

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

TRADOC Regulation 1-11

29 March 2012

Administration
STAFF PROCEDURES

FOR THE COMMANDER:

OFFICIAL:

PETER D. UTLEY
Brigadier General, U.S. Army
Deputy Chief of Staff



CHARLES E. HARRIS, III
Colonel, GS
Deputy Chief of Staff, G-6

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

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

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

Proponent and exception authority. The proponent of this regulation is the Command Group Actions Office. The proponent has the authority to approve exceptions or waivers to this regulation that are consistent with controlling law and regulations. The proponent may delegate this authority in writing, to a division chief with the proponent agency or its direct reporting unit or field operating activity (FOA), in the grade of colonel or the civilian equivalent. Activities may request a waiver to this regulation by providing justification that includes a full analysis of the expected benefits and must include formal review by the activity's senior legal officer. All waiver requests

***This regulation supersedes TRADOC Regulation 1-11, dated 10 June 2009, and Change 3, dated 31 January 2012.**

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

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

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

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

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

Summary of Change

TRADOC Regulation 1-11
Staff Procedures

This revision, dated 29 March 2012-

- ° Adds Deputy Chief of Staff (DCoS) to the HQ TRADOC Command Group.
- ° Deletes references to TRADOC Deputy Chief of Staff, Futures (DCS G-9).
- ° Changes TRADOC Master Activities Calendar (TMAC) to TRADOC Enterprise Calendar (TEC).
- ° Changes TRADOC name of Message Address and Mailing List (MAML) to TRADOC Senior Leaders Contact List.
- ° Directs deputy chiefs of staff (DCSs) and Chiefs of Special Staff to require incoming personnel to review deputy commanding general (DCG)/chief of staff (CoS) Web site in their welcome/sponsorship letters. (Para 1-4d(1))
- ° Directs preparation of correspondence for DCoS signature, unless otherwise directed. (Para 2-1a)
- ° Directs Director, Command Group Actions Office (CGAO) to e-mail all actions signed by the Commanding General (CG), DCG/CoS, or DCoS that are addressed to all major subordinate organizations (MSOs), special activities, FOAs, schools and centers, and

HQ TRADOC. Also directs distribution of actions addressed elsewhere to be the responsibility of the lead organization. (Para 2-1i)

- Changes authority to request extensions for CGAO (CG and Chief of Staff (CS)) tasker suspenses from action officers to the organization principal, or their deputy, or executive officer (XO) only. (Para 2-3h(1))

- Adds Deputy Chief of Staff signature block to figure 2-4. (Fig 2-4)

- Adds figure illustrating memorandum format for CG notes and taskings. (Fig 2-5)

- Delegates approval authority for internal memorandums of understanding (MOUs) to TRADOC MSOs; commandants, TRADOC Schools; TRADOC directors; TRADOC DCGs; Personal and Special Staff offices; and FOAs (Para 2-6d)

- Directs TRADOC staff judge advocate (SJA) and TRADOC G-8 to review all HQ TRADOC MOUs and memorandums of agreement (MOAs). (Para 2-6d)

- Changes approval authority for TRADOC administrative publications that establish new policy, revise existing policy, delegate authority, or assign responsibility to DCoS. (Para 2-6g)

- Adds U.S. Army Combined Arms Support Command, U.S. Army Cadet Command, U.S. Army Recruiting Command, DCG, Initial Military Training, and Asymmetric Warfare Group to distribution list for correspondence addressed to TRADOC subordinate activities, and deputy chiefs of general and chiefs of special staff offices. (Fig 2-7)

- Changes suspense for DCG/CoS and DCoS tasks to 5 duty days unless otherwise directed. (Para 2-9d)

- Adds responsibility for lead organization to confirm the list of taskings directed during CG, DCG/CoS or DCoS forums before adjournment of event. (Para 2-10, para 2-11)

- Changes suspense for installation representatives to submit CG trip reports for commander's planning group (CPG) approval to 2 duty days. (Para 2-10d)

- Directs CPG Chief or CG's XO to record taskings at Chief of Staff, Army (CSA) conferences the CG attends and forward them to CGAO for dissemination. (Para 2-10e)

- Adds instructions for responsible organization's action officer to prepare and submit memorandum describing CG's notes and taskings. (Para 2-10g(1))

- Requires responsible staff offices to coordinate with ACoS, DCG/CoS XO, or DCoS XO before sending a summary of significant issues and taskings directed by the DCG/CoS or DCoS during any venue. (Para 2-11)

TRADOC Reg 1-11

- Adds instructions for internal and external coordination by lead organizations, and for documentation on TRADOC Form 5. (Paras 2-13a and 2-13b)
- Adds requirement for senior representative to provide his/her name for a concurrence/nonconcurrence on an action. Specifically, in MSOs, the chief of staff, or higher must provide name; in HQ TRADOC organizations, the assistant deputy chief of staff, or higher must provide name. (Para 2-13)
- Directs lead organizations to consult TR 10-5 and TR 10-5-1 for functional areas of responsibility across TRADOC when determining staff action coordination. (Para 2-13b(2)(a))
- Changes 24- and 72-hour suspenses for providing coordination on CG and routine actions, respectively, to 2 duty days for all actions. (Para 2-13b(9))
- Specifies use of last name only in point of contact (POC) information paragraph on correspondence. (Para 2-17)
- Deletes inclusion of a POC line on memorandums to be signed by the CG. (Para 2-17)
- Adds TRADOC Form 5-1 (Generic Transmittal, Action and Control) for use by TRADOC organizations for internal staffing and internal transmission of actions. (Para 3-3)
- Rescinds requirement to spell out the state names in star notes. (Para 3-9c)
- Changes instructions for HQ TRADOC Special/Ethnic Observances and Recurring Events. (Chapter 6)
- Changes HQ TRADOC Organization Day memorandum of instruction approval/signature to DCoS. (Para 6-4)
- Adds requirement to include statement in ITA request memorandums that secure video teleconference, or other means of Web-based communication, are not sufficient to accomplish travel objectives. (Figs 7-1, 7-2)
- Rescinds HQ TRADOC Label 1001.
- Adds TR 10-5-1 as required publication. (Appendix A)
- Changes requirement for number of copies of CG Readaheds from three to four. Changes packaging requirements. (Para C-2a (1))
- Adds instructions for DCG/CoS Readaheds. (Para C-2a (2))
- Adds instructions for DCoS Readaheds. (Para C-2a (3))

- Updates sample Headquarters, Department of the Army (HQDA) Form 5 to HQDA Form 5 dated Jan 2011. (Fig G-1)
- Directs documents with personally identifiable information (PII) be placed in the PII folder in the Actions Library. (Para I-3)
- Adds requirement for Staff Actions Division staff action control officer (SACOs) to delete closed actions from Actions Library after 30 days. (Para I-6h)

Contents

| | Page |
|--|-------------|
| Chapter 1 Introduction..... | 9 |
| 1-1. Purpose | 9 |
| 1-2. References | 9 |
| 1-3. Explanation of abbreviations and terms..... | 9 |
| 1-4. Responsibilities..... | 9 |
| Chapter 2 Staff Policies and Procedures..... | 11 |
| 2-1. Correspondence | 11 |
| 2-2. Commanding General (CG) actions..... | 13 |
| 2-3. Staff action process | 15 |
| 2-4. G-33 responsibilities | 21 |
| 2-5. Readaheds (RAs) | 26 |
| 2-6. Command Group notification, review, or approval..... | 26 |
| 2-7. Authority line..... | 28 |
| 2-8. Signature blocks/complimentary closings..... | 29 |
| 2-9. Suspenses..... | 31 |
| 2-10. Note taking and suspenses for CG forums | 33 |
| 2-11. Note taking and suspenses for DCG/CoS and DCoS forums | 34 |
| 2-12. Staff assistance | 35 |
| 2-13. Coordination | 36 |
| 2-14. Distribution..... | 39 |
| 2-15. Abbreviations and acronyms | 40 |
| 2-16. Type font and size | 40 |
| 2-17. Identification of point of contact (POC) | 40 |
| 2-18. Distinguished visitors..... | 40 |
| Chapter 3 U.S. Army Training and Doctrine Command (TRADOC) Forms and Formats | 42 |
| 3-1. Guidelines..... | 42 |
| 3-2. Assembling a staff action (for actions that cannot be posted to the Actions Library) | 43 |
| 3-3. TRADOC Form 5..... | 45 |
| 3-3. TRADOC Form 5-1 | 45 |
| 3-5. Point paper | 45 |
| 3-5. Executive summary | 47 |
| 3-6. Decision memorandum..... | 49 |
| 3-7. Information paper | 52 |
| 3-8. Position paper..... | 53 |
| 3-9. Star note | 54 |
| 3-10. TRADOC policy letters..... | 55 |
| Chapter 4 Conferences and Briefings | 55 |
| 4-1. TRADOC Conferences | 55 |
| 4-2. HQ TRADOC Conference room locations and responsible staff offices | 55 |
| 4-3. Procedures for scheduling conferences/briefings requiring command group participation | 55 |
| 4-4. Preparing visual aids | 57 |
| 4-5. Tracking taskings..... | 60 |

| | |
|--|-----|
| Chapter 5 Use of E-mail and the Defense Message System (DMS) | 60 |
| 5-1. E-mail | 60 |
| 5-2. DMS and Automated Message Handling System (AMHS) | 61 |
| 5-3. Organizational e-mail accounts | 62 |
| 5-4. Use of calendars within e-mail | 63 |
| Chapter 6 Headquarters (HQ) TRADOC Special/Ethnic Observances and Recurring Events | 63 |
| 6-1. Tasking | 63 |
| 6-2. Special/ethnic observances: | 63 |
| 6-3. Administrative guidelines for special/ethnic observances | 64 |
| 6-4. HQ TRADOC Organization Day..... | 66 |
| 6-5. Coordinate with TRADOC Enterprise Calendar (TEC) | 66 |
| Chapter 7 TRADOC Invitational Travel Authorization (ITA) Procedures | 67 |
| 7-1. Guidelines..... | 67 |
| 7-2. ITA approval authorities..... | 67 |
| 7-3. Preparation of an ITA request..... | 67 |
| 7-4. Publication of the ITA..... | 71 |
| Chapter 8 TRADOC Calendars | 73 |
| 8-1. TRADOC Enterprise Calendar (TEC) | 73 |
| 8-2. TRADOC Master Planning Calendar (TMPC)..... | 73 |
| 8-3. Instructions on accessing and inputting to the TEC and the TMPC | 74 |
| 8-4. Calendar management | 74 |
| Appendix A References..... | 75 |
| Appendix B Helpful Hints for Preparing Correspondence and Processing Actions | 78 |
| Appendix C Procedures and Formats for RAs | 86 |
| Appendix D TRADOC Form 5 | 96 |
| Appendix E Zone Improvement Plan (ZIP)+4 Address Format | 100 |
| Appendix F Schedule of Recurring Events..... | 101 |
| Appendix G Headquarters, Department of the Army (HQDA) Form 5..... | 102 |
| Appendix H Public Distribution Lists..... | 106 |
| Appendix I Uploading Documents to TRADOC Knowledge Environment (TKE) Web site | 106 |
| Glossary..... | 113 |

Table List

| | |
|--|-----|
| Table 6. Tasking timelines for special/ethnic observances..... | 64 |
| Table C-1. Configuration of RAs | 87 |
| Table F. Schedule of recurring events..... | 101 |

Figure List

| | |
|--|----|
| Figure 2-1. Command Group tasking process..... | 19 |
| Figure 2-2. DCS, G-3/5/7 Current Operations (G-33) tasking process | 22 |
| Figure 2-3. TRADOC TASKORD..... | 23 |
| Figure 2-4. Generic CG, DCG/CoS, DCoS, and CSM signature blocks | 31 |
| Figure 2-5. Memo format for CG notes and taskings | 35 |

| | |
|--|-----|
| Figure 2-6. Consideration of nonconcurrency | 38 |
| Figure 2-7. Distribution list for correspondence | 39 |
| Figure 2-8. Distinguished visitors/major events | 42 |
| Figure 3-1. Assembling a hard copy staff action | 44 |
| Figure 3-2. Sample point paper | 46 |
| Figure 3-3. Internal executive summary (EXSUM) format | 47 |
| Figure 3-4. External EXSUM format (from Command Group to higher HQ) | 48 |
| Figure 3-5. Decision memorandum format | 51 |
| Figure 3-6. Sample information paper | 52 |
| Figure 3-7. Sample position paper | 53 |
| Figure 3-8. Sample CG star note | 54 |
| Figure 4-1. Diagram of Command Conference Room | 58 |
| Figure 4-2. Diagram of Morelli Auditorium | 59 |
| Figure 7-1. ITA request memorandum | 69 |
| Figure 7-2. Accompanying spouse travel request memorandum | 70 |
| Figure B-1. DISTRIBUTION: (see next page) signature page | 84 |
| Figure B-2. DISTRIBUTION: (see next page) (cont.) | 85 |
| Figure C-1. RA guidance | 89 |
| Figure C-2. RA table of contents | 89 |
| Figure C-3. RA executive overview | 92 |
| Figure C-4. RA itinerary | 94 |
| Figure C-5. RA participants/POCs | 95 |
| Figure D-1. Sample TRADOC Form 5, Page 1 | 97 |
| Figure D-2. Sample TRADOC Form 5. Page 2 | 98 |
| Figure D-3. Sample TRADOC Form 5. Page 3 | 99 |
| Figure E-1. Example of an outgoing (delivery) three-line ZIP+4 address | 100 |
| Figure E-2. Example of an outgoing (delivery) five-line ZIP+4 address | 100 |
| Figure E-3. Example of a return ZIP+4 address | 100 |
| Figure E-4. Optional and mandatory lines of address | 101 |
| Figure G-1. Sample HQDA Form 5 | 103 |
| Figure I-1. Actions library | 107 |
| Figure I-2. Organization actions library | 108 |
| Figure I-3. Add new action folder | 108 |
| Figure I-4. Title new action folder | 109 |
| Figure I-5. New action folder | 109 |
| Figure I-6. Upload document or multiple documents | 110 |
| Figure I-7. Upload document(s) | 111 |
| Figure I-8. Choose document(s) | 111 |
| Figure I-9. Posting document(s) | 112 |
| Figure I-10. TRADOC Form 5 and supporting documents (titled "TAB") | 112 |

Chapter 1 Introduction

1-1. Purpose

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

1-2. References

Required and related publications and prescribed and referenced forms are listed in appendix A.

1-3. Explanation of abbreviations and terms

Abbreviations and special terms used in this regulation are explained in the glossary.

1-4. Responsibilities

a. The Director, Command Group Actions Office (CGAO) will-

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

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

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

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

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

(6) Maintain the CGAO Web site.

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

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

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

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

(11) Conduct the bimonthly Executive Officers' Breakfast to provide a forum for enhanced communication between staff sections.

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

(13) Conduct bi-annual Staff Actions Training.

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

(1) Serve as primary tasking authority for all internal (IN), external (EX), and operational (OP) taskings not generated by the TRADOC Command Group (see para 2-4) in accordance with (IAW) TRADOC Regulation 10-5, chapter 14.

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

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

c. DCSs and Chiefs of Special Staff will-

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

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

d. The Chief, Congressional Activities Office (CAO) will monitor and provide assistance on all congressional actions (see paras 2-9g and B-4c). Additional guidance and information on CAO functions and services is available on the CAO SharePoint site at <https://cac.tkeportal.army.mil/sites/cao/default.aspx>.

e. XOs and SGSs at MSOs, special activities and field operating activities (FOAs), schools and centers, and HQ TRADOC will-

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

(2) Designate organization points of contact (POCs).

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

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

f. Designated organization POCs will upload documents to the TRADOC Knowledge Environment (TKE) Actions Library (for CG, CS, IN, EX, OP taskings, and ES actions) IAW appendix I.

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

Chapter 2 Staff Policies and Procedures

2-1. Correspondence

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

- a. Prepare correspondence for DCoS signature, unless directed otherwise.
- b. Prepare correspondence for CG, DCG/CoS, and DCoS signature in final form, not as a draft.
- c. Use TRADOC letterhead stationery and the proponent's office symbol for all formal memorandums for Command Group signature. Use CG, DCG/CoS, or DCoS letterhead stationery for letters to civilians, Members of Congress, and dignitaries, or in response to a personal letter. Do not use office titles or office symbols on CG, DCG/CoS, or DCoS letters. The space under "Reply to the Attention Of" should remain blank. Electronic letterhead templates are available on the TRADOC Web site (<http://www.tradoc.army.mil/Publications.htm>).
- d. Present the authorized slogan "Victory Starts Here!" as the last paragraph in letters, memoranda, or messages of a complimentary, positive nature going to individuals and/or higher or subordinate commands. Use of the slogan is optional, omit if it adds a second page to the correspondence.
- e. As a general rule, respond in like form. For example, use a memorandum to respond to a memorandum; personal letter to a personal letter, etc.

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

g. Use TRADOC Form 5, dated Jan 2012, (Transmittal, Action and Control) for all correspondence (hard copy or electronic) going to the Command Group.

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

i. Command Group Action Center (CGAC) will date correspondence the Command Group signs (if not dated at time of signature). A copy of the correspondence will be scanned and placed in CATS. The Director, CGAO will e-mail all actions signed by the CG, DCG/CoS, or DCoS that are addressed to all major subordinate organizations (MSOs), special activities, FOAs, schools and centers, and HQ TRADOC. See figure 2-7. Distribution of actions addressed elsewhere is the responsibility of the lead organization. Proponents are responsible for maintaining their records IAW AR 25-400-2.

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

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

(a) DCG/CoS

(b) DCoS

(c) CG XO

(d) Assistant Chief of Staff (ACoS)

(e) DCG/CoS XO

(f) DCoS XO

(g) Director, CGAO to track response/close tasking

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

- (a) DCoS
- (b) ACoS
- (c) DCG/CoS XO
- (d) DCoS XO
- (e) Director, CGAO to track response/close tasking

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

l. Ensure interim policy or procedural guidance messages or memorandums are coordinated and incorporated into the publication within 6 months of issuance, IAW AR 25-30, paragraph 1-25d(4).

2-2. Commanding General (CG) actions

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

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

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

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

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

(2) For detailed actions requiring more than 5 duty days to complete, upload TRADOC Form 5 (containing the EXSUM and appropriate digital signatures) to the TKE Actions Library IAW appendix I. E-mail TRADOC SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil when TRADOC Form 5 has been uploaded. Include EXSUM title in the subject line. TRADOC CGAO will then forward it to the CG and cc individuals

listed in paragraph 2-1j(1). Provide current status and way ahead with milestones to complete the tasking.

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

(1) Send draft e-mail, along with e-mail address of recipient, to the CG's XO, with a cc to TRADOC SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil, DCG/CoS and/or DCoS.

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

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

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

(c) Analysis. This key piece is not simply a history lesson, but explains why the CG should become personally involved. As applicable, address the implications for the Army of accepting or rejecting the TRADOC position. Example: "Release of \$15M by 14 May 12 is essential to fully realize our vision of 21st century classrooms throughout TRADOC. Of the \$50M invested in classroom renovation since 2005, \$7.5M was provided from within TRADOC's already limited budget. We absorbed this level of funding in the past, with some painful tradeoffs in the length and content of the Basic Officer Leadership Course (BOLC), as well as Captains Career Course. Funding the final \$15M from within the TRADOC budget will force us to either further reduce instructor contact hours in both courses or eliminate the field training exercise from BOLC. Either option is unacceptable, since it will provide the field inadequately trained graduates."

(d) Restate the answer, elicit addressee's support (if applicable), and end with a short, personal close. Example: "In conclusion, the key to resolving classroom renovation issues at Fort Victory is DA's release of \$15M by 14 May 12. I stand ready to discuss this further with you as you desire."

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

2-3. Staff action process

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

b. AOs will:

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

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

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

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

(5) Provide assistance to subordinate commands/activities. Ensure instructions to subordinate commanders are clear, concise, and leave no doubt of the objectives. Act on subordinate commander requests or recommendations promptly. If review of the subordinate command request or recommendation results in nonconcurrency, discuss the decision with the affected organization before forwarding to the Command Group for final action/signature. This gives the field an opportunity to understand the forthcoming response and ensures consideration of the most critical data points from the centers'/ schools' perspective. Explain action fully and in a positive manner, pointing out alternatives, if available. Nonconcurrences/negative responses to subordinate activities and/or other commands outside of TRADOC require CG, DCG/CoS, and/or DCoS approval.

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

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

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

(9) Complete coordination with MSOs, special activities and FOAs, schools and centers, HQ TRADOC organizations, and other Army commands (ACOMs) IAW TRADOC Regulation 10-5 and paragraph 2-13 of this regulation prior to forwarding to CGAO. Ensure coordinating office is commensurate with level of signature. For MSOs, the chief of staff, or higher must provide his/her name for concurrence/nonconcurrence on an action. For HQ TRADOC organizations, the deputy chief of staff, assistant deputy chief of staff, or higher must provide his/her name for concurrence/nonconcurrence on an action. Include date and concur or nonconcur on TRADOC Form 5. If they nonconcur, include additional tab that explains objections. (For example, if TRADOC CG signs correspondence requiring coordination with U.S. Army Forces Command (FORSCOM), the FORSCOM CG is the coordinating authority.)

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

(11) Ensure the distribution is appropriate (see para 2-14).

(12) Ensure staff action includes a completed TRADOC Form 5. Staff actions in response to HQDA taskings must also include HQDA Form 5 (Army Staffing Form) located at the Army Publishing Directorate Web site.

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

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

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

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

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

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

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

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

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

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

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

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

d. Chief, SAD, CGAO will:

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

(2) Conduct mission analysis, assign actions to appropriate proponent IAW TR10-5, and monitor suspense dates using CATS (see fig 2-1 for a flow chart of the Command Group tasking process).

TRADOC Reg 1-11

- (a) Upon receipt in CGAC, assign an ES CATS number to actions generated by the proponent requiring TRADOC CG, DCG/CoS, or DCoS approval.
- (b) Assign staff lead/assist(s) and immediately e-mail the CG, DCG/CoS and DCoS taskings/requests for information to respective proponent with a cc to AO (if known).
- (3) Act as liaison between the Command Group and action offices concerning correspondence preparation and administrative procedures.
- (4) Review all correspondence sent to the Command Group for administrative completeness and correctness, appropriate coordination, proper level of signature, and compliance with established policies.
- (5) Date all correspondence the Command Group signs before returning to proponent for dispatch.
- (6) Maintain electronic file copies of completed actions, update CATS to close action, and return to XO of originating proponent for dispatch.
- (7) E-mail scanned correspondence signed or lined-through by the Command Group in response to HQDA taskings to G-33. Copy lead organization, including AO, if known, on e-mail to G-33. Deliver original signed/initialed correspondence to lead organization.
- (8) Will deliver Command Group correspondence addressed to Secretary of the Army, Under Secretary of the Army, Chief of Staff, Army (CSA), DCSA, or members of the Army Staff on behalf of lead organizations not located at Fort Eustis.

Command Group Tasking Process

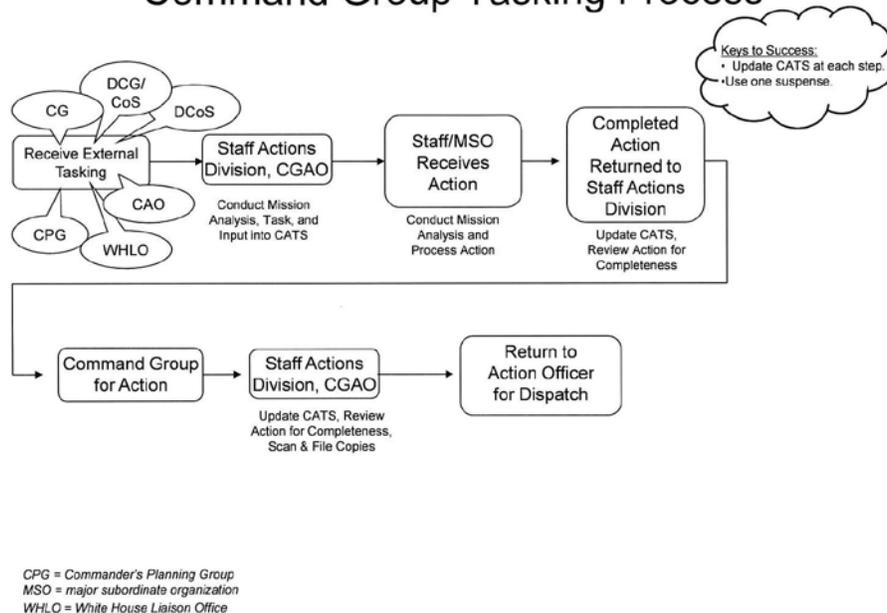


Figure 2-1. Command Group tasking process

e. Lead organizations will:

- (1) Conduct a thorough mission analysis of the tasking (see para 2-3b(3)) and take responsibility for satisfactory completion of the tasking.
- (2) For G-33 taskings, construct the tasking following the current TRADOC tasking order (TASKORD) format. (Fig 2-3)
- (3) Accomplish all required communications and coordination, within the proponent organization, external and higher organizations, and across the command (see TRADOC Regulation 10-5, chapter 12).
- (4) Use the telephone directories/rosters provided at the Staff Action Officer Resource Center to contact all assist organizations within 1 duty day and identify their primary AO and his/her contact information.
- (5) Identify and task additional organizations required to complete action.
- (6) Ensure CGAO staff action control officers (SACOs) are aware of time-sensitive actions to facilitate quick turnaround and tracking. Highlight the TRADOC Form 5 or attach a note that clearly states the reason why an action is time sensitive.

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

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

g. Procedures to request transfer of lead:

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

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

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

(2) CGAO Taskings: Within **2 duty days** of receipt of tasking if the organization assigned as lead believes the tasking is outside of their area of responsibility, the action officer will contact the XO of the organization they consider the appropriate lead via e-mail (with a cc to the TRADOC SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil) and include detailed justification for transfer of lead. The gaining organization has **1 duty day** to assess the request for lead change and reply to the originating organization (with cc to the CGAO SACO who issued the tasking) of their acceptance/rejection. Transfer must occur within **3 duty days** of the initial assignment of the tasking. If after 3 duty days no agreement is reached, Chief, SAD will determine the lead.

h. Requesting extensions

(1) CGAO procedures. TRADOC lead organizations may request a suspense extension for CGAO taskings (CS or CG). Requests will be accepted from organization principals, or their deputies/XOs only. MSO commanders/deputies/XOs, and HQ TRADOC staff DCSs/XOs will send request via e-mail to the CGAO organizational mailbox at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil. Copy the individual SACO who initiated the tasking. Include the CATS control number, a detailed reason for the request, and an estimated date for completion.

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

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

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

2-4. G-33 responsibilities

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

(1) EX taskings originate outside TRADOC to elements within TRADOC. Note: White House and congressional inquiries are CGAO responsibilities.

(2) IN and OP taskings:

(a) Originating within TRADOC, except TRADOC CG, DCG/CoS, DCoS, or commander's planning group (CPG) actions.

(b) External to originator's organization that require significant resources, involve changes in policy, generate new policy, or require formal concurrence/comment. Examples are a TRADOC MSO tasking another; a TRADOC MSO tasking the HQ TRADOC staff; a TRADOC MSO/HQ TRADOC tasking a special activity; or a HQ TRADOC staff office tasking another HQ TRADOC staff office.

b. Receive the complete tasking in the current TRADOC TASKORD (Fig 2-3) format from the originator of the tasking.

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

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

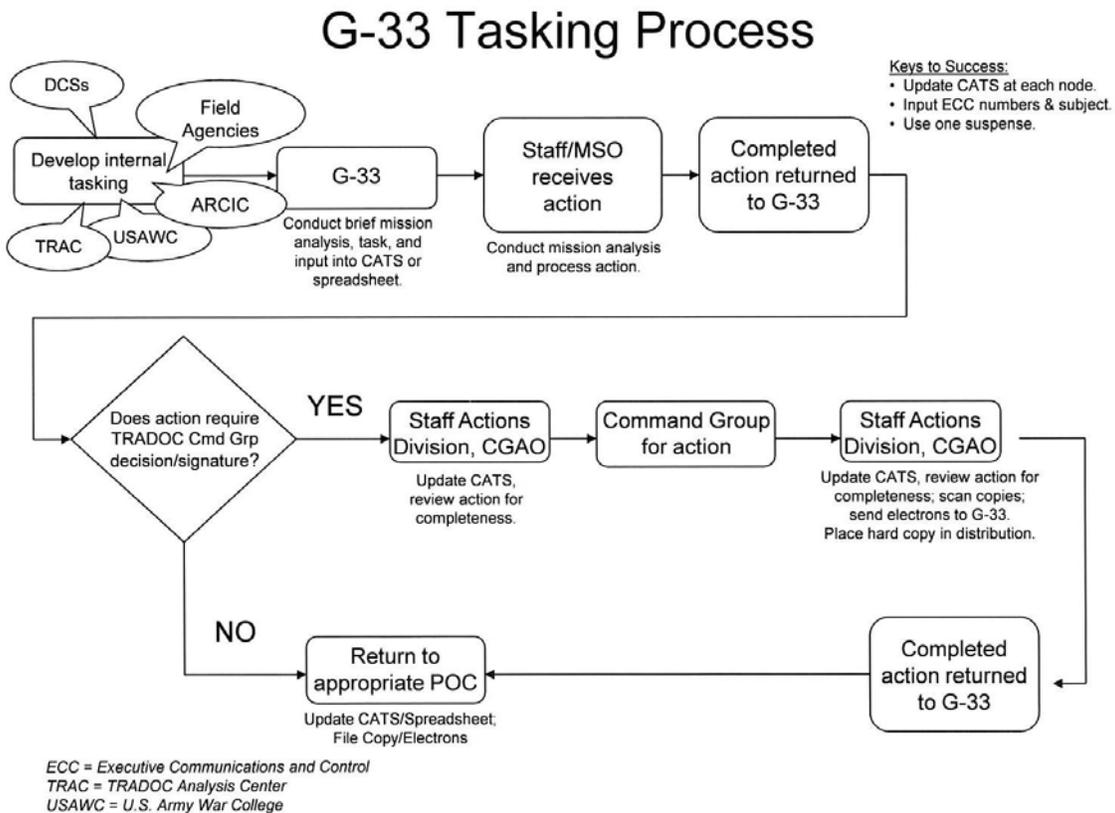


Figure 2-2. DCS, G-3/5/7 Current Operations (G-33) tasking process

UNCLASSIFIED (or) FOR OFFICIAL USE ONLY

U.S. ARMY TRAINING AND DOCTRINE COMMAND
 G-33 CURRENT OPERATIONS
 950 Jefferson Avenue (Suite C1016)
 Fort Eustis, Virginia 23604-5711
 (757) 501-5095 or DSN: 312-501-5095
 UNCLAS FAX: 5122 or Secure FAX: 5123

HQ TRADOC TASKING ORDER**S: 141200JUL11**(Enter " **Multiple** " if more than one suspense)

{NOTE: Lead-time less than 30 days requires originating office COL/GS-15/YC-03/YA-03 approval. Approving official must be listed in paragraph 5D. Lead-time of 15 days or less requires substantial rationale from originating office for DCS G-3/5/7 GO/SES approval to release. TASKORD is for internal TRADOC taskings only. This order cannot be used to task external/non-TRADOC organization.}

DTG: {G-33 will insert}

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

1. Situation. {Background leading to the need for the tasking. Describe why this tasking is needed, what is the mission/intent of higher HQ and higher HQ/DA timeline. Describe the Commander's intent. Frame the problem or issue so all can understand why this tasking is needed. If TASKORD has a short suspense, justify the urgency. If you have background documents describe and list in para 4 as enclosures. Ensure the files are similarly named. Subparagraphs may be used to describe mission or parallel efforts of other ACOMs, ASCCs or DA Staff. }

2. Mission. {Who, What, Where, When, Why (5Ws). Mission statement contains no subparagraphs. Be clear, concise, specific and directive. Use active voice. Should be a single directive sentence}

3. Execution.

3.A. Suspense: {DD1200MMYY such as **031200JUN11**. All suspenses at **NLT 1200 hours**.

If multiple suspenses, list each with brief description. All suspenses must be referenced within the body of the TASKORD under 3.C TASKS. NOTE: If suspense is less than 30 days, submission must be approved by COL/GS15. Approving official must be listed in paragraph 5D.}

3.B. Concept of Operations. {Expand on situation and mission paragraphs. Describe how the Commander/DCS sees the actions of subordinate units fitting together to accomplish the mission. May be a single paragraph or multiple subparagraphs. Address decisive and shaping operations. Address phases if appropriate.}

3.C. Tasks. {Identify each in a separate line; the standard first task is always 3.C.1 acknowledge receipt of tasking to primary POC. Use actual name - do not just refer to a following paragraph.}

3.C.1. Acknowledge. Within 2 working days reply via e-mail to Lead point of contact (POC) {Use actual name - do not just refer to a following paragraph.}

3.C.2. {Specify tasks to MSO, CoE, and Staff in separate lines. Be clear what is to be done. Tasks should be to MSO, CoE and not to sub-elements within a major organization.}

3.C.2.(a). {Format for multiple subparagraphs.}

{Delete all instructions from final version.}

{Enter appropriate protective marking or classification IAW AR 380-5}

UNCLASSIFIED (or) FOR OFFICIAL USE ONLY

Version 01 August 2011. Previous versions are obsolete. See TR 1-11.

Figure 2-3. TRADOC TASKORD

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

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

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

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

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

{G-33 Tasking Control Official (TCO) will certify/digitally sign, as appropriate, and disseminate in Adobe PDF format.}
JEFF UPCHURCH
Chief, Taskings Division
HQ TRADOC G-33

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

DISTRIBUTION: {G-33 distributes to TRADOC organizations (MSO, CoE, Primary Staff, etc) not to individuals via Command Action Tracking System (CATS). Refer to TR 1-11, paragraph 2-14. List in alphabetical order using official Army plain language organizational abbreviations or acronyms IAW AR 25-50 and TR 1-11. Do not use mailing addresses. Distro to non-TRADOC agencies is the responsibility of the originator. Action addressees listed first followed by info (CF) addressees.

If distribution list goes beyond 1 page, insert "(see next page)" or "(CONT)".

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) FOR OFFICIAL USE ONLY
Version 01 August 2011. Previous versions are obsolete. See TR 1-11.

Figure 2-3. TRADOC TASKORD page 2

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

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

{Continuation page}

{Delete all instructions from final version.}
{Enter appropriate protective marking or classification IAW AR 380-5}
UNCLASSIFIED (or) FOR OFFICIAL USE ONLY
Version 01 August 2011. Previous versions are obsolete. See TR 1-11.

Figure 2-3. TRADOC TASKORD page 3

2-5. Readaheads (RAs)

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

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

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

- a. Any meetings involving subordinate commanders or school commandants, that provide less than 30 calendar days notification, must have DCoS approval.
- b. Outgoing correspondence making personal reference to CG (CG, DCG/CoS, or DCoS SENDS, PERSONAL FOR messages, or any correspondence using first person in reference to CG or DCG/CoS). Only the CG, DCG/CoS, or DCoS may release such correspondence.
- c. Responses to incoming communications addressed personally to CG, DCG/CoS, or DCoS unless directed otherwise.
- d. Memorandums of Agreement (MOAs) and Memorandums of Understanding (MOUs). HQ TRADOC G-8 provides administrative policy and guidance, and assists TRADOC organizations in the development, review, and staffing of MOAs, MOUs, and other support agreements to include DD Form 1144, Support Agreement and Systems Interface Agreements.

(1) MOAs. MOAs between TRADOC and outside organizations will be approved by the DCG/CoS to ensure HQ TRADOC is part of the coordination or decision process for these types of arrangements. The TRADOC staff judge advocate (SJA) will review all MOAs prior to approval by the delegated HQ TRADOC staff elements. MOAs approved by other TRADOC authorities will be reviewed by their servicing SJA prior to approval. Any questions concerning whether an MOA requires DCG/CoS approval should be directed to the TRADOC SJA.

(2) MOUs. Approval authority for MOUs is delegated to TRADOC MSOs; Centers of Excellence (CoE) commanders; commandants; TRADOC schools; TRADOC directors; TRADOC DCGs; Personal and Special Staff Officers; and field operating activities. The TRADOC SJA will review all MOUs prior to approval by the delegated HQ TRADOC staff elements. MOUs approved by other TRADOC authorities will be reviewed by their servicing SJA prior to approval. Any questions concerning whether an MOU requires DCG/CoS approval should be directed to the TRADOC SJA.

(3) Documenting DCG/CoS Approval. TRADOC organizations processing MOAs/MOUs requiring DCG/COS approval will use the TRADOC staffing process, recording the DCG/CoS approval on the TRADOC Form 5-E.

(4) HQ TRADOC G-8 will review all MOAs and modifications thereto prior to approval by the DCG/CoS and maintain a repository of all TRADOC MOAs/MOUs.

e. Correspondence to and from:

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

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

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

(4) TRADOC commanders or school commandants.

f. Nonconcurrences and disapprovals.

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

(2) Disapproval of actions proposed by subordinate commands.

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

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

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

j. Reports of significant financial or property irregularities.

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

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

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

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

o. Requests for approval of outside continental United States (OCONUS) temporary duty (TDY) or overseas conference travel. Submit requests on TRADOC Form 712-R-E, Request for Official OCONUS Temporary Duty Travel. See Department of Defense (DOD) 4500.54-G, Department of Defense Foreign Clearance Guide (<https://www.fcg.pentagon.mil>), and AR 55-46 (Travel Overseas), chapter 8, for guidance on submitting requests for OCONUS TDY or overseas conference travel.

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

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

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

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

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

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

2-7. Authority line

a. Principal staff officers and chiefs of special and personal staff offices may sign correspondence using the authority line FOR THE COMMANDER when the correspondence is totally within their area of responsibility. Such correspondence cannot establish policy nor impose suspenses, and must remain within TRADOC. In most instances this correspondence is informational and between counterparts.

b. Principal staff officers and chiefs of special and personal staff offices may delegate signature authority for correspondence within their organization. When delegated, use an authority line to show for whom the person is signing, for example: FOR THE DEPUTY CHIEF OF STAFF, G-1/4.

c. Delegation of signature authority for chiefs of special and personal staffs will be in writing and accompanied by an explanation of the material for which the CG has approved signature delegations.

2-8. Signature blocks/complimentary closings

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

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

c. The CG begins PERSONAL FOR messages to the CSA with "Sir, ..." and uses "Very respectfully" as the complimentary closing. The CG generally does not use a complimentary closing on VCSA or counterpart PERSONAL FOR messages.

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

COMMANDING GENERAL

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

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

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

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

For Memorandums of Understanding

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

(Date)

DEPUTY COMMANDING GENERAL/CHIEF OF STAFF

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

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

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

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

For Memorandums of Understanding

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

(Date)

DEPUTY CHIEF OF STAFF

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

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

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

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

For Memorandums of Understanding

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

(Date)

COMMAND SERGEANT MAJOR

**Military Correspondence,
e.g., memorandums
(Use TRADOC letterhead.)**

JOHN A. SMITH, JR.
CSM, USA
Command Sergeant Major

**Nonmilitary Correspondence,
e.g., letters to civilians**

John A. Smith, Jr.
CSM, United States Army

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

2-9. Suspenses

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

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

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

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

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

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

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

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

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

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

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

(5) When circumstances prevent a final or draft reply by the suspense date, provide an interim reply. The interim reply will acknowledge receipt of the inquiry, contain as much information that is available at the time, inform the congressional member of the reason for the delay (if appropriate), and set a specific time period for a final response. These instances are rare and reserved for very complex issues that require additional time to prepare an adequate answer.

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

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

2-10. Note taking and suspenses for CG forums

CG taskings. It is important to make note of any guidance, taskings, and/or observations the CG provides in various venues (for example, during meetings, video teleconferences (VTCs), visits, conferences, discussions en route, etc.). To ensure unity of effort and maintain visibility, responsible staff offices, in coordination with the CPG (usarmy.jble.tradoc.mbx.hq-tradoc-cpg@mail.mil) will, within **2 duty days**, e-mail a summary of significant issues that arose to CGAO for dissemination, with cc to the CG XO, ACoS, and CPG. Highlight only significant CG guidance, decisions, and taskings and provide the who, what, when, where, and why of the event. Prior to adjournment the lead will confirm the list of taskings by the CG.

- a. CG calendar event (office, Morelli, VTC, etc.). Staff lead, in coordination with CPG, submits an e-mail summary of CG decisions, taskings, and/or guidance to CGAO within **2 duty days**.
- b. CG VTC with all commanders (with no staff lead). The CPG representative submits an e-mail summary of decisions, taskings, and/or guidance to CGAO within **2 duty days**.
- c. CG-directed conference. Staff lead submits a summary not later than **5 duty days** in memorandum format for DCG/CoS to send to all commanders/coordinating staff.
- d. CG installation visits. The installation representative compiles a comprehensive trip report to include CG decisions, taskings, and/or guidance and submits it for CPG approval within **2 duty days** of return from travel.
- e. CG attendance at CSA conferences. CPG Chief or CG's XO will record taskings and forward them to CGAO for dissemination.

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

g. Key points:

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

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

(3) AO will confer with CPG representative after meeting to make sure both are tracking same tasks.

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

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

(6) AO will e-mail memorandum to CPG Chief and cc the CPG representative who attended the meeting, the CG's XO, ACoS, and the organization's SGS asking them for any comments before sending to CGAO to task.

(7) Send final memorandum to CGAO for tasking.

2-11. Note taking and suspenses for DCG/CoS and DCoS forums

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

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

| | |
|--|--|
|  <p>REPLY TO ATTENTION OF</p> | <p>DEPARTMENT OF THE ARMY HEADQUARTERS, YOUR COMMAND YOUR COMMAND'S STREET ADDRESS YOUR COMMAND'S POST NAME 23651-1047</p> |
| <p>Your Directorate's Office Symbol</p> | |
| <p>MEMORANDUM FOR Director, CGAO</p> | |
| <p>SUBJECT: Title of Meeting, Location, and Date(s)</p> | |
| <ol style="list-style-type: none"> 1. Provide a brief synopsis of the meeting the CG attended. Answer the five Ws: who, what, when, where, and why. 2. Objectives. Write a simple statement of the meeting's objectives. What were attendees gathered to do? 3. Tasker Recap. Identify taskers, if any, that come from the CG, DCG/CoS, or DCoS during the meeting. Ensure the tasker is clear, specific, concise, and includes subject, deliverable, recommended lead and assist(s), and suspense. Refer to a key point as necessary. If no taskers emerged from the meeting, so state. 4. Summary of key points. Summarize the key points in the meeting. Do not try to capture discussions verbatim. Key points should be clear and concise. A good example would be: "Brigade Modernization Command – GEN Smith and MG Jones discussed FCS training strategy, Brigade manning, concerns with ownership of the overall network, issues associated with the JTRS radio, and upcoming reports to Congress." 5. Point of contact is LTC Sad, Your Directorate, DSN 501-xxxx, (757) 501-xxxx, james.sad@us.army.mil. | |
| <p style="text-align: right;">JAMES W. SAD LTC, IN Respective Title</p> | |
| <p>CF: Chief, CPG Other individuals as necessary</p> | |

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

2-12. Staff assistance

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

2-13. Coordination

Staff actions must be coordinated both within the lead organization (internal coordination), and with other TRADOC organizations that have an interest in the action (external coordination). For MSOs, the chief of staff, or higher must provide his/her name for concurrence/nonconcurrence on an action. For HQ TRADOC organizations, the deputy chief of staff, assistant deputy chief of staff, or higher must provide his/her name for concurrence/nonconcurrence on an action. That individual should initial and date the TRADOC Form 5 in the appropriate space. A note indicating the individual's name and the date of his/her review is acceptable. Also see para 2-3b(9) for AO responsibilities in the staff action process.

a. Internal Coordination

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

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

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

b. External Coordination

(1) All staff actions going to the command group must show coordination with TRADOC organizations that have an interest in the action. When no coordination is required, the Form 5 must include the statement "Coordination not required" in block 7, Discussion section.

(2) Lead organizations should consider actions from the CG's, DCG/CoS or DCoS' viewpoint. What organizations will the CG, DCG/CoS, or DCoS expect to have reviewed this action? Whose input will they want as they consider their decision? Any organization directly affected by the action, or having expertise in the subject matter, must be given the opportunity to review it. For example, any action that involves training or education must be reviewed by TRADOC G-3/5/7. If an action impacts the TRADOC budget, or if it's a memorandum of agreement/understanding, it must be reviewed by TRADOC G-8 and SJA. If it involves a regulatory or legal issue, it must be reviewed by TRADOC SJA. If it involves leader development, it must be reviewed by U.S. Army Combined Arms Center (CAC). Coordinate all actions impacting strategic communications with Public Affairs Office (PAO), CPG, and CAO. Coordinate

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

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

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

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

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

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

(6) There is no designated format for conveying nonconcurrences. E-mail comments will suffice.

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

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

| | |
|---|--|
| OFFICE SYMBOL | (Date) |
| MEMORANDUM FOR RECORD | |
| SUBJECT: CONSIDERATION OF NONCONCURRENCE | |
| 1. The first sentence will read: "I have personally discussed this matter with XXXXXXXXXX, and we cannot reach agreement." | |
| 2. State the reason for not accepting the nonconcurrency. Be sure to address every point. Address all nonconcurrences on one memorandum for record. | |
| 3. Send a copy furnished to the nonconcurring office. | |
| 4. Place as last tab of the staff action. | |
| CF: XXXXXXXX | PETER W. GREENE Colonel, GS Chief of Staff |

Figure 2-6. Consideration of nonconcurrency

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

the TRADOC Form 5 in the appropriate space. A note indicating the individual's name and the date of his/her review is acceptable.

(10) Only the CGAO may grant extensions for CG and CS taskings. Requests for extension must be made through the lead organization to the CGAO, Staff Actions Division. For example, AOs should request an extension in an e-mail to the lead organization who will then forward it to the Staff Actions Division. Extensions will be granted based on justification provided. See para 2-3h(1) for further details on requesting extensions.

(11) The TRADOC SJA and TRADOC G-8 will review all MOAs and MOUs.

2-14. Distribution

a. If offices both external and internal to the HQ receive the correspondence, the AO will determine whether to show the internal distribution on the original correspondence. When the CG signs correspondence going to higher HQ, do not show copies furnished to subordinates. Internal distribution or copies furnished may be listed on the file copy.

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

| |
|--|
| <p>Commander U.S. Army Combined Arms Center U.S. Army Combined Arms Support Command U.S. Army Cadet Command U.S. Army Recruiting Command Centers of Excellence Asymmetric Warfare Group</p> <p>DCG, Initial Military Training</p> <p>Commandants, TRADOC Schools</p> <p>Director Army Capabilities Integration Center U.S. Army TRADOC Analysis Center U.S. Army Aeronautical Services Agency</p> <p>Deputy Chiefs of General and Chiefs of Special Staff Offices, HQ TRADOC</p> |
|--|

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

c. The TRADOC Principal Commanders and Key Staff Officers Roster identifies TRADOC subordinate activities and key HQ coordinating staff and is located at <http://www.tradoc.army.mil/sgs/TradocSGSDocRes.html> (requires AKO logon).

d. To determine correct addresses use:

(1) U.S. Army Addresses and Office Symbols Online (AAO) database at <https://www.rmda.army.mil/aa0/Search.aspx>.

(2) TRADOC Senior Leaders Contact List. CGAO SAD posts TRADOC Senior Leaders Contact List updates at the SAD Web site under Telephone Directories/Rosters (requires AKO logon).

2-15. Abbreviations and acronyms

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

2-16. Type font and size

Use Arial font, size 12 for all correspondence.

2-17. Identification of point of contact (POC)

POC information is generally placed in the last paragraph of the correspondence: military rank or civilian prefix, last name only, office/organization, Defense Switch Network (DSN) phone number, commercial phone number, and e-mail. For example, "Point of contact is Mr. Sample, Office of the DCS, G-1/4, DSN 501-XXXX, (757) 501-XXXX, joe.a.sample.civ@mail.mil" Do not include POC statements on correspondence going to the CSA or higher. Do not include a POC statements on memorandums to be signed by the CG.

2-18. Distinguished visitors

a. Visits to HQ TRADOC. Proponents request DCoS approval for visits to HQ TRADOC and major events, via the bi-weekly DCoS event briefing. (See chapter 8 for policy on special/ethnic observances and recurring events.) The request will include the type of visit/event, the objectives, the visitor's biography, and the 5Ws. (See TRADOC Memorandum 1-16 for additional distinguished visitor information.) Along with Executive Services Office (ESO), the staff lead will attend the bi-weekly meeting with the DCoS and brief all aspects of the visit or event.

(1) Upon DCoS approval:

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

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

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

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

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

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

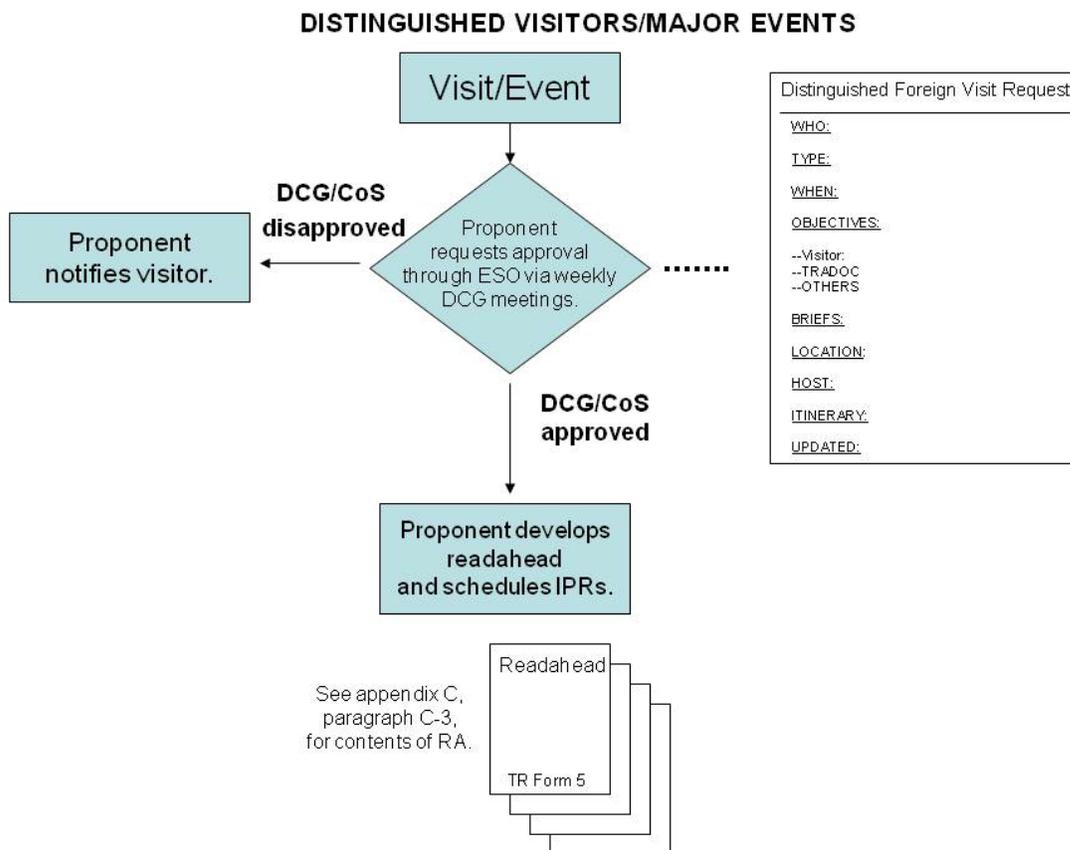


Figure 2-8. Distinguished visitors/major events

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

3-1. Guidelines

This chapter prescribes specific forms and formats to use within HQ TRADOC. Use HQ TRADOC letterhead stationery for military correspondence, annotated with the proponent’s office symbol. Use personal stationery for letters (for example, CG, DCG/CoS, or DCoS letterhead). Do not change or modify electronic or printed letterhead stationery IAW AR 25-30, paragraph 7-7. Templates are available on the TRADOC Web site at <http://www.tradoc.army.mil/publications.htm>. The following general guidelines apply to all staff actions:

- a. Always use editing and proofreading tools available (that is, spelling and grammar check) as an initial step in the proofreading process.
- b. Review correspondence to ensure document preparation follows guidelines in AR 25-50, is error free, and ready for Command Group signature/approval prior to submission to CGAO.

c. Use Arial 12 font for all text. Ensure headers, footers, and page numbers are also in Arial 12 font.

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

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

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

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

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

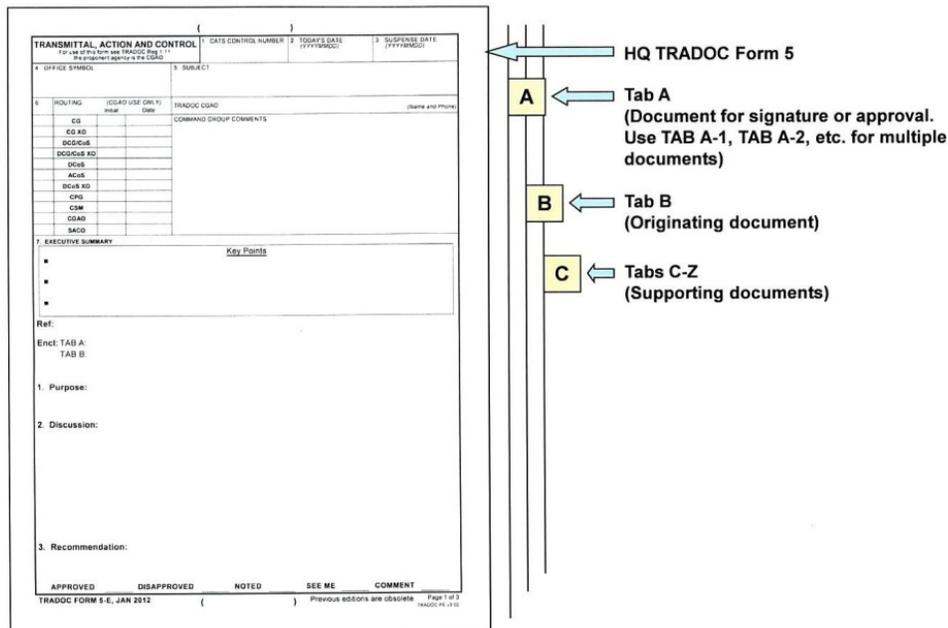


Figure 3-1. Assembling a hard copy staff action

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

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

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

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

3-3. TRADOC Form 5

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

3-3. TRADOC Form 5-1

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

3-5. Point paper

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

MAJ R. Sample
ATCS-XE/2513
8 Aug 12

POINT PAPER

SUBJECT: Point Paper Preparation

1. **Purpose:** To provide sample point paper format.
2. **Assessment:** Identify stakeholders and implications of his/her position on topic or issue. Consider impact to operations, organizations, resources, public opinion, etc.
3. **Recommendation(s):** Based on the assessment, provide the recommended position or course of action. N/A (if not applicable).
4. **Discussion Points:**
 - Font: Arial 12. Margins: 1 inch for the top, bottom, left, and right.
 - Use bullet statements to outline discussion points supporting paragraphs 2 and 3 above. Short, to the point, easy to read.
 - One page preferred. However, if two or more pages, place page number at bottom center beginning on the second page, 1 inch from edge.

Figure 3-2. Sample point paper

3-5. Executive summary

Use EXSUMs to provide information, updates, and interim responses to the Command Group. Although not intended to replace all other staff papers, the EXSUM provides important information to the Command Group in a timely manner. Whenever possible, use EXSUMs instead of information papers.

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

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

(1) Do not exceed 15 lines. Use Arial 12 font. If space allows, type EXSUMs on TRADOC Form 5 in the discussion section of block 7 (instead of attaching it as a tab).

(2) The EXSUM will be one paragraph, marked with the appropriate classification. A separate classification for the title is also required.

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

| |
|--|
| 6 Aug 12 |
| <p>(U) UNIT PHYSICAL FITNESS. Considerable resources are programmed in the future budget years, all designed to improve the overall health and lifestyle of our Soldiers and their Families. The program stresses a total approach concept and is not limited to strict conditioning. Too often, commanders fall into the trap of competing with one another on how far or fast their unit can run. While running is an integral part of fitness, it is not the only element. It is not the Army’s intent to measure fitness by 9-mile runs in 90 minutes. Fitness is measured by overall health of the command. The new Soldier Physical Fitness Center at Fort Benning, GA, is the proponent. Graduates will provide commanders technical fitness expertise.</p> <p>PROVIDE MEMO _____</p> |
| <p>MAJ Sample/ATTG-I/1234 APPROVED BY: COL Conner</p> |

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

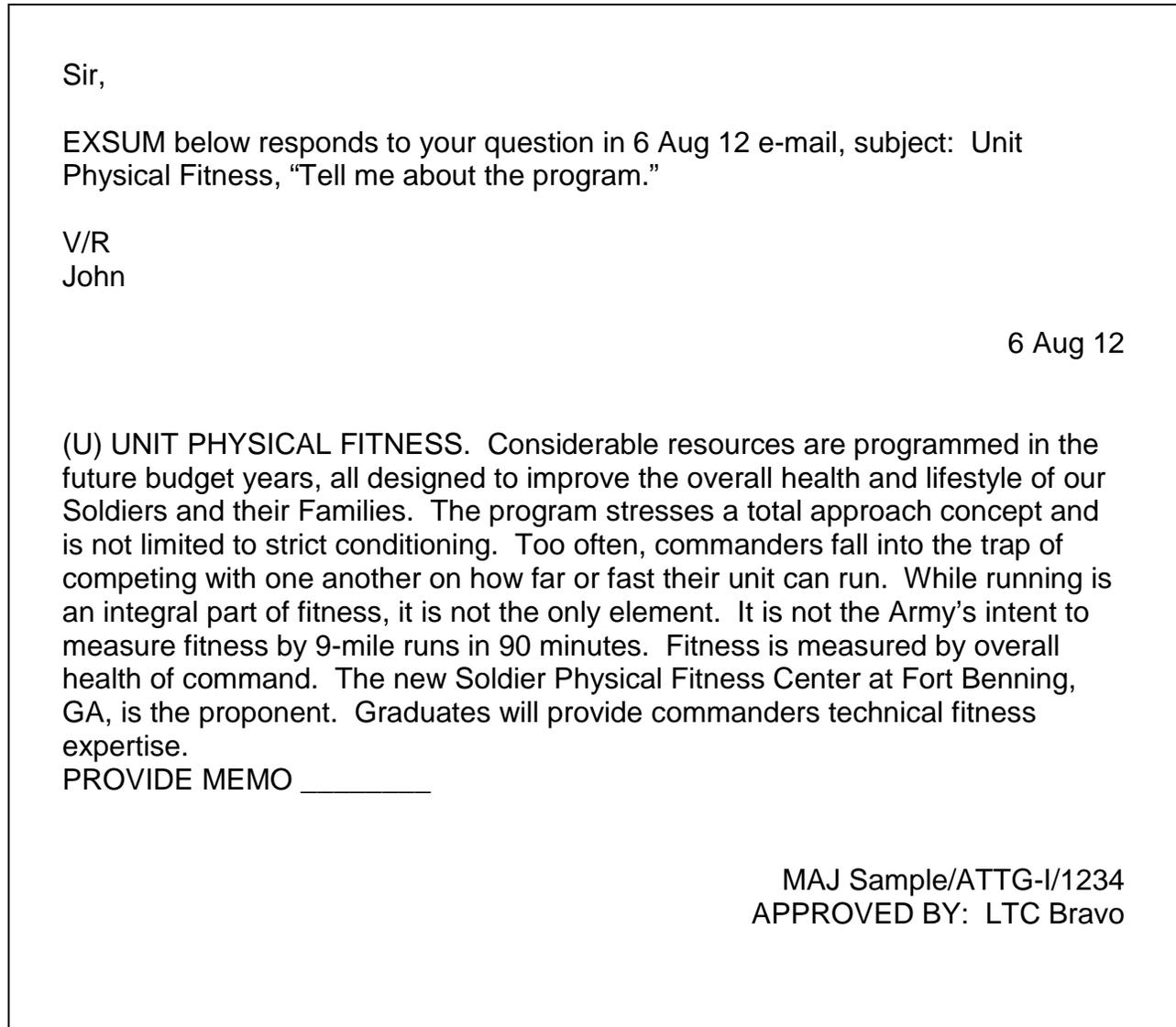


Figure 3-4. External EXSUM format (from Command Group to higher HQ)

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

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

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

3-6. Decision memorandum

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

a. General. AR 25-50 directs the use of 1-inch margins for the informal memorandum. Use Arial 12 font. The memorandum content should represent the complete situation, without relying on enclosures. Summarize issues and reserve enclosures for a detailed analysis or explanation of the summary presented in the memorandum. Identify enclosures contained at tabs in the body of the decision memorandum. Use TRADOC Form 5 when submitting decision memorandums to the Command Group. Keep information in the TRADOC Form 5 brief, with a purpose statement, short background summary, and coordination.

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

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

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

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

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

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

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

“APPROVED_____ DISAPPROVED_____ SEE ME_____”

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

(8) Paragraph 5, DISCUSSION. This paragraph lists/assesses the alternatives considered. Assess the alternatives considered for the decision in terms of advantages

and disadvantages. Include documents that support the recommendation as enclosures at tabs. Summarize their key points in the decision memorandum.

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

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

ORG _____ CONCUR/NONCONCUR _____ DATE

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

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

| | |
|--|---|
| OFC SYMBOL | Date |
| MEMORANDUM THRU | |
| Deputy Chief of Staff Deputy Commanding General/Chief of Staff | |
| FOR TRADOC Commanding General | |
| SUBJECT: Decision Memorandum Format | |
| 1. For DECISION. | |
| 2. PURPOSE. To obtain... | |
| 3. RECOMMENDATION(S). CG sign memorandum at TAB A-1. | |
| APPROVED_____ DISAPPROVED_____ SEE ME_____ | |
| 4. BACKGROUND. | |
| 5. DISCUSSION. | |
| a. Course of Action (COA) 1: (Advantages/Disadvantages) | |
| b. COA 2: (Advantages/Disadvantages) | |
| c. COA 3: (Advantages/Disadvantages) | |
| 6. IMPACT. | |
| 7. COORDINATION. | |
| TRADOC DCS, G-8 _____ | CONCUR/NONCONCUR_____ DATE |
| TRADOC DCS, G-1/4 _____ | CONCUR/NONCONCUR_____ DATE |
| 8. POC is Mr. Jones, agency/activity, (757) xxx-xxxx, joe.jones@us.army.mil. | |
| Encl | XXXX X. XXXXXXX Major General, U.S. Army XXXX XXXXX |

Figure 3-5. Decision memorandum format

3-7. Information paper

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

| |
|--|
| <p>30 Aug 12</p> |
| <p>INFORMATION PAPER</p> |
| <p>SUBJECT: Information Paper Format</p> |
| <p>1. Purpose. To provide guidance on the preparation and use of an information paper. Font: Arial 12.</p> |
| <p>2. Facts.</p> <ul style="list-style-type: none">a. An information paper provides facts in a clear and concise format. The format may be altered to meet a specific need. Include the subject and the purpose. Paragraphs will contain only essential facts concerning the subject. There are two lines between the date and the title "INFORMATION PAPER." There is one line between "INFORMATION PAPER" and the subject line.b. Information papers are self-explanatory and will not refer to enclosures, except for tabular data, charts, or photographs.c. Information papers should not exceed one page in length. If a continuation page is unavoidable, number pages starting on page 2, bottom center. Do not repeat the subject line, title, or date on the second page.d. Information papers do not require signature, but must include the AO's name and telephone number in the lower right corner. Type the AO's information on the third line below the last paragraph. Type an approval line below AO's name and number to indicate directorate approval by principal, deputy, or director. Right justify the AO contact information and "APPROVED BY" lines.e. Avoid using acronyms and abbreviations, except those that are familiar outside the Army. Avoid using classified information when it does not contribute to understanding the issue.f. Information papers should not include a decision statement. |
| <p>MAJ Kennedy/ATCS-XS/1234 APPROVED BY: COL Bradford-Jones</p> |

Figure 3-6. Sample information paper

3-8. Position paper

Use a position paper to define an organization's position or policy on an issue and promotes or defends a position. See figure 3-7 for format and preparation instructions.

| |
|--|
| 30 Aug 12 |
| POSITION PAPER |
| Title (word, phrase, or question defining the issue) |
| <p>1. Background. Short overview that does not overshadow the position paragraph below. If the sheet is one of many collected for a common purpose, consolidate the background in a single document and eliminate from the individual sheets. There are two lines between the date and the title "POSITION PAPER." There is one line between "POSITION PAPER" and the title line. Type the AO's information two lines below the last paragraph. Type an approval line below AO's name and number to indicate directorate approval by principal, deputy, or director. Right justify the AO contact information and "APPROVED BY" lines.</p> <p>2. Position. Sentence or short paragraph stating organization's policy or position on the issue.</p> <p>3. For the Position. Supporting facts and arguments sequenced, labeled, and subdivided.</p> <p>4. Against the Position. Summary of each argument against the position. Be accurate when representing opposing views.</p> <p>5. Rebuttals. Summary of rebuttals to opposing arguments. Ideally, rebuttals will reinforce the position.</p> <p>6. Sources. List sources:</p> <ul style="list-style-type: none"> a. AO (name, office, phone). b. Subject matter experts. c. Supporting documents. d. Related point or position papers. <p>If using only one source, label this paragraph specifically (for example, Point of Contact).</p> |
| LTC Johnson/ATCS-XS/1234 APPROVED BY: COL Brown |

Figure 3-7. Sample position paper

3-9. Star note

a. Only GOs use star notes, normally for brief personal replies or to convey congratulations, appreciation, welcome, regrets, etc. Prepare the star note according to the personal preference of the GO signing the note. Include appropriate information in the TRADOC Form 5; for example, "PURPOSE: To obtain CG signature on star note (TAB A) to Mr. Jonathan (John) E. Doe for his selection as TRADOC Employee of the Year." The preparer may also put first name/nickname on small adhesive notes on each letter within the package. Star notes are normally one page in length. See Figure 3-8 for a sample CG star note with formatting instructions. Note: Cover embossed flags on the star stationery with an adhesive note before feeding the stationery through a laser printer to prevent reprinting of the embossed area.

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

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

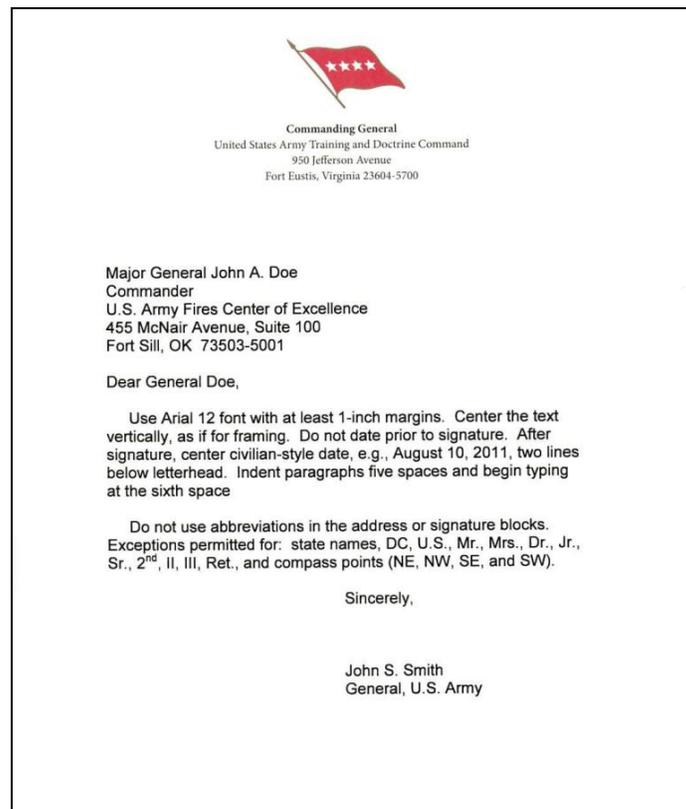


Figure 3-8. Sample CG star note

3-10. TRADOC policy letters

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

b. Staff elements will forward policy letters under cover of a TRADOC Form 5, coordinated through the SJA, for CG approval. Once the CG approves, CGAO will consecutively number and maintain an index of the policy letters. All policy letters are published on the TRADOC Web site.

c. Policy letters are effective until superseded or rescinded. The issuing staff element will then review the policy letter and ensure the information is still valid and current. Some policy letters may require earlier review based on the subject matter and separate regulations that govern their functional area.

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

Chapter 4 Conferences and Briefings

4-1. TRADOC Conferences

TRADOC conferences will be conducted in accordance with TRADOC Policy Letter 17, Guidance on TRADOC-Sponsored Conferences.

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

a. ESO is responsible for scheduling conferences and briefings held in the Command Conference Room (CCR) and the Morelli Auditorium. For scheduled events the CG, DCG/CoS, or DCoS hosts, send requests for protocol support to Chief, ESO.

b. DCSs and chiefs of special staffs are responsible for scheduling conferences and briefings in coordination with the HQ Commandant.

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

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

TRADOC Reg 1-11

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

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

d. When arranging conferences and briefings, AOs will:

(1) Coordinate with Command Group schedulers and/or XOs to arrange the date, time, and location of conferences/briefings. CG and DCG/CoS Calendar Event Request Forms are located at the CGAO Web site.

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

(3) Coordinate with ESO to reserve the CCR or Morelli Auditorium. To schedule the Morelli or CCR go to the ESO Web page and click on either the Morelli or CCR calendar/scheduler links.

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

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

(b) Attendance requirements.

(c) Name or title of chair.

(d) Purpose of conference or briefing.

(e) Security classification.

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

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

(h) Uniform requirements.

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

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

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

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

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

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

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

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

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

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

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

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

4-4. Preparing visual aids

a. There is no prescribed format for TRADOC visual aids, such as PowerPoint slides, charts, or graphs.

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

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

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

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

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

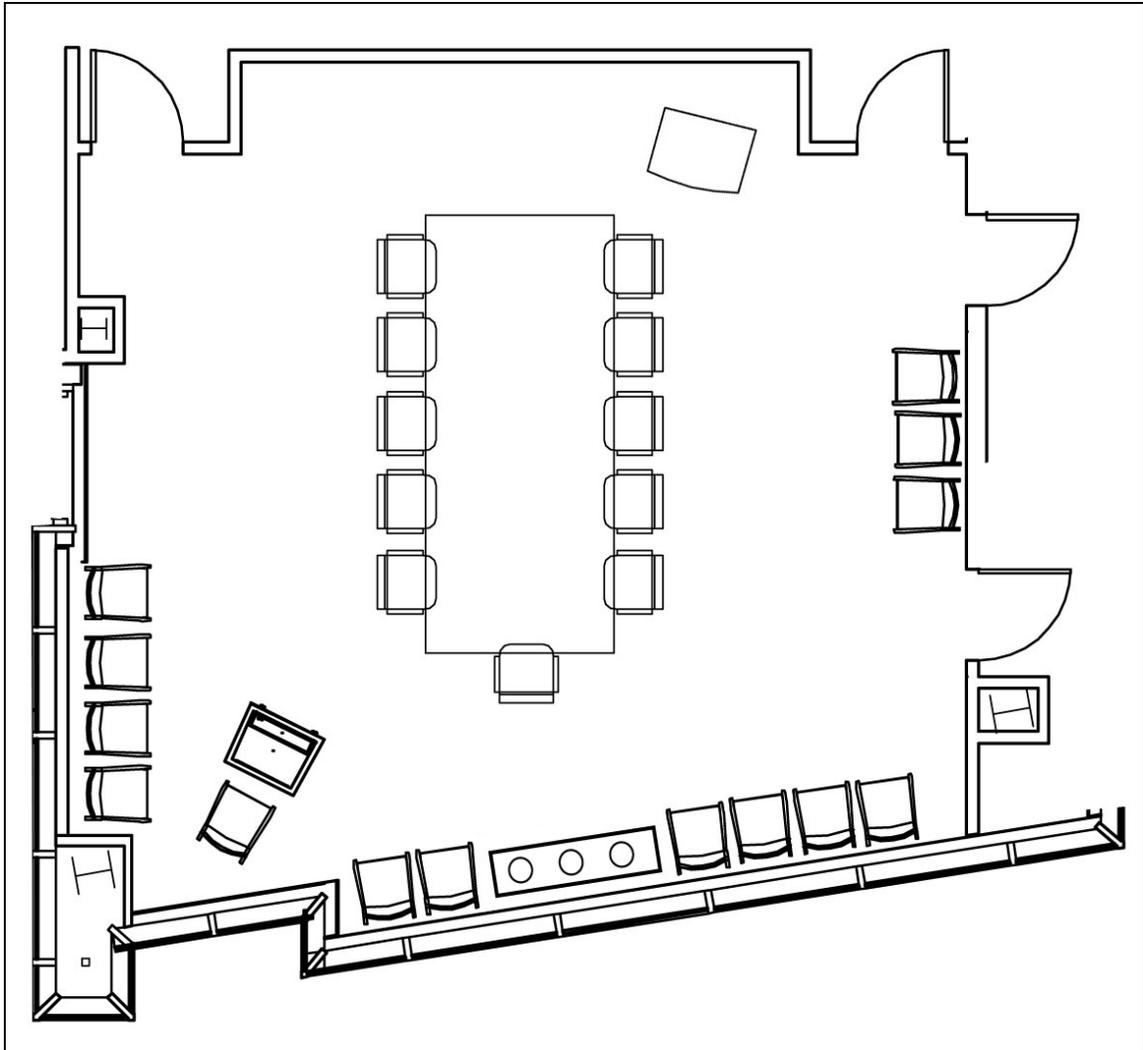


Figure 4-1. Diagram of Command Conference Room

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 top and bottom IAW AR 25-55 and AR 380-5. Ensure classification is clearly visible during the presentation.

- i. Text of visual aids should not repeat the verbal presentation.
- j. If more than one map is shown on a single visual aid, use the same scale.
- k. Provide color copies of slides to visiting dignitaries, GOs, civilian equivalents, and above. All other attendees receive black and white copies.

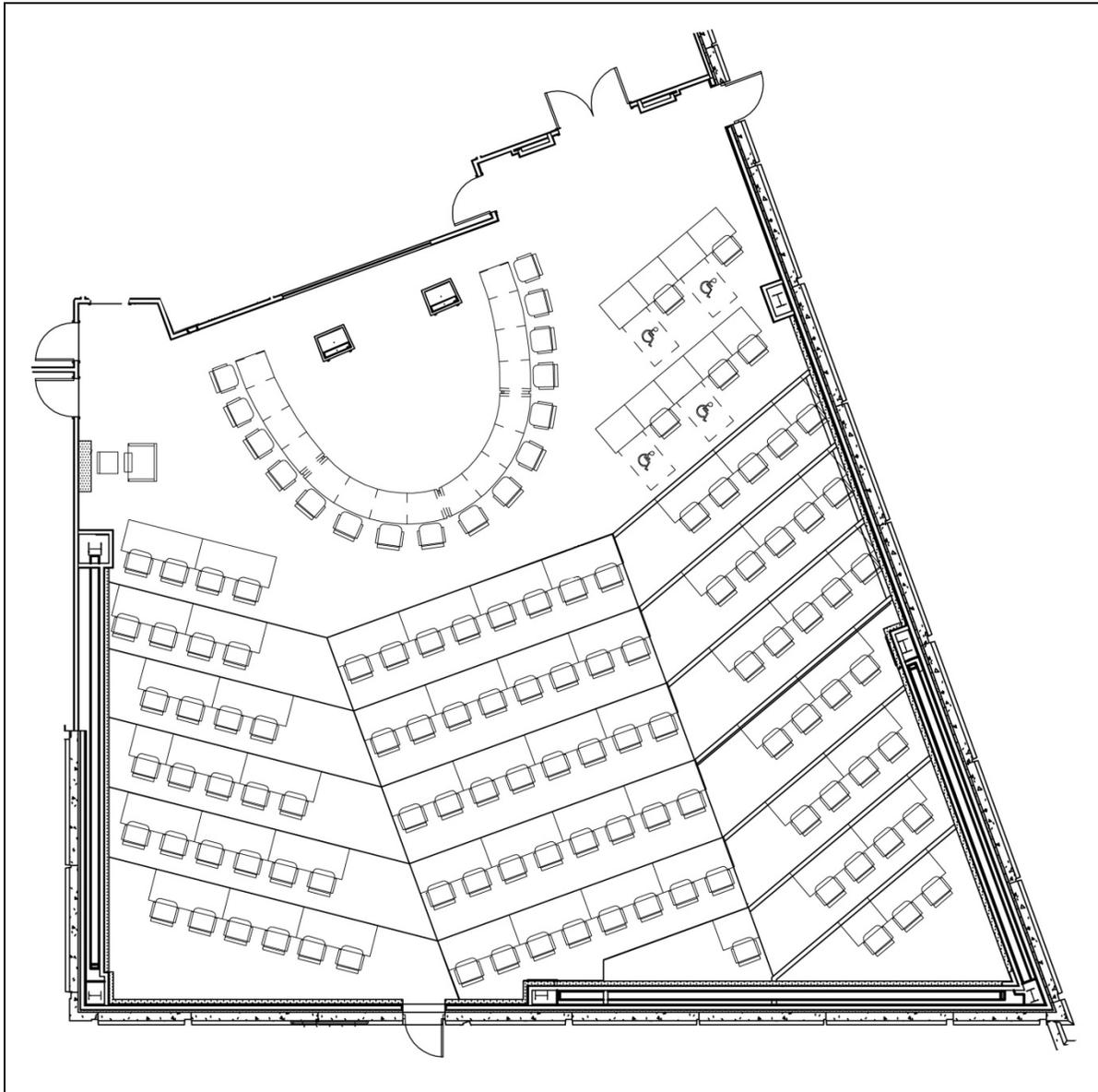


Figure 4-2. Diagram of Morelli Auditorium

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

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

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

4-5. Tracking taskings

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

Chapter 5

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

5-1. E-mail

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

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

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

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

(NIPRNET), and will be used on secure Internet protocol router (SIPRNET) or other DOD networks by the end of 2012.

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

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

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

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

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

5-2. DMS and Automated Message Handling System (AMHS)

a. The DMS is the system of record to be used for transmitting official record messages. DMS is available on both NIPRNET and SIPRNET. DOD use of DMS has decreased over the past several years, but DMS is still used within the Army to transmit all Army activities (Army general message address) (ALARACT) messages and other official messages.

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

c. Messages. TRADOC organizational account users prepare and release messages electronically via the Army Enterprise DMS/Modernization Automated Message Handling System (AMHS) on the Pentagon Web site at <https://www.amhs.army.pentagon.mil>. Follow procedures below when preparing AMHS traffic the Command Group will release:

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

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

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

(c) Once approved, a designated user with release authority for the FROM organizational account is responsible for dispatching the message using DMS/AMHS software. Recommend designated releasers synchronize their personal address books prior to release/dispatch of message. If there is no date time group (DTG) in the DTG field, click on the calendar icon and select the desired DTG. To confirm delivery, recommend releasers select "delivery report for all recipients." Once dispatched, a copy of the message is printed from the "sent items" folder and placed in the package behind tab A. Then, the entire package, with TRADOC Form 5 showing approval, is uploaded to the lead organization's folder and notification made to CGAO to close action in CATS.

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

5-3. Organizational e-mail accounts

a. Using individual e-mail accounts (accounts assigned to specific person with that person's name as the account name) to transmit official e-mails causes a number of complications. E-mail accounts created for organizations alleviate many of these complications. Organizational accounts are not group accounts or address lists,

although the accounts can be configured to provide similar functionalities. A specific individual must be responsible for each account and the responsible individual will control shared access to the account. This shared access can be enabled without sharing the password for the account. Organizational e-mail accounts can be found on the HQ TRADOC SACO Points of Contact roster and the TRADOC SGS/G-3 Points of Contact roster. Both rosters are available on the Staff Action Officer Resource Center SharePoint site under the "Telephone Information, Rosters and Directories" heading.

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

5-4. Use of calendars within e-mail

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

Chapter 6. Headquarters (HQ) TRADOC Special/Ethnic Observances and Recurring Events

6-1. Tasking

CGAO is responsible for tasking TRADOC special/ethnic observances and recurring events (for example, special/ethnic observances, TRADOC Organization Day, and other official events). Table F lists the schedule of recurring HQ TRADOC events and responsible staff offices.

6-2. Special/ethnic observances:

a. Special/ethnic observances are:

- Dr. Martin Luther King, Jr., Birthday
- African American/Black History Month
- Women's History Month
- Asian Pacific Heritage Month
- Women's Equality Day
- National Hispanic Heritage Month
- Prisoner of War/Missing in Action Recognition Day
- National Native American Indian Heritage Month

b. Responsibility for TRADOC-sponsored observances, and necessary funding, lies within the TRADOC Command Diversity Office (CDO). Non-TRADOC sponsored observances are within the responsibility of the identified command. Schedule is published by the JBLE EEO Office and coordinated with each command.

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

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

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

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

6-3. Administrative guidelines for special/ethnic observances

a. To ensure timely Command Group awareness of event concepts and use of proper protocol procedures, responsible organization or special staff office will follow timelines in table 6.

Table 6, Tasking timelines for special/ethnic observances

| DATE | RESPONSIBLE PROPONENT OFFICE: |
|---------------------------------------|--|
| 120 days prior to observance | <ul style="list-style-type: none"> • Coordinate date of event (or keynote event, if a series of events) with their TEC POC or the Office of the Commanding General (OCG), DCG/CoS Office, or DCoS Office to ensure no conflicts with the TEC. • Assign an AO (field grade officer or GS-13 and above) and provide the name of the AO to the CDO. The CDO will provide specific observance guidelines and oversight for all special/ethnic observances. |
| 90 days prior to observance | Submit a plan of action/milestones to the CDO. |
| 70 days prior to primary event | Brief event concept plan to the first GO/SES in chain of command. |
| 60 days prior to primary event | Send the DCoS an information paper, along with the memorandum announcing scheduled events for approval/signature, under cover of a TRADOC Form 5. If CG, DCG/CoS, or DCoS is involved in the program, send the DCoS an information paper, as instructions state in first sentence. Coordinate concept with appropriate agencies, but, at a minimum, with CDO and TRADOC ESO. Note: Distribute announcement memorandum to the staff immediately upon DCoS signature. |
| At conclusion of observance | Provide a written after action report (AAR) in memorandum format to the DCoS with copy furnished to CDO no later than 30 days after event. |

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

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

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

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

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

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

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

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

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

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

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

6-4. HQ TRADOC Organization Day

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

- a. Review the prior year's AAR for comments and recommendations.
- b. Organize, plan, coordinate, and execute HQ TRADOC Organization Day.
- c. Establish a TRADOC Organization Day Planning Committee with personnel from the Command Group/Special Staff/Personal Staff, all DCSs (G-1/4, G-2, G-3/5/7, G-6, G-8), and ARCIC, DCG-Initial Military Training Center of Excellence (IMTCoE), and participating JBLE tenant organizations. Each organization will provide a primary and alternate POC to attend meetings. TRADOC SJA will provide an attorney to serve as a legal advisor to the Organization Day Planning Committee.
- d. Host and conduct regularly scheduled planning committee meetings and IPRs.
- e. Develop/finalize an MOI outlining the concept of operation, event rules, and safety plan for HQ TRADOC Organization Day.
- f. Collect an AAR of lessons learned and suggestions for future activities from each organization following HQ TRADOC Organization Day.
- g. Compile information from planning committee meetings, MOIs, and AARs and place in a binder for the lead the following year.

6-5. Coordinate with TRADOC Enterprise Calendar (TEC)

To preclude schedule and facility conflicts, coordinate all major events, symposiums, conferences, seminars, etc., with G-33 for inclusion in the TEC.

Chapter 7

TRADOC Invitational Travel Authorization (ITA) Procedures

7-1. Guidelines

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

7-2. ITA approval authorities

a. All HQ TRADOC ITAs for official TDY (non-spouse travel) must be approved by the DCG/CoS. The approval authority at TRADOC major subordinate organizations (MSOs), field operating activities (FOAs), and special activities is delegated to the senior TRADOC commander/commandant on the installation (with the exception of accompanying spouse travel as described in paragraph 7-2b.)

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

7-3. Preparation of an ITA request

a. ITA request memorandums (figure 7-1) for all official TDY not involving accompanying spouse travel as described in paragraph 7-2b will be prepared and submitted IAW with the Joint Federal Travel Regulations (JFTR), volume 1, appendix E, part 1; Joint Travel Regulation (JTR), volume 2; and AR 600-8-105. ITA request memorandums must be signed by the approving official within the requesting organization.

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

(2) All HQ TRADOC ITA packets requesting military air will be staffed through G-3/5/7, Readiness and Flight Operations Division prior to forwarding for SJA review. All ITA requests will be forwarded 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 through the CGAO (Staff Actions Division) for DCG/CoS approval. The ITA approval packet will contain:

(a) TRADOC Form 5 (with a coordination line for TRADOC G-3/5/7, if applicable, and TRADOC SJA to concur/nonconcur).

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

b. ITA request memorandums for accompanying spouse travel will be prepared and submitted IAW Army Directive 2007-01, JFTR, and JTR (figure 7-2). The ITA request memorandum must be signed by the funding budget analyst and spouse's sponsor. All TRADOC MSOs, FOAs, special activities, and HQ TRADOC organizations will forward the ITA packet through the G-3/5/7 Readiness and Flight Operations Division (if military air is requested) to the TRADOC OSJA for review at least 15 calendar days prior to the travel date. After review, the TRADOC OSJA will forward the ITA request package through the CGAO (Staff Actions Division) for DCG/CoS approval. The ITA package will contain:

- (1) TRADOC Form 5 (with a coordination line for TRADOC G-3/5/7, if applicable, and OSJA to concur/nonconcur).
- (2) ITA request memorandum signed by the funding budget analyst and spouse's sponsor.
- (3) Legal review from the requesting organization's servicing legal advisor.
- (4) Spouse agenda.

LETTERHEAD OF REQUESTING OFFICE

OFFICE SYMBOL DATE

MEMORANDUM THRU (Enter the organization's servicing legal office)

FOR (ENTER THE SECTION RESPONSIBLE FOR ISSUING ITA)

SUBJECT: Invitational Travel Authorization (ITA) Request

1. Request publishing of ITA for the below individual:

- a. Name/title or position:
- b. Mailing address:
- c. Proceed date:
- d. Itinerary: 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:
- i. Purpose of travel:
- j. Estimated cost:
Per Diem: - \$0-
Travel: - \$0
- k. Fund cite: (if applicable; if DTS annotate DTS Line of Accounting)

(signature required even if cost is zero \$.)
Budget Analyst

2. Justification for travel:

- a.
- b. Secure Video Teleconference or other means of Web-based communication are not sufficient to accomplish travel objectives because A DETAILED JUSTIFICATION IS REQUIRED TO EXPLAIN WHY OTHER MEANS OF COMMUNICATION ARE NOT ACCEPTABLE.

Encls _____
Signature Block of
Approving Official

Figure 7-1. ITA request memorandum

LETTERHEAD OF REQUESTING OFFICE

OFFICE SYMBOL DATE

MEMORANDUM THRU TRADOC STAFF JUDGE ADVOCATE
FOR (ENTER THE SECTION RESPONSIBLE FOR ISSUING ITA)

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

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

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

3. Request publishing of ITA 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: name and phone number
- h. Modes of travel for entire visit:
- i. Purpose of travel:
 - (1)
 - (2) Individual meets the eligibility requirements for Invitational Travel Authorization found in JFTR, Appendix E, paragraph A, and is NOT a non-appropriated funds official (or employee traveling on non-appropriated fund business), a contractor or contractor employee, a Federal employee (unless traveling in a leave status), or uniformed service member.

(a) Estimated cost:
Per diem: - \$0 (may not be applicable)
Travel: - \$0

Fund cite: (if applicable; if DTS annotate DTS Line of Accounting)

(signature required even if cost is zero \$)
Budget Analyst

Figure 7-2. Accompanying spouse travel request memorandum

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

4. Justification for travel:

a.

b. Secure Video Teleconference or other means of Web-based communication are not sufficient to accomplish travel objectives because A DETAILED JUSTIFICATION IS REQUIRED TO EXPLAIN WHY OTHER MEANS OF COMMUNICATION ARE NOT ACCEPTABLE.

THE SPONSOR MUST SIGN THIS REQUEST FOR SPOUSE ACCOMPANIED TRAVEL

Encls _____
Sponsor's signature block

2

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

7-4. Publication of the ITA

After the ITA is approved, the requesting organization will process the ITA in the Defense Travel System (DTS).

- a. Routing lists within DTS will be set up IAW local procedures.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Chapter 8

TRADOC Calendars

8-1. TRADOC Enterprise Calendar (TEC)

The TEC is a Web-based calendar that provides information on key events affecting organizations in TRADOC. It is designed to keep the command informed of key events and to provide a leadership tool to prevent scheduling conflicts.

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

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

8-2. TRADOC Master Planning Calendar (TMPC)

The TMPC is a calendar created at HQ TRADOC based on selected input from users in the field. The calendar features key events that impact multiple TRADOC entities, or are of high visibility or importance. FRAGO 9 to OPORD 11-004 (27 APR 11) details that the TMPC was modified to better align with the TCP 11-12, and the Army Campaign Plan calendar. Tab B to Appendix 9 to TCP 11-12 details the updated color-coding and provides example events.

a. The TMPC is accessible with a CAC. It is published each Wednesday and reflects all changes, additions, and deletions posted to the TEC from the previous week. The TMPC is a rolling 24-month calendar. Detailed information on individual events is available by accessing that specific event on the TEC. Calendar events are categorized as follows:

(1) Tiers 1 and 3. Senior leaders of DA enterprise boards. Purpose: Army enterprise-level leaders discuss Army's critical strategic issues. Examples: Army Enterprise Board, ARFORGEN Synchronization Board, Human Capital Enterprise Board, Readiness Core Enterprise Board, Material Core Enterprise Board, services and infrastructure core enterprise.

(2) Tier 2. HQDA forums (includes DA-sponsored events requiring TRADOC input/attendance/interest). Purpose: DA-level Army Campaign Plan synchronization. Examples: ACP, ASM, SRU, AR2B, SVTC, BRAC, TGOS, ATLD, FD/FM.

(3) Tier 4. TRADOC Internal Senior Leader Forums. Purpose: execution and synchronization of the TRADOC Campaign Plan. Examples: Quarterly Futures Review, Prepare the Army, Initial Military Training, Operational Environment, Knowledge Management, Large Group Staff Call, Senior Resource Committee, TRADOC Senior Leader Conference, Protection, Executive Safety, Accreditation trends and issues, dashboard, and reports. Only Tier 4 events are further detailed in Appendix 10 to Annex C to TCP 11-12.

(4) Tier 5. TRADOC internal TCP planning forums and TRADOC-sponsored events. Purpose: planning, staff synchronization and staff assistance required for TCP development and execution. G-3/5/7 Synchronization Meeting, Staff Officer Orientation Briefing, Planners Conference, C-DOT, continuity of operation exercise, OE/OPFOR Conf, Army Learning Summit, staff assistance.

(5) Association Events. Example: AUSA conferences.

(6) MSO and/or CoE-Sponsored Events. Examples: Fires seminar, maneuver conference, Maneuver Support Center of Excellence change of responsibility.

(7) Exercises/Simulations. Examples: Empire Challenge, Unified Quest

(8) Special Events: Retirement ceremonies, TRADOC Organization Day.

(9) Other. Examples: Joint Forces Command Pinnacle course, the Hampton Regatta.

8-3. Instructions on accessing and inputting to the TEC and the TMPC

a. TEC.

(1) Calendar viewing. A CAC is required to open the TEC.

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

b. TMPC.

(1) Calendar viewing. A CAC is required to open the TMPC.

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

8-4. Calendar management

The TEC and TMPC are managed by the G-33.

Appendix A References

Section I Required Publications

ARs, DA pamphlets, and DA forms are available at <http://www.apd.army.mil>. TRADOC publications and forms are available at <http://www.tradoc.army.mil/publications.htm>.

AR 25-50
Preparing and Managing Correspondence

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

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

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

Section II Related Publications

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

AR 1-20
Legislative Liaison

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

AR 20-1
Inspector General Activities and Procedures

AR 25-1
Army Knowledge Management and Information Technology

AR 25-30
The Army Publishing Program

AR 25-51
Official Mail and Distribution Management

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

TRADOC Reg 1-11

AR 25-400-2

The Army Records Information Management System (ARIMS)

AR 55-46

Travel Overseas

AR 335-15

Management Information Control System

AR 340-21

The Army Privacy Program

AR 380-5

Department of the Army Information Security Program

AR 600-8-22

Military Awards

AR 600-8-105

Military Orders

AR 672-20

Incentive Awards

DA Memo 25-50

Staff Action Process and Correspondence Policies

DA Pam 672-20

Incentive Awards Handbook

DOD 4500.54-G

Department of Defense Foreign Clearance Guide (available at <https://www.fcg.pentagon.mil>)

JFTR

Joint Federal Travel Regulations

JTR

Joint Travel Regulation

TRADOC Memo 1-2

Courier Service Between Headquarters, U.S. Army Training and Doctrine Command and Headquarters, Department of the Army

TRADOC Regulation 5-14

Acquisition Management and Oversight.

TRADOC Regulation 10-5-2
Futures Center

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

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

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

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

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

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

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

TRADOC Regulation 37-2
Temporary Duty Travel Policies and Procedures

TRADOC Regulation 95-5
Flight Operations

TRADOC Supplement 1 to AR 600-8-2
Military Awards

TRADOC Supplement 1 to AR 672-20
Incentive Awards

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

Section III Prescribed Forms and Label

TRADOC Form 5-E
Transmittal, Action and Control

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

Section IV Referenced Forms

DA Form 3964
Classified Document Accountability Record

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

DD Form 2501
Courier Authorization

DD Form 1351-2
Travel Voucher

DD Form 2501
Courier Authorization

HQDA Form 5
Army Staffing Form

Appendix B Helpful Hints for Preparing Correspondence and Processing Actions

B-1. Introduction

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

B-2. Reference materials

Use the following references to assist in preparing correspondence:

- a. AR 25-50 (http://www.apd.army.mil/pdf/r25_50.pdf).
- b. DA Pam 25-50, paragraph 4a references the AAO database (<https://www.rmda.army.mil/abbreviation/MainMenu.asp>).

- c. The TRADOC Senior Leader Contact List (posted on the CGAO Web site under Telephone Directories/Rosters link).
- d. United States Government Printing Office Style Manual
- e. Staff guidance folder at the Staff Action Officer Resource Center.

B-3. Processing staff actions

- a. PURPOSE statements on TRADOC Form 5 will state action to take in one concise sentence (for example, "CG, DCG/CoS, or DCoS (as appropriate) sign memo (TAB A) to MG Brown nonconcurring with his proposed changes to FM XX-X (TAB B)").
- b. Ensure the CATS control number is in block 1 on the TRADOC Form 5. If the action is generated by the proponent, the CGAC will assign an ES control number for tracking purposes. If AO questions appropriate signature/approval authority of ES action, precoordinate with CGAO and/or ACoS prior to processing action.
- c. Tab A is document requiring signature or action. When forwarding more than one action for approval/signature, use "TABs A-1, A-2, A-3," etc.
- d. Tab B is the document that generated the action. Additional background information follows, using succeeding tabs in order mentioned in TRADOC Form 5.
- e. Always use editing and 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 CGAO for Command Group signature.
- f. Ensure CGAO SACO is aware of time-sensitive actions to assist in expediting through the Command Group. If action requires a red folder, the reason must be included on the TRADOC Form 5.
- g. AOs will provide the designated organization POC an electronic copy of all documents to upload IAW appendix I. The POC will make administrative corrections, but will not change the content of the documents. SACOs will retrieve the documents, make administrative corrections, but will not change the content.
- h. If CGAO or the Command Group returns action for corrections, ALWAYS include marked-up copy with returned package.
- i. Hand-carry/upload to Staff Actions Library actions returned for corrections to CGAC or the appropriate SACO. Actions are logged out on CATS and must be logged back in to maintain tracking system.
- j. Use Arial font, size 12 for all correspondence, e.g., memorandums, information papers, EXSUMS, point papers, star notes, and position papers,.

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

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

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

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

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

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

B-4. Coordination

a. Show name, title, and date on TRADOC Form 5 in block 9 of the TR Form 5.

b. The DCS, deputy, or organization command group must sign nonconcurrences and considerations of nonconcurrency.

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

d. Coordinate all conferences/major briefings with TRADOC DCS, G-3/5/7 (G-33 Current Operations) to avoid conflicts with the TEC.

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

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

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

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

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

B-5. Helpful hints

The following hints apply to all correspondence:

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

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

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

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

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

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

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

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

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

B-6. Tips for specific types of correspondence

The following guidelines are provided for specific types of correspondence.

a. Letters.

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

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

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

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

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

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

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

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

(9) In signature block, use upper and lowercase letters for name, as shown in figure 2-5.

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

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

b. Memorandums.

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

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

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

(4) When referencing other correspondence, follow guidance in AR 25-50, paragraph 1-31 (provide type of correspondence, organization of origin, office symbol, date, and subject). For example, Memorandum, HQ TRADOC, ATCS-X, 12 Dec 05, subject: New Staff Procedures.

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

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



REPLY TO
ATTENTION OF

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

OFFICE SYMBOL

MEMORANDUM FOR SEE DISTRIBUTION

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

1. Use the *SEE DISTRIBUTION* format when more than five addresses are required.
2. When spacing does not allow listing distribution on the first page, the complete distribution list may be typed on the second page.
3. Type the word *DISTRIBUTION* on the second line below the last line of the signature block. On the third line below the last line of the signature block, type *see next page* enclosed in parenthesis.
 - a. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX.
 - b. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX.
 - (1) XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX.
 - (2) XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX.
4. On page 2, on the third line under the subject line, type *DISTRIBUTION:* and list the addresses starting on the fourth line.

AUTHORITY LINE:

Encl

JANE D. SMITH
MAJ, SC
Chief, Operations Division

DISTRIBUTION:
(see next page)

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

OFFICE SYMBOL

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

DISTRIBUTION:

DCS, G-1 (DAPE-ZA)

DCS, G-2 (DAMI-ZA)

DCS, G-3/5/7 (DAMO-ZA)

DCS, G-4 (DALO-ZA)

US ARMY MATERIEL COMMAND

US ARMY FORCES COMMAND

Figure B-2. DISTRIBUTION: (see next page) (cont.)

c. DMS/AMHS messages.

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

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

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

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

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

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

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

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

(9) Upload the completed message to the TKE Actions Library IAW appendix I. Name the file the same as the DMS/AMHS subject.

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

Appendix C

Procedures and Formats for RAs

C-1. Procedures for RAs

a. The OCG or DCG determines RA requirements and forwards them to the CGAO SACO. When a proponent is not identified, the CGAO SACO assigns an office of primary responsibility as the HQ TRADOC staff lead. The SACO assigns CATS control numbers and notifies designated action offices via encrypted e-mail.

b. The lead coordinates directly with external agencies and other staff offices to obtain pertinent topics and information for timely completion of RA products. For events that a member of the Command Group or external agencies schedule, the lead consolidates all input and assessments into the final RA product. No later than **2 duty days** prior to event, the lead must e-mail reply with the name of the AO to all concerned. Suspense for submission of the RA to CGAO is no later than **4 duty days** prior to the event. Pending GO/SES approval or receipt of information from external agencies must not delay submission; however, if the GO is TDY, the appropriate official should approve the RA prior to submission to CGAO. The partial submission is vital to alert all concerned of the status and to initiate review and analysis. Include a "placeholder" page in partial submissions to identify what is pending, from whom, and date of expected completion. At a minimum, insure executive overview is submitted on time. Upon completion of delayed items, add to the initial partial submission as an update, rather than reconstructing an entirely new submission.

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

d. When the CG uses desktop VTC or VTC facilities, the AO will provide OCG a seating chart. Include personnel in the VTC room with the CG, as well as the VTC participants (first name, last name, and position). The AO is responsible for notifying all attendees of cancellations or changes in times and/or locations as they occur.

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

C-2. Format

a. Composition.

(1) CG Readaheds. All CG events require four copies of the RA tabbed and secured with a binder clip--the original for the CG, and one copy each for the DCG/CoS, DCoS, and CPG. Package and tab the three additional copies the same as the original, with a copy of the TRADOC Form 5 on the front. Provide all electrons for the RA. Refer to table C-1, below, for configuration of RAs. It is not necessary to begin tabs with "A," but keep tabs in alphabetical/numerical sequence. Top document is always the TRADOC Form 5.

(2) DCG Readaheds. All DCG RAs require two copies of the RA tabbed and secured with a binder clip. Provide RA to Staff Actions Division for processing and delivery to the DCG/CoS office.

(3) DCoS Readaheds. All DCoS RAs require one copy of the RA tabbed and secured with a binder clip. Provide RA to Staff Actions Division for processing and delivery to the DCoS office.

Table C-1, Configuration of RAs

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

b. TRADOC Form 5. Forward all RAs to the CGAO with a one-page TRADOC Form 5, as outlined below. The following paragraphs on the TRADOC Form 5 will include

minimal information. Include expanded details in the executive overview. Subject line on TRADOC Form 5 should read exactly like the subject of the actual tasking.

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

(2) **DISCUSSION.** Include your key discussion points.

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

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

RA GUIDANCE

TRADOC FORM 5 : What is the purpose of the CG's participation in the event, visit, or brief? The answers should address the following:

- Who is participating?
- What is TRADOC there to accomplish?
- When will the event take place?
- Where will it occur?
- Why is it important to the Nation, the Army, and TRADOC to do this and why now? (Specifics)

BLUF: Is this RA going to prepare the CG for the event? Will this RA ensure the CG is expert at representing TRADOC's position?

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

Figure C-1. RA guidance

| | |
|--|---------|
| <p>Visit of General (R) Moring 29-30 April 2012</p> <p>TABLE OF CONTENTS</p> | |
| Executive Overview | TAB A |
| Briefing | TAB B |
| Point Paper on Program Details | TAB C |
| Itinerary | TAB D |
| Participants/POCs | TAB E |
| Other Items of Interest | TAB F |
| Social Schedule | TAB G |
| Background Material | TAB H |
| General (R) Moring Biography | TAB H-1 |
| AAR from Office Call (General Wilson and General Lewis) | TAB H-2 |
| Logistical Requirements | TAB I |
| Work Plan | TAB J |

Figure C-2. RA table of contents

C-3. Assembling RAs

Description of tabs.

- a. **Executive overview (Required for all readaheads).** This is the most important part of the RA. In one to two pages, succinctly frame all primary issues and include any joint perspective and a strategic analysis. State the issue or topic and identify each stakeholder, his/her position, and both the implications of his/her position and any hidden agendas for engaging the CG. For each issue or topic, provide the response options available to the CG and the recommended TRADOC position, based on the detailed staff assessment, joint perspective, and strategic analysis. (Fig C-3 is an example of an executive overview.)
- b. **Briefing(s)** (in presentation/agenda timetable sequence). Print paper slides on one side, in color, if the use of color differentiates data. Ensure briefing slides include page numbers.
- c. **Point and/or information paper(s).** Include point and/or information papers only when additional details have a distinct bearing on the purpose of the event involving the CG. **Do not duplicate information contained in the executive overview or primary brief;** include only papers directly relevant to the purpose of the brief. Do not provide the CG with too much information. Use standard formats for discussion, information, point, or position papers, as appropriate for the topic(s) and event. Use decision memorandums only in exceptional cases.
- d. **Itinerary.** The itinerary provides the when, where, and what in sequential order, and cross-references these events with details found at various tabs in the RA book (see example at fig C-4). Provide full itinerary for very important persons (VIPs) while in the company of the CG. Provide short comments on persons the VIP is scheduled to meet after the CG and why. This information could impact the CG's discussion with the VIP.
- e. **Participants/POCs.** List attendees, including all from TRADOC, in descending order, senior official at top. Include grade, name, title, and organization. At the bottom, list POCs with primary responsibility for actions during the event. Include office telephone numbers to reach individuals during the event (including cellular and pager numbers). (See example at fig C-5.) E-mail the list to appropriate Command Group office no later than 2 duty days prior to event and provide updates on participants as they occur. If the CG is attending, include a seating chart diagram of the meeting room (see fig 4-1 and fig 4-2). Do not provide the CG biographies of TRADOC personnel or other GOs that the CG knows or works with routinely.
- f. **Other items of interest.** In point paper format, include topics not on the itinerary, but which may occur should the opportunity present itself. Include tentative office calls and anticipated sidebar discussions. This tab should also include a list and biographical sketches of key attendees, any formal remarks, and the seating arrangement for the CG's table.
- g. **Social schedule.** Include as required. If no social event, omit this tab.

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

**Executive Overview
Visit of General (R) Moring
30-31 January 2013**

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

2. **BACKGROUND.** This CSA-invited visit results from a meeting between French Army Chief of Staff and CSA on 18 April 2010 in the Pentagon. General (R) Moring led the French Army's transformation efforts. The visit is to share lessons learned. See Tab H.

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

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

b. Endorse the utility of maintaining the full-time liaison and exchange personnel within the French and U.S. Armies. Highlight the key role that the French Army Senior Liaison to TRADOC and the TRADOC Senior Liaison to French Army play in keeping TRADOC and CDES synchronized.

4. **STRATEGIC ANALYSIS.**

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

b. The French/U.S. Army Staff Talks program, in existence since 1979, has conducted 27 Staff Talks to date. Staff Talks focus on doctrine, training and education, materiel and equipment, and logistics. These areas facilitate an ongoing dialogue on transformation-related topics. The theme for the 2009 Staff Talks is "Future Warfighting in Military Operations in Urban Terrain by a Digitized and Reinforced Combined Arms Brigade."

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

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

b. Since 2007, when the French military began its latest round of dramatic transformation, the French Army has shrunk by almost half (Tab C).

Figure C-3. RA executive overview

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

7. **DATE/TIME/PLACE.** Arrival 30 January 2008 at 1300, CG office call 1330-1430, DCG/CoS office call 1430-1445, roundtable discussion in the Command Conference Room 1500-1700, and CG-hosted dinner in the evening. Departure after a no-host breakfast on 31 January 2008 at 0900. See Tab D for detailed itinerary, and Tab G for social schedule.

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

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

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

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

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

| ITINERARY | | | |
|---|--|------------------------------|------------|
| IPR - THE MARS COLONY MISSION 2013 | | | |
| DATE/TIME | WHAT | WHERE | TAB |
| 19 Jan | | | |
| 0500-0630 | C21 Flight | LAFB to Kennedy Space Center | |
| 0700-0745 | Breakfast | KSC HQ Bldg Dining Facility | |
| 0800-0930 | NASA Project Status Overview | HQ Bldg, Rm 21 | |
| 0945-1030 | OMB Budget Brief | HQ Bldg, Rm 21 | |
| 1045-1145 | DOD Overview | HQ Bldg, Rm 21 | |
| 1200-1300 | Working Lunch | HQ Bldg, Rm 46 | |
| 1300-1330 | USAF Astronaut Selection Status | HQ Bldg, Rm 35 | |
| 1330-1430 | Army Corps of Engineers Martian Facility Model | KSC Vehicle Assembly Bldg | |
| 1445-1615 | DOTMLPF Model Application | VTC Facility | |
| 1615-1700(T) | Office Call with CINCSPACE | HQ Bldg, Rm 7 | |
| 1800-0100 | Social/Dinner | KSC Club | G |

Figure C-4. RA itinerary

**CG Trip
Vint Hill Farms Station
3 Nov 12**

PARTICIPANTS

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

| | | |
|-----------|------------|--------|
| GEN XXXXX | Commander | TRADOC |
| LTG XXXXX | DCG, ARCIC | TRADOC |
| BG XXXXX | Dep Comdt | CGSC |

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

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

3. Video Teleconference - Integrating New Operational Environment into Training and Leader Development (4 Nov/1230-1345)

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

POCs/Phone Numbers

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

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

Figure C-5. RA participants/POCs

Appendix D
TRADOC Form 5

D-1. Completing TRADOC Form 5

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

D-2. Assembling the action

See figure 3-1 for assembling the staff action in the proper order.

()

| | | | | | | |
|---|-------------------------------------|--|-------------------------|---------------|-----------------|----------------------|
| 8. LEAD AGENCY STAFF COORDINATION | | | CATS CONTROL NUMBER: | | | |
| TITLE | INITIAL | TYPE OR PRINT NAME | DATE (YYYYMMDD) | | | |
| Ch | | Ms. Antonio | 20100913 | | | |
| Dir | | Mr. Farwell | 20100913 | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| PRINCIPAL | | Mr. Roger Cummings, DCS G-8 | 20100914 | | | |
| ACTION OFFICER <i>(Name/Title/Phone Number/E-mail)</i> | | Ms. Karen Smith/Senior Analyst/x3241/karen.smith@us.army.mil | | | | |
| FILE LOCATION: N/A | | | | | | |
| SACO's NAME <i>(Name/Phone Number/E-mail)</i> | | | | | | |
| RECOMMENDATION FOR COORDINATING STAFF: Mr. Cummings reviewed action on 3 Mar 10 and concurs. | | | | | | |
| 9. STAFF COORDINATION | | | | | | |
| CONCUR | NON-CONCUR | AGENCY | NAME (TITLE, LAST NAME) | PHONE | DATE (YYYYMMDD) | REMARKS |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | CAC | Mr. Orland | (913)684-1386 | 20100901 | See comments TAB B |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | CDG, IMTCoE | Mr. Roy | 3762 | 20120213 | See comments TAB C |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | ARCIC | Mr. Brown | 2023 | 20100912 | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | CASCOM | Mrs. Hanks | (804)765-0577 | 20100901 | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | G-2 | Mr. McFerris | 4103 | 20100902 | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | G-3/5/7 | LTC Patton | 5769 | 20100902 | With comments, TAB D |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | G-1/4 | Ms. Harwell | 2234 | 20100901 | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | G-6 | LTC Bell | 2310 | 20100905 | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| 10. REMARKS BY TRADOC CGAO: <input type="checkbox"/> RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION | | | | | | |
| | | | | | | |

()

Figure D-2. Sample TRADOC Form 5. Page 2

| INSTRUCTIONS |
|--|
| <p>PARENTHESES AT TOP OF FORM: Fill in classification (UNCLASSIFIED, FOUO, etc.)</p> <p>Block 1. CATS CONTROL NUMBER: If the action has been assigned a tasker number by the G-33 Tasking Office or CGAO Staff Actions Division, enter that number.</p> <p>Block 2. TODAY'S DATE: Enter today's date. Use the Army standard date format: YYYYMMDD. Example: 20120212.</p> <p>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.</p> <p>Block 4. OFFICE SYMBOL: Enter the office symbol of the agency responsible for the action. Example: (ATFC-Y).</p> <p>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.</p> <p>Block 6. ROUTING: (TRADOC CGAO use only.) The TRADOC CGAO will complete this block.</p> <p>Block 7. EXECUTIVE SUMMARY: Key Points: The key points are the pieces of salient information that the CG, DCG/CoS, and/or DCoS need to know about this action. Write them at senior Army leaders' level. These are the points your principal or deputy want to convey to the CG, DCG/CoS, and/or DCoS. Each key point area allows you two lines (164 characters/spaces) to express your thought with a maximum of three key points. Ref: List all references, e.g., CSA tasker; meeting; e-mail; etc. If none, state N/A. Encl: List all enclosures and tabs. Explain what is included within the packet. If none, state N/A. For example: Enclosures: TAB A: Memorandum for CG's signature. TAB B: CSA tasking, and so on. If the packet has more than four tabs list them linearly separated by commas or semicolons within the "TAB A" and "TAB B" designated spaces. If necessary, continue in the undesignated space within the Encl section. 1. Purpose: Provide a short, clear statement describing the purpose (e.g., to obtain the CG's signature on the memorandum at TAB A). 2. Discussion: Summarize the information and provide a current status, if applicable. Why are you telling this to the CG, DCG/CoS, and/or DCoS? What should the CG, DCG/CoS, and/or DCoS know and discuss? Describe the task, its origin, issue, and requirements. Provide a fact-filled background and comment. This discussion should tell the story on an action without prompting questions. The final approval authority should fully understand why the action is necessary. Be concise. 3. Recommendation: Provide a brief statement of the desired action by the final approving authority and explain why it is the best option. For example: CG approve action and sign the memorandum at TAB A. Block 7 allows the CG, DCG/CoS, and/or DCoS to approve, disapprove, and/or comment on the action.</p> <p>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 CGAO for CG, DCG/CoS, and/or DCoS review. ACTION OFFICER (Name/Title/Phone Number/E-Mail): Enter the responsible person's name, rank and/or position title, office phone number, and e-mail address. This information is especially important to ensure any questions can be quickly directed to the appropriate POC. The action officer will electronically sign. FILE LOCATION: N/A SACO'S NAME (Name/Phone Number/E-Mail): Enter the SACO's name, office phone number, and e-mail address. The SACO will electronically sign. RECOMMENDATION FOR COORDINATING STAFF: This block allows for recommendations to the coordinating staff. For example, DCS, G-3/5/7 approve memorandum at TAB A by electronically initialing block 8.</p> <p>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.</p> <p>Block 10. REMARKS BY TRADOC CGAO: (TRADOC CGAO use only.) The TRADOC CGAO will complete this block. RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION: CGAO will use this block to identify all actions being returned for additional information.</p> |
| <p>TRADOC FORM 5-E, JAN 2012 Page 3 of 3 TRADOC PE v3.00</p> |

Figure D-3. Sample TRADOC Form 5. Page 3

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

E-1. Mandatory lines of address

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

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

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

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

| | |
|------------------------|---------------------------|
| OFFICE NAME LINE | OFFICE OF THE DCS G357 |
| ATTENTION LINE | ATTN ATTG ZA |
| DOD ACTIVITY NAME LINE | TRADOC |
| DELIVERY ADDRESS LINE | 950 JEFFERSON AVENUE |
| CITY STATE ZIP CODE+4 | FORT EUSTIS VA 23604-5711 |

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

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

| | |
|-----------------------------|---------------------------|
| DEPARTMENT OF THE ARMY | DEPARTMENT OF THE ARMY |
| OFFICE NAME LINE | OFFICE OF THE DCS G6 |
| ATTENTION LINE | ATTN ATIM II |
| DOD ACTIVITY NAME LINE | TRADOC |
| DELIVERY ADDRESS LINE | 661 SHEPPARD PLACE |
| CITY, STATE, ZIP CODE+4 | FORT EUSTIS VA 23604-5733 |
| OFFICIAL BUSINESS ACCOUNT # | OFFICIAL BUSINESS 40 06 |

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

E-2. Optional lines of address

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

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

Figure E-4. Optional and mandatory lines of address

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

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

**Appendix F
Schedule of Recurring Events**

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

Table F, Schedule of recurring events.

| Other HQ TRADOC Recurring Events | | | | | | |
|----------------------------------|--|---------|-----------------------|-----------------------|-----------------------|-----------------------|
| | Event | Date | 2012 | 2013 | 2014 | 2015 |
| 1 | Army Emergency Relief * | May | 733 rd MSG | 733 rd MSG | 733 rd MSG | 733 rd MSG |
| 2 | HQ TRADOC Organization Day (Responsibility rotates between DCS, G-1/4; DCS, G-3/5/7; DCS, G-8; and ARCIC.) | Jun | DCS, G-1/4 | DCS, G-2 | DCS, G-6 | DCS, G-8 |
| 3 | Savings Bond Campaign * | Jun | 733 rd MSG | 733 rd MSG | 733 rd MSG | 733 rd MSG |
| 4 | Noncommissioned officer/Soldier of the Year Competition | Aug | DCS, G-3/5/7 | DCS, G-3/5/7 | DCS, G-3/5/7 | DCS, G-3/5/7 |
| 5 | Combined Federal Campaign **NOTE: <i>When TRADOC CG serves as Honorary Chairman, DCS, G-1/4 has oversight and intraservice coordination responsibilities.</i> | Sep-Nov | 733 rd MSG | 733 rd MSG | 733 rd MSG | 733 rd MSG |

*DCS, G-8 is the HQ TRADOC proponent for Garrison-hosted events 1 and 3.
**DCS, G-1/4 is the HQ TRADOC proponent for Garrison-hosted event 5.

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

G-1. Use of HQDA Form 5

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

G-2. Completing HQDA Form 5

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

G-3. Assembling the action

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

| | | | | |
|---|--|---|-------------------------------|--------------------------------|
| ARMY STAFFING FORM <small>For use of this form, see DA Memo 25-52; the proponent agency is AASA.</small> | | 1. TRACKING NUMBER (HQDA ECC #) | 2. TODAY'S DATE (YYYYMMDD) | 3. SUSPENSE DATE (YYYYMMDD) |
| 4. OFFICE SYMBOL Office symbol of originator/author/SME | | 5. SUBJECT Must match subject line on the tasker (upper and lower case, unbolded.) | | |
| 6. ROUTING: (ECC USE ONLY) Initial Date | | ECC POC (Rank, Name, Phone) DIR, ECC | | |
| SA | | COMMENTS: (Comments from senior leaders of the Department of the Army only.) | | |
| CSA | | | | |
| USA | | | | |
| VCSA | | | | |
| AASA | | | | |
| DAS | | | | |
| SMA | | | | |
| DUSA | | | | |
| VDAS | | | | |
| 7. EXECUTIVE SUMMARY / ACTION MEMORANDUM | | | | |
| Key Points | | | | |
| <ul style="list-style-type: none"> ■ Place the most important points to the senior leaders of the Department of the Army here. ■ Maximum one sentence or two lines per bullet. ■ | | | | |
| <p>Ref: Provide details of what generated this action (ECC tasker, message, or e-mail, memorandum, or meeting) that initiated the requirement.</p> <p>Encl: TAB A: The document for signature or the first piece of support documentation. TAB B: The next piece of supporting documentation (ECC tasker or other backup documents). TAB C: Continue tabs as needed.</p> <p>1. Purpose: Provide a brief statement as to why the action officer is staffing this action, recommendation or information.</p> <p>2. Discussion:</p> <p>a. Summarize or amplify the information provided in the Key Points above. Provide current status of issue (if applicable). The discussion should tell the "story" on an action without "begging questions." The final authority should fully understand why the action is necessary.</p> <p>b. If this discussion block offers sufficient space to convey the information, present as an EXSUM. There is no continuation page for this form. If more space is needed, in lieu of an EXSUM, prepare a one-page Action/Info Memorandum or an Info/Discussion Paper at TAB A and use this space to describe the details or highlights of the document. Action officers should make every attempt to limit all information to one page. DO NOT COPY FROM THE DOCUMENT AT TAB A.</p> <p>3. Recommendation: If for information, state "Information only." If a decision is required, identify the final approving authority and the desired action. For example, "CSA sign memorandum at TAB A."</p> | | | | |
| <p style="text-align: center;">APPROVED DISAPPROVED NOTED SEE ME COMMENT</p> | | | | |
| HQDA FORM 5, JAN 2011 | | PREVIOUS EDITIONS ARE OBSOLETE. Page 1 of 3 APD PE v2.02 | | |

Figure G-1. Sample HQDA Form 5

()

| | | | | | | |
|---|--------------------------|---|-------------------------|---|--------------------|---------|
| 8. LEAD AGENCY STAFF COORDINATION | | TRACKING NUMBER: | HQDA ECC # | | | |
| TITLE | INITIAL | TYPE OR PRINT NAM | DATE (YYYYMMDD) | | | |
| | | Branch Chief, LTC/GS-14 | | | | |
| | | Division Chief, COL/GS-15 | | | | |
| | | The Director, BG/SES | | | | |
| | | The Deputy, MG/SES | | | | |
| PRINCIPAL | | GO Principal, LTG/SES or DCG/CoS | | | | |
| ACTION OFFICER <i>(Name/Title/Phone Number/E-mail)</i> | | (name/title/phone #/e-mail of originator/SME) | | | | |
| FILE LOCATION: | | | | | | |
| SACO's NAME <i>(Name/Title/Phone Number/E-mail)</i> | | (HQ TRADOC SGS or G-3 Tasking SACO) | | | | |
| RECOMMENDATION FOR STAFF PRINCIPAL: This block allows for recommendations to the staff principal, e.g., "G-3/5/7 approves this memorandum at TAB A by initialing Block 8." | | | | | | |
| 9. STAFF COORDINATION | | | | | | |
| CONCUR | NON- CONCUR | AGENC | NAME (TITLE, LAST NAME) | PHONE | DATE (YYYYMMDD) | REMARKS |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Office | LTC Action Officer | XXX-XXX | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Office | MAJ Action Officer | XXX-XXX | | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Office | CPT Action Officer | XXX-XXX | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | <input type="checkbox"/> | | | | | |
| 10. REMARKS BY ECC: | | | | <input type="checkbox"/> RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION | | |
| | | | | | | |

()

Figure G-2. Sample HQDA Form 5 (page 2)

| INSTRUCTIONS | |
|---|--|
| PARENTHESES AT TOP OF FORM: | |
| Parentheses at top of form: Fill in classification (UNCLASSIFIED, FOUO, etc.) If for the Executive Office Headquarters (EOH), a classification of FOUO will be used as a minimum. If using a classified SIPR system then can use (CONFIDENTIAL, SECRET) classification. | |
| Block 1. TRACKING NUMBER: | |
| a. If the action has been assigned a tracking number by ECC, enter that number. | |
| b. If the action has been assigned a tracking number by the activity Staff Action Control Office (SACO), enter that number along with the ECC tracking number (if applicable). | |
| Block 2. TODAY'S DATE: | |
| Enter today's date. The Army standard date format is YYYYMMDD. Example: 20071015. This allows for tracking system searches by a standard date. | |
| Block 3. SUSPENSE DATE: | |
| The format is YYYYMMDD. | |
| a. If the action is responding to an external suspense, enter the date of the assigned suspense. | |
| b. If the suspense date is established internally, enter that date. | |
| Block 4. OFFICE SYMBOL: | |
| Enter the office symbol of the agency responsible for the action. Example: (DAMO-FMP) | |
| Block 5. SUBJECT: | |
| Enter the primary subject line of the action. The subject on the HQDA Form 5 should match the subject used in the HQDA Tracking System (use upper/lower case, unbolded). | |
| Block 6. ROUTING: | |
| (ECC USE ONLY): The ECC POC will complete this block. | |
| Block 7. EXECUTIVE SUMMARY/ACTION MEMORANDUM: | |
| Key Points: The key points are the salient information that the EOH member needs to take away from the action and are written at the Senior Army Leaders' level. These are the key points your Principal or Deputy want to convey to the EOH members. Each key point area allows you essentially two lines to express your key point (164 spaces) with a maximum of three key points. | |
| Ref: List all references, e.g., OSD tasker, meeting, e-mail, etc. If none, state N/A. | |
| Encl: List all enclosures/TABs. Explain what is included within the packet. If none, state N/A (for example, Enclosures: TAB A: Memorandum for SecArmy signature. TAB B: DOD tasking and ECC tasking, and so on). | |
| 1. Purpose: Provide a short and clear statement of purpose (e.g., to obtain the SecArmy's signature on the memorandum at TAB A). | |
| 2. Discussion: Summarize the information and provide a current status if applicable. Why are you telling this to the EOH? What should the EOH know and discuss? Describe the task, origin of the action, issue and the requirement. Provide fact-filled background and comment. This discussion should tell the "story" on an action without "begging questions." The final approval authority should fully understand why this action is necessary. | |
| 3. Recommendation: Provide a brief statement defining the desired action by the final approval authority and explain why this is the best option (e.g., SecArmy approve action and sign the memorandum at TAB A.) Block 7 allows the EOH member to approve, disapprove, or comment on the action. | |
| Block 8. LEAD AGENCY STAFF COORDINATION (Lead Agency Use Only): | |
| These blocks are designated for the internal approval chain within a Staff. Possible entries could include Branch, Division, Director, and Deputy. The appropriate releasing authority should electronically sign and date the action once they have released/approved for forwarding to the next appropriate office for disposition. | |
| The Staff Principal will electronically sign and date. His or her electronic signature represents concurrence with the contents of the HQDA Form 5 and the final product to be submitted to ECC for EOH review. | |
| ACTION OFFICER (Name/Title/Phone Number/E-Mail): Enter the responsible action officer's name, rank and/or position title, office phone number and email address. This information is especially important to ensure any questions related to the action can be quickly directed to the appropriate point of contact, avoiding delay in processing the action. Action Officer will electronically sign. | |
| FILE LOCATION: It is important to be able to retrieve a file for corrections and annotations in the event that the originating action officer is not available. Enter the file path to reflect where the correspondence was saved on the server in order that an alternate POC may retrieve the file and make any necessary annotations. NOTE: This applies to unclassified documents only. | |
| SACO'S NAME (Name/Title/Phone Number/E-Mail): Enter the responsible SACO's name, rank and/or position title, office phone number and email address. This information is especially important to ensure any questions related to the action can be quickly directed to the appropriate POC, avoiding delay in processing the action. SACO will electronically sign. | |
| RECOMMENDATION FOR STAFF PRINCIPAL: This block allows for recommendations to the Staff Principal (for example, G-3/5/7 approves the memorandum at TAB A by electronically signing Block 8). | |
| Block 9. STAFF COORDINATION: | |
| When staffing an action for review and comment, include each office and POC information that the action is being staffed with and include instructions for the addressees to indicate their concurrence by checking the appropriate block and returning to the originator. If concurrence indicates "concur with comments," then include comments at appropriate tab. | |
| Block 10. REMARKS BY ECC (ECC use only): | |
| The ECC POC will complete this block. | |
| RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION: ECC will use this block to identify all packets being returned to the Staff for additional information requirements. | |

Figure G-3. Sample HQDA Form 5 (page 3)

Appendix H Public Distribution Lists

H-1. Command Group distribution lists

The Command Group Distribution Lists include frequently used distribution lists such as **Commanders/Commandants-TRADOC, Chiefs-TRADOC, XO-TRADOC, SGS-TRADOC** and **TRADOC Staff Principals**. These distribution lists are located on the global address list.

H-2. Guidance for using Command Group distribution lists

The **Commanders/Commandants-TRADOC** distribution list should be used only by GOs and SESs. The **Chiefs-TRADOC** distribution list should be used by assistant deputy chiefs of staff or their equivalents. The **SGS-TRADOC** and **XO-TRADOC** distribution lists may be used by anyone. Used together, these two lists are the best tools for distributing information to all of TRADOC.

Appendix I

Uploading Documents to TRADOC Knowledge Environment (TKE) Web site

I-1. Title TRADOC Form 5 and supporting documents

a. If a CATS number is assigned:

(1) Title the TRADOC Form 5 with the CATS number and Form 5 (for example IN509059 Form 5).

(2) Title each supporting document as "TAB" and labeled respectively (for example TAB A One Time Review of SSN Use and Justification).

b. If a CATS number is not assigned:

(1) Title the TRADOC Form 5 as Form 5 and the subject (for example Form 5 One Time Review of SSN Use and Justification).

(2) Title each support document as "TAB" and the subject (for example TAB A One Time Review of SSN Use and Justification Memorandum).

c. The first tab "TAB A" is always the original document requiring signature (or approval) IAW paragraph 3-2a.

I-2. Upload TRADOC Form 5 and supporting documents

Designated organization POCs will electronically upload the digitally signed TRADOC Form 5 and supporting documents to the TKE Actions Library (See fig I-1 for screenshots of the actions library.) Notify CGAO at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil that documents are uploaded.

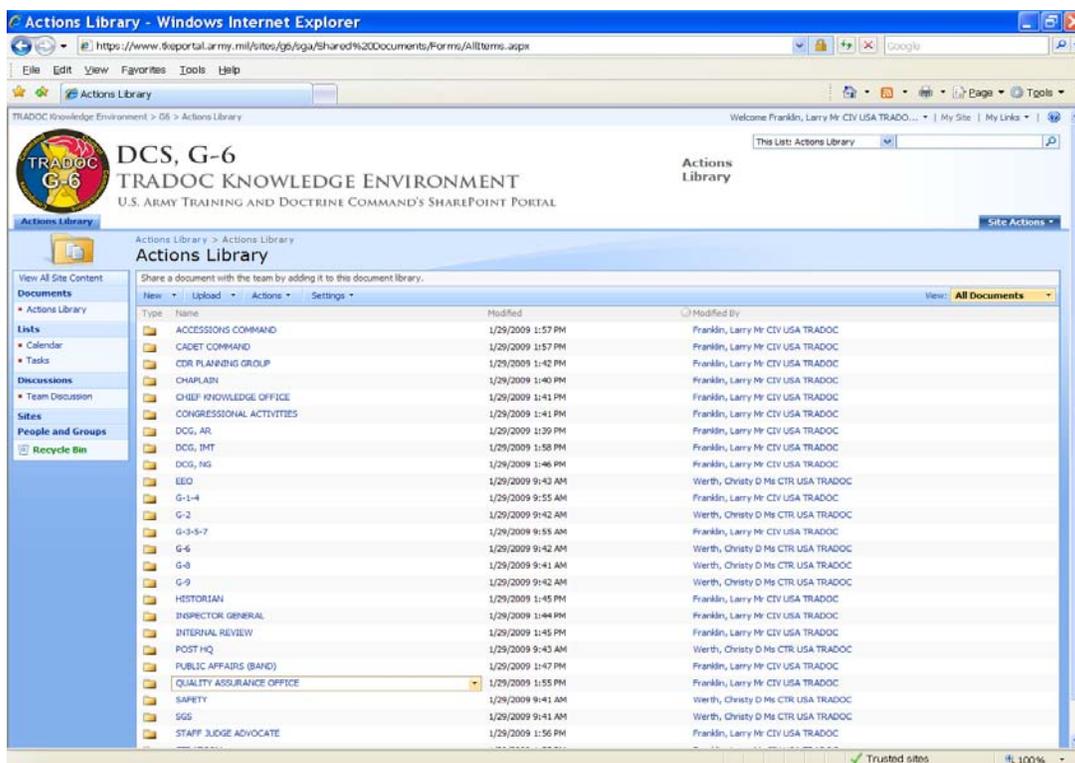


Figure I-1. Actions library

I-3. Personally Identifiable Information (PII).

Documents with PII will be placed in the PII Items List. This particular list is set up with restricted permissions in order to safeguard PII. Only individuals with the need to know can view all documents in the PII Items List. Those who upload documents in this list will only be able to see the specific documents they upload. Detailed instructions to upload to the PII list can be found under Announcements at: <https://cac.tkeportal.army.mil/sites/al/default.aspx>

I-4. Organization folders

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

- a. Click organization title in order to access organization actions library (see fig I-2).
- b. Add an action folder in order to keep tasking documents together (see para I-3).

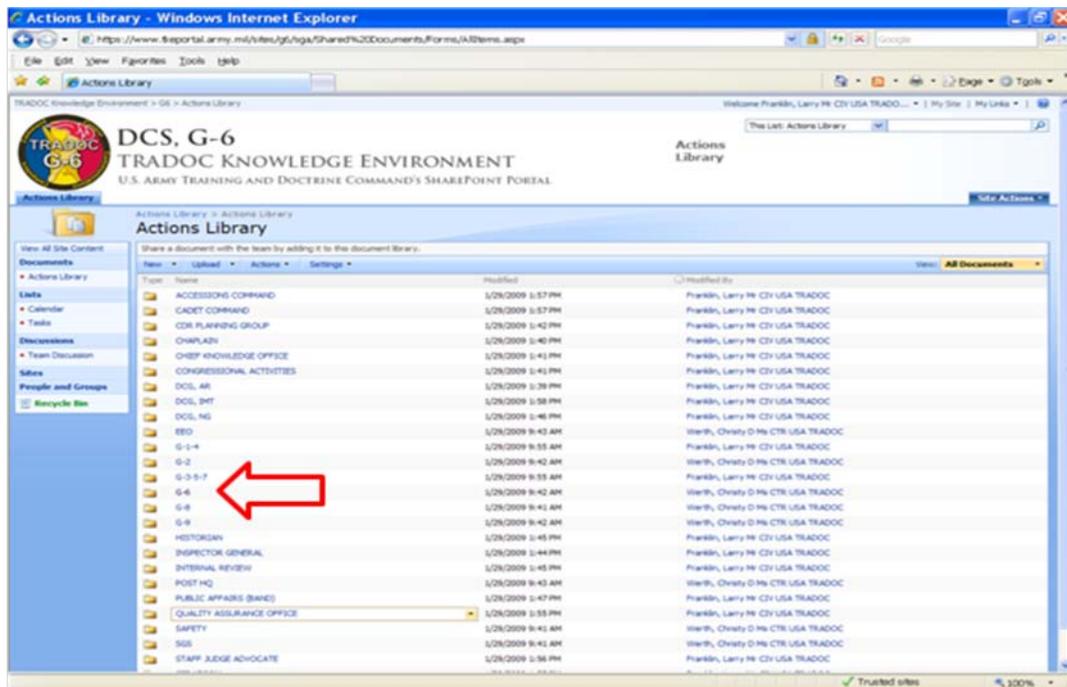


Figure I-2. Organization actions library

I-5. Instructions for adding a new folder

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

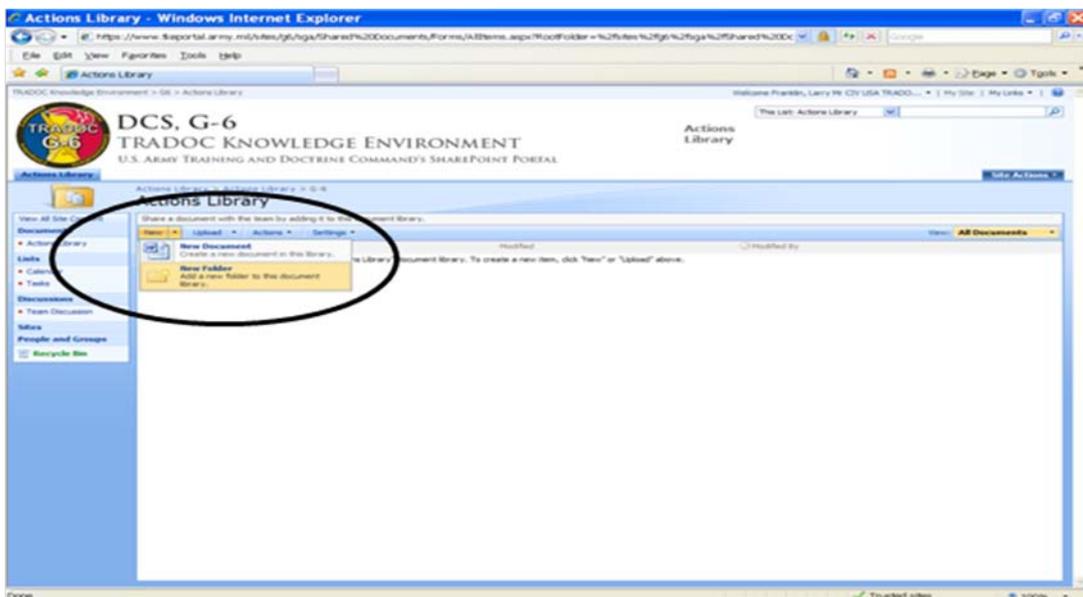


Figure I-3. Add new action folder

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

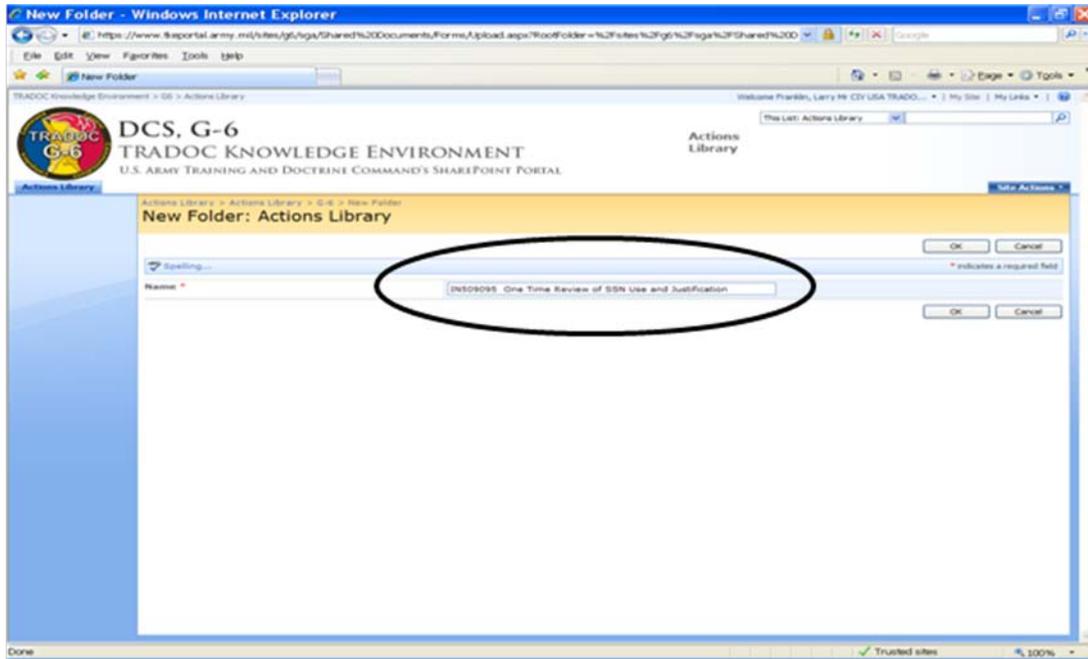


Figure I-4. Title new action folder

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



Figure I-5. New action folder

I-6. Uploading document(s)

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

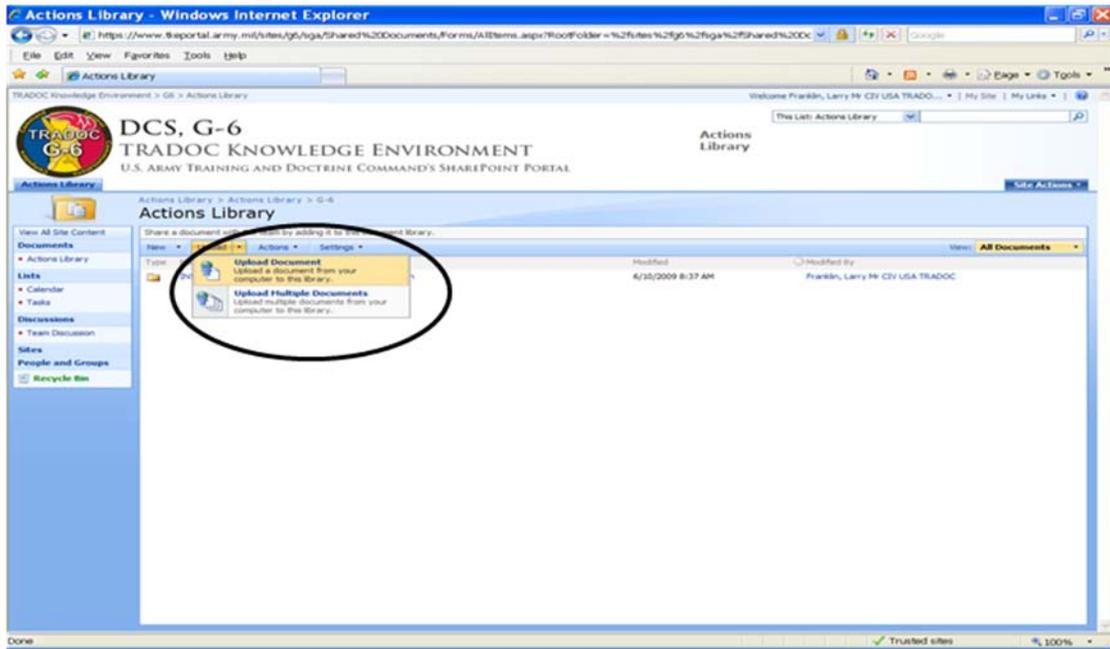


Figure I-6. Upload document or multiple documents

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

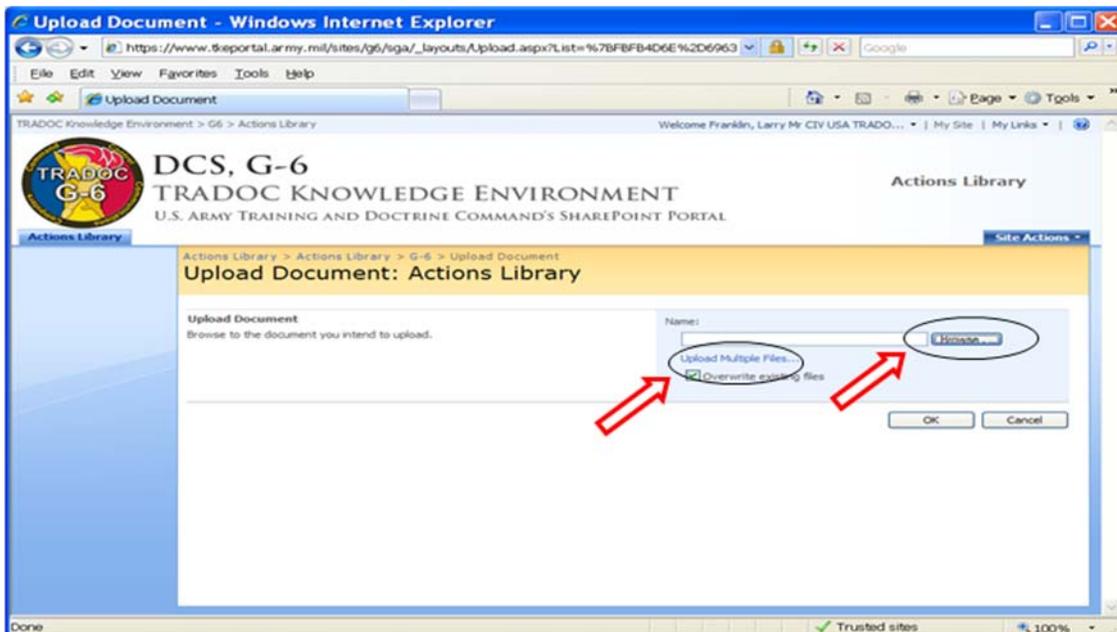


Figure I-7. Upload document(s)

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

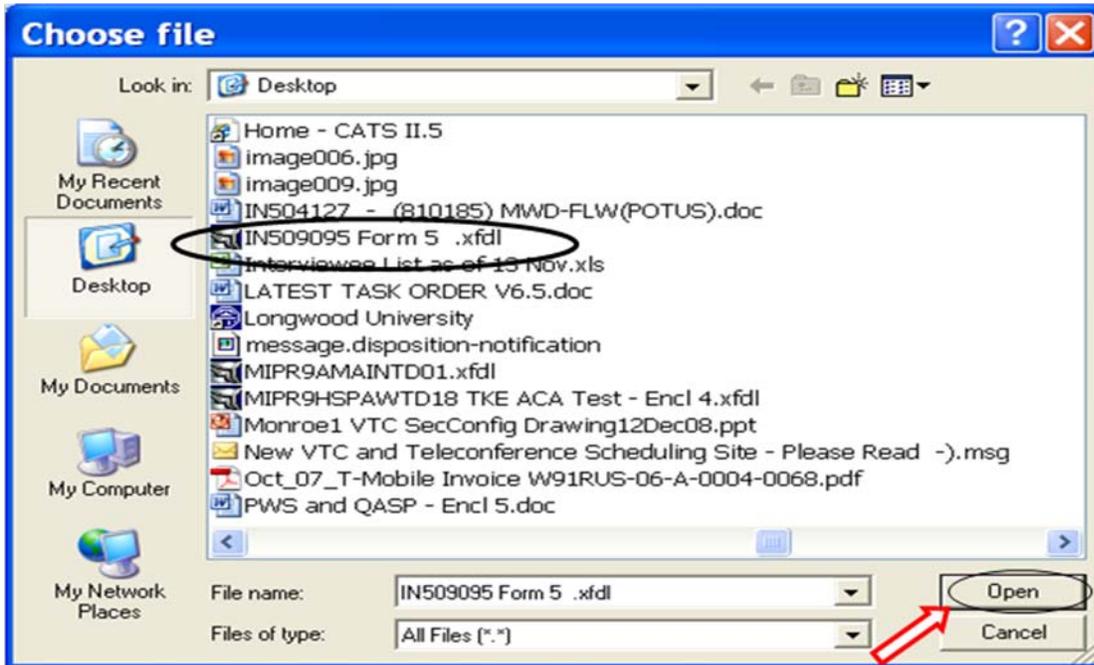


Figure I-8. Choose document(s)

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

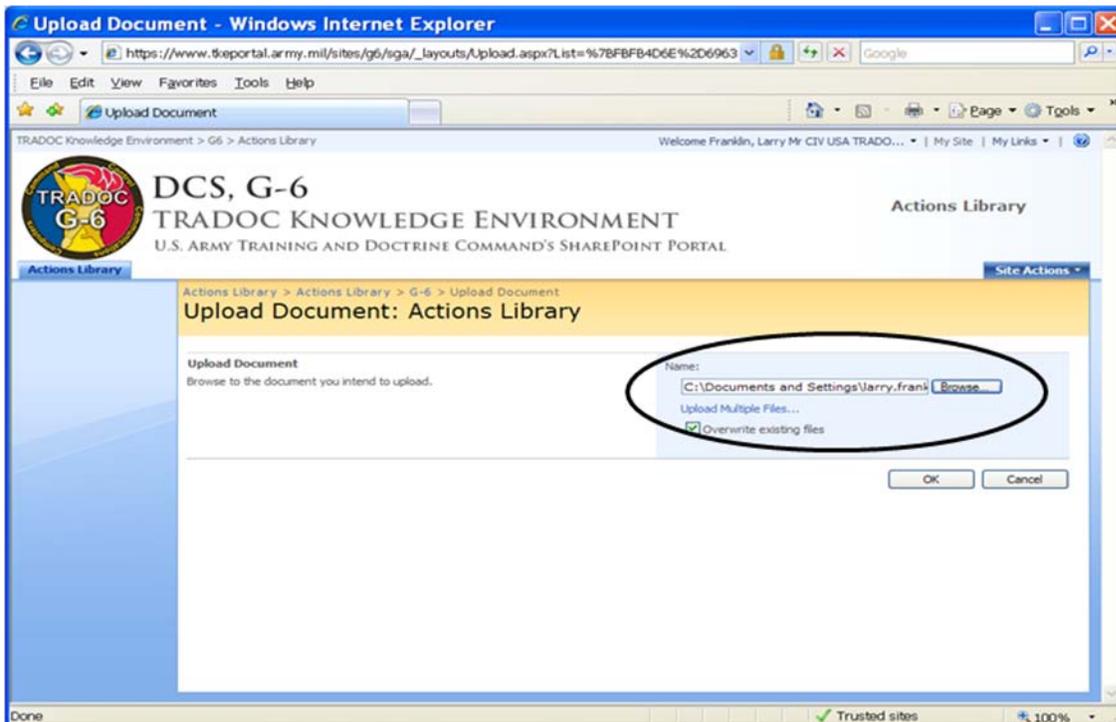


Figure I-9. Posting document(s)

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

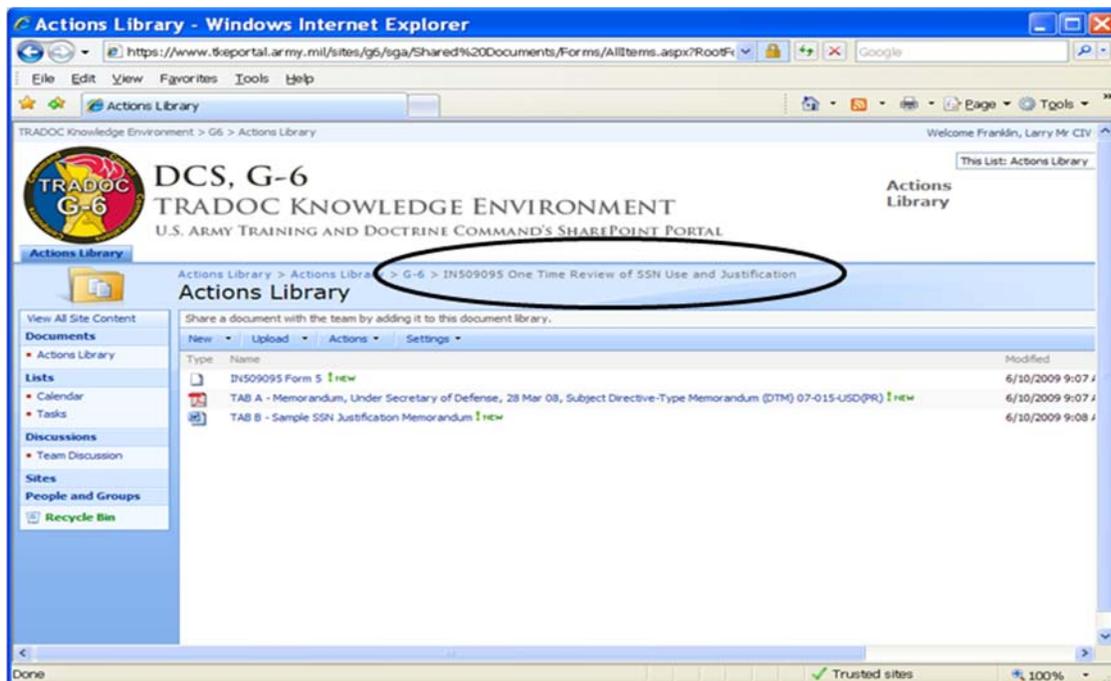


Figure I-10. TRADOC Form 5 and supporting documents (titled “TAB”)

f. Close the browser when finished.

g. Make notification via e-mail that the tasking TRADOC Form 5 and supporting documents have been uploaded to CGAO at usarmy.jble.tradoc.mbx.hq-tradoc-sad@mail.mil or G-33 at usarmy-jble.tradoc.mbx.eustis-g33-tasking@mail.mil. Title the subject line of the e-mail with the CATS number (if assigned) and the subject title (for example Subject: IN509059 One Time Review of SSN Use and Justification).

h. Staff Actions Division SACOs will delete closed actions from Actions Library after 30 days.

Glossary

Section I Abbreviations and Acronyms

| | |
|--------------|--|
| AAO | Army Addresses and Office Symbols Online |
| AAR | after action report |
| ACoS | assistant chief of staff |
| ACOM | Army command |
| AKO | Army Knowledge Online |
| ALARACT | all Army activities (Army general message address) |
| AMHS | Automated Message Handling System |
| AO | action officer |
| APD | Army Publishing Directorate |
| AR | Army regulation |
| ARCIC | Army Capabilities Integration Center |
| BLUF | bottom line up front |
| CAC | U.S. Army Combined Arms Center |
| CAO | Congressional Activities Office |
| CASCOM | U.S. Army Combined Arms Support Command |
| CATS | Command Action Tracking System |
| cc | courtesy copy |
| CCR | command conference room |
| CDO | Command Diversity Office |
| CG | commanding general |
| CGAC | Command Group Actions Center |
| CGAO | Command Group Actions Office |
| COA | course of action |
| CoE | Center of Excellence |
| CoS | chief of staff |
| CPG | commander's planning group |
| CS | chief of staff (CATS Control Number Prefix) |
| CSA | Chief of Staff, Army |
| DA | Department of the Army |
| DCG | deputy commanding general |
| DCG/CoS | deputy commanding general/chief of staff |
| DCoS | deputy chief of staff (TRADOC) |
| DCS | deputy chief of staff |
| DCS, G-1/4 | Deputy Chief of Staff, Personnel and Logistics |
| DCS, G-2 | Deputy Chief of Staff, Intelligence |
| DCS, G-3/5/7 | Deputy Chief of Staff, Operations, Plans, and Training |
| DCS, G-6 | Deputy Chief of Staff, Command, Control, Communications, and Computers |
| DCS, G-8 | Deputy Chief of Staff, Resource Management |
| DMS | Defense Message System |
| DOD | Department of Defense |
| DSN | Defense Switch Network |

TRADOC Reg 1-11

| | |
|---------|---|
| DTA | defense travel administrator |
| DTG | date time group |
| DTS | Defense Travel System |
| ECC | Executive Communications and Control |
| ES | external suspense (CATS Control Number Prefix for actions generated by proponent) |
| EX | G-33 external tasking |
| ESO | Executive Services Office |
| EXSUM | executive summary |
| FOUO | for official use only |
| FOA | field operating activities |
| G-33 | Deputy Chief of Staff, G-3/5/7 Current Operations |
| GO | general officer |
| HQDA | Headquarters, Department of the Army |
| HQ | headquarters |
| IAW | in accordance with |
| IMTCoE | Initial Military Training Center of Excellence |
| IN | G-33 internal tasking |
| IPR | in-process review |
| JFTR | Joint Federal Travel Regulation |
| JTR | Joint Travel Regulation |
| MOI | memorandum of instruction |
| MSO | major subordinate organization |
| NIPRNET | non-secure internet protocol router network |
| OCG | Office of the Commanding General |
| OP | G-33 operational tasking |
| PAO | Public Affairs Office |
| PII | personally identifiable information |
| POC | point of contact |
| PKI | Public Key Infrastructure |
| RA | readahead |
| RC | Reserve component |
| SACO | staff action control officer |
| SAD | Staff Actions Division |
| SES | senior executive service |
| SIPRNET | secure internet protocol router network |
| SJA | staff judge advocate |
| SME | subject matter expert |
| SOOB | Staff Officer Orientation Briefing |
| TASKORD | tasking order |
| TDY | temporary duty |
| TEC | TRADOC Enterprise Calendar |
| TKE | TRADOC Knowledge Environment |
| TRADOC | U.S. Army Training and Doctrine Command |
| VCSA | Vice Chief of Staff, Army |
| VIP | very important person |
| VTC | video teleconference |
| XO | executive officer |

ZIP zone improvement plan

Section II Terms

This section contains no entries.

Section III Special Abbreviations and Terms

5Ws

Who, what, when, where, and why

Assist

Offices/activities that help or support the lead in preparing the final tasking deliverable.

Designated organization POC(s)

The designated administrative individual, or team, within MSOs, special activities, FOAs, schools and centers, and HQ TRADOC who interacts with the CGAO SAD and G-33 on behalf of their organization.

Lead

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

Mission analysis

Evaluation and assessment to determine the specified, implied, and essential tasks; reason for GO involvement; identify critical facts and assumptions and available resources. Mission analysis is performed to varying degrees at different levels when completing an action (see figs 2-2 and 2-3). For example, TRADOC Operations (G-33) provide a mission statement to responsible organizations (lead and assists), including the 5Ws, purpose, action, and reason based on a brief version of mission analysis using available information with minimal or no research. At the subject matter expert level, specified or implied tasks are developed further.

Proponent

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

Tasking or Tasker

Any action originating from higher HQ; TRADOC CG; TRADOC activities or subordinate commands; HQDA; other services; outside agencies; Congress; the White House; and the general public that requires resources (personnel, equipment, funds) or policy/program decisions that is disseminated to a lead organization/staff office for analysis, review, and reply. Organizations/staff offices assigned as assists report to the lead for the action. Taskings are monitored through a tracking system that assigns control numbers and suspense dates.