREEMENT SCOPE	FINANCIAL IMPACT ($)	Enterprise Level Agreement (ELA) or FS Form 7600A	MOA	MOU	APPROVAL SIGNATURE AUTHORITY	Final Acknowledgement
LEVEL 0	AGREEMENT with a PARTY that IMPACTS a SINGLE TRADOC CoE, ORGANIZATION, or ACTIVITY	NO DOLLAR AMOUNT	N/A	Required when Terms Establish Support by the Parties	Required when Terms Establish Independent Responsibilites by the Parties	Commandant and/or equivalent regardless of rank.	TRADOC DCS G-357 (May delegate)
LEVEL 00	AGREEMENT with a PARTY that IMPACTS TWO or more TRADOC CoEs, ORGANIZATIONS, or ACTIVITIES	ANY or NO DOLLAR AMOUNT	Required when a Dollar Amount is Present	Required when Terms Establish Support by the Parties	Required when Terms Establish Independent Responsibilites by the Parties	TRADOC DCG/EDCG.	TRADOC DCS G-357
LEVEL 1	AGREEMENT with a PARTY that IMPACTS a SINGLE TRADOC CoE, ORGANIZATION, or ACTIVITY	BELOW $100K	*Required	Required if more detail is needed	N/A	Commandant, and/or equivalent regardless of rank.	TRADOC DCS G-357 (May delegate)
LEVEL 2	AGREEMENT with a PARTY that IMPACTS a SINGLE TRADOC CoE, ORGANIZATION, or ACTIVITY	BETWEEN $100K BUT LESS THAN $5M	*Required	Required if more detail is needed	N/A	CoE CG/DCG/Directors in the grade of MG/SES2; and TRADOC DCOS, DCS G-3/5/7 & DCS, G-8	TRADOC DCS G-357
LEVEL 3	AGREEMENT with a PARTY that IMPACTS a SINGLE TRADOC CoE, ORGANIZATION, or ACTIVITY	BETWEEN $5M BUT LESS THAN $10M	*Required	Required if more detail is needed	N/A	TRADOC DCG/EDCG and CG CAC.	TRADOC DCS G-357
LEVEL 4	AGREEMENT with a PARTY that IMPACTS a SINGLE TRADOC CoE, ORGANIZATION, or ACTIVITY	GREATER THAN $10M BUT LESS THAN $50M	*Required	Required if more detail is needed	N/A	TRADOC DCG/EDCG	TRADOC DCS G-357
LEVEL 5	AGREEMENT with a PARTY that IMPACTS a SINGLE TRADOC CoE, ORGANIZATION, or ACTIVITY	$50M OR GREATER	*Required	Required if more detail is needed	N/A	TRADOC CG	TRADOC DCS G-357

Submitting Draft Support Agreements to HQ TRADOC requires prior Commandant/CoS/CG or DCG signature in the Grade of MG/SES

*Prior to creating any FS7600A, it is required for all TRADOC elements to try and use an existing ELA FS Form 7600A at the following link: https://dod.teams.microsoft.us/l/channel/19%3adod%3a4d279d03a8c1407e8f03350fe739b4c3%40thread.tacv2/General?groupId=3ad3aabf-7bfb-4e2e-b115-576e6c1f4d64&tenantId=fae6d70f-954b-4811-92b6-0530d6f84c43. These ELAs are to be combined with MIPRs/7600Bs, Direct Cite and Direct Charge. If no ELA FS7600A exists and/or does not fit within the ELA scope/terms, then a separate FS7600A is required using the same staffing procedures per TR 1-11, para 2-22.

2-23. Approval of OCONUS TDY or overseas conference travel

a. HQ TRADOC personnel will submit a completed TF 712 (Request for Official OCONUS Temporary Duty Travel) and any documentation required by the DOD Foreign Clearance Guide to TRADOC DCS, G-1/4, Personnel and Logistics (ATBO-BP) at least 60 calendar days prior to travel. See DOD Foreign Clearance Guide and AR 55-46 for guidance on submitting requests for OCONUS TDY or overseas conference travel.

b. Traveler will 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.

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

d. Traveler must verify current Antiterrorism Level I Awareness training and completion of an area of responsibility brief for country destined for travel, per AR 525-13.

Chapter 3
U.S. Army Training and Doctrine Command Forms and Correspondence 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 and ARIMS record number. Use personal stationery for letters (for example, CG, DCG/CoS, EDCG, or DCoS letterhead). Templates are available on the TRADOC SAORC SharePoint site at https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-SGS/SitePages/Staff-Action-Officer-Resource-Center.aspx. The following general guidelines apply to all staff actions:

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

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

c. Maintain appropriate tracking, route initial actions, and those returned for corrections through SGS SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil. Do not take actions directly to command group offices.

d. If the CG, DCG/CoS, EDCG, DCoS, or CSM returns an action directly to the AO or director, bypassing SGS, the recipient will alert SGS to the action's status and location. Use documents stored in ETMS2 to edit or correct the correspondence, if required. If the CG, DCG/CoS, EDCG, DCoS, or CSM requires a response, forward through SGS.

e. Provide SGS an electronic copy of action by uploading it to ETMS2. SACO will make administrative corrections, but will return staff actions to AOs that require substantive changes or contain inordinate amount of errors for rewrite and/or corrections. Upload the corrected documents in ETMS2 and notify SGS once they are resubmitted. Remove older versions to ensure only one working document is maintained.

3-2. Assembling a staff action

a. Assemble all staff actions, ensuring tabs are consecutive and explained in order in the ETMS2 My Response section. Refer to Appendix C, table C-1, when assembling readaheads.

b. First tab (TAB A): Document requiring signature, approval, or line-thru. If action is the submission of an information paper only, place the paper at TAB A. When transmitting more

than one document for signature or approval, attach the separate documents as tabs A1, A2, A3, etc. When multiple letters similar in content require signature, forward the action with only one letter for signature and a listing of other addressees/proposed salutations who will receive similar letters. Once SGS reviews/edits the letter, the document is returned to the originating staff office to prepare the remaining memorandums or letters. Entire package is returned to SGS to process for signature on the remaining correspondence.

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

d. Subsequent tabs: Attach detailed background material required for complete understanding of the action or material that expands on items discussed in the "DISCUSSION" portion of the ETMS2 My Response section. Use succeeding tabs in the order mentioned in ETMS2 My Response section. Use pertinent extracts of lengthy publications and reference documents, including messages.

My Response

RECOMMENDATION(S): (Provide a brief statement of the purpose and 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.)

KEY POINT(S): (The key points are the pieces of salient information that the CG, DCG/CoS, EDCG, DCoS and/or CSM need to know about this action. Write them at senior Army leaders' level. These are the points your principal or deputy want to convey to the CG, DCG/CoS, EDCG, DCoS and/or CSM)

DISCUSSION: (Summarize the information and provide a current status, if applicable. Why are you telling this to the CG, DCG/CoS, EDCG, and/or DCoS? What should the CG, DCG/CoS, EDCG, and/or DCoS know and discuss? Describe the task, its origin, issue, and requirements. Provide a fact-filled background and comment. This discussion should tell the story on an action without prompting questions. The final approval authority should fully understand why the action is necessary. Be clear and concise.)

STAFF ACTION DOCUMENT(S): (List all enclosures and tabs. Explain what is included within the packet. If none, state N/A. For example: TAB A: Memorandum for CG's signature. TAB B: Legal Review, and so on. List the tabs vertically, one per line). The document for action (i.e. signature, review, or approval) will always be in TAB A.

PRINCIPAL/PRINCIPAL DEPUTY [Organization, Name, Phone, email]: All actions going to the TRADOC Top 5 (CG, DCG/COS, EDCG, DCOS, CSM) require release by a principal or principal deputy in TMT or in a wet/digital signature on the main document. For subordinate organizations (USACIMT, USACC, COEs, etc.), the "principal" is the CG and the "principal deputies" are the DCG or DtCG.

OPR ACTION OFFICER [Organization, Name, Phone, email]: The lead action officer for the action.

STAFF & UNIT COORDINATION [Agency Name, POC, Date, Concur/Non-concur (include summary if non-concur)]: (List vertically, one per line). Include each office and POC's information that the action was staffed with and indicate their concurrence. If "concur with comments," include comments at appropriate tab or with additional text. (e.g. TRADOC G-1, LTC John Smith, 111-111-1111, ltc.smith@army.mil – Concur w/o comment)

Figure 3-1. ETMS2 My Response format

3-3. ETMS2 My Response section
ETMS2 My Response section accompanies all staff actions processed for command group information, signature, or approval. Use of ETMS2 My Response section ensures correct tracking of staff actions within ETMS2 and provides an official record of approvals and disapprovals. Ensure the information is well thought out and succinct so the CG, DCG/CoS, EDCG, DCoS, or CSM can quickly review a summary of the details they need to know before

taking action. This should always be clear, concise, and written at the 4-star level. Obtain the appropriate coordination and approval/release signature(s) within your organization before forwarding to SGS. A well-prepared ETMS2 My Response section 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.

3-4. Executive summary
Use EXSUMs to provide information, updates, and interim responses to the command group. Whenever possible, use EXSUMs instead of information papers.

 a. Procedures. Requests for EXSUMs are tasked according to procedures in paragraph 2-5.

 b. See figure 3-2, for the EXSUM format. (The TRADOC EXSUM format matches the HQDA EXSUM format shown in HQDA Policy Notice 25-52).

  (1) Do not exceed 15 lines.

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

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

 c. Begin typing the originator's name and contact information at the center of the page as seen in figure 3-2.

 d. Type APPROVED BY: Rank/Mr./Mrs./Ms. Surname one line below originator's name and contact information. EXSUMs prepared for TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) review or approval have the subordinate principal or principal deputy as the approver (see para 2-1k.).

 e. DCSs and chiefs of special staff offices and organization command groups will forward EXSUMs, via email, to the CG (and the CG XO), DCG/CoS (and the DCG/CoS XO), EDCG (and the EDCG XO), or DCoS (and the DCoS XO). Provide CC to SGS for tracking.

(CLASSIFICATION)

<u>1</u>

EXECUTIVE SUMMARY

<u>1</u>

1 Mar XX

<u>1</u>

(U) <u>PREPARATION OF AN EXECUTIVE SUMMARY.</u> (U) (originator's office symbol)
An executive summary (EXSUM) is prepared in Arial 12 with 1-inch margins. The
EXSUM should begin with the overall classification 1 inch from the top and bottom of
the page. Place the words EXECUTIVE SUMMARY centered and one line down from
the classification. The tasker number (if applicable) and the date are two lines down
from EXECUTIVE SUMMARY. The subject is uppercase, underlined, and marked with a
security classification. The originator's office symbol will appear in parentheses after the
security classification, followed by the body of the text. An EXSUM should contain no
more than 15 lines and synthesize the essential elements of information necessary to
answer the recipient's question. The first sentence will identify the purpose of the
correspondence (EXSUMs are self-initiated or respond to someone's question.)
Acronyms should always be spelled out the first time they appear, followed by the
acronym in parentheses. Ensure the originator is identified and the EXSUM approved
as shown below. Type the name of the approval authority below the originator's name
and telephone number to indicate approval by principal, deputy, or director.

1
2
3
<u>4</u>

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

<u>1</u>

APPROVED BY: BG Brian Xxxxxx

<u>1</u>
Encl

(CLASSIFICATION)

Figure 3-2. Executive summary format

3-5. Decision memorandum
Use a decision memorandum to obtain decisions from senior leadership. Prepare this special purpose action in memorandum format. Do not exceed two pages, excluding supporting documents.

a. General. The decision memorandum content should represent the complete situation, without relying on enclosures. Summarize issues and reserve enclosures for a detailed analysis or explanation of the summary presented in the memorandum. Identify enclosures contained at tabs in the body of the decision memorandum. Use ETMS2 when submitting decision memorandums to the command group. Keep information in the ETMS2 "My Response" section brief, with a purpose statement, short background summary, and coordination.

b. See figure 3-3, for the decision memorandum format.

(1) Office symbol and ARIMS record number. Type the office symbol of the proponent office at the left margin, 1 inch below the top of the page. Type the applicable record number in parentheses one space to the right of the office symbol.

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

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

(4) Paragraph 1, FOR <u>DECISION</u>.

(5) Paragraph 2, <u>PURPOSE</u>. In one concise sentence state the action to be taken (for example, "To gain CG approval of the issues developed at the TRADOC Commanders Conference held at Fort Eustis, 23-24 Oct 18.").

(6) Paragraph 3, <u>RECOMMENDATION(S)</u>. This paragraph contains specific recommendations; for example, "CG sign the enclosed memorandum at TAB A-1."

(7) Paragraph 4, <u>BACKGROUND</u>. 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, <u>DISCUSSION</u>. This paragraph lists and assesses the alternatives considered. Assess the alternatives considered for the decision in terms of courses of action with advantages and disadvantages. Include documents that support the recommendation as enclosures at tabs. Summarize their key points in the decision memorandum.

(9) Paragraph 6, <u>IMPACT</u>. 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, <u>COORDINATION</u>. This paragraph indicates with whom and when the action was staffed. Indicate concurrence or non-concurrence 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/NON-CONCUR. Type or write the date the individual provided feedback in the blank before DATE. Prepare each line as follows:

(11) Paragraph 8, Point of contact. Include POC name and rank, title, telephone number, and email address.

(12) Second page. If a decision memorandum is longer than one page, at the top of all continuation pages, type the office symbol (and ARIMS record number) 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 line.

(13) Decision memorandums prepared for TRADOC Senior Leader (CG, DCG, EDCG, DCoS, CSM) review or approval have the subordinate principal's or principal's deputy signature (see para 2-1k).

DEPARTMENT OF THE ARMY
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND
950 JEFFERSON AVENUE
FORT EUSTIS, VIRGINIA 23604-5700

Office Symbol (ARIMS #)

MEMORANDUM THRU (add necessary chain of command as necessary)

FOR

SUBJECT: Preferably 10 words or less—no acronyms

1. FOR DECISION.

2. PURPOSE. (To obtain SECARMY approval. . . a concise statement on action to be taken.)

3. RECOMMENDATION(S). (CG sign the memo at TAB A.)

    APPROVED_____DISAPPROVED_____SEE ME_____

4. BACKGROUND. (Origin of the action. Facts necessary to understand the recommendation.)

5. DISCUSSION. (Assess the alternatives/courses of action (COAs). Include as enclosures, documents that support the recommendation and summarize their key points.)

    a. COA 1: (Advantages/Disadvantages)

    b. COA 2: (Advantages/Disadvantages)

    c. COA 3: (Advantages/Disadvantages)

6. IMPACT. (Does it impact personnel, equipment, funding, etc.)

7. COORDINATION.

    Organization   CONCUR/NONCONCUR   DATE
    Name

    Organization   CONCUR/NONCONCUR   DATE
    Name

8. See AR 25-50, figure 2-19 when creating a digital decision memorandum.

9. Point of contact is (name, title, phone number, email).

Encls   NAME
                               Rank, U.S. Army
                               Title

Figure 3-3. Decision memorandum format

3-6. Information paper

Use an information paper (IP) to provide the reader pertinent facts in a clear and concise format. Figure 3-4 provides format and instructions for preparing an IP. Note the authority block begins at the center of the page, with a 3.25-inch tab stop, and one line below the last paragraph. IPs for

TRADOC Senior Leaders (CG, DCG, EDCG, DCoS, CSM) have a principal or principal deputy as the approver (see para 2-1k).

CLASSIFICATION

INFORMATION PAPER

ATCS-XS (ARIMS record number)   30 Aug XX

SUBJECT: Information Paper Format

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

2. Facts:

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

    b. Include the subject and the purpose. Paragraphs will contain only essential facts concerning the subject. Papers will be self-explanatory and will not refer to enclosures, except for tabular data, charts, or photographs.

    c. There are two lines between the title "INFORMATION PAPER" and the office symbol. There is one line between the date and the subject line. The office symbol and date are on the same line. There are two lines between the subject line and the purpose. Do not "bold" and text."

    d. Papers should not exceed two pages in length, and need not be signed, but must include the action officer's name and telephone number in the lower right corner. Type the name of the approval authority below the action officer's name and number to indicate agency approval by the principal, deputy, or director.

    e. Avoid using acronyms and abbreviations, except those that are familiar outside the Army (such as DoD and FY).

    f. Avoid using classified information when it does not contribute to understanding the issue.

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

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

CLASSIFICATION

Figure 3-4. Sample format for an information paper

3-7. Point paper

Use a point paper to provide assessment, recommendations, and discussion points in outline form. It features short, to the point, easy to read bullet phrases. Use a point paper when the reader has a thorough knowledge of the subject. See figure 3-5, for instructions on preparing a point

paper. Minor variations in the point paper format are acceptable, if needed, to better present the information. Point papers for TRADOC Senior Leaders (CG, DCG, EDCG, DCoS, CSM) have a principal or principal deputy as the approver (see para 2-1k).

MAJ R. Xxxxxx
ATCS-XE/2513
8 Aug XX

POINT PAPER

SUBJECT: Point Paper Preparation

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

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

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

4. **Discussion Points:**

• Font: Arial 12. Margins: 1 inch all around.

• 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 3-5. Sample point paper

3-8. Star note

a. Only GOs use star notes, normally for brief personal replies or to convey congratulations, appreciation, welcome, regrets, etc. Prepare the star note according to the personal preference of the GO signing the note. Include appropriate information in the ETMS2 My Response section; for example, "PURPOSE: To obtain CG's signature on star note (TAB A) to Mr. Jonathan (John) E. Doe for his selection as TRADOC Employee of the Year." The preparer may also put first name/nickname on small adhesive notes on each letter within the package. Star notes are normally one page in length. See figure 3-6 for a sample CG star note with formatting instructions.

   b. 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, but leave space for it when typing. Indent paragraphs five spaces and begin typing at the sixth space.

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

Commanding General
United States Army Training and Doctrine Command
950 Jefferson Avenue
Fort Eustis, Virginia 23604-5700

Major General David A. Doe
Commander
U.S. Army Fires Center of Excellence
455 McNair Avenue, Suite 100
Fort Sill, OK 73503-5001

Dear General Doe:

   Use Arial 12 font with at least 1-inch margins. Center the text vertically, as if for framing. Do not date prior to signature. After signature, center civilian-style date, e.g., August 10, 20XX, two lines below letterhead. Indent paragraphs five spaces and begin typing at the sixth space.

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

                                        Sincerely,

                                        John S. Smith
                                        General, U.S. Army

Figure 3-6. Sample commanding general star note

3-9. Command coin
Command coin requests must be submitted to SGS via ETMS2 to forward to the command group for approval. Fill out the My Response section and assign to SGS as OPR.

3-10. TRADOC policy letters and delegations of authority

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

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

c. Staff elements will forward policy letters and delegations of authority in ETMS2, through the SGS for CG approval. Policy letters and delegations of authority must be coordinated through the OSJA, TRADOC G-6 Publications Control, and any other staff as required.

d. Once the CG approves, SGS will consecutively number the policy letters, and maintain an index of the policy letters and delegations of authority (those in delegation memorandums and those written into administrative publications).

e. Each new CG will review policy letters and delegations of authority upon assumption of command. The issuing staff elements will review their policy letters and delegations of authority and ensure the information is still valid and current. Some policy letters may require earlier review based on the subject matter and separate regulations that govern their functional area. Policy letters are effective until superseded or rescinded.

f. Consistent with AR 25-30, TRADOC policy letters will not be used as substitutes for issuing or revising Army- or TRADOC-wide policy and procedures that should be included in administrative publications.

Chapter 4
Conferences and Briefings

4-1. U.S. Army Training and Doctrine Command-hosted or -sponsored conferences
TRADOC-hosted or -sponsored conferences will be conducted in accordance with governing policy, to include AR 1-50 and supplementing TRADOC policy. Official conference records are permanent and will be maintained per ARIMS record number 1-1m1, or according to the most current Army retention and disposition schedule.

4-2. Headquarters, U.S. Army Training and Doctrine Command conference room locations and responsible staff offices
DCSs and chiefs of special staff are responsible for scheduling conferences and briefings in the General William W. Hartzog Conference Room and Morelli Auditorium via the Conference Room Scheduler.

a. The Office of the Commanding General (OCG) approves requests for the General William W. Hartzog Conference Room.

b. ESO approves requests for the Morelli Auditorium. For scheduled events hosted by the CG, DCG/CoS, EDCG, DCoS, or CSM that require protocol support, send requests to Chief, ESO.

4-3. Scheduling conferences and briefings requiring command group participation

a. DCSs and chiefs of special staff are responsible for notifying the CG of short-notice taskings from HQDA 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 email to CG's scheduler within 24 hours of receiving the mission. As required, CG will attend CSA briefings.

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

c. Any internally-scheduled meetings involving subordinate commanders or commandants that provide less than 30 calendar days notification must have DCoS approval.

d. Meetings, conferences, or symposiums involving the command group will begin no earlier than 0900 to avoid conflicts with physical training schedules.

e. 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 and briefings.

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

(3) Reserve appropriate conference rooms via the Conference Room Scheduler: https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-CRS.

(4) Submit an action in ETMS2 for DCG/CoS approval of all conferences or briefings requiring expenditure of HQ TRADOC funds. ETMS2 My Response section will include:

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

(b) Attendance requirements.

(c) Name or title of chair.

(d) Purpose of conference or briefing.

(e) Security classification.

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

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

(h) Uniform requirements.

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

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

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

g. The lead staff office for organizing a conference or briefing for the command group will provide a notetaker to record taskings and issues that surface during the conference or briefing.

h. 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 diagrams of seating charts.

i. Payment of conference costs for locally hosted conferences:

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

(2) Subject to the applicable dollar threshold for the cardholder, the Government Purchase Card may be used to pay for conference room rental expenses. The purchase card dollar threshold varies among cardholders. The card will not be used to purchase food or refreshments. If for any reason the card is not accepted, contact the Fort Eustis Agency Program Coordinator 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 G-8, Budget Directorate, a summary list of costs, broken out by directorate.

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

(5) Use of government funds to pay for food or refreshments is extremely restricted. Violation of these restrictions can result in administrative action, personal liability, and/or civil and criminal penalties for violating the Anti-Deficiency Act. Conference planners should coordinate with their servicing OSJA before any purchase of food and refreshments for consumption at conferences.

(6) Conference facilities contracts are subject to the TR 5-14 review process.

4-4. Preparing visual aids

a. A briefing template is available in the SAORC under TRADOC Templates.

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

c. Ensure each chart or graph has the bottom line up front, conveys a single idea or thought, and is simple and straightforward.

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

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

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

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

h. Mark classified slides at the top and bottom per AR 25-55 and AR 380-5. Ensure classification is clearly visible during the presentation. Add CUI markings as appropriate per DODI 5200.48.

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

j. Transmit material via email or on Microsoft TEAMS. Ensure all files are created with approved Army software. Distribute paper copies of slides/conference materials to multiple attendees only as a last resort.
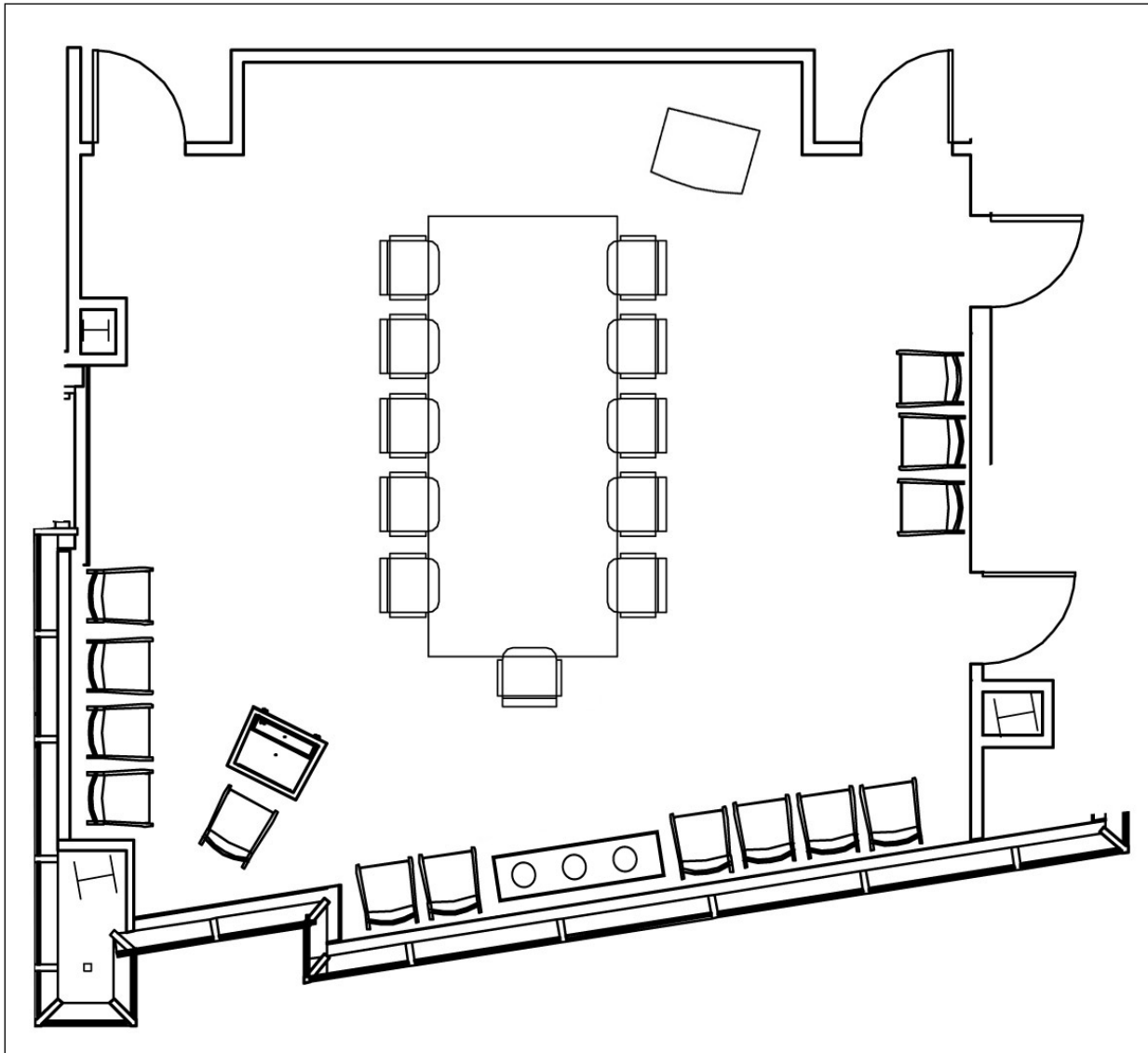
Figure 4-1. Diagram of General William W. Hartzog Conference Room
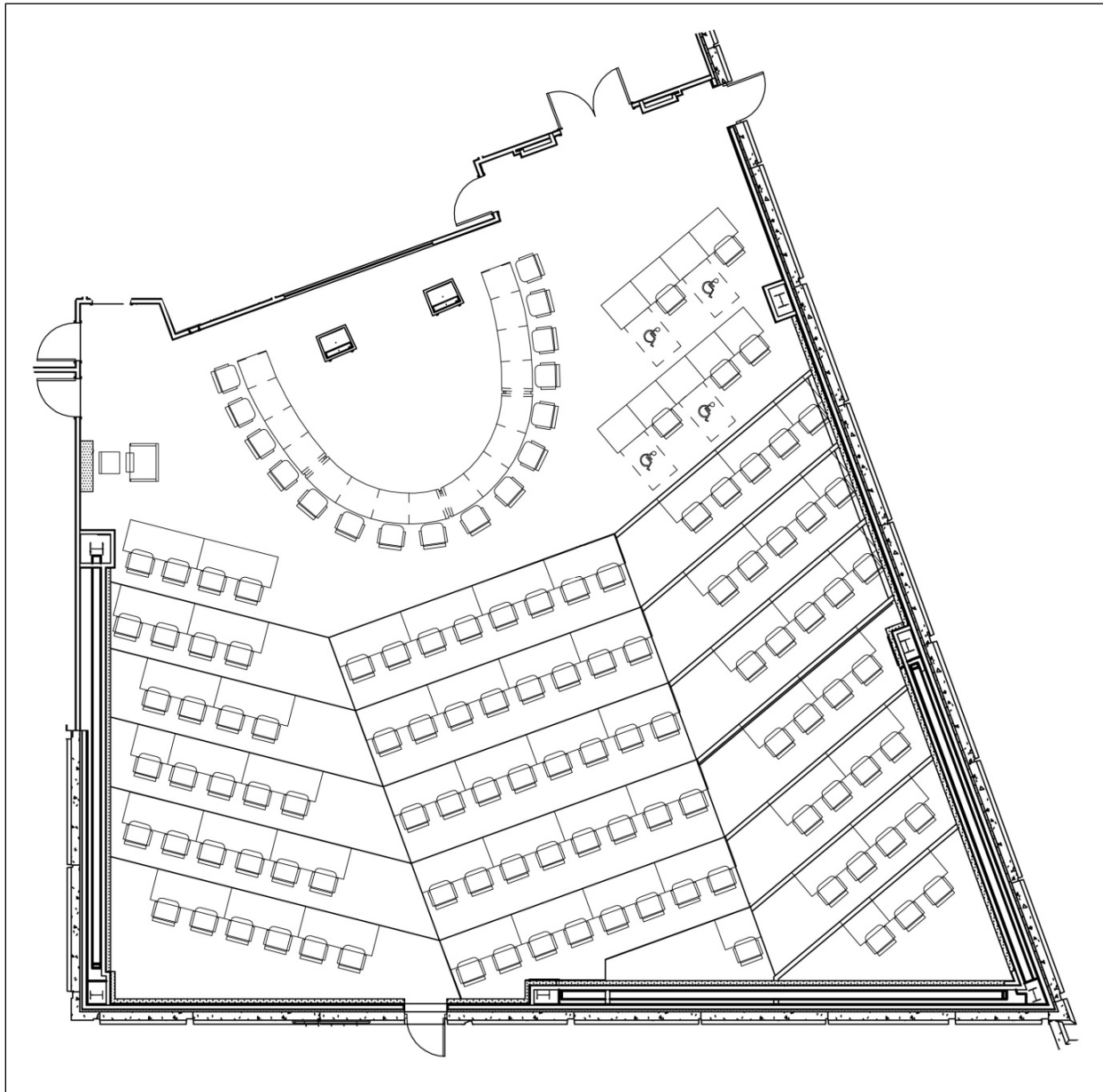
Figure 4-2. Diagram of Morelli Auditorium

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

Chapter 5
Use of Enterprise Email

5-1. Email

a. Enterprise email enables Soldiers, government Civilians, and selected contractor employees (as per the terms of each particular contract) to accomplish their work efficiently and effectively. This email service is provided for official use and authorized purposes only.

b. AOs should use email 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 email to communicate and AOs must be conscious of the time it takes others to access, analyze, and act upon emails. Unnecessary emails 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 email or who need to take action on an email. 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 emails are addressed. Commanders, directors, and other senior leaders should not be distracted from other tasks by emails pertaining to routine matters. Such emails should be sent to the receiving organization's administrative staff or to an organizational email address—not to the commander or director of the organization. AOs should also not assume that sent emails 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. AR 25-1 prescribes email digital signature and encryption requirements. Digital signatures on emails provide a means to determine the exact originator of a particular message, a capability commonly referred to as non-repudiation. Encrypted emails can only be opened 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 emails is available on non-secure internet protocol router network (NIPRNET).

(1) An email must be sent encrypted if it contains sensitive information. Sensitive information includes, but is not limited to, CUI information, personally identifiable information, information protected by the Freedom of Information Act, and the Privacy Act of 1974.

(2) All emails sent from an Army-owned system or account that contain an active (embedded) hyperlink (uniform resource locator web address or email 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 email devices, personal digital assistants, etc.) and remote workstations (such as connected using a virtual private network). Additionally, emails when considered official business, should be digitally signed (when they constitute orders, promulgate policy, or commit resources).

e. TRADOC organizations should use the Army's approved email bannering tool to help ensure emails containing sensitive information are appropriately labeled according to DODM 5200.01, Volume 2 and DODI 5200.48. Personnel are still responsible for applying appropriate labels and protections when automated tools are unavailable. Those originating emails should also use descriptive subject lines and descriptive filenames on attachments that include such terms as CUI in order to provide a ready indication of the contents of the email and any attachments. Information management officers will notify the local installation network enterprise command if the email banner is not enabled.

f. TRADOC personnel generating email in their official capacity will not include slogans, quotes, or other personalized information as part of the individual senders signature block (see AR 25-1).

g. AOs should avoid unnecessary attachments. Attachments are difficult to read by those accessing email from a mobile device. If information can be placed directly in the body of a message, vice in an attached file, then do so.

h. Emails containing CUI in the body or in attachments are to be digitally signed and encrypted, with appropriate paragraph and banner markings and a designation indicator block, per DODI 5200.48.

i. AOs should use the out of office assistant tool to provide status and alternate POC information during absences in excess of 1 workday.

5-2. Organizational email accounts

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

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

5-3. Use of Microsoft Outlook calendars
AOs should use the calendar function in Outlook to manage their daily schedules. This will allow others to easily plan and coordinate meetings. AOs should set calendar permissions to allow the maximum feasible ability to view individual schedule information by others on the local installation network. AOs should freely share their schedules with other AOs within their organization.

Chapter 6
Headquarters, U.S. Army Training and Doctrine Command Army Heritage Month, Decentralized Organization Day

6-1. Army Heritage Month

a. Commander, CIMT is the Senior Commander and final approval authority for Army Heritage Month (AHM) plans per HQ TRADOC Army Heritage Month Committee (AHMC) recommendation.

b. In accordance with AR 600-20, TRADOC HQ will conduct an Army Heritage Month Observance in June to:

(1) Promote the Army Values.

(2) Foster a culture of equity and inclusion in the Army.

(3) Recognize diversity within the Army Total Force as a strength and force multiplier.

(4) Promote unit cohesion, teamwork, and esprit de corps.

(5) Recognize and celebrate the Army's Heritage and Birthday.

c. Support requirements for AHM will be identified by the AHMC during the planning process. The AHMC will publish a TASKORD that specifies if support is needed and from which DCS.

d. Mandatory members of TRADOC AHMC will include a representative from CIMT, Command Diversity Office (CDO), COMMDIR, ESO (if CG, DCG, EDCG, and/or DCoS are involved in the program), History Office, and the Military Equal Opportunity Advisor from all tenant units. As it concerns any aspect of AHM requiring a legal review, the CIMT OSJA will provide the initial legal review, while the TRADOC OSJA will provide any further legal input/review as necessary. The TRADOC G-8 will review/process approved funding requests in connection with the AHM.

e. AHMC representatives will provide quality control and oversight for the planning and execution of AHM in support of the CG, CIMT and Fort Eustis Senior Commander.

f. Funding for AHM is available through the AHMC for facilities, speakers, tokens of appreciation, and ethnic food tasting. Organizations can use a budget planning factor of $2,500.

g. See table 6-1 for AHM tasking timelines.

Table 6-1
Army Heritage Month tasking timelines

Timeframe	Responsible proponent office
120 days prior to observance date	Convene AHMC. AHMC determines scope of proposed activities and identifies installation activity lead/s.
90 days prior to observance date	AHM AOs submit a plan of action/milestones to the AHMC.
70 days prior to primary event	Brief event concept plan to SAEC for approval.
60 days prior to primary event	If CG, DCG/CoS, EDCG, or DCoS are involved in the program, AHMC sends the DCoS an information paper. AHMC/AO coordinates concept and funding with appropriate agencies and HQ TRADOC Directorates as required.
no later than (NLT) 31 July	AHMC provides a written after action report in memorandum format to the AEC and HQ TRADOC DCoS.

6-2. Administrative guidelines for Army Heritage Month

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 6-1.

b. The following HQ TRADOC DCSs Special Staff will designate and provide AHMC board members: CDO (AHMC Co-Chair), G-8, ESO, COMMDIR, SJA, and History Office.

c. DCSs or their deputies, will personally host the event(s) (or keynote event if a series of events) external to, or in support of Fort Eustis AHM as required by HQ TRADOC.

d. For TRADOC-sponsored events, if the CG, DCG, EDCG, or DCoS are involved in the program, TRADOC ESO will send electronic invitations of scheduled event(s) to all GOs/SESs and other special guests. ESO will also send electronic invitations to the XO Distribution List for dissemination to the remaining staff.

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

f. When desiring command group participation (to introduce guest speaker, present recognitions, etc.), on behalf of the AHMC, CDO will send request through SGS to the CSM, DCoS, EDCG, DCG/CoS, or OCG.

g. CDO and ESO, as standing members of the AHMC, will review event plan (sequence of events, seating, and program) to ensure compliance with accepted standards.

h. Coordinate CG remarks with designated CPG speechwriter. When requesting remarks from DCG/CoS, EDCG, or DCoS, responsible organization coordinates with their respective XO to prepare draft remarks and forwards remarks as part of readahead, or separately, as directed. Brief command group participant(s) 1 week prior to the event(s) and forward readahead at least 4 workdays prior to IPR.

i. Tasked TRADOC OPR will provide escorts for guest speakers and guests of honor.

j. AHMC will coordinate obligation of funds for fees, honoraria, or awards for presentation to non-DOD personnel participating in AHM-related key events. The appropriate authority for the payment of fees or honoraria under $2,000 is the coordinating staff responsible for the event. For honoraria in excess of $2,000 the approval authority is the VCSA.

k. The committee chairperson must coordinate in advance with the proper award authority to determine the appropriateness of providing awards in recognition of any DOD members/DA civilians' participation in ethnic/special observance events.

l. OPRs should refer to the Defense Equal Opportunity Management Institute website for the current theme, posters, invitations, presentations, and other observance products: https://www.defenseculture.mil/Human-Relations-Toolkit/Special-Observances/.

6-3. Headquarters, U.S. Army Training and Doctrine Command Decentralized Organization Day

TRADOC was founded on 1 July 1973 under General William E. DePuy. TRADOC celebrates that founding every year with a variety of special activities. There is no centralized program honoring TRADOC's founding. TRADOC HQ staff organizations, located on Fort Eustis, will honor TRADOC's founding by conducting individual organization celebratory programs customized to meet their members' preferences and responsibilities. Multiple laws, regulations, rules, and standards govern holding an Organization Day on a joint base. Different rules apply to different employees, even if they work in the same location. If there are any questions about engaging in select Organization Day activities, who may participate in such activities, and/or any related concerns, submit any such proposed plans/issues to the TRADOC OSJA for a legal review.

a. TRADOC HQ organizations responsible for conducting Decentralized Organization Day activities are:

(1) Command group, personal, and select special staff (includes Office of the CG, Office of the DCG/CoS, Office of the EDCG, Office of the DCoS, Office of the DCG - Army National Guard, and Office of the DCG - U.S. Army Reserve, CPG, Office of the CSM, SGS, CAO, ESO, COMMDIR, Command Chaplain, Inspector General, OSJA, Internal Review and Audit Compliance Office, Quality Assurance Office, and CDO).

(2) G-1/4 (includes Military History, Safety Office, Surgeon's Office, and the TRADOC Library)

(3) G-2

(4) G-3/5/7

(5) G-6 (includes CKO)

(6) G-8

   b. OPR for the decentralized events will draft a memorandum for DCoS signature announcing the date(s) and parameters for the events. OPR will also collect after action reports from the participating organizations and prepare a single after action report for DCoS's review. The after action report will be submitted in ETMS2 through the SGS SAD, no later than 30 days following the final organization day event.

   c. Organizations may join together to maximize resources or may conduct separate events.

   d. Organizations will schedule activities no earlier than the last full week of June and no later than the first full week of July. Organizations desiring to conduct their organization day outside of this window may submit an exception to policy request to the TRADOC DCOS. Activities will not be in conjunction with Independence Day, or the associated training holiday.

   e. Activities will be conducted on Fort Eustis, unless the DCoS approves an exception.

   f. Activities will reflect positively on TRADOC and the Army.

   g. Activities will focus on team building, enhancing working relationships, and will support Army values.

   h. Activities should recognize TRADOC's history, mission, and traditions.

   i. See table 6-2 for the list of HQ TRADOC Decentralized Organization Day and recurring events schedule and the responsible organizations.

Table 6-2.
Headquarters, U.S. Army Training and Doctrine Command Decentralized Organization Day and other recurring events schedule, calendar years 2024-2029

Event	2024	2025	2026	2027	2028	2029
HQ TRADOC Decentralized Organization Day *July*	G-3/5/7	G-6	G-8	Cmd Grp	G-1/4	G-2
Army Emergency Relief *May*	STB	STB	STB	STB	STB	STB
TRADOC Best Warrior Competition *July*	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7
Instructor of the Year *August*	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7	G-3/5/7
Drill Sergeant of the Year *September*	CIMT	CIMT	CIMT	CIMT	CIMT	CIMT
Combined Federal Campaign *September-November*	733rd MSG	733rd MSG	733rd MSG	733rd MSG	733rd MSG	733rd MSG
Legend: Center for Initial Military Training (CIMT) Command Group (Cmd Grp) Mission Support Group (MSG) Special Troops Battalion (STB)						

Chapter 7
U.S. Army Training and Doctrine Command Invitational Travel Authorization Procedures

7-1. Invitational travel authorization guidelines
This chapter prescribes invitational travel authorization (ITA) procedures, specific forms, and formats for use at HQ TRADOC and TRADOC schools and centers.

7-2. Preparation of an invitational travel authorization request

a. ITA request memorandums for all official TDY not involving spousal representational travel, as described in paragraph 7-2b, will be prepared and submitted in accordance with the Joint Travel Regulations (JTR), AR 600-8-105, and current Army policy. Figure 7-1 on page 61 shows an example format for an ITA request memorandum. ITA request memorandums must be signed by the approving official within the requesting organization (see table 7-1).

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

(2) All HQ TRADOC ITA packets requesting military air will be staffed through G-3/5/7 Flight Operations Division and then forwarded to the TRADOC OSJA for review at least 15 calendar days prior to the travel date. G-3/5/7 Flight Operations Division will forward the ITA request package, with any legal review, through the SGS SAD for DCG/CoS approval. The ITA packet will contain:

(a) ETMS2 My Response section (with TRADOC G-3/5/7 concur/non-concur recorded if military air travel is requested and with TRADOC OSJA review recorded).

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

Table 7-1.
Invitational travel authorization request approval authority

	Non-spouse travel	Spousal travel
HQ TRADOC	Approval authority is DCG/CoS.	Approval authority is TRADOC CG.
Subordinate organizations	Approval authority delegated to senior TRADOC commander/commandant and Director, Center of Military History. No further delegation allowed.	Approval authority is TRADOC CG.
All TRADOC organizations	Requests are signed by the traveling Soldier or general schedule civilian.	Requests are signed by the traveling spouse's sponsor.

b. Army spouses may be authorized military aircraft or commercial aircraft transportation where the requirements of Section 5703, Title 5, United States Code (5 USC 5703) are met (that is, the spouse is acting as a "quasi employee" during a period of service to the government) and

the spouse is "legitimately performing a direct service for the Government," as established in JTR, paragraph 030501-A12. Additionally, spousal travel by government aircraft is authorized for spouses accompanying their sponsors on military aircraft transportation when the current requirements listed in DODD 4500.56, enclosure 3, paragraph 5 are met. Commercial aircraft transportation is not authorized for this latter type of travel.

(1) ITA request memorandums for spousal travel will be prepared and submitted in accordance with the JTR and Army Directive 2020-14. The ITA request memorandum must clearly explain how spouse travel to activities meets either the "direct service" standard of the JTR or the "nonreimbursable spousal travel" standard of DODD 4500.56. The ITA request memorandum must be signed by the funding budget analyst and spouse's sponsor. Figure 7-2 on page 63 shows an example format for a spousal travel request memorandum.

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

(a) Unless per diem is separately authorized by the CG, the spousal travel request memorandum will contain the text: "This travel authorization authorizes the spouse to accompany the sponsor on official travel. It does not authorize per diem or other expense allowances for the spouse. If the spouse does not desire to bear the expenses ordinarily reimbursed through per diem or other expense allowances, this travel authorization is canceled." (See figure 7-2).

(b) ETMS2 My Response section (with TRADOC G-3/5/7 concur/non-concur recorded if military air travel is requested and with TRADOC OSJA review recorded).

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

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

(e) If the request is for an ITA, spouse's agenda that defines the focus and audience of the spouse's participation and identifies the service to the Government to result from the participation.

(3) Figure 7-3 on page 65 illustrates an overview of the spousal travel process.

DEPARTMENT OF THE ARMY
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND
950 JEFFERSON AVENUE
FORT EUSTIS, VIRGINIA 23604-5700

REPLY TO
ATTENTION OF

Office Symbol (ARIMS RN)   8 Aug XX

MEMORANDUM THRU (Enter organization's servicing legal office)

FOR (Office and address of approval authority as defined in table 7-1)

SUBJECT: Invitational Travel Authorization

1. Request publishing of invitational travel authorization for the below individual:

    a. Name, title or position:

    b. Mailing address:

    c. Proceed date:

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

    e. Itinerary attached? Yes

    f. Length of travel:

    g. Point of contact:

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

    i. Purpose of travel:

    j. Estimated cost:

        (a) Per diem: $00.00

        (b) Travel: $00.00

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

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

Figure 7-1. Invitational travel authorization request memorandum format

Office Symbol (ARIMS RN)
SUBJECT: Invitational Travel Authorization

2. Justification for travel:

    a.

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

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

2

Figure 7-1. Invitational travel authorization request memorandum format, continued

DEPARTMENT OF THE ARMY
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND
950 JEFFERSON AVENUE
FORT EUSTIS, VIRGINIA 23604-5700

Office Symbol (ARIMS RN)   20 Aug XX

MEMORANDUM THRU TRADOC Staff Judge Advocate, U.S. Army Training and
Doctrine Command, 950 Jefferson Avenue, Fort Eustis, VA 23604

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

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

1. References:

    a. Joint Travel Regulations (JTR) (Uniformed Service Members and DOD Civilian
Employees).

    b. Army Directive 2020-14 (Army Spouse Travel).

2. IAW JTR paragraph 030501-A12 [OR] IAW DoDD 4500.56, enclosure 3, paragraph
5 [the requestor would have to select which authority under which they are seeking
transportation.]

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

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

    b. Mailing address:

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

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

    e. Itinerary attached? Yes

    f. Length of travel:

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

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

    i. Purpose of travel:

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

Figure 7-2. Spousal representational travel request memorandum format

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

    (2) Individual meets the eligibility requirements for an ITA found in JTR paragraph 030501-A12 [OR] DoDD 4500.56, enclosure 3, paragraph 5.

    (a) Estimated cost:

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

    (c) Travel: $0

  j. Fund Cite: DTS Line of Accounting

4. This travel authorization authorizes the spouse to accompany the sponsor on official travel. It does not authorize per diem or other expense allowances for the spouse. If the spouse does not desire to bear the expenses ordinarily reimbursed through per diem or other expenses allowances, this travel authorization is canceled.

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

5. Justification for Travel:

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

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

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

2

Figure 7-2. Spousal representational travel request memorandum format, continued
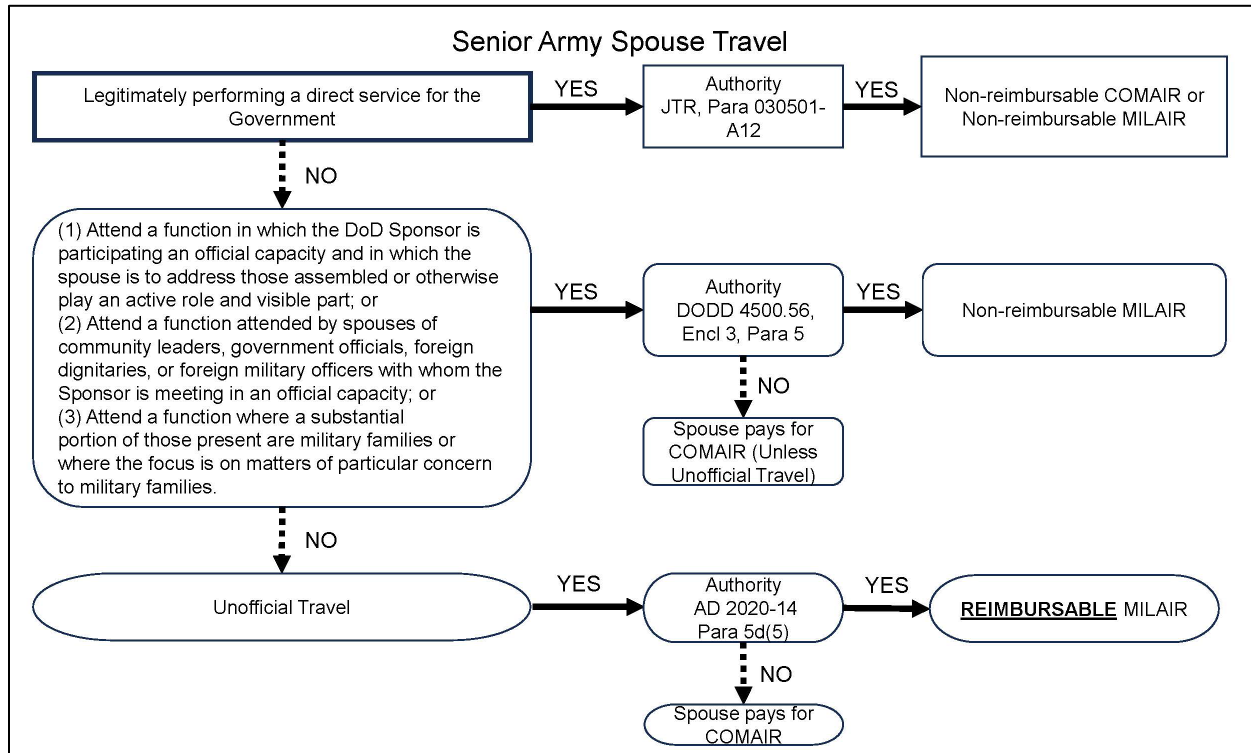
Figure 7-3. Spousal travel overview

7-3. Publication of the invitational travel authorization

After the ITA is approved, the requesting organization will process the ITA in the Defense Travel System (DTS). For details on preparing an ITA in DTS, refer to the Invitational Travel Procedures Guide on the Defense Travel Management Office website (https://www.defensetravel.dod.mil/site/trainingSearch.cfm).

a. Routing lists within DTS will be set up in accordance with local procedures. Subordinate organizations, FOAs, and special activities will follow procedures set forth within their organization.

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

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

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

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

(1) E-invitational (only for non-spousal representational travel), or

(2) E-family transportation 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 spousal representational 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 and G-8 personnel will also review for accuracy and ensure all required statements are on the authorization.

g. All approval documents are required to be scanned into the DTS authorizations substantiating records (ITA request memo, legal review, agenda, etc.).

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

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

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

Chapter 8
U.S. Army Training and Doctrine Command Enterprise Calendar

8-1. U.S. Army Training and Doctrine Command Enterprise Calendar overview
The TEC (https://ua.tradoc.army.mil/sites/TEC2/_layouts/calendar/index.aspx) is a web-based calendar that provides information on key events affecting TRADOC organizations. It is designed to keep the command informed of key events and to provide a tool to help prevent scheduling conflicts. The online version of the TEC is the authoritative version of the TRADOC master activities calendar. The TEC is shown in real time, as all events are immediately reflected on the calendar once approved.

8-2. U.S. Army Training and Doctrine Command Enterprise Calendar management and access

a. The TEC is managed by the TRADOC G-3/5/7, G-33, and requires a common access card for access.

b. To prevent duplicate entries, the event sponsor (or TRADOC OPR) is responsible for inputting the event into their respective calendars, then nominating the event to the TRADOC TEC.

c. Information placed on the TEC will be designated no higher than CUI. The TEC itself is designated CUI. The TEC will not contain names of, nor specific movement data for GOs or SES members.

Appendix A
References

Section I
Required Publications
Unless otherwise indicated, DA publications and forms are available on the Army Publishing Directorate website at https://armypubs.army.mil/. TRADOC publications and forms are available on the TRADOC Administrative Publications website at https://adminpubs.tradoc.army.mil/. DOD issuances and forms are available on the Executive Services Division website at https://www.esd.whs.mil/DD/.

AR 25-50
Preparing and Managing Correspondence

HQDA Policy Notice 25-52
Staff Action Process and Correspondence Policies

TR 10-5
U.S. Army Training and Doctrine Command

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

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

AR 1-20
Legislative Liaison

AR 1-50
Army Conference Policy

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 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 380-5
Army Information Security Program

AR 525-13
Antiterrorism

AR 600-8-22
Military Awards

AR 600-8-105
Military Orders

AR 600-20
Army Command Policy

AR 672-20
Incentive Awards

Army Directive 2020-14
Army Spouse Travel

DA Memorandum 1-18
Joint Actions

DA Pamphlet 25-40
Army Publishing Program Procedures

DOD Foreign Clearance Guide
Electronic Foreign Clearance Guide (https://www.fcg.pentagon.mil/fcg.cfm)

DOD Invitational Travel Procedures Guide, Ver 8.1
(https://www.defensetravel.dod.mil/site/trainingSearch.cfm)

DODM 5200.01, Volume 2
DoD Information Security Program: Marking of Information

DODD 4500.56
DoD Policy on the Use of Government Aircraft and Air Travel

DODI 4000.19
Support Agreements

DODI 5200.48
Controlled Unclassified Information (CUI)

FM 5-0
Planning and Orders Production

JTR
Joint Travel Regulations (https://www.defensetravel.dod.mil/site/travelreg.cfm)

TRADOC ETMS2 Business Practices and Rules (https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-SGS/SitePages/Staff-Action-Officer-Resource-Center.aspx)

TRADOC Memorandum 1-16
Distinguished Visitors, Conferences and Ceremonies, Headquarters, U.S. Army Training and Doctrine Command

TR 5-14
Acquisition Management and Oversight

TR 10-5-4
United States Army Combined Arms Center

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

TR 10-5-8
United States Army Center for Initial Military Training

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

TR 37-2
Temporary Duty Travel Policies and Procedures

TR 95-5
Flight Operations

TR 500-2
Taskings and Individual Augmentation Management

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

U.S. Government Publishing Office Style Manual
(https://www.govinfo.gov/app/details/GPO-STYLEMANUAL-2016)

5 USC 5703
Per diem, travel, and transportation expenses; experts and consultants; individuals serving without pay (http://uscode.house.gov/)

Section III
Prescribed Forms

TF 5
Transmittal, Action and Control

TF 712
Request for Official OCONUS Temporary Duty Travel

Section IV
Referenced Forms

DA Form 2028
Recommended Changes to Publications and Blank Forms

DD Form 1351-2
Travel Voucher or Subvoucher

FS Form 7600A
United States Government General Terms & Conditions (GT&C)
(https://www.fiscal.treasury.gov/g-invoice/)

FS Form 7600B
United States Government Order Form (https://www.fiscal.treasury.gov/g-invoice/)

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
Follow AR 25-50 and this regulation to assist in preparing correspondence.

B-3. Processing staff actions

   a. Recommendation statement in ETMS2 My Response section tells the recipient what you want them to do. For example: "CG sign memo at TAB A non-concurring with proposed changes to FM XX-X at TAB B."

   b. TAB A is the document requiring signature or action. When forwarding more than one action for approval/signature, use TABs A1, A2, A3, etc. TAB A can also be an information paper you are sending to the command group.

   c. TAB B is the document that generated the action. Additional background information follows, using succeeding tabs in order mentioned in ETMS2 My Response section.

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

   e. Ensure SGS SACO is aware of time-sensitive actions to assist in expediting through the command group.

   f. AOs will provide the designated organization POC an electronic copy of all documents to upload in ETMS2. 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.

   g. If SGS or the command group returns action for corrections, include marked-up copy with returned package.

   h. Hand-carry or upload to ETMS2 actions returned for corrections to SAD or the appropriate SACO. Actions are logged out in ETMS2 and must be logged back in to maintain tracking.

   i. If not dated at time of signature, SAD dates correspondence upon command group signature, and original is returned to the appropriate action office for dispatch.

   j. Do not send copies or internal routing slips to the command group.

k. All actions going to the command group must come through SAD/SGS. Do not take actions directly to command group offices. Do not pick up actions from the command group. Actions received in the command group without SGS approval are returned to the SGS without action. In urgent situations, if a proponent picks up an action from the command group, ensure SGS receives a file copy of the signed/approved/dated action.

l. If an action requires presentation to the CG, DCG/CoS, EDCG, DCoS, or CSM for signature during a briefing, provide the SGS an advanced copy of the correspondence for proofreading, editing, assignment of ETMS2 control number, and approval prior to the briefing. Following the briefing, return the signed correspondence to SGS.

B-4. Correspondence

a. Put yourself in the shoes of the person signing the action. Ensure the ETMS2 My Response section answers the 5Ws. When preparing CG correspondence, write at the 4-star level.

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

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

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

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

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

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

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

Appendix C
Procedures and Formats for Readaheads

C-1. Procedures for readaheads

a. The OCG determines readahead requirements and forwards them to the SGS SACO. When a proponent is not identified, the SGS SACO assigns an OPR as the HQ TRADOC staff lead. OPR will compile and submit readahead packet electronically per instructions in paragraphs C-2a(1) through C-2a(4) and table C-1.

b. The OPR coordinates directly with external agencies and other staff offices to obtain pertinent topics and information for timely completion of readahead products. For events that a member of the command group or external agencies schedule, the OPR consolidates all input and assessments into the final readahead product. Upon receipt of the tasker, OPR will email the name of the AO to the CG scheduler and the CPG operations officer. No later than 2 workdays prior to event, the OPR must email the list of attendees to the CG scheduler and the CPG operations officer.

c. Suspense for submission of a readahead to SGS for meetings is no later than 2 workdays prior to the meeting, and for visits is no later than 4 workdays prior to the visit. 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 readahead prior to submission to SGS. The partial submission is vital to alert all concerned of the status and to initiate review and analysis. Include a placeholder page in partial submissions to identify what is pending, from whom, and date of expected completion. At a minimum, ensure executive overview is submitted on time. Upon completion of delayed items, add to the initial partial submission as an update, rather than reconstructing an entirely new submission.

d. AOs can contact the CPG upon receipt of a CG readahead tasking for advice and/or recommendations to ensure an accurate, timely, and relevant product for the CG. Coordinate any required or desired opening remarks with CPG prior to submission of the readahead and mention in the executive overview (first tab of readahead). AO can contact the TRADOC SGS SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil for administrative guidance or questions pertaining to readahead preparation.

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

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

C-2. Format

a. Composition and transmittal.

(1) CG readaheads. All CG readaheads are emailed electronically to the TRADOC SGS office at usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil. Submit readahead documents to SGS for meetings no later than 2 workdays prior to the meeting and for visits is no later than 4 workdays prior to the visit, or per the ETMS2 suspense via email to the TRADOC SGS office. Ensure all document file names for readahead electrons are clearly named (for example, TAB A - Executive Overview, TAB B - Briefing Slides, etc.). SGS will upload CG readaheads to a secure portal and provide email notification to the command group. The respective command group offices will print the CG, DCG, EDCG, DCoS, and CPG copies of the readahead. If the readahead document changes, provide updates via email to the TRADOC SGS office. SGS will upload updated documents to the secure portal and notify the command group of the changes.

(2) DCG readaheads. All DCG readaheads will be sent electronically and directly to the DCG's office. Submit readahead documents NLT 2 days prior to the event via email to the DCG's Executive Assistant and CC the DCG's XO and Aide. AO must also provide hard copy of the readahead at the meeting or briefing to the DCG.

(3) EDCG readaheads. All EDCG readaheads will be sent electronically and directly to the EDCG's office. Submit readahead documents NLT 2 days prior to the event via email to the EDCG's Executive Assistant and CC the EDCG's XO. AO must also provide hard copy of the readahead at the meeting or briefing to the EDCG.

(4) DCoS readaheads. All DCoS readaheads will be sent electronically and directly to the DCoS's office. Submit readahead documents NLT 2 days prior to the event via email to the DCoS's NCOIC and CC the DCoS's XO.

b. Refer to the guidelines in table C-1 and figure C-1 when preparing readahead packages.

Table C-1.
Configuration of readaheads

Type of readahead	TAB A	TAB B	TAB C	TAB D	TAB E	TAB F
Briefings	Executive Overview and top 4 bullets	Briefings	Point and/or Information Papers			
CG Office Calls	Executive Overview	Biography (only if CG is not familiar with visitor)	Briefings (as appropriate, and with facing pages, as required)	Point and/or Information Papers	Social Schedule (as appropriate)	Visitor Template
Conferences	Executive Overview	Agenda	Participants	Briefings		
Distinguished Foreign Visits	Executive Overview	Itinerary	Biographies	Briefings	Country Information (as appropriate)	

Table C-1.
Configuration of readaheads, *continued*

Type of readahead	TAB A	TAB B	TAB C	TAB D	TAB E	TAB F
Installation Visits	Executive Overview	Briefings	Point and/or Information Papers	Biography/ Biographies (as appropriate)	Social Schedule (as appropriate)	
Social Events	Executive Overview	Itinerary	Logistics			
Speaking Engagements	Executive Overview	Speech	Itinerary	Point and/or Information Papers	Logistics	
*Include visitor template for all visitors to TRADOC, except foreign visitors.						

READAHEAD GUIDANCE

Executive Overview: 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 readahead going to prepare the CG for the event? Will this readahead ensure the CG is expert at representing TRADOC's position?
  - Include only essential items (4 bullets) 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 readahead is for content and relevancy.
  - The Overview must capture all salient points found in the remainder of the readahead.
  - Must include a *Strategic Analysis* with reference to points in following tabs in the readahead (tabs are listed in the Table of Contents):
    -- Executive Overview (*required)*
    -- Itinerary (required for visits, events)
    -- Participants/Points of Contact *(required)*
    -- Other items (*Put briefs here*)
    -- Social Schedule (*for social events only*)
    -- Background (only topics directly relevant to the main issue or brief; include biography only if this is the first meeting with the CG)
    -- Logistical Requirements (not usually required—CG's office will develop)
    -- Visitor Template (include for all but foreign visitors)
    -- Work Plan (include only if this is a prep for a major event or conference, like Requirements Review Council or Association of United States Army)

Figure C-1. Readahead guidance

C-3. Assembling readaheads
Description of readahead tabs.

   a. The required content for readaheads is in table C-1. OPRs may add additional content and tabs to meet the overall intent of the readahead (see figure C-1). All readaheads require a table of contents (see figure C-2).

Visit of General (R) Moring

3-4 Nov XX

TABLE OF CONTENTS

Executive Overview	TAB A
Briefing	TAB B
Point Paper on Program Details	TAB C
Itinerary	TAB D
Participants/POCs	TAB E
Other Items of Interest	TAB F
Social Schedule	TAB G
Background Material	TAB H
General (R) Moring Biography	TAB H-1
AAR from Office Call (General Wilson and General Lewis)	TAB H-2
Logistical Requirements	TAB I
Work Plan	TAB J

Figure C-2. Readahead table of contents

b. Executive overview is required for all readaheads (see figure C-3). This is the most important part of the readahead. In one or 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, their position, and both the implications of their 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. The approver for executive overviews is the principal/principal deputy and their approval is annotated at the bottom of the executive overview.

Executive Overview
Visit of General (R) Moring
3-4 Mar XX

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

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

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

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

   b. Endorse the utility of maintaining the full-time liaison and exchange personnel within the French and U.S. Armies. Highlight the key role that the French Army Senior Liaison to 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 20XX staff talks is "Future Warfighting in Military Operations in Urban Terrain by a Digitized and Reinforced Combined Arms Brigade."

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

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

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

Figure C-3. Readahead executive overview

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

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

As of: 1 Mar XX
Prepared: LTC Bos/501-5669
Approved: COL Letendre/501-5690

2

Figure C-3. Readahead executive overview, continued

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

d. 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.

e. 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 readahead book (see example at figure C-4). Provide full itinerary for very important persons (VIPs) while in the company of the CG. Provide short comments on persons the VIP is scheduled to meet after the CG and why. This information could impact the CG's discussion with the VIP.

f. 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 portable electronic device numbers). An example of a participant/POC list is shown in figure C-5. Email the list to appropriate command group office no later than 2 workdays 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 chapter 4, figures 4-1 and 4-2). Do not provide the CG biographies of TRADOC personnel or other GOs that the CG knows or works with routinely.

g. Other items of interest. In point paper format, include topics not on the itinerary, that could 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.

h. Social schedule. Include as required. If there is no social event, omit this tab.

i. Background material. Include other biographies, historical information, and other related documents (email, 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.

j. Logistics. Include transportation details (who, what, where, when, how) and billeting information for the CG. This information is available from the OCG.

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

l. Work plan. This tab contains a list of all AOs contributing to the readahead, 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 pre-briefs.

ITINERARY
IPR – THE MARS COLONY MISSION 20XX

DATE/TIME	WHAT	WHERE	TAB
19 Oct XX 0500-0630	C21 Flight	LAFB to Kennedy Space Center (KSC)	A
0700-0745	Breakfast	KSC HQ Bldg Dining Facility	B
0800-0930	NASA Project Status Overview	KSC HQ Bldg, Rm 21	C
0945-1030	OMB Budget Briefing	KSC HQ Bldg, Rm 21	D
1045-1145	DOD Overview	KSC HQ Bldg, Rm 21	E
1200-1300	Working Lunch	KSC HQ Bldg, Rm 46	
1300-1330	USAF Astronaut Selection Status Briefing	KSC HQ Bldg, Rm 35	F
1330-1430	Army Corps of Engineers Martian Facility Model	KSC Assembly Bldg	
1445-1615	DOTMLPF Model Application Briefing	KSC VTC Facility	G
1615-1700(T)	Office Call with CINCSPACE	KSC HQ Bldg, Rm 7	
1800-0100	Social/Dinner	KSC Club	H
20 Oct XX 0130-0300	C21 Flight	KSC to LAFB	

Figure C-4. Readahead itinerary

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

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

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

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

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

POCs/Phone Numbers

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

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

Figure C-5. Readahead participants/points of contact

Appendix D
U.S. Army Training and Doctrine Command Form 5
See figure D-1 for a sample TF 5 with the instructions page for how to complete the form.

(**UNCLASSIFIED**)

TRANSMITTAL, ACTION AND CONTROL For use of this form, see TRADOC Reg 1-11; the proponent agency is SGS.	1. ETMS2 CONTROL NUMBER	2. TODAY'S DATE *(YYYYMMDD)* 20XX0601	3. SUSPENSE DATE *(YYYYMMDD)*

4. OFFICE SYMBOL ATRM-XX	5. SUBJECT Readahead: Brief: To the CG for guidance on planning and executing TRADOC 50th Anniversary activities. 12 January 2023 1500-1530

6. ROUTING:	*(SGS USE ONLY)*	TRADOC SGS SACO *(Signature)*	SGS SACO NAME	PHONE *(XXX) XXX-XXXX* (757) 501-XXXX
	Initial	Date			

	Initial	Date	COMMAND GROUP COMMENTS:
CG			
CG XO			
DCG/CoS			
DCG/CoS XO			
EDCG			
EDCG XO			
DCoS			
DCoS XO			
CPG			
CSM			
SGS			

7. EXECUTIVE SUMMARY

KEY POINTS

- The 50th Anniversary of the establishment of TRADOC as an ACOM is 1 July 2023.

- To mark TRADOC's anniversary every five years a new history of TRADOC has been published. For the 50th jubilee of TRADOC, additional commemoration activities are proposed.
- It is also proposed that CoE history offices (branch, command, and function) to conduct local commemoration activities through July 2023.

Ref:

Encl: TAB A: 12JAN23 TRADOC 50th Anniversary Activities Brief
      TAB B:

1. Purpose:
Seek CG's guidance on planning and executing commemoration activities for TRADOC's 50th anniversary.

2. Discussion:

a. Every five years since the 25th anniversary of TRADOC's establishment as an Army Command (ACOM) in July 1973, the command's Military History and Heritage Office (MHHO), an HQ Special Staff Office, has published a TRADOC short hardcopy history to ensure that TRADOC's history gets published and that its anniversary gets recognized in five-year increments.

b. Now that the 50th anniversary of TRADOC's establishment is upcoming in July 2023, it is time to plan and execute appropriate activities recognizing the command's Golden Jubilee.

c. Brief includes expanded options for the CG's consideration and guidance.

3. Recommendation:

CG sign memorandum at TAB A.

APPROVED _____	DISAPPROVED _____	NOTED _____	SEE ME _____	COMMENT _____

TRADOC FORM 5-E, APR 2022	( )	PREVIOUS EDITIONS ARE OBSOLETE.	Page 1 of 3 TRADOC AEM v1.00ES

Figure D-1. Sample U.S. Army Training and Doctrine Command Form 5

( )

8. LEAD AGENCY STAFF COORDINATION			ETMS2 CONTROL NUMBER:	
TITLE	**INITIAL**	**TYPE OR PRINT NAME**		**DATE** (YYYYMMDD)
Chief	Digital	Mr. Number3		20XX0301
Director	Digital	Mr. Number2		20XX0301
PRINCIPAL	Digital	Mr. Green, DCS, G-8		20XX0303
ACTION OFFICER *(Signature)* (*Name/Title/Phone Number/E-mail)*	Digital Signature Box Ms. Action Officer/Senior Analyst/(757) 501-0000 action.x.officer.civ@army.mil			20XX0301

RECOMMENDATION FOR COORDINATING STAFF:

9. STAFF COORDINATION						
CONCUR	**NON-CONCUR**	**AGENCY**	**NAME** *(TITLE, LAST NAME)*	**PHONE** *(XXX) XXX-XXXX*	**DATE** *(YYYYMMDD)*	**REMARKS**
		SJA				
☐	☐	CAC	Mr. White	(913) 684-0000	20XX0301	See statement TAB B
☐	☐	G-3/5/7	Mr. Black	(757) 501-0000	20XX0301	See statement TAB C
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
☐	☐					
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☐	☐					
☐	☐					
☐	☐					

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

Figure D-1. U.S. Army Training and Doctrine Command Form 5, continued

INSTRUCTIONS

PARENTHESES AT TOP FORM:

Fill in designation/classification (UNCLASSIFIED, CUI, etc.).

Block 1. ETMS2 CONTROL NUMBER:

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

Block 2. TODAY'S DATE:

Enter today's date. The Army standard date format: YYYYMMDD. Example: 20220408.

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: ATIM-RM.

Block 5. SUBJECT:

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

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

The TRADOC SGS will complete this block.

Block 7. EXECUTIVE SUMMARY:

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

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

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

Block 9. STAFF COORDINATION:

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

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

The TRADOC SGS will complete this block.

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

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Figure D-1. Sample U.S. Army Training and Doctrine Command Form 5, continued

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

E-1. Mandatory lines of address

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

Notes. District of Columbia will be abbreviated as DC (see figure E-1). For envelopes, there is only one space between the state and ZIP code.

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

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

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

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

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

   c. Return address: The DEPARTMENT OF THE ARMY is the first line of the return address. All return addresses will show ZIP+4 values (23604-57XX).

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

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

E-2. Optional lines of address

a. As indicated in figure E-4, the two additional lines are optional and, if used, MUST appear above the mandatory three lines:

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

Figure E-4. Optional and mandatory lines of address

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

Note. Allow only one space between state and ZIP code.

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

Appendix F
Public Distribution Lists

F-1. Command group email distribution lists
The command group email distribution lists include frequently used lists such as
Commanders/Commandants-TRADOC, Chiefs-TRADOC, XO-TRADOC, SGS-TRADOC and
TRADOC Staff Principals. These distribution lists are located on the Global Address list.

F-2. Guidance for using command group email 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 DCSs 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.

Glossary

Section I
Abbreviations and Acronyms

ABCA	abbreviation, brevity code, or acronym
ACOM	Army command
AHM	Army Heritage Month
AHMC	Army Heritage Month Committee
AMHS	Automated Message Handling System
AO	action officer
AR	Army Regulation
ARIMS	Army Records Information Management System
ASCC	Army service component command
CAO	Congressional Activities Office
CC	courtesy copy
COMMDIR	Communication Directorate
CDO	Command Diversity Office
CG	Commanding General
CGAC	Command Group Actions Center
CIMT	Center for Initial Military Training
CoS	Chief of Staff
CPG	commander's planning group
CSA	Chief of Staff, Army
CSM	Command Sergeant Major
CTO	central tasking office
CUI	controlled unclassified information
DA	Department of the Army
DCG	Deputy Commanding General
DCoS	Deputy Chief of Staff (U.S. Army Training and Doctrine Command)
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
DODD	Department of Defense Directive
DODI	Department of Defense Instruction
DODM	Department of Defense Manual
DSN	Defense Switched Network
DTA	Defense Travel Administrator
DTS	Defense Travel System
DV	distinguished visitor
EDCG	Executive Deputy to the Commanding General
ESO	Executive Services Office
ETMS2	Enterprise Task Management Software Solution
EXSUM	executive summary

FM	field manual
FOA	field operating activity
FS	Fiscal Service
G-33	Current Operations
GO	general officer
HQDA	Headquarters, Department of the Army
HQ	headquarters
IA	individual augmentation
IPR	in-process review
ITA	invitational travel authorization
MOA	memorandum of agreement
MOU	memorandum of understanding
NDEA	non-designated entry agent
NIPRNET	non-secure internet protocol router network
OCG	Office of the Commanding General
OCONUS	outside the continental United States
OCR	office of coordinating responsibility
OPR	office of primary responsibility
OMS	Organizational Messaging Service
OSD	Office of the Secretary of Defense
OSJA	Office of the Staff Judge Advocate
PARD	Priorities Analysis and Requirements Directorate
POC	point of contact
PKI	Public Key Infrastructure
RC	Reserve Component
RRS-A	Records Retention Schedule-Army
SA	support agreement
SACO	staff action control officer
SAORC	Staff Action Officer Resource Center
SAD	Staff Actions Division
SOOB	Staff Officer Orientation Briefing
SES	senior executive service
SGS	Secretary of the General Staff
SJA	Staff Judge Advocate
SIPRNET	secure internet protocol router network
TASKORD	tasking order
TDY	temporary duty
TEC	U.S. Army Training and Doctrine Command Enterprise Calendar
TF	U.S. Army Training and Doctrine Command form
TR	U.S. Army Training and Doctrine Command regulation
TRADOC	U.S. Army Training and Doctrine Command
VCSA	Vice Chief of Staff, Army
VIP	very important person
VTC	video teleconference
XO	executive officer
ZIP	zone improvement plan

Section II
Special Abbreviations and Terms

5Ws
Who, what, when, where, and why

Assist (OCR)
Offices/activities that help or support the lead in preparing the final tasking deliverable.

Lead (OPR)
Office/activity with the responsibility for preparing, coordinating, and submitting a final tasking deliverable by the assigned suspense date. This includes identifying and acquiring required resources for mission accomplishment (for example personnel, funding, facilities, etc.).

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. For example, Current Operations (G-33) provide a mission statement to responsible organizations (lead and assists), including the 5Ws, purpose, action, and reason based on a brief version of mission analysis using available information with minimal or no research. At the subject matter expert level, specified or implied tasks are developed further.

Organization ETMS2 Manager / Designated organization points of contact
The designated administrative individual, or team, within subordinate organizations, special activities, FOAs, schools and centers, and HQ TRADOC who interact with SGS and G-33 Tasking Division on behalf of their organization. They include Central Tasking Offices (CTOs), G-33 Tasking Specialists, Staff Action Control Officers (SACOs), and other individuals assigned the duties to process, assign, manage, track, coordinate, and approve assigned tasks and actions entering or leaving their organization in ETMS2.

Proponent
The proponent is the organization (command or staff) responsible for initiating, preparing, and coordinating actions and correspondence.

Subordinate organizations
Refers to all core function leads (U.S. Combined Arms Center, U.S. Army Cadet Command, U.S. Army Recruiting Command, and U.S. Army Center for Initial Military Training), special activities, field operating activities, schools, and centers.

Task
A specific deliverable request assigned to an office of primary responsibility (OPR).

Tasker
An electronic record of an ETMS2 task. The tasker includes any initiating documentation; the documents comprising the action; and records of assignment, coordination, approval, and disposition. Includes Any ETMS2 action originating from higher HQ; TRADOC CG, TRADOC activities or subordinate commands, HQDA, other services, outside agencies, Congress, the

White House, and the general public that requires resources (personnel, equipment, funds) or policy/program decisions that is disseminated to a lead organization/staff office for analysis, review, and reply. Organizations/staff offices assigned as assists report to the lead for the action. Taskings are monitored through a tracking system that assigns control numbers and suspense dates.

TASKORD, or tasking order
A method used to disseminate specific instructions and general instructions for accomplishing a mission or administrative action to components, subordinate units, and command and control agencies. TASKORDs cover taskings that are of short duration, are expected to be one-time requirements, or do not require dissemination of an OPORD.

Task Management Office (TMO)
Consists of a group or individual task managers that works at a directorate or subordinate command below a CTO. See the ETMS2 Business Practices and Rules for a list of SACOs and CTOs. All others are TMOs.