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DEPARTMENT OF THE ARMY

Officer and Civilian Foundation Standards (OCFS) Manual



RECRUITING STAFF ELEMENTS
OFFICER, ENLISTED, AND CIVILIAN

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Recruiting Command

Officer and Civilian Foundation Standards

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Skill Level 5

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PREFACE

Mission.

The Mission of the CG, USAREC is to—

- a. Recruit qualified persons for the Active Army and US Army Reserve (USAR).
- b. Assist in Army National Guard (ARNG), Reserve Officers Training Corps (ROTC), and special personnel recruitment efforts.
- c. Command subordinate field activities.

Functions.

Primary functions of the CG, USAREC are as follows:

- a. Recruit persons from civilian life in CONUS and overseas areas of responsibility; determine whether they satisfy Army enlistment qualifications; and enlist qualified applicants in the Active Army and USAR.
- b. Plan, program, budget, and coordinate USAREC Active Army requirements for resources with the Office of the Deputy Chief of Staff for Personnel (ODCSPER).
- c. Coordinate all PPBS submissions with ODCSPER.
- d. In coordination with ODCSPER, program and budget for USAR recruiting and advertising resource requirements and forward to the Office of the Chief, Army Reserve.
- e. Assist the USAR in the personnel procurement effort of the ROTC program, especially through the simultaneous membership program.
- f. Assist the State adjutants general in the procurement efforts of the ARNG when requested.
- g. Assist the Surgeon General in the procurement of Army Medical Department Officer personnel (less Army Nurse Corps) when requested. Procure qualified nurses for the Active Army and USAR as required.
- h. Assist the United States Military Academy Program when required.
- i. Develop, budget, and contract, through proper procurement channels, Active Army and USAR national recruiting and reenlistment publicity and advertising. (See AR 601–208.) Coordinate all USAR retention advertising actions with FORSCOM.
- j. Establish and maintain liaison with educators and educational associations at the national, State, and local levels to stay abreast of current developments.
- k. Maintain liaison with the following:

- (1) United States Military Enlistment Processing Command.
- (2) United States Army Training and Doctrine Command.
- (3) United States Army Forces Command.
- (4) Recruiting services of the Navy, Air Force, and Marine Corps.
- (5) General Services Administration.
- (6) Military Traffic Management Command.
- (7) Corps of Engineers.
- (8) Postal authorities.

- I. Prepare and review the Army training program for enlisted recruiting personnel in coordination with the United States Army Institute of Administration. Develop and administer a continuous training program for all recruiter personnel assigned to USAREC.
- m. When needed, coordinate additional services and support for recruiting activities from other Services, Corps of Engineers, GSA, and major Army commands.

The Role of the Recruiting Staff Elements:

Inherent with USAREC's mission are command, supervisory, and managerial leadership requirements for the design and implementation of recruiting operations on a global scale. Recruiting staff elements plan, direct, control, and manage recruiting operations at all levels of the Army, which includes tactical, operational, and strategic recruiting operations. This requires the integration of diverse leadership styles, which provides the best opportunity for recruiters to tell the Army Story offering a mutually supportive benefit for America's youth and the United States Army.

This manual applies to Active and Reserve Component Soldiers as well as Civilian and Contract personnel assigned to a Recruiting BN Staff position.

The proponent for this publication is the Recruiting and Retention School. Users of this publication are encouraged to report errors, recommend changes, and submit comments on its improvement. Comments should be keyed to the specific page, paragraph, and line of text in which the change is recommended. Reasons will be provided for each comment to ensure understanding and complete evaluation. Comments can be made through electronic means or on DA Form 2028 sent directly to the Commandant, US Army Recruiting and Retention School, ATTN: Director of Training, 10000 Hampton Parkway, Fort Jackson, SC 29207.

The use of personal pronouns in this document has been limited; however, unless this manual states otherwise, masculine pronouns do not refer exclusively to men.

CHAPTER 1

Introduction

1-1. **GENERAL** - This Officer and Civilian Foundation Standard (OCFS) identifies the individual training requirements for Soldiers and Civilians serving in USAREC staff level positions. Commanders, trainers, Civilians, and Soldiers use the OCFS to plan, conduct, and evaluate individual training in units. The OCFS is the primary duty reference to support the self-development and training of every Soldier in the unit. This chapter explains how to use the OCFS to establish an effective individual training program. Based on these guidelines, commanders and unit trainers tailor the information to meet the requirements for their specific unit.

1-2. **TRAINING REQUIREMENT** - Every Soldier, noncommissioned officer (NCO), warrant officer, and officer has one primary mission -- to be trained and ready to fight and win our nation's wars. Success in recruiting does not happen by accident; it is a direct result of tough, realistic, and challenging training.

a. **Leader Training and Leader Development**

(1) Competent and confident leaders are a prerequisite to the successful training of units. It is important to understand that leader training and leader development are integral parts of unit readiness. Leaders are inherently seasoned and should be technically and tactically proficient in basic skills. They are also adaptive, capable of sensing their environment, adjusting the plan when appropriate, and properly applying the proficiency acquired through training.

(2) Leader training is an expansion of these skills that qualifies them to lead other Soldiers and Civilians. As such, doctrine and principles of training require the same level of attention of senior commanders. Leader training occurs in the Institutional Army, the unit, and through self-development. Leader training is just one portion of leader development.

(3) Leader development is the deliberate, continuous, sequential, and progressive process, grounded in Army values, that grows Soldiers and civilians into competent and confident leaders capable of decisive action. Leader development is achieved through the life-long synthesis of the knowledge, skills, and experiences gained through institutional training and education, organizational training, operational experience, and self-development. Commanders play the key roll in leader development that ideally produces tactically and technically competent, confident, and adaptive leaders who act with boldness and initiative in dynamic, complex situations to execute mission-type orders achieving the commander's intent.

d. **Training Responsibility.** Soldier and leader training and development continue in the unit. Using the institutional foundation, training in organizations and units focuses and hones individual and team skills and knowledge.

(1) **Commander Responsibility**

(a) The unit commander is responsible for the wartime readiness of all elements in the formation. The commander is, therefore, the primary trainer of the organization and is responsible for ensuring that all training is conducted in accordance with the OCFS to the Army standard.

(b) Commanders ensure OCFS standards are met during all training. If a Soldier fails to meet established standards for identified duty tasks, the Soldier must retrain until the tasks are performed to standard. Training to standard on duty tasks is more important than completion of a unit training event such as a field exercise. The objective is to focus on sustaining duty proficiency -- this is the critical factor commanders must adhere to when training individual Soldiers units.

(2) NCO Responsibility

(a) A great strength of the Army is its professional NCO Corps who takes pride in being responsible for the individual training of Soldiers, crews, and small teams. The NCO support channel parallels and complements the chain of command. It is a channel of communication and supervision from the Command Sergeant Major (CSM) to the First Sergeants (1SGs) and then to other NCOs and enlisted personnel. NCOs train Soldiers to the non-negotiable standards published in OCFSs. Commanders delegate authority to NCOs in the support channel as the primary trainers of individual, crew, and small team training. Commanders hold NCOs responsible for conducting standards-based, performance-oriented, warrior-focused training and providing feedback on individual, crew, and team proficiency. Commanders define responsibilities and authority of their NCOs to their staffs and subordinates.

(b) NCOs continue the Soldierization process of newly assigned enlisted Soldiers and begin their professional development. NCOs are responsible for conducting standards-based, performance-oriented, and battle-focused training. They identify specific individual, crew and small team tasks that support the unit's collective mission essential tasks; plan, prepare, rehearse, and execute training; and evaluate training through conducting after action reviews (AARs) to provide feedback to the commander on individual, crew, and small team proficiency. Senior NCOs coach junior NCOs to master a wide range of individual tasks.

(3) Soldier and Civilian Responsibility. Each Soldier/Civilian is responsible for performing individual tasks identified by the first-line supervisor based on the unit's mission essential task list (METL). Soldiers and civilians must perform tasks to the standards included in the task summary. If they have questions about tasks or which tasks in this manual they must perform, they are responsible for asking their first-line supervisor for clarification, assistance, and guidance. First-line supervisors know how to perform each task or can direct performers to appropriate training materials, including current field manuals, technical manuals, and Army regulations. Soldiers and civilians are responsible for using these materials to maintain performance. Soldiers are also responsible for maintaining standard performance levels of all Soldiers' Manual of Common Tasks at their current skill level and below. Periodically, Soldiers should ask their supervisor or another Soldier to check their performance to ensure that they can perform these common tasks.

1-3. **TASK SUMMARY FORMAT** - Task summaries outline the wartime performance requirements of each critical task in the SM. They provide the performer and the trainer with the information they need to prepare, conduct, and evaluate critical task training. As a minimum, task summaries include information the performer must know and the skills that he must perform to standard for each task. The format of the task summaries included in this OCFS is as follows:

- a. **Task Number.** A 10-digit number identifies each task or skill. This task number, along with the task title, must be included in any correspondence pertaining to the task.
- b. **Task Title.** The task title identifies the action to be performed.
- c. **Conditions.** The task conditions identify all the equipment, tools, references, job aids, and supporting personnel that the performer needs to use to perform the task in wartime. This section identifies any environmental conditions that can alter task performance, such as visibility, temperature, or wind. This section also identifies any specific cues or events that trigger task performance, such as a chemical attack or identification of a threat vehicle.
- d. **Standards.** The task standard describes how well and to what level the task must be performed under realtime conditions. Standards are typically described in terms of accuracy, completeness, and/or speed.
- e. **Training and Evaluation.** The training evaluation section identifies specific actions, known as performance steps, which the performer must do to successfully complete the task. These actions are in the evaluation guide section of the task summary and are listed in a pass/fail format for easy evaluation. For some tasks, the training and evaluation section may also include detailed training information in a training information outline and an evaluation preparation section. The evaluation preparation section indicates necessary modifications to task performance in order to train and evaluate a task that cannot be trained to the real-time conditions. It may also include special training and evaluation preparation instructions to accommodate these modifications, and any instructions that should be given to the performer before evaluation.
- f. **References.** This section identifies references that provide more detailed and thorough explanations of task performance requirements than those given in the task summary description.
- g. **Warnings.** Warnings alert users to the possibility of immediate personal injury or damage to equipment.
- h. **Notes.** Notes provide a supportive explanation or hint that relates to the performance standards.

1-4. **TRAINING EXECUTION** - All good training, regardless of the specific collective, leader, and individual tasks being executed, must comply with certain common requirements. These include adequate preparation, effective presentation and practice, and thorough evaluation. The execution of training includes preparation for training, conduct of training, and recovery from training.

a. Preparation for Training. Formal -planning for near-term training culminates with the publication of the unit training schedule. Informal planning, detailed coordination, and preparation for executing the training continue until the training is performed. Commanders and other trainers use training meetings to assign responsibility for preparation of all scheduled training. Preparation for training includes selecting tasks to be trained, planning the conduct of the training, training the trainers, reconnaissance of the site, issuing the training execution plan, and conducting rehearsals and pre-execution checks. Pre-execution checks are preliminary actions commanders and trainers use to identify responsibility for these and other training support tasks. They are used to monitor preparation activities and to follow up to ensure planned training is conducted to standard. Pre-execution checks are a critical portion of any training meeting. During preparation for training, battalion and company commanders identify and eliminate potential training distracters that develop within their own organizations. They also stress personnel accountability to ensure maximum attendance at training.

(1) Subordinate leaders, as a result of the bottom-up feed from internal training meetings, identify and select the individual tasks necessary to support the identified training objectives. Commanders develop the tentative plan to include requirements for preparatory training, concurrent training, and training resources. At a minimum, the training plan should include confirmation of training areas and locations, training ammunition allocations, training simulations and simulators availability, transportation requirements, Soldier support items, a risk management analysis, assignment of responsibility for the training, designation of trainers responsible for approved training, and final coordination. The time and other necessary resources for retraining must also be an integral part of the original training plan.

(2) Leaders, trainers, and evaluators are identified, trained to standard, and rehearsed prior to the conduct of the training. Leaders and trainers are coached on how to train, given time to prepare, and rehearsed so that training will be challenging and doctrinally correct. Commanders ensure that trainers and evaluators are not only tactically and technically competent on their training tasks, but also understand how the training relates to the organization's METL. Properly prepared trainers, evaluators, and leaders project confidence and enthusiasm to those being trained. Trainer and leader training is a critical event in the preparation phase of training. These individuals must demonstrate proficiency on the selected tasks prior to the conduct of training.

(3) Commanders, with their subordinate leaders and trainers, conduct site reconnaissance, identify additional training support requirements, and refine and issue the training execution plan. The training plan should identify all those elements necessary to ensure the conduct of training to standard. Rehearsals are essential to the execution of good training. Realistic, standards-based, performance-oriented training requires rehearsals for trainers, support personnel, and evaluators.

b. Conduct of Training. Ideally, training is executed using the crawl-walk-run approach. This allows and promotes an objective, standards-based approach to training. In USAREC the operating

tempo dictates training opportunity. Therefore, most training is conducted using a “live fire” approach. Training starts at the basic level. Crawl events are relatively simple to conduct and require minimum support from the unit. After the crawl stage, training becomes incrementally more difficult, requiring more resources from the unit and home station, and increasing the level of realism. At the run stage, the level of difficulty for the training event intensifies. Run stage training requires optimum resources and ideally approaches the level of realism expected in combat. Progression from the walk to the run stage for a particular task may occur during a one-day training exercise or may require a succession of training periods over time. Achievement of the Army standard determines progression between stages.

(1) In crawl-walk-run training, the tasks and the standards remain the same; however, the conditions under which they are trained change. Commanders may change the conditions, for example, by increasing the difficulty of the conditions under which the task is being performed, increasing the tempo of the task training, increasing the number of tasks being trained, or by increasing the number of personnel involved in the training. Whichever approach is used, it is important that all leaders and performers involved understand in which stage they are currently training and understand the Army standard.

(2) An AAR is immediately conducted and may result in the need for additional training. Any task that was not conducted to standard should be retrained. Retraining should be conducted at the earliest opportunity. Commanders should program time and other resources for retraining as an integral part of their training plan. Training is incomplete until the task is trained to standard. Performers will remember the standard enforced, not the one discussed.

c. Recovery from Training. The recovery process is an extension of training, and once completed, it signifies the end of the training event. At a minimum, recovery includes conduct of maintenance training, turn-in of training support items, and the conduct of AARs that review the overall effectiveness of the training just completed.

(1) Maintenance training is the conduct of post-operations preventive maintenance checks and services, accountability of organizational and individual equipment, and final inspections. Class IV, Class V, TADSS and other support items are maintained, accounted for, and turned-in, and training sites and facilities are closed out.

(2) AARs conducted during recovery focus on collective, leader, and individual task performance, and on the planning, preparation and conduct of the training just completed. Unit AARs focus on individual and collective task performance, and identify shortcomings and the training required to correct deficiencies. AARs with leaders focus on tactical judgment. These AARs contribute to leader learning and provide opportunities for leader development. AARs with trainers and evaluators provide additional opportunities for leader development.

1-5. **TRAINING ASSESSMENT** - Assessment is the commander's responsibility. It is the commander's judgment of the organization's ability to accomplish its wartime operational mission. Assessment is a

continuous process that includes evaluating individual training, conducting an organizational assessment, and preparing a training assessment. The commander uses his experience, feedback from training evaluations, and other evaluations and reports to arrive at his assessment. Assessment is both the end and the beginning of the training management process. Training assessment is more than just training evaluation, and encompasses a wide variety of inputs. Assessments include such diverse systems as training, force integration, logistics, and personnel. It provides the link between the unit's performance and the Army's standard. Evaluation of training is, however, a major component of assessment. Training evaluations provide the commander with feedback on the demonstrated training proficiency of Soldiers, leaders, civilians, battle staffs, and units. Commanders cannot personally observe all training in their organization and, therefore, gather feedback from their senior staff officers, civilians, and NCOs.

a. Evaluation of Training. Training evaluations are a critical component of any training assessment. Evaluation measures the demonstrated ability of Soldiers, commanders, leaders, battle staffs and units against the Army standard. Evaluation of training is integral to standards-based training and is the cornerstone of leader training and leader development. OCFSs describe standards that must be met for each task.

(1) All training must be evaluated to measure performance levels against the established Army standard. The evaluation can be as fundamental as an informal, internal evaluation performed by the leader conducting the training. Evaluation is conducted specifically to enable the individual undergoing the training to know whether the training standard has been achieved. Commanders must establish a climate that encourages candid and accurate feedback for the purpose of developing leaders.

(2) Evaluation of training is not a test; it is not used to find reasons to punish leaders civilians, and Soldiers. Evaluation tells the performer whether or not they achieved the Army standard and, therefore, assists them in determining the overall effectiveness of their training plans. Evaluation produces disciplined Soldiers, leaders and units. Training without evaluation is a waste of time and resources.

(3) Leaders use evaluations as an opportunity to coach and mentor performers. A key element in developing leaders is immediate, positive feedback that coaches and leads subordinate leaders to achieve the Army standard. This is a tested and proven path to develop competent, confident adaptive leaders.

b. Evaluators. Commanders must plan for formal evaluation and must ensure the evaluators are trained. These evaluators must also be trained as facilitators to conduct AARs that elicit maximum participation from those being trained. External evaluators will be certified in the tasks they are evaluating and normally will not be dual slotted as a participant in the training being executed.

c. Role of Commanders and Leaders. Commanders ensure that evaluations take place at each echelon in the organization. Commanders use this feedback to teach, coach, and mentor their subordinates. They ensure that every training event is evaluated as part of training execution and that every trainer conducts evaluations. Commanders use evaluations to focus command attention by

requiring evaluation of specific mission essential and battle tasks. They also take advantage of evaluation information to develop appropriate lessons learned for distribution throughout their commands.

d. **After Action Review.** The AAR, whether formal or informal, provides feedback for all training. It is a structured review process that allows participating Soldiers, leaders, civilians, and units to discover for themselves what happened during the training, why it happened, and how it can be done better. The AAR is a professional discussion that requires the active participation of those being trained.

1-6. **TRAINING SUPPORT** - References have been identified for each task to assist in planning and conducting training. A consolidated list of references identified by type, publication number, and title and a comprehensive glossary of acronyms, abbreviations, and definitions are included in this OCFS.

1-7. **FEEDBACK** - Recommendations for improvement of this OCFS are requested. Feedback will help to ensure that this OCFS answers the training needs of units in the field. There is a questionnaire at the end of this OCFS to make it easier to send recommendations and comments.

CHAPTER 2

Training Guide

Captains:

Upon completion of the Recruiting Company Commander Course (RCCC), the majority of Captains will secure initial USAREC assignments as company commanders. Subsequently, to enhance professional development, captains selected to assume a company command will complete the company commander certification program at the organizational level of training.

A smaller number of captains are selected to perform battalion operations officer duties. Initial training for this duty position is through the Recruiting Operations Officer Course (ROOC) conducted at the Recruiting and Recruiting and Retention School.

Majors:

Following the completion of the Recruiting Battalion Executive Officers Course conducted at Headquarters USAREC, Majors perform Battalion Executive Officer duties throughout the command.

2-1. **General.** The Training Plan identifies the essential components of a unit training plan for individual training. Units have different training needs and requirements based on differences in environment, location, equipment, dispersion, and similar factors. Therefore, the OCFS should be used as a guide for conducting unit training and not a rigid standard. The OCFS consists of two parts. Each part is designed to assist the commander in preparing a unit training plan which satisfies integration, cross training, training up, and sustainment training requirements for soldiers in this AOC.

Part One of the OCFS shows the relationship of Duty Position and skill level between duty position and critical tasks. These critical tasks are grouped by task commonality into subject areas.

Section I lists subject area numbers and titles used throughout the OCFS. These subject areas are used to define the training requirements for each duty position within an AOC.

Section II identifies the total training requirement for each duty position within an AOC and provides a recommendation for cross training and train-up/merger training.

Duty Position Column. This column lists the duty positions of the AOC, by skill level, which have different training requirements.

Subject Area Column. This column lists, by numerical key (see Section I), the subject areas a soldier must be proficient in to perform in that duty position.

Cross-Train Column. This column lists the recommended duty position for which soldiers should be cross-trained.

Train-Up/Merger Column. This column lists the corresponding duty position for the next higher skill level or AOC the soldier will merge into on promotion.

Part Two lists, by general subject areas, the critical tasks to be trained in an AOC and the type of training required (resident, integration, or sustainment).

Subject Area Column. This column lists the subject area number and title in the same order as Section I, Part One of the OCFS.

Task Number Column. This column lists the task numbers for all tasks included in the subject area.

Title Column. This column lists the task title for each task in the subject area.

Training Location Column. This column identifies the training location where the task is first trained to soldier training publications standards. If the task is first trained to standard in the unit, the word “Unit” will be in this column. If the task is first trained to standard in the training base, it will identify, by brevity code (ANCOC, BNCOC, etc.), the resident course where the task was taught. Figure 2-1 contains a list of training locations and their corresponding brevity codes.

RCCC	Recruiting Company Commander Course
ROOC	Recruiting Operations Officer Course
RXOC	Recruiting Executive Officer Course

Figure 2-1. Training Locations

Sustainment Training Frequency Column. This column indicates the recommended frequency at which the tasks should be trained to ensure soldiers maintain task proficiency. Figure 2-2 identifies the frequency codes used in this column.

BA	- Biannually
AN	- Annually
SA	- Semiannually
QT	- Quarterly
MO	- Monthly
BW	- Biweekly
WK	- Weekly

Figure 2-2. Sustainment Training Frequency Codes

Sustainment Training Skill Level Column. This column lists the skill levels of the AOC for which soldiers must receive sustainment training to ensure they maintain proficiency to soldier’s manual standards.

2-2. Subject Area Codes.

Recruiting Company Commander

- 1 Intelligence
- 2 Prospecting
- 3 Processing
- 4 Future Soldier Training Program (FSTP)
- 5 Recruiting Service Support
- 6 C4
- 7 Training

Recruiting BN Operations Officer

- 1 Intelligence
- 3 Processing
- 4 Future Soldier Training Program (FSTP)
- 5 Recruiting Service Support
- 6 C4
- 7 Training

Recruiting BN Executive Officer

- 3 Processing
- 5 Recruiting Service Support

6 C4

2-3. GENERAL.

a. The Training Guide (TG) identifies the essential components of a unit training plan for individual training. Units have different training needs and requirements based on differences in environment, location, equipment, dispersion, and similar factors. Therefore, the TG is a guide used for conducting unit training and is not considered to be a rigid standard.

b. The TG provides the following information necessary for planning training requirements for the MOS:

- (1) Identifies subject areas in which to train Soldiers.
- (2) Identifies the critical tasks for each subject area.
- (3) Specifies how Soldiers are trained to standard on each task.
- (4) Recommends how often to train Soldiers on each task to sustain proficiency.
- (5) Recommends a strategy for cross-training.
- (6) Recommends a strategy for training Soldiers to perform higher level tasks.

2-4. BATTLE-FOCUSED TRAINING.

a. The commander must define the Mission-Essential Task List (METL) as the basis for unit training.

b. Unit leaders use the METL to identify the collective, leader, and Soldier tasks which support accomplishing the METL.

c. Unit leaders then assess the status of the training, lay out the training objectives, and make a plan for accomplishing needed training. After preparing long- and short-range plans, they then conduct and evaluate training. The unit's training preparedness is then re-assessed, and the training management cycle begins again. This process ensures that the unit has identified the following:

- (1) The kind of training that is important for the wartime mission.
- (2) That the training focus is applied to the needed training.
- (3) That the training meets the established objectives and standards.

2-5. RELATIONSHIP OF OFFICER FOUNDATION STANDARDS (OFSs) TO BATTLE-FOCUSED TRAINING.

a. The two key components of enlisted OFSs are the Training Guide (TG) and Soldier's Manual (OFS). They give leaders important information which helps them develop battle-focused training.

b. The TG relates Soldier and leader tasks in the MOS to duty positions and equipment. As leaders go through the assessment and planning stages, they should use the TG as an important tool in identifying WHAT needs to be trained.

c. Leaders conducting and evaluating Soldier and leader training should rely on the ANA-wide training objectives and standards in the OFS. The OFS ensures that Soldiers in any unit or location have the same definition of task performance and that trainers evaluate the Soldiers to the same standard.

2-6. TRAINER'S RESPONSIBILITIES. Training Soldier and leader tasks to standard and relating this training to collective mission essential tasks are the trainer's responsibilities. Trainers use the following steps to plan and evaluate training:

a. Identify Soldier and leader training requirements. Using the commander's training guidance, the trainer determines which tasks Soldiers need to train on. The unit's METL is the source for helping the trainer define the individual training needs.

b. Plan the training. Training for specific tasks can usually be integrated or conducted concurrently with other training or during "slack periods." The unit's inspections can help identify the Soldier and leader tasks that can be trained and evaluated concurrently with collective task training and evaluation.

c. Gather the training references and materials. The OFS lists all references which can help the trainer prepare for the training of that task.

d. Determine risk assessment and identify safety concerns. Trainers must analyze the risk involved in training a specific task under the current conditions at the time of the scheduled training. They must ensure that their training preparation takes into account those cautions, warnings, and dangers associated with each task.

e. Train each Soldier. Trainers must show each Soldier how a task is done to standard, explain step-by-step how to do the task, and give each Soldier one chance to do the task step-by-step.

f. Check each Soldier. Training must evaluate how well each Soldier performs the tasks in this manual. They conduct these evaluations during individual training sessions or while evaluating Soldier proficiency during the conduct of unit collective tasks. This manual provides an evaluation guide for each task to enhance the trainer's ability to conduct year-round, hands-on evaluations of tasks critical to the unit's mission.

g. Retrain and evaluate. Trainers must work with each Soldier until the Soldier can perform the task to specific OFS standards.

2-7. EVALUATION.

a. Evaluation guide. This manual contains an evaluation guide for each task. Trainers use the evaluation guide year-round to determine if Soldiers can perform their critical tasks to OFS standards. Each evaluation guide contains one or more performance measures. These measures identify what the trainer needs to observe to score a Soldier's performance. Each step is clearly identified by a "GO" and "NO GO" located under the "Results" column on each evaluation guide. Some tasks involve a process which the trainer must observe as the Soldier performs the task. For other tasks, the trainer must evaluate an "end product" that results from doing the task. The following are some general points about using the evaluation guide to evaluate Soldiers:

(1) Review the guide to become familiar with the information on which the Soldier will be scored.

(2) Ensure that the necessary safety equipment and clothing needed for proper performance of the job are on hand at the training site.

(3) Prepare the test site according to the conditions section of the task summary. Some tasks contain special evaluation preparation instructions. These instructions tell the trainer what modifications must be made to the job conditions to evaluate the task. To ensure that conditions are the same for each Soldier, the trainer must reestablish the test site to the original requirements after evaluating each Soldier.

(4) Score each Soldier according to the performance measures and feedback section in the evaluation guide.

- (5) Record the date and task performance ("GO" or "NO GO").

2-8. TRAINING TIPS FOR THE TRAINER.

a. Prepare yourself.

(1) Get training guidance from your chain of command on when to train, which Soldiers to train, availability of resources, and a training site.

(2) Get the training objective (task, conditions, and standards) from the task summary in this manual.

(3) Ensure that you can do the task. Review the task summary and the references in the reference section. Practice doing the task or, if necessary, have someone train you on the task.

(4) Choose a training method. Some tasks provide recommended training methods in the feedback section of the task summary.

(5) Prepare a training outline consisting of informal notes on what you want to cover during your training session.

(6) Practice your training presentation.

b. Prepare the resources.

(1) Obtain the required resources identified in the conditions statement for each task.

(2) Gather equipment and ensure that it is operational.

(3) Ensure that the necessary training aids and devices are on hand.

(4) Prepare the training site according to the conditions statement and evaluation preparation section of the task summary.

c. Prepare the Soldier.

(1) Tell the Soldier what task to do and how well it must be done. Refer to the standard statement and evaluation preparation section for each task.

(2) Caution Soldiers about safety, environment, and security.

(3) Provide any necessary training on basic skills that Soldiers must have before they can be trained on the task.

(4) Pretest each Soldier to determine who needs training in what areas by having the Soldier perform the task.

d. Train the Soldiers who failed the pretest.

(1) Demonstrate how to do the task or the specific performance steps to those Soldiers who could not perform to OFS standards.

(2) Have Soldiers study the appropriate training materials.

(3) Have Soldiers practice the task until they can perform it to OFS standards.

(4) Evaluate each Soldier using the evaluation guide.

(5) Provide feedback to those Soldiers who fail to perform to OFS standards and have them continue to practice until they can perform to OFS standards.

e. Record all results.

2-1. General. The MOS Training Plan (MTP) identifies the essential components of a unit training plan for individual training. Units have different training needs and requirements based on differences in environment, location, equipment, dispersion, and similar factors. Therefore, the MTP should be used as a guide for conducting unit training and not a rigid standard. The MTP consists of two parts. Each part is designed to assist the commander in preparing a unit training plan which satisfies integration, cross training, training up, and sustainment training requirements for soldiers in this MOS.

Part One of the MTP shows the relationship of an MOS skill level between duty position and critical tasks. These critical tasks are grouped by task commonality into subject areas.

Section I lists subject area numbers and titles used throughout the MTP. These subject areas are used to define the training requirements for each duty position within an MOS.

Section II identifies the total training requirement for each duty position within an MOS and provides a recommendation for cross training and train-up/merger training.

- **Duty Position Column.** This column lists the duty positions of the MOS, by skill level, which have different training requirements.
- **Subject Area Column.** This column lists, by numerical key (see Section I), the subject areas a soldier must be proficient in to perform in that duty position.
- **Cross-Train Column.** This column lists the recommended duty position for which soldiers should be cross-trained.
- **Train-Up/Merger Column.** This column lists the corresponding duty position for the next higher skill level or MOSC the soldier will merge into on promotion.

Part Two lists, by general subject areas, the critical tasks to be trained in an MOS and the type of training required (resident, integration, or sustainment).

- **Subject Area Column.** This column lists the subject area number and title in the same order as Section I, Part One of the MTP.
- **Task Number Column.** This column lists the task numbers for all tasks included in the subject area.
- **Title Column.** This column lists the task title for each task in the subject area.
- **Training Location Column.** This column identifies the training location where the task is first trained to soldier training publications standards. If the task is first trained to standard in the unit, the word "Unit" will be in this column. If the task is first trained to standard in the training base, it will identify, by brevity code (ANCOC, BNCOC, etc.), the resident course where the task was taught. Figure 2-1 contains a list of training locations and their corresponding brevity codes.
- **Sustainment Training Frequency Column.** This column indicates the recommended frequency at which the tasks should be trained to ensure soldiers maintain task proficiency. Figure 2-2 identifies the frequency codes used in this column.

BA	- Biannually
AN	- Annually
SA	- Semiannually
QT	- Quarterly
MO	- Monthly
BW	- Biweekly
WK	- Weekly

Figure 2-2. Sustainment Training Frequency Codes

- **Sustainment Training Skill Level Column.** This column lists the skill levels of the MOS for which soldiers must receive sustainment training to ensure they maintain proficiency to soldier's manual standards.

2-2. Subject Area Codes.

Skill Level 5

- 2 S1
- 3 S2
- 4 S3
- 5 S4
- 7 S6
- 8 ESS
- 9 CO CDR
- 10 XO
- 14 A & PA
- 15 Resource Management

2-3. Duty Position Training Requirements.

2-4. Critical Tasks List.

**MOS TRAINING PLAN
79R**

CRITICAL TASKS

Task Number	Title	Training Location	Sust Tng Freq	Sust Tng SL
Skill Level 5				
Subject Area 2. S1				
805B-79R-8101	Manage Military Awards Program			
805B-79R-8102	Process a Military Evaluation Report			
805B-79R-8103	Process a Reassignment within USAREC			
805B-79R-8104	Process a Reclassification to PMOS 79R			
805B-79R-8105	Process a Request for Voluntary/Involuntary Reassignment/Reattachment from USAREC			
805B-79R-8106	Process Financial Actions			
805B-79R-8107	Process Semi-Centralized Promotions (Sergeant/Staff Sergeant)			
805B-79R-8108	Review Emergency Notification Data			
805B-79R-8109	Review Flow of Personnel Actions			
805B-79R-8110	Manage Personnel Evaluation System			
805B-79R-8111	Review Processing of Enlisted Distribution Assignment			
805B-79R-8112	Review the Report Management Zone (RMZ) Unit Manning Report (UMR)			
805B-79R-8113	Review a Completed Noncommissioned Officer Evaluation Report			
805B-79R-8114	Review a Completed Officer Evaluation Report (OER)			
805B-79R-8115	Review the Processing of a Request and Authority for Leave, Pass, or Permissive Temporary Duty.			
805B-79R-8116	Review Personnel Asset Inventory (PAI)			
Subject Area 3. S2				
805B-79R-8202	Assess a Recruiting Market			
805B-79R-8203	Assess the Competition			
805B-79R-8204	Develop Recommendations for Positioning the Recruiting Force Structure			
805B-79R-8205	Develop Recommendations for Priority Targets			
805B-79R-8206	Perform Missioning Procedures			
805B-79R-8207	Train the Recruiting Force on Their Market and Missioning Procedures			
Subject Area 4. S3				
805B-79R-7102	Develop a Recruiting BN Operational Plan			
805B-79R-7103	Manage the Battalion Training Management Program			
805B-79R-7104	Monitor the Battalion Future Soldier Training Program			
805B-79R-7109	Supervise the Battalion Enlistment Waiver Program			
805B-79R-7110	Supervise the Battalion Suitability Program			

CRITICAL TASKS

Task Number	Title	Training Location	Sust Tng Freq	Sust Tng SL
Subject Area 5. S4				
805B-79R-8400	Manage Telecommunications			
805B-79R-8401	Manage Procurement Procedures			
805B-79R-8402	Manage Facility Inspections			
805B-79R-8403	Manage Accountable Property			
805B-79R-8404	Manage Unaccompanied Family Housing Program			
805B-79R-8405	Manage Fleet Vehicle Program			
Subject Area 7. S6				
805B-79R-8602	Verify Systems Compliance of Information Assurance			
805B-79R-8604	Configure a Workstation			
805B-79R-8605	In-Process Personnel			
805B-79R-8606	Out Process Personnel			
805B-79R-8607	Perform Technical Support			
Subject Area 8. ESS				
805B-79R-8301	Advise The Battalion Commander on Education Information			
805B-79R-8302	Assist with Acquiring Student Directories			
805B-79R-8303	Assist with Gaining School Access			
805B-79R-8304	Develop BN School Recruiting Plan			
805B-79R-8305	Evaluate Education Credentials			
805B-79R-8306	Maintain Liaison with the Education Community			
805B-79R-8307	Manage the Battalion's ASVAB-Career Exploration Program (ASVAB-CEP)			
805B-79R-8308	Manage USAREC Education Program			
Subject Area 9. CO CDR				
805B-79R-7004	Manage the Company Future Soldier Training Program			
805B-79R-7006	Plan Company Training			
805B-79R-7007	Conduct a Company AAR			
805B-79R-7008	Develop a Company Recruiting Operational Plan.			
805B-79R-7011	Develop a Company School Recruiting Program			
Subject Area 10. XO				
805B-79R-7301	Coordinate the Battalion Organizational Inspection Program			
805B-79R-7303	Manage the Battalion Recruiting Standards Program			
805B-79R-7305	Manage Battalion Level Enlistment Waiver Actions			
805B-79R-7306	Supervise the Battalion Staff Sections			
805B-79R-7307	Synchronize the Battalion Staff Operation			
Subject Area 14. A & PA				
805B-79R-8501	Develop a Marketing / Advertising Plan			
805B-79R-8502	Manage Advertising and Public Affairs Budget			
805B-79R-8503	Organize a Recruiting Event			

CRITICAL TASKS

Task Number	Title	Training Location	Sust Tng Freq	Sust Tng SL
805B-79R-8504	Manage Public Affairs Programs			
Subject Area 15. Resource Management				
805B-79R-8700	Manage Commander's Financial Resources			
805B-79R-8701	Manage Civilian Human Resources			
805B-79R-8702	Manage Defense Travel System			
805B-79R-8703	Manage Government Purchase Card (GPC)			
805B-79R-8704	Manage Government Travel Charge Card			
805B-79R-8705	Manage Applicant Travel Requests			

CHAPTER 3

Skill Level Tasks

Skill Level 5

Subject Area 2: S1

Manage Military Awards Program

805B-79R-8101

Conditions: You have just received an award recommendation (DA 638 and USAREC Form 1210) in the battalion S1.

Standards: Process an accurate award recommendation, signed by the battalion commander, and forward in a timely manner to brigade S1, when required.

Performance Steps

1. Identify guidelines for processing awards
 - a. Check to ensure awarded is within proper time limitations.
 - (1) Monitor and manage all MSM recommendations so they are received at USAREC headquarters not later than 30 days prior to the presentation date.
 - (2) Monitor and manage all LOM recommendations so they are received at USAREC Headquarters not later than 90 days prior to the presentation date.
 - (3) Prepare a letter of lateness for the battalion commander's signature to address any MSM/LOM that does not meet established timelines.
 - b. In cases where commanders determine an interim award is appropriate, ensure interim awards are given promptly to award a suitable lesser decoration pending the final approval of a higher award. Upon approval of the higher award, ensure the interim award is revoked.
 - c. Ensure only one award is given for the same act, achievement, or period of meritorious service.
 - d. Ensure succeeding awards and decorations are awarded as an oak leaf cluster or numerical device.
2. Identify purpose of Army awards and their required forms
 - a. Advise personnel on eligibility requirements for the potential recipients.
 - b. Advise personnel on correct approval authority for Army individual awards.
3. Initiate and maintain permanent orders log to issue permanent order numbers
4. Develop and maintain a tracking system to project Soldiers who may warrant award consideration due to transfer or separation from the unit or command, and track awards currently being processed.
5. Log in and verify the DA Form 638 contains the correct administrative data and is properly formatted.
6. Check AAC-095 to ensure Soldier is eligible for the award. If so, sign block 22a, DA Form 638, indicating the Soldier meets all administrative requirements to receive the award, and ensure USAREC Form 1210 is complete.
7. For Army Commendation Medal and higher awards:
 - a. Forward DA Form 638 to battalion commander for signature.
 - b. Receive signed DA Form 638 from battalion commander.
 - c. Forward signed DA Form 638 to brigade S1.
 - d. Track award.
8. For Army Achievement Medal and lower awards:

Performance Steps

- a. Forward DA Form 638 and certificate or other award certificate to battalion commander for signature.
 - b. Receive signed DA Form 638 and certificate or other certificate from battalion commander.
 - c. Forward signed DA Form 638 and certificate or other certificate to appropriate company/staff section.
 - d. Track award.
9. Maintain file copy of award.
10. Forward copy of the award/certificate to supporting Military Personnel Division
11. Collect awards data for annual awards report and quarterly Equal Opportunity reports.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Identified guidelines for processing awards	—	—
a. Checked to ensure awarded is within proper time limitations.		
b. Checked to ensure interim awards are given promptly to award a suitable lesser decoration pending the final approval of a higher award. Upon approval of the higher award, the interim award is revoked. Advise personnel on the qualifying periods of service for awards.		
c. Checked to ensure that only one award is given for the same act, achievement, or period of meritorious service.		
d. Ensured Succeeding awards and decorations will be awarded as an oak leaf cluster or numerical device.		
e. Checked the approval authority makes the decision on whether to award an individual with a decoration and which one is given.		
2. Identified purpose of Army awards and their required forms	—	—
a. Advised personnel on eligibility requirements for the potential recipients.		
b. Advised personnel on correct approval authority for Army individual awards.		
3. Logged in and verified the DA Form 638 contains the correct data and is properly formatted.	—	—
4. For Army Commendation Medal and higher awards:	—	—
a. Forwarded DA Form 638 to Battalion Commander for signature.		
b. Received signed DA Form 638 from Battalion Commander.		
c. Forwarded signed DA Form 638 to Brigade S-1.		
d. Tracked award		
5. For Army Achievement Medal and lower awards:	—	—
a. Forwarded DA Form 638 and certificate, or other award certificate to Battalion Commander for signature.		
b. Received signed DA Form 638 and certificate, or other certificate from Battalion Commander.		
c. Forwarded signed DA Form 638 and certificate, or other certificate to appropriate company/staff section.		
d. Tracked award		
6. Maintained file copy of award	—	—

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required
AR 600-8-22

Related
AR 600-8-105
USAREC REG 600-8

**Process a Military Evaluation Report
805B-79R-8102**

Conditions: You have just received a completed automated evaluation report (DA Form 67 9/DA 2166-8-1) in the battalion S1. You have access to and standard office equipment.

Standards: Process an accurate evaluation report and forward to appropriate agency in accordance with the suspense dates outlined in AR 623-3.

Performance Steps

1. For NCOER: Log in and review NCOER IAW Chapter 3, AR 623-3 for administrative procedures.
 - a. Log in NCOER.
 - b. Review completed DA Forms 2166-8 and verify entries made by the rating officials are correct
 - (1) Part I, Administrative Data (Table 3-1)
 - (2) Part II, Authentication (Table 3-2)
 - (3) Part III, Duty Description (Table 3-3)
 - (4) Part IV, Army Values/NCO Responsibilities (Table 3-4)
 - (5) Part V, Overall Performance and Potential (Table 3-5)
2. Process NCOER.
 - a. Ensure the different types of mandatory and optional reports are processed according to the appropriate guidelines and timelines.
 - b. Verify the exceptional processing procedures (i.e., relief for cause reports, commander's inquiries).
 - c. Ensure requests for modifications to previously submitted reports meet the appropriate Soldier Readiness Data Center (SRDC) processing guidelines.
 - d. Notify rating officials of any discrepancies and advise them of corrective action.
3. Forward and Log out completed NCOER (date to Soldier and SRDC) IAW Chapter 5, AR 623-3.
 - a. Electronically transmit or forward to reach SRDC within 60 days after the ending month of the NCOER
 - b. Ensure the rated NCO is provided a copy of his/her completed NCOER before it is sent to SRDC.
4. FOR OER: Log in and review OER IAW Chapter 2, AR 623-3 for administrative procedures.
 - a. Log in OER.
 - b. Review completed DA Forms 67-9 and verify entries made by the rating officials are correct.
 - (1) Part I, Administrative Data (Table 2-1)
 - (2) Part II, Authentication (Table 2-2)
 - (3) Part III, Duty Description (Table 2-3)
 - (4) Part IV, Performance Evaluation - Professionalism (Table 2-4)
 - (5) Part V, Performance and Potential - Rater (Table 2-5)
 - (6) Part VI, Intermediate Rater (if applicable) (Table 2-6)
 - (7) Part VII, Senior Rater
5. Process OER.
 - a. Ensure the different types of mandatory and optional reports are processed according to the appropriate guidelines and timelines.
 - b. Verify the exceptional processing procedures are followed (i.e., relief for cause reports, referred reports, commander's inquiries, supplemental reviews).
 - c. Ensure requests for modifications to previously submitted reports meet the appropriate processing guidelines.
 - d. Notify rating officials of any discrepancies and advise them of corrective action.
6. Forward and Log out completed OER (date to Soldier and SRDC) IAW Chapter 5, AR 623-3.

Performance Steps

- a. Forward to reach Human Resources Command (HRC) within 90 days after the "Thru" date of the report.
Forward to reach HRC within 90 days after the "Thru" date of the report.
 - b. Ensure the rated officer is provided a copy of his/her completed OER before it is sent to HRC.
7. Maintain file copy of evaluation reports IAW AR 623-3.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. For NCOER: Log in and review NCOER IAW Chapter 3, AR 623-3 for administrative procedures.	—	—
a. Logged in NCOER.		
b. Reviewed completed DA Forms 2166-8 and verify entries made by the rating officials are correct		
(1) Part I, Administrative Data (Table 3-1)		
(2) Part II, Authentication (Table 3-2)		
(3) Part III, Duty Description (Table 3-3)		
(4) Part IV, Army Values/NCO Responsibilities (Table 3-4)		
(5) Part V, Overall Performance and Potential (Table 3-5)		
2. Processed NCOER.	—	—
a. Ensured the different types of mandatory and optional reports are processed according to the appropriate guidelines and timelines.		
b. Verified the exceptional processing procedures (i.e., relief for cause reports, commander's inquiries).		
c. Ensured requests for modifications to previously submitted reports meet the appropriate Soldier Readiness Data Center (SRDC) processing guidelines.		
d. Notified rating officials of any discrepancies and advise them of corrective action.		
3. Forwarded and Logged out completed NCOER (date to Soldier and SRDC) IAW Chapter 5, AR 623-3.	—	—
a. Electronically transmitted or forwarded to reach SRDC within 60 days after the ending month of the NCOER		
b. Ensured the rated NCO is provided a copy of his/her completed NCOER before it is sent to SRDC.		
4. FOR OER: Log in and review OER IAW Chapter 2, AR 623-3 for administrative procedures.	—	—
a. Logged in OER.		
b. Reviewed completed DA Forms 67-9 and verify entries made by the rating officials are correct.		
(1) Part I, Administrative Data (Table 2-1)		
(2) Part II, Authentication (Table 2-2)		
(3) Part III, Duty Description (Table 2-3)		
(4) Part IV, Performance Evaluation - Professionalism (Table 2-4)		
(5) Part V, Performance and Potential - Rater (Table 2-5)		
(6) Part VI, Intermediate Rater (if applicable) (Table 2-6)		
(7) Part VII, Senior Rater		
5. Processed OER.	—	—

Process a Reassignment within USAREC
805B-79R-8103

Conditions: You have just received a request for a reassignment in the battalion S1.

Standards: Process an accurate request for a reassignment within USAREC, signed by the battalion commander, and forward in a timely manner to brigade S1.

Performance Steps

1. Prepare required Memorandum requesting operational reassignment within USAREC.
 - a. Ensure the Soldier's PMOS is 79R.
 - b. Ensure the request is based on a valid requirement/vacancy at the gaining station.
 - c. Ensure the 79R recruiter has served at least 24 months in the geographic area prior to recommendation for a cost operational move. Requests for movement of a recruiter with less than 24 months in the geographic location must include a request for general officer waiver IAW paragraph 3-7a, AR 601-1.
 - d. Ensure full justification is included with all operational move requests.
 - e. Entered required information and check "yes" in the HSS-Per screen.
 - f. Forward the operational move request.

2. Prepare a request for voluntary reassignment within USAREC.
 - a. Ensure the Soldier's PMOS is 79R.
 - b. Ensure the request is based on a valid requirement/vacancy at the gaining station.
 - c. Ensure the 79R recruiter will serve at least 24 months in the local travel area by the proposed report date when processing a recommendation for a cost move.
 - d. Ensure the Soldier is not pending investigation or unfavorable action.
 - e. Submit the DA Form 4187 through the chain of command to the brigade S1.
 - f. Ensure the Soldier agrees to extend or reenlist to meet the 24 month TOS goal effective on the reporting date to the gaining unit.
 - g. Ensure the Soldier lists at least three recruiting battalions in order of preference.
 - h. Ensure a reporting date is recommended, generally between 90 and 180 days from the date of submission.
 - i. Provide the date of the last cost PCS on the DA Form 4187.
 - j. Ensure an ERB is attached to the request.
 - k. Ensure the recruiting battalion commander recommends approval/disapproval. If disapproval is recommended, the reason must be provided.
 - l. Entered required information and check "yes" in the HSS-Per transfer screen.
 - m. Forward operational move.

3. Maintain electronic file copies of all operational moves.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

- | | <u>GO</u> | <u>NO-GO</u> |
|--|-----------|--------------|
| 1. Prepared required Memorandum requesting operational reassignment within USAREC. | — | — |
| a. Ensured the Soldier's PMOS is 79R. | | |
| b. Ensured the request is based on a valid requirement/vacancy at the gaining station. | | |

**Process a Reclassification to PMOS 79R
805B-79R-8104**

Conditions: You have just received a request for reclassification to PMOS 79R in the battalion S1.

Standards: Process an accurate PMOS 79R reclassification, signed by the battalion commander, and forward in a timely manner to brigade S1.

Performance Steps

1. Process Soldier's DA Form 4187 requesting reclassification to MOS 79R.
 - a. Review DA Form 4187 and USAREC Form 1143.
 - b. Verify the Soldier meets the eligibility criteria IAW AR 601-1, chapter 4.
 - c. Verify the Soldier's signature and date.
 - d. Verify that the Soldier's chain of command has completed USAREC Form 1143.
 - e. Forward reclassification action to the battalion commander for recommendation of approval/disapproval. A recommendation of disapproval must include specific comments.
 - f. Verify the packet contains a current Enlisted Records Brief (ERB).
2. Record the action in local personnel actions log.
3. Forward request and all attachment to brigade retention office for processing.
4. Upon receipt of approved reclassification from HRC, coordinate for issuance of reclassification orders
5. Change PMOS for the Soldier approved for reclassification to 79R in HSS-Per.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Processed Soldier's DA Form 4187 requesting reclassification to MOS 79R. <ol style="list-style-type: none"> a. Reviewed DA Form 4187 and USAREC Form 1143. b. Verified the Soldier meets the eligibility criteria IAW AR 601-1, chapter 4. c. Verified the Soldier's signature and date. d. Verified that the Soldier's chain of command has completed USAREC Form 1143. e. Forwarded reclassification action to the battalion commander for recommendation of approval/disapproval. A recommendation of disapproval included specific comments. f. Verified the packet contains a current Enlisted Records Brief (ERB). 	—	—
2. Recorded the action in local personnel actions log.	—	—
3. Forwarded request and all attachment to brigade retention office for processing.	—	—
4. Upon receipt of approved reclassification from HRC, coordinated for issuance of reclassification orders	—	—
5. Changed PMOS for the Soldier approved for reclassification to 79R in HSS-Per.	—	—

Evaluation Guidance: Score "GO" if Soldier correctly performs all performance measures. Score "NO GO" if Soldier incorrectly performs one or more performance measures. Provide on-the-spot correction, should the Soldier experience minor difficulty. Consider directing self-study or OJT for Soldiers who experience major difficulties in task performance.

References

Required

USAREC REG 616-6

Related

AR 601-1

AR 614-200

**Process a Request for Voluntary/Involuntary Reassignment/Reattachment from USAREC
805B-79R-8105**

Conditions: You have just received a request for voluntary/involuntary reassignment/reattachment in the Battalion S-1. You have access to:

AR 601-1
AR 614-200
AR 635-200
UF 1270
UF 1271
UF 1272
Enlisted Record Brief (ERB)
DA 4187/Assignment Satisfaction Key (ASK) assignment preference form.

Standards: Process an accurate request for voluntary/involuntary reassignment/reattachment, signed by the Battalion Commander, and forward in a timely manner to Brigade S-1.

Performance Steps

1. Battalion S1s will complete USAREC Form 1270 (Notification of Initiation of Involuntary Reassignment, Reattachment, and/or Reclassification) as described below.
 - a. Complete Soldier information fields (Name, rank, SSN, PMOS, unit, and RA/AGR).
 - b. If the Soldier is an RA Soldier, select reassignment; if the Soldier is an AGR Soldier, select reattachment.
 - c. If the Soldier's PMOS is 79R, select reclassification; if the Soldier's PMOS is not 79R, select removal of SQI "4".
 - d. Select the category of involuntary reassignment or reattachment.
 - e. Select the commander's determination of continuation of recruiting and recruiting related duties. If the commander elects to suspend the Soldier, enter the SDAP termination date.
 - f. Type in the commander's basis for the action.
 - g. Type in the page numbers for the supporting documentation on the form. Pages will start with the number one and end with the last page. Ensure all supporting document pages are numbered accordingly.
 - h. If the Soldier is an initial tour AGR Soldier, the commander must consider the Soldier for release from active duty for the convenience of the government. If this applies, select "Applies" block; if it does not, select "Does not apply".
 - i. Type the commander's name, rank, position, and date on the form.
 - j. Scan any supporting documents and add them as an attachment to the email to the battalion commander.
 - k. Email USAREC Form 1270 to the battalion commander for his digital signature. Attach all supporting documents and any continuation pages to the email as digital documents via digital sender.

2. Complete USAREC Form 1271 (Acknowledgement of Initiation of Involuntary Reassignment, Reattachment, and/or Reclassification).
 - a. Battalion S1s will complete Soldier information fields (Name, rank, SSN, PMOS, unit, and RA/AGR), and select if the Initial Tour AGR requirement apply.
 - b. Battalion S1s will have the Soldier complete USAREC Form 1271 electronically, normally by sending the form via e-mail to the Soldier. The battalion S1 will also provide a copy of the digitally signed USAREC Form 1270 with enclosures and continuation pages to the Soldier. The Soldier will have 10 calendar days to complete the form and return it. Commanders may grant a five calendar day extension to the Soldier upon request if the commander believes it is warranted.
 - c. If the category of the involuntary reassignment or reattachment is ineffective new, ineffective, unqualified, or unsuitable, the Soldier will complete that block.

Performance Steps

- (1) Ensure the Soldier selects either to not make a statement, or to make a statement. If the Soldier makes a statement, he/she will provide it and any supporting documents to the battalion S1.
 - (2) The Soldier will number the pages of the statement/supporting documents beginning with the number immediately following the number of the last supporting documents. (Example: If the last page number of the supporting documents was 11, the number of the first page of the Soldier's documents will be 12.)
 - (3) The Soldier will include the page numbers by typing the first and last page number on the form.
 - (4) The Soldier will include his/her assignment preference statement via DA Form 4187 or by a print-out of their assignment preferences from the Assignment Satisfaction Key (ASK).
 - (5) The Soldier will number this form in the manner described above. If the Soldier provides a statement, the page number will immediately follow the last page number of the statement. The Soldier will type the page number on the form.
 - (6) The Soldier will date and digitally sign (or sign) this block.
- d. If the category of the involuntary reassignment or reattachment is involuntary reassignment or reattachment (and reclassification) without prejudice, the Soldier will complete that block.
- (1) He/she will select either to not make a statement, or to make a statement. If the Soldier makes a statement, he/she will provide it and any supporting documents to the battalion S1.
 - (2) The Soldier will number the pages of the statement/supporting documents beginning with the number immediately following the number of the last supporting documents. (Example: If the last page number of the supporting documents is 11, the number of the first page of the Soldier's documents is 12.)
 - (3) The Soldier will include the page numbers by typing the first and last page number on the form.
 - (4) The Soldier will include his/her assignment preference statement via DA Form 4187 or by a print-out of their assignment preferences from the Assignment Satisfaction Key (ASK).
 - (5) The Soldier will number this form in the manner described above. If the Soldier provides a statement, the page number will immediately follow the last page number of the statement. The Soldier will type the page number on the form.
 - (6) The Soldier will date and digitally sign (or sign) this block.
- e. If the Soldier is an initial tour AGR recruiter, he/she must complete the Soldier rights election block. The Soldier will indicate his/her desire for counsel and whether they want to make a statement. The Soldier will digitally sign and date this block. The Soldier will provide a copy of any statement they wish to make at the time the packet is sent back to the battalion S1.
- f. The Soldier will provide a copy of the digitally signed USAREC Form 1271 to the battalion S1 via email. The Soldier will also provide a copy of any statements and the assignment preferences to the battalion S1 via digital sender if available. If a digital sender is not available, the Soldier will provide a copy to the battalion S1 via hardcopy or fax. Battalion S1s will scan all hardcopy/faxed documents using a digital sender so they can be attached as part of the digital relief packet.
3. Battalion S1s will complete USAREC Form 1272 (Recommendation for Involuntary Reassignment, Reattachment, and/or Reclassification) as described below.
- a. Complete Soldier information fields (Name, rank, SSN, PMOS, unit, and RA/AGR).
 - b. If the Soldier is a RA Soldier, select reassignment; if the Soldier is an AGR Soldier, select reattachment.
 - c. If the Soldier's PMOS is 79R, select reclassification; if the Soldier's PMOS is not 79R, select removal of SQI "4".
 - d. Select the category of involuntary reassignment or reattachment.
 - e. Fill in the page numbers for all the attachments and statements.
 - f. If the Soldier submitted a rebuttal or statement, type in the date of the USAREC Form 1271. Type in the battalion commander's response to the rebuttal. If the response cannot fit in the block, continue it on a sheet of bond paper. Battalion S1s will send a copy of the response to the rebuttal to the Soldier..

Performance Steps

- g. Select the appropriate block regarding the Soldier's promotion information. If the Soldier is on a promotion list, the commander must state if he plans to take action as shown on the form.
 - h. Select the appropriate block regarding suspension of favorable actions. If the commander has suspended favorable personnel actions for the Soldier, provide an explanation on the form.
 - i. Select the appropriate block for performance of recruiting duties. Provide an explanation if the Soldier is not performing recruiting duty.
 - j. Select the appropriate block about suspension of SDAP. Provide the SDAP termination date if required.
 - k. Provide a copy of the ERB. The battalion S1 must include a digital copy with the packet.
 - l. If the Soldier is an initial tour AGR Soldier, he/she must attend ACAP prior to HRC-STL issuing assignment instructions. Complete the ACAP block appropriately.
 - m. If the Soldier is an initial tour AGR Soldier, he/she must have a separation health assessment within the last 12 months. Complete the separation health assessment block appropriately.
 - n. Type the commander's name, rank, position, and date on the form.
4. The battalion S1 will forward USAREC Forms 1272, 1271, and 1270 with all attachments and statements to the battalion commander, via email, for electronic signature.
 5. The battalion commander will electronically sign the form
 6. The battalion S1 will forward the form and USAREC Forms 1272, 1271, and 1270 with all attachments and statements to the brigade S1 for processing.
 7. Maintain file copy of forwarded packet.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Battalion S1s completed USAREC Form 1270 (Notification of Initiation of Involuntary Reassignment, Reattachment, and/or Reclassification) as described below.	_____	_____
a. Completed Soldier information fields (Name, rank, SSN, PMOS, unit, and RA/AGR).		
b. If the Soldier is an RA Soldier, selected reassignment; if the Soldier is an AGR Soldier, selected reattachment.		
c. If the Soldier's PMOS is 79R, selected reclassification; if the Soldier's PMOS is not 79R, selected removal of SQI "4".		
d. Selected the category of involuntary reassignment or reattachment.		
e. Selected the commander's determination of continuation of recruiting and recruiting related duties. If the commander elects to suspend the Soldier, entered the SDAP termination date.		
f. Typed in the commander's basis for the action.		
g. Typed in the page numbers for the supporting documentation on the form. Pages will start with the number one and end with the last page. Ensured all supporting document pages are numbered accordingly.		
h. If the Soldier is an initial tour AGR Soldier, the commander must consider the Soldier for release from active duty for the convenience of the government. If this applies, selected "Applies" block; if it does not, select "Does not apply".		
i. Typed the commander's name, rank, position, and date on the form.		
j. Scanned any supporting documents and added them as an attachment to the email to the battalion commander.		

Performance Measures**GO** **NO-GO**

k. Emailed USAREC Form 1270 to the battalion commander for his digital signature. Attached all supporting documents and any continuation pages to the email as digital documents via digital sender.

2. Completed USAREC Form 1271 (Acknowledgement of Initiation of Involuntary Reassignment, Reattachment, and/or Reclassification). _____

a. Battalion S1s completed Soldier information fields (Name, rank, SSN, PMOS, unit, and RA/AGR), and select if the Initial Tour AGR requirement apply.

b. Battalion S1s had the Soldier complete USAREC Form 1271 electronically, normally by sending the form via e-mail to the Soldier. The battalion S1 will also provided a copy of the digitally signed USAREC Form 1270 with enclosures and continuation pages to the Soldier. The Soldier will have 10 calendar days to complete the form and return it. Commanders may grant a five calendar day extension to the Soldier upon request if the commander believes it is warranted.

c. If the category of the involuntary reassignment or reattachment is ineffective new, ineffective, unqualified, or unsuitable, the Soldier completed that block.

(1) Ensured the Soldier selects either to not make a statement, or to make a statement. If the Soldier makes a statement, he/she will provide it and any supporting documents to the battalion S1.

(2) The Soldier numbered the pages of the statement/supporting documents beginning with the number immediately following the number of the last supporting documents. (Example: If the last page number of the supporting documents was 11, the number of the first page of the Soldier's documents will be 12.)

(3) The Soldier included the page numbers by typing the first and last page number on the form.

(4) The Soldier included his/her assignment preference statement via DA Form 4187 or by a print-out of their assignment preferences from the Assignment Satisfaction Key (ASK).

(5) The Soldier numbered this form in the manner described above. If the Soldier provides a statement, the page number will immediately follow the last page number of the statement. The Soldier will type the page number on the form.

(6) The Soldier dated and digitally signed (or sign) this block.

d. If the category of the involuntary reassignment or reattachment is involuntary reassignment or reattachment (and reclassification) without prejudice, the Soldier completed that block.

(1) He/she selected either to not make a statement, or to make a statement. If the Soldier makes a statement, he/she will provide it and any supporting documents to the battalion S1.

(2) The Soldier numbered the pages of the statement/supporting documents beginning with the number immediately following the number of the last supporting documents. (Example: If the last page number of the supporting documents is 11, the number of the first page of the Soldier's documents is 12.)

(3) The Soldier included the page numbers by typing the first and last page number on the form.

(4) The Soldier included his/her assignment preference statement via DA Form 4187 or by a print-out of their assignment preferences from the Assignment Satisfaction Key (ASK).

(5) The Soldier numbered this form in the manner described above. If the Soldier provides a statement, the page number will immediately follow the last page number of the statement. The Soldier will type the page number on the form.

Performance Measures

GO NO-GO

- (6) The Soldier dated and digitally signed (or sign) this block.
 - e. If the Soldier is an initial tour AGR recruiter, he/she completed the Soldier rights election block. The Soldier indicated his/her desire for counsel and whether they want to make a statement. The Soldier digitally signed and dated this block. The Soldier provided a copy of any statement they wish to make at the time the packet is sent back to the battalion S1.
 - f. The Soldier provided a copy of the digitally signed USAREC Form 1271 to the battalion S1 via email. The Soldier also provided a copy of any statements and the assignment preferences to the battalion S1 via digital sender if available. If a digital sender is not available, the Soldier provided a copy to the battalion S1 via hardcopy or fax. Battalion S1s scanned all hardcopy/faxed documents using a digital sender so they can be attached as part of the digital relief packet.
3. Battalion S1s completed USAREC Form 1272 (Recommendation for Involuntary Reassignment, Reattachment, and/or Reclassification) as described below. _____ _____
- a. Completed Soldier information fields (Name, rank, SSN, PMOS, unit, and RA/AGR).
 - b. If the Soldier is a RA Soldier, selected reassignment; if the Soldier is an AGR Soldier, selected reattachment.
 - c. If the Soldier's PMOS is 79R, selected reclassification; if the Soldier's PMOS is not 79R, selected removal of SQI "4".
 - d. Selected the category of involuntary reassignment or reattachment.
 - e. Filled in the page numbers for all the attachments and statements.
 - f. If the Soldier submitted a rebuttal or statement, typed in the date of the USAREC Form 1271. Type in the battalion commander's response to the rebuttal. If the response cannot fit in the block, continued it on a sheet of bond paper. Battalion S1s sent a copy of the response to the rebuttal to the Soldier.
 - g. Selected the appropriate block regarding the Soldier's promotion information. If the Soldier is on a promotion list, the commander stated his plans to take action as shown on the form.
 - h. Selected the appropriate block regarding suspension of favorable actions. If the commander has suspended favorable personnel actions for the Soldier, provided an explanation on the form.
 - i. Selected the appropriate block for performance of recruiting duties. Provided an explanation if the Soldier is not performing recruiting duty.
 - j. Selected the appropriate block about suspension of SDAP. Provided the SDAP termination date if required.
 - k. Provided a copy of the ERB. The battalion S1 included a digital copy with the packet.
 - l. If the Soldier is an initial tour AGR Soldier, he/she must attend ACAP prior to HRC-STL issuing assignment instructions. Completed the ACAP block appropriately.
 - m. If the Soldier is an initial tour AGR Soldier, he/she must have a separation health assessment within the last 12 months. Completed the separation health assessment block appropriately.
 - n. Typed the commander's name, rank, position, and date on the form.
4. The battalion S1 forwarded USAREC Forms 1272, 1271, and 1270 with all attachments and statements to the battalion commander, via email, for electronic signature. _____ _____
5. The battalion commander electronically signed the form _____ _____

Performance Measures

- 6. The battalion S1 forwarded the form and USAREC Forms 1272, 1271, and 1270 with all attachments and statements to the brigade S1 for processing.
- 7. Maintained file copy of forwarded packet.

GO **NO-GO**

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Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

- AR 601-1
- AR 614-200
- AR 635-200

Related

Process Financial Actions
805B-79R-8106

Conditions: You have just received a financial action request from a Soldier assigned to your battalion.

Standards: Process an accurate financial action to the servicing finance office in a timely manner.

Performance Steps

1. Review the unit commander's finance report (UCFR) to ensure Soldiers are receiving the correct allowances and that all changes are properly documented.
 - a. Ensure the Soldier receives the basic allowance for subsistence (BAS).
 - b. Ensure the Soldier receives the basic allowance for housing (BAH).
 - c. Ensure the Soldier receives the family separation allowance (FSA).
 - d. Ensure the Soldier receives the correct level of Special Duty Assignment Pay (SDAP)
2. Request and review the special duty assignment pay (SDAP) report from the DMPO to ensure the Soldier receives the correct level of SDAP. If the Soldier is not receiving the correct level of SDAP, prepare the appropriate SDAP order (RA) or submit a request for the appropriate SDAP from HRC-KNOX
3. Ensure the Soldier meets the requirements for special pay for the foreign language proficiency.
 - a. Ensure the Soldier meets one of the following entitlement provisions.
 - (1) Verify the Soldier is qualified in a military specialty requiring a foreign language.
 - (2) Verify the Soldier has received training under regulations prescribed by the Secretary of the Army.
 - (3) Verify the Soldier is assigned to military duties requiring such proficiency.
 - (4) Verify the Soldier is proficient in a foreign language for which the DoD may have critical need, as determined by the Secretary of Defense.
 - b. Ensure the correct dollar amount is given to a Soldier with a foreign language proficiency.
 - (1) Ensure a Soldier with a foreign language proficiency rating of 1 is given a monthly rate of \$25
 - (2) Ensure a Soldier with a foreign language proficiency rating of 2 is given a monthly rate of \$50.
 - (3) Ensure a Soldier with a foreign language proficiency rating of 3 is given a monthly rate of \$75.
 - (4) Ensure a Soldier with a foreign language proficiency rating of 4 is given a monthly rate of \$100.
4. Ensure all pay transactions are processed by comparing the Daily Record of Transactions (DROT) report against your unit copy of the Unit Transmittal Memorandum.
 - a. Ensure the document transmittal list identifies all transactions that have processed, recycled or rejected.
 - (1) Ensure Identifier column will reflect the state of each pay transaction.
 - (2) Ensure format identifier will reflect a pay event.
 - (3) Ensure action indicator describes the type of action taken for that pay event.
 - (4) Ensure variable data column is the information specific to the pay event or transaction.
 - (5) Ensure the error column identifies if the document is rejected or recycled.
 - (6) Ensure and verify all source documents are present for all processed and recycled transactions with the document transmittal list.
 - b. Contact the DMPO to resolve any finance actions in question and determine if you need to resubmit any requests with documentation on a new Unit Transmittal Memorandum.
5. Maintain appropriate files IAW Army Record Information Management System (ARIMS).

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Reviewed the unit commander's finance report (UCFR) to ensure Soldiers are receiving the correct allowances and that all changes are properly documented. <ul style="list-style-type: none"> a. Ensured the Soldier receives the basic allowance for subsistence (BAS). b. Ensured the Soldier receives the basic allowance for housing (BAH). c. Ensured the Soldier receives the family separation allowance (FSA). d. Ensured the Soldier receives the correct level of Special Duty Assignment Pay (SDAP) 	—	—
2. Requested and reviewed the special duty assignment pay (SDAP) report from the DMPO to ensure the Soldier receives the correct level of SDAP. If the Soldier is not receiving the correct level of SDAP, prepared the appropriate SDAP order (RA) or submit a request for the appropriate SDAP from HRC-KNOX	—	—
3. Ensured the Soldier meets the requirements for special pay for the foreign language proficiency. <ul style="list-style-type: none"> a. Ensured the Soldier meets one of the following entitlement provisions. <ul style="list-style-type: none"> (1) Verified the Soldier is qualified in a military specialty requiring a foreign language. (2) Verified the Soldier has received training under regulations prescribed by the Secretary of the Army. (3) Verified the Soldier is assigned to military duties requiring such proficiency. (4) Verified the Soldier is proficient in a foreign language for which the DoD may have critical need, as determined by the Secretary of Defense. b. Ensured the correct dollar amount is given to a Soldier with a foreign language proficiency. <ul style="list-style-type: none"> (1) Ensured a Soldier with a foreign language proficiency rating of 1 is given a monthly rate of \$25 (2) Ensured a Soldier with a foreign language proficiency rating of 2 is given a monthly rate of \$50. (3) Ensured a Soldier with a foreign language proficiency rating of 3 is given a monthly rate of \$75. (4) Ensured a Soldier with a foreign language proficiency rating of 4 is given a monthly rate of \$100. 	—	—
4. Ensured all pay transactions are processed by comparing the Daily Record of Transactions (DROT) report against your unit copy of the Unit Transmittal Memorandum. <ul style="list-style-type: none"> a. Ensured the document transmittal list identifies all transactions that have processed, recycled or rejected. <ul style="list-style-type: none"> (1) Ensured Identifier column will reflect the state of each pay transaction. (2) Ensured format identifier will reflect a pay event. (3) Ensured action indicator describes the type of action taken for that pay event. (4) Ensured variable data column is the information specific to the pay event or transaction. (5) Ensured the error column identifies if the document is rejected or recycled. (6) Ensured and verified all source documents are present for all processed and recycled transactions with the document transmittal list. 	—	—

Performance Measures

GO **NO-GO**

- b. Contacted the DMPO to resolve any finance actions in question and determine if you need to resubmit any requests with documentation on a new Unit Transmittal Memorandum. _____

- 5. Maintained appropriate files IAW Army Record Information Management System (ARIMS). _____

Evaluation Guidance: Score "GO" if Soldier correctly performs all performance measures. Score "NO GO" if Soldier incorrectly performs one or more performance measures. Provide on-the-spot correction, should the Soldier experience minor difficulty. Consider directing self-study or OJT for Soldiers who experience major difficulties in task performance.

References

Required

- AR 37-104-4
- AR 600-8-10

Related

Process Semi-Centralized Promotions (Sergeant/Staff Sergeant)
805B-79R-8107

Conditions: You have just received the AAA-294 back from the company commander.

Standards: Without error, determine eligibility for promotion, prepare recommendation for promotion, perform promotion board actions, process board proceedings and maintain sergeant/staff sergeant promotion standing list.

Performance Steps

1. Verify recommendations and eligibility for promotion to SGT/SSG.
 - a. Prepare for the promotion board.
 - (1) Prepare the unit enlisted promotion report and eligibility/ineligibility listing for USAR Soldiers; forward it to the unit commander to select Soldiers for board appearance the month prior to the promotion board.
 - (2) Prepare automated promotion point worksheets (RA)/DA Form 3355 (AGR) for Soldiers the commander has recommended for promotion board appearance.
 - b. Verify promotion data on Soldier's Enlisted Record Brief (ERB/Official Military Personnel File (OMPF)).
 - (1) For Regular Army Soldiers, coordinate an appointment (either a remote appointment or face-to-face) between the S1/Soldier(s) and the servicing Military Personnel Division (MPD) to review their personnel record/ERB NTL the 15th of the month, if required.
 - (2) Ensure Soldiers provide documents (if required) to verify award of promotion points.
 - (3) For RA Soldiers, ensure the promotion point worksheet is authenticated by a SSG/GS6 or higher at the MPD prior to board appearance.
 - c. Verify all of the required information is contained in the recommendation.
 - (1) Verify APFT data/scores, weapons qualification data/scores, and duty performance evaluation .
 - (2) Verify commander's signature in section A, block 3.
 - (3) Verify date is entered in section A, block 5.
 - d. Verify Soldier meets eligibility requirements for recommendation.
 - (1) Verify the Soldier meets MOS requirements.
 - (2) Verify the Soldier meets education requirements.
 - (3) Verify the Soldier meets time in service/time in grade (TIS/TIMIG) requirements.
 - (4) Verify the Soldier meets reenlistment requirements.
 - (5) Verify the Soldier meets physical qualification requirements.
 - (6) Verify the Soldier meets APFT requirements.
 - (7) Verify the Soldier meets weight control requirements.
 - (8) Verify the Soldier is not enrolled in the Army Substance Abuse Program (ASAP).
 - (9) Verify the Soldier meets points requirements.
 - (10) Verify the Soldier is not flagged.
 - e. Verify all Soldiers eligible for the first time primary zone.
 - (1) Verify battalion S1 provided unit commander a completed DA Form 3355 for all eligible SPC/CPL and SGTs.
 - (2) Verify unit commander recommends approval and returns the completed DA 3355 to the battalion S1 or recommends disapproval and provides the DA 3355 along with counseling documents to the promotion authority for a final decision.
 - (3) Ensure quarterly counselings are provided to the promotion authority until the Soldier is recommended for promotion or is no longer eligible.
2. Perform actions required to schedule and conduct the promotion board.
 - a. Conduct actions to schedule promotion board not later than the 15th of each month.
 - b. Verify promotion board is properly appointed.
 - (1) Verify president is the senior member and is an officer, CSM or SGM.
 - (2) Verify members are at least one grade senior to those being considered.

Performance Steps

- (3) Verify at least one voting member is the same sex as Soldiers being considered. Verify that the reason is included in board proceedings if this is not possible.
 - (4) Verify the board includes a minority member if reasonably available.
 - (5) Verify a non-voting recorder from the battalion S1 is appointed.
 - c. Verify conduct of promotion selection board.
 - (1) Schedule the monthly promotion board with board members appointed in writing by promotion authority.
 - (2) Verify all DA Forms 3355, with sections A and B completed for each Soldier scheduled to appear before the promotion board.
 - (3) Ensure unit commander notified of board schedule.
 - (4) Ensure unit notifies Soldier(s) and board members.
 - (5) Ensure promotion authority briefs the president of the board on responsibilities.
 - (6) Verify conduct of promotion board.
 - (7) Verify recorder collects all DA Forms 3356 and prepares DA Forms 3357 after each Soldier's appearance and obtains president's signature.
 - (8) Verify section D, DA Form 3355, is completed by the Soldier, board recorder, and the promotion authority.
 - d. Process results of promotion selection board.
 - (1) Prepare the board proceeding memorandum not later than 1 duty day after the board adjourns.
 - (2) Ensure president reviews memorandum for accuracy signs and forwards to promotion authority.
 - (3) Ensure promotion authority approves or disapproves the board and signs the memo within 3 days of board adjournment. Forward completed results to the MPD promotion work center(RA) or USAREC G1 (AGR) within 3 days of board adjournment.
 - (4) Ensure Soldiers attained either 450 points for promotion to SSG or 350 points for promotion to SGT before integrating onto the recommended list.
 - (5) Ensure completed board actions reach the MPD by the 20th day of the board month.
 - (6) Ensure promotion point data is entered into the appropriate database as soon as possible, but not later than the 27th day of the promotion board month.
 - (7) Ensure Soldiers not recommended or who have not attained the minimum points are counseled by the promotion authority and/or board president. Ensure Soldier and counselor sign block D of DA Form 3355. Ensure "Soldier refuses to sign" is entered if Soldier will not sign block D of DA Form 3355.
 - (8) Ensure administrative points are determined as of and up until the date the board is approved.
 - (9) Maintain file copies of promotion board proceedings IAW AR 600-8-19.
3. Perform maintenance of the SGT/SSG promotion list.
- a. Process reevaluations.
 - (1) Process administrative reevaluations
 - (a) Verify Soldier has submitted a memorandum to request administrative reevaluation.
 - (b) Ensure commander signs a memorandum recommending approval or disapproval, and indicating if he/she wants to increase or decrease the duty performance points.
 - (c) After verifying the Soldier has 20 new points to add, forward the memorandum (and DA Form 3355 when duty performance points change) to the MPD (RA) or USAREC G1 (AGR).
 - (2) Process total reevaluation.
 - (a) Ensure the total reevaluation covers the entire process: the commander's recommendation, promotion board appearance, and administrative points.
 - (b) Verify it has been six months from the latest board appearance or last administrative reevaluation.

Performance Steps

- (c) Ensure the Soldier's application for a total reevaluation contains the following statement: "I understand that I may lose points and that the results of this reevaluation will take precedence over my current promotion list standing. Additionally, I understand that if the board does not recommend me for promotion or if I do not obtain the minimum required promotion points to maintain promotion list status, I will be immediately removed from the recommended list." Document must be signed by the Soldier and attached as a continuation page to the DA Form 3355.
- (d) Prepare a new DA Form 3355 for the Soldier and forward it the unit commander with the Soldier's request for reevaluation. Commander may elect to award new duty performance points or allow the previous duty performance points to remain.
- (e) Include Soldier requesting reevaluation into the promotion board for the following month.
- (f) After the promotion board, process the request for total evaluation with the board proceedings and forward to the MPD (RA) or USAREC G1 (AGR).
- (3) Verify the promotion scores achieved through the reevaluation process are effective for promotion on the first day of the second month following the date the new score is entered into the database.
- (4) Ensure gaining commanders of in-transit Soldiers elect either to award duty performance points or use the previous commander's evaluation.
- (5) Ensure MPD/HRC-St. Louis provides the Soldier with a copy of the completed (DA Form 3355) and computer generated report reflecting the new score and data.
- b. Process promotion point adjustments.
 - (1) Verify points were effective prior to the date of the last board or administrative reevaluation but were left off of the DA Form 3355 or were not supported with official documentation.
 - (a) Ensure adjustment action is limited to specific points in question.
 - (b) Verify adjustment is supported by official documentation.
 - (c) Verify request for adjustment submitted using a memorandum with all supporting documents listed. Memorandum should be included as a portion of the promotion packet. Forward a copy of the promotion point adjustment with documentation for AGR Soldiers to USAREC G1.
 - (2) Verify point adjustment is approved by MPD chief (RA) or HRC-St. Louis (AGR) and approval document is included with promotion packet and DA Form 3355 annotated in red to show adjustment points and date
 - (3) Ensure the Soldier is notified through chain of command of the adjusted promotion points. Notification must include the reason for change, new points, effective date of new points, a copy of completed action, and a computer generated report reflecting the new information.
- c. Review withdrawal of promotion points and maintenance of list status.
 - (1) Verify points suspended from the promotion point worksheet (DA Form 3355) for being outdated until verified with Soldier or commander.
 - (2) Ensure Soldier is notified within five days of discovery of outdated documents.
 - (3) Allow Soldiers 60 days to verify suspended points beginning on the day the Soldier is notified.
 - (4) Ensure official documentation verifying suspended points is dated/effective prior to the promotion month.
 - (5) Ensure suspended points are withdrawn on the 61st day if not verified and Soldier is notified.
 - (6) Ensure new points are effective immediately.
 - (7) Ensure the promotion of an otherwise promotable Soldier on the current recommended list is suspended when promotion authority concludes that he or she was considered in error or was granted more administrative points than entitled.
 - (8) Ensure promotion is suspended when a promotion packet, or portion thereof, has been lost and must be reconstructed.
 - (9) Ensure Soldier whose name appears on the by-name list announced by CDR, HRC (AHRC-MSP-E) is promoted even if a portion of points are suspended as long as the unchallenged point total meets or exceeds the promotion cut-off score.

Performance Steps

(10) Ensure erroneous or outdated points are removed immediately if not updated by Soldier.

4. Maintain appropriate promotion files IAW Army Records Information Management System (ARIMS).

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures**GO** **NO-GO**

- | | | |
|--|---|---|
| 1. Verified recommendations and eligibility for promotion to SGT/SSG. | — | — |
| a. Prepared for the promotion board. | | |
| (1) Prepared the unit enlisted promotion report and eligibility/ineligibility listing for USAR Soldiers; forward it to the unit commander to select Soldiers for board appearance the month prior to the promotion board. | | |
| (2) Prepared automated promotion point worksheets (RA)/DA Form 3355 (AGR) for Soldiers the commander has recommended for promotion board appearance. | | |
| b. Verified promotion data on Soldier's Enlisted Record Brief (ERB/Official Military Personnel File (OMPF). | | |
| (1) For Regular Army Soldiers, coordinated an appointment (either a remote appointment or face-to-face) between the S1/Soldier(s) and the servicing Military Personnel Division (MPD) to review their personnel record/ERB NTL the 15th of the month, if required. | | |
| (2) Ensured Soldiers provide documents (if required) to verify award of promotion points. | | |
| (3) For RA Soldiers, ensured the promotion point worksheet is authenticated by a SSG/GS6 or higher at the MPD prior to board appearance. | | |
| c. Verified all of the required information is contained in the recommendation. | | |
| (1) Verified APFT data/scores, weapons qualification data/scores, and duty performance evaluation . | | |
| (2) Verified commander's signature in section A, block 3. | | |
| (3) Verified date is entered in section A, block 5. | | |
| d. Verified Soldier meets eligibility requirements for recommendation. | | |
| (1) Verified the Soldier meets MOS requirements. | | |
| (2) Verified the Soldier meets education requirements. | | |
| (3) Verified the Soldier meets time in service/time in grade (TIS/TIMIG) requirements. | | |
| (4) Verified the Soldier meets reenlistment requirements. | | |
| (5) Verified the Soldier meets physical qualification requirements. | | |
| (6) Verified the Soldier meets APFT requirements. | | |
| (7) Verified the Soldier meets weight control requirements. | | |
| (8) Verified the Soldier is not enrolled in the Army Substance Abuse Program (ASAP). | | |
| (9) Verified the Soldier meets points requirements. | | |
| (10) Verified the Soldier is not flagged. | | |
| e. Verified all Soldiers eligible for the first time primary zone. | | |
| (1) Verified battalion S1 provided unit commander a completed DA Form 3355 for all eligible SPC/CPL and SGTs. | | |
| (2) Verified unit commander recommends approval and returns the completed DA 3355 to the battalion S1 or recommends disapproval and provides the DA 3355 along with counseling documents to the promotion authority for a final decision. | | |

Performance Measures**GO** **NO-GO**

- (3) Ensured quarterly counselings are provided to the promotion authority until the Soldier is recommended for promotion or is no longer eligible.
2. Performed actions required to schedule and conduct the promotion board. _____
- a. Conducted actions to schedule promotion board not later than the 15th of each month.
- b. Verified promotion board is properly appointed.
- (1) Verified president is the senior member and is an officer, CSM or SGM.
- (2) Verified members are at least one grade senior to those being considered.
- (3) Verified at least one voting member is the same sex as Soldiers being considered. Verified that the reason is included in board proceedings if this is not possible.
- (4) Verified the board includes a minority member if reasonably available.
- (5) Verified a non-voting recorder from the battalion S1 is appointed.
- c. Verified conduct of promotion selection board.
- (1) Scheduled the monthly promotion board with board members appointed in writing by promotion authority.
- (2) Verified all DA Forms 3355, with sections A and B completed for each Soldier scheduled to appear before the promotion board.
- (3) Ensured unit commander notified of board schedule.
- (4) Ensured unit notifies Soldier(s) and board members.
- (5) Ensured promotion authority briefs the president of the board on responsibilities.
- (6) Verified conduct of promotion board.
- (7) Verified recorder collects all DA Forms 3356 and prepares DA Forms 3357 after each Soldier's appearance and obtains president's signature.
- (8) Verified section D, DA Form 3355, is completed by the Soldier, board recorder, and the promotion authority.
- d. Processed results of promotion selection board.
- (1) Prepared the board proceeding memorandum not later than 1 duty day after the board adjourns.
- (2) Ensured president reviews memorandum for accuracy signs and forwards to promotion authority.
- (3) Ensured promotion authority approves or disapproves the board and signs the memo within 3 days of board adjournment. Forward completed results to the MPD promotion work center(RA) or USAREC G1 (AGR) within 3 days of board adjournment.
- (4) Ensured Soldiers attained either 450 points for promotion to SSG or 350 points for promotion to SGT before integrating onto the recommended list.
- (5) Ensured completed board actions reach the MPD by the 20th day of the board month.
- (6) Ensured promotion point data is entered into the appropriate database as soon as possible, but not later than the 27th day of the promotion board month.
- (7) Ensured Soldiers not recommended or who have not attained the minimum points are counseled by the promotion authority and/or board president. Ensured Soldier and counselor sign block D of DA Form 3355. Ensured "Soldier refuses to sign" is entered if Soldier will not sign block D of DA Form 3355.
- (8) Ensured administrative points are determined as of and up until the date the board is approved.
- (9) Maintained file copies of promotion board proceedings IAW AR 600-8-19.

Performance Measures**GO** **NO-GO**

3. Performed maintenance of the SGT/SSG promotion list. _____

a. Processed reevaluations. _____

- (1) Processed administrative reevaluations
 - (a) Verified Soldier has submitted a memorandum to request administrative reevaluation.
 - (b) Ensured commander signs a memorandum recommending approval or disapproval, and indicating if he/she wants to increase or decrease the duty performance points.
 - (c) After verifying the Soldier has 20 new points to add, forwarded the memorandum (and DA Form 3355 when duty performance points change) to the MPD (RA) or USAREC G1 (AGR).
- (2) Processed total reevaluation.
 - (a) Ensured the total reevaluation covers the entire process: the commander's recommendation, promotion board appearance, and administrative points.
 - (b) Verified it has been six months from the latest board appearance or last administrative reevaluation.
 - (c) Ensured the Soldier's application for a total reevaluation contains the following statement: "I understand that I may lose points and that the results of this reevaluation will take precedence over my current promotion list standing. Additionally, I understand that if the board does not recommend me for promotion or if I do not obtain the minimum required promotion points to maintain promotion list status, I will be immediately removed from the recommended list." Document must be signed by the Soldier and attached as a continuation page to the DA Form 3355.
 - (d) Prepared a new DA Form 3355 for the Soldier and forward it the unit commander with the Soldier's request for reevaluation. Commander may elect to award new duty performance points or allow the previous duty performance points to remain.
 - (e) Included Soldier requesting reevaluation into the promotion board for the following month.
 - (f) After the promotion board, processed the request for total evaluation with the board proceedings and forward to the MPD (RA) or USAREC G1 (AGR).
- (3) Verified the promotion scores achieved through the reevaluation process are effective for promotion on the first day of the second month following the date the new score is entered into the database.
- (4) Ensured gaining commanders of in-transit Soldiers elect either to award duty performance points or use the previous commander's evaluation.
- (5) Ensured MPD/HRC-St. Louis provides the Soldier with a copy of the completed (DA Form 3355) and computer generated report reflecting the new score and data.

b. Processed promotion point adjustments.

- (1) Verified points were effective prior to the date of the last board or administrative reevaluation but were left off of the DA Form 3355 or were not supported with official documentation.
 - (a) Ensured adjustment action is limited to specific points in question.
 - (b) Verified adjustment is supported by official documentation.
 - (c) Verified request for adjustment submitted using a memorandum with all supporting documents listed. Memorandum should be included as a portion of the promotion packet. Forward a copy of the promotion point adjustment with documentation for AGR Soldiers to USAREC G1.

Review Emergency Notification Data
805B-79R-8108

Conditions: Given a requirement to review a Soldier's emergency documents, access to the Soldier, a completed DD Form 93 (Record of Emergency Data), a completed SGLV Form 8286 (Service members' Group Life Insurance Election and Certificate) AR 600-8-1 and a Officer Records Brief (ORB)/Enlisted Records Brief (ERB).

Standards: 1. Verify the items 1-16 of the DD form 93 are properly completed.
2. Verify the personal data on the SGLV Form 8286 is filled out completely and accurately.
3. Ensure the completed DD Form 93 and SGLV Form 8286 are properly distributed.

Performance Steps

1. Verify items 1-17 of the DD Form 93 are properly completed.
1. Complete responsibilities when processing evaluations.
1. Review the contents of DA Form 4187, Section 1 (Personnel Identification) for completeness and accuracy.
 - a. Verify the member's full last name, first name, and middle name are entered in item 1.
 - b. Verify the member's social security number (SSN) is entered in item 2.
 - c. Verify the member's component is correct in item 3a.
 - d. Verify item 3b is left blank.
 - e. Verify Children information. Enter last name (only if different from Item 1) first name and middle initial, relationship, and date of birth of all children. If none, so state. Include illegitimate children if acknowledged by member or paternity/maternity has been judicially decreed. Relationship examples: son, daughter, stepson or daughter, adopted son or daughter or ward. Date of birth example: 19950704. For children not living with the member's current spouse, include address and name and relationship of person with whom residing in item 5d.
 - f. Verify Father's Name (Last name, first name and middle initial) in Block 6a. In block 6B, verify address and Telephone Number of Father. If unknown or deceased, so state. Include civilian title or military rank and service if applicable. If other than natural father is listed, indicate relationship.
 - g. Verify Mother Name's (Last name, first name and middle initial) in block 7a. In block 7b, verify address and Telephone Number of Mother. If unknown or deceased, so state. Include civilian title or military rank and service if applicable. If other than natural mother is listed, indicate relationship.
 - h. Verify Persons Not to be Notified Due to Ill Health in block 8. List relationship, e.g., "Mother," of person(s) listed in Items 4, 5, 6, or 7 who are not to be notified of a casualty due to ill health. If more than one child, specify, e.g., "daughter Susan." Otherwise, enter "None". List relationship, e.g., "Father" or name and address of person(s) to be notified in lieu of person(s) listed in item 8a. If "None" is entered in Item 8a, leave blank.
 - i. Verify information in block 9. Information in block 9a item will be used to record the name of the person or persons, if any, other than the member's primary next of kin or immediate family, to whom information on the whereabouts and status of the member shall be provided if the member is placed in a missing status. Ensure the address of this person is entered in block 9b.
 - j. For Soldiers, ensure block 10 is blank..

Performance Steps

- k. In block 11, verify beneficiary(ies) for Death Gratuity. Enter first name(s), middle initial, and last name(s) of the person(s) to receive death gratuity pay. A member may designate one or more persons to receive all or a portion of the death gratuity pay. The designation of a person to receive a portion of the amount shall indicate the percentage of the amount, to be specified only in 10 percent increments, that the person may receive. The member should make specific designations, as it expedites payment. If the member does not wish to designate a beneficiary for the payment of death gratuity, enter "None," or if the full amount is not designated, the payment or balance will be paid as follows:
 - (1) To the surviving spouse of the person, if any
 - (2) To any surviving children of the person and the descendants of any deceased children by representation
 - (3) To the surviving parents or the survivor of them
 - (4) To the duly appointed executor or administrator of the estate of the person
 - (5) If there are none of the above, to other next of kin of the person entitled under the laws of domicile of the person at the time of the person's death.
 - (6) In block 11b, ensure Soldier has entered beneficiary (ies) full mailing address and telephone number to include the ZIP Code.
 - (7) In block 11c, ensure Soldier has entered the percentage to be paid to each person (Enter 10%, 20%, 30%, up to 100% as appropriate.) The sum shares must equal 100 percent. If no percent is indicated and more than one person is named, the money is paid in equal shares to the persons named.
 - l. In Block 12a, verify Soldier's beneficiary(ies) for Unpaid Pay/Allowance. Enter first name(s), middle initial, last name(s) and relationship of person to receive unpaid pay and allowances at the time of death. The member may indicate anyone to receive this payment. If the member designated two or more beneficiaries, state the percentage to be paid each in item 10c. If the member does not wish to designate a beneficiary, enter "By Law." The member is urged to designate a beneficiary for unpaid pay and allowances as payment will be made to the person in order of precedence by law in the absence of a designation.
 - (1) In block 12b, ensure Soldier entered beneficiary(ies) full mailing address and telephone number to include the ZIP Code.
 - (2) In block 12c, ensure if the member designated two or more beneficiaries they state the percentage to be paid each in this section. The sum shares must equal 100 percent.
 - m. In block 13, ensure Soldier entered the name, relationship, and address of the Person Authorized to Direct Disposition (PADD) of your remains should they become a casualty. Only the following persons may be named as a PADD: surviving spouse, blood relative of legal age, or adoptive relatives of the decedent. If neither of these three can be found, a person standing in loco parentis may be named.
 - n. In block 14, ensure the Soldier has entered any continuations/remarks.
 - o. In block 15 ensure the Soldier has signed the form (physically or electronically). Electronic signature is preferred as it does not require a witness.
 - p. In block 16, verify a witness has signed the form if the Soldier did not electronically sign the form.
 - q. In block 17, ensure there is a date on the form.
2. Verify the personal data on the SGLV Form 8286 is filled out completely and accurately.
- a. Verify the Soldier's full name has been properly entered.
 - b. Verify the Soldier's rank, title or grade have been properly entered.
 - c. Verify the SSN has been properly entered.
 - d. Verify the reason for completing this form was checked as appropriate.
 - e. Verify the amount of insurance has been properly entered.
 - f. Verify beneficiaries are correct.
 - (1) Verify for unusual beneficiaries, the Soldier is counseled on the original purpose of SGLI.
 - (2) Verify for unusual beneficiaries, an unusual beneficiary designation notation is on the form.
 - (3) Verify for unusual beneficiaries, the individual who counsels the Soldier, signs and dates the notation.

Performance Steps

- g. Verify the SGLV Form 8286 is appropriately signed.
 - (1) Confirm the Soldier has signed the form, in the correct location, including grade and date, in ink.
 - (2) Confirm a disinterested witness has signed the form, in the correct location, including grade, in ink.
- 3. Ensure the completed DD Form 93 and SGLV Form 8286 are properly distributed.
 - a. Verify the Soldier received one copy of each form.
 - b. Transmit the form to the servicing MPD (RA) or USAREC G1 (AGR).

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Completed processing evaluations.	—	—
1. Verified items 1-17 of the DD Form 93 are properly completed. <ul style="list-style-type: none"> a. Verified the member's full last name, first name, and middle name are entered in item 1. b. Verified the member's social security number (SSN) is entered in item 2. c. Verified the member's component is correct in item 3a. d. Verified item 3b is left blank. e. Verified Children information. Enter last name (only if different from Item 1) first name and middle initial, relationship, and date of birth of all children. If none, so state. Include illegitimate children if acknowledged by member or paternity/maternity has been judicially decreed. Relationship examples: son, daughter, stepson or daughter, adopted son or daughter or ward. Date of birth example: 19950704. For children not living with the member's current spouse, include address and name and relationship of person with whom residing in item 5d. f. Verified Father's Name (Last name, first name and middle initial) in Block 6a. In block 6B, verify address and Telephone Number of Father. If unknown or deceased, so state. Include civilian title or military rank and service if applicable. If other than natural father is listed, indicate relationship. g. Verified Mother Name's (Last name, first name and middle initial) in block 7a. In block 7b, verify address and Telephone Number of Mother. If unknown or deceased, so state. Include civilian title or military rank and service if applicable. If other than natural mother is listed, indicate relationship. h. Verified Persons Not to be Notified Due to Ill Health in block 8. List relationship, e.g., "Mother," of person(s) listed in Items 4, 5, 6, or 7 who are not to be notified of a casualty due to ill health. If more than one child, specify, e.g., "daughter Susan." Otherwise, enter "None". List relationship, e.g., "Father" or name and address of person(s) to be notified in lieu of person(s) listed in item 8a. If "None" is entered in Item 8a, leave blank. i. Verified information in block 9. Information in block 9a item will be used to record the name of the person or persons, if any, other than the member's primary next of kin or immediate family, to whom information on the whereabouts and status of the member shall be provided if the member is placed in a missing status. Ensured the address of this person is entered in block 9b. j. For Soldiers, ensured block 10 is blank.. 	—	—

Performance Measures**GO** **NO-GO**

- k. In block 11, verified beneficiary(ies) for Death Gratuity. Enter first name(s), middle initial, and last name(s) of the person(s) to receive death gratuity pay. A member may designate one or more persons to receive all or a portion of the death gratuity pay. The designation of a person to receive a portion of the amount shall indicate the percentage of the amount, to be specified only in 10 percent increments, that the person may receive. The member should make specific designations, as it expedites payment. If the member does not wish to designate a beneficiary for the payment of death gratuity, enter "None," or if the full amount is not designated, the payment or balance will be paid as follows:
- (1) To the surviving spouse of the person, if any
 - (2) To any surviving children of the person and the descendants of any deceased children by representation
 - (3) To the surviving parents or the survivor of them
 - (4) To the duly appointed executor or administrator of the estate of the person
 - (5) If there are none of the above, to other next of kin of the person entitled under the laws of domicile of the person at the time of the person's death.
 - (6) In block 11b, ensured Soldier has entered beneficiary (ies) full mailing address and telephone number to include the ZIP Code.
 - (7) In block 11c, ensured Soldier has entered the percentage to be paid to each person (Enter 10%, 20%, 30%, up to 100% as appropriate.) The sum shares must equal 100 percent. If no percent is indicated and more than one person is named, the money is paid in equal shares to the persons named.
- l. In Block 12a, verified Soldier's beneficiary(ies) for Unpaid Pay/Allowance. Enter first name(s), middle initial, last name(s) and relationship of person to receive unpaid pay and allowances at the time of death. The member may indicate anyone to receive this payment. If the member designated two or more beneficiaries, state the percentage to be paid each in item 10c. If the member does not wish to designate a beneficiary, enter "By Law." The member is urged to designate a beneficiary for unpaid pay and allowances as payment will be made to the person in order of precedence by law in the absence of a designation.
- (1) In block 12b, ensured Soldier entered beneficiary(ies) full mailing address and telephone number to include the ZIP Code.
 - (2) In block 12c, ensured if the member designated two or more beneficiaries they state the percentage to be paid each in this section. The sum shares must equal 100 percent.
- m. In block 13, ensured Soldier entered the name, relationship, and address of the Person Authorized to Direct Disposition (PADD) of your remains should they become a casualty. Only the following persons may be named as a PADD: surviving spouse, blood relative of legal age, or adoptive relatives of the decedent. If neither of these three can be found, a person standing in loco parentis may be named.
- n. In block 14, ensured the Soldier has entered any continuations/remarks.
- o. In block 15 ensured the Soldier has signed the form (physically or electronically). Electronic signature is preferred as it does not require a witness.
- p. In block 16, verified a witness has signed the form if the Soldier did not electronically sign the form.
- q. In block 17, ensured there is a date on the form.

2. Verified the personal data on the SGLV Form 8286 is filled out completely and accurately.

Performance Measures

GO NO-GO

- a. Verified the Soldier's full name has been properly entered.
 - b. Verified the Soldier's rank, title or grade have been properly entered.
 - c. Verified the SSN has been properly entered.
 - d. Verified the reason for completing this form was checked as appropriate.
 - e. Verified the amount of insurance has been properly entered.
 - f. Verified beneficiaries are correct.
 - (1) Verified for unusual beneficiaries, the Soldier is counseled on the original purpose of SGLI.
 - (2) Verified for unusual beneficiaries, an unusual beneficiary designation notation is on the form.
 - (3) Verified for unusual beneficiaries, the individual who counsels the Soldier, signs and dates the notation.
 - g. Verified the SGLV Form 8286 is appropriately signed.
 - (1) Confirmed the Soldier has signed the form, in the correct location, including grade and date, in ink.
 - (2) Confirmed a disinterested witness has signed the form, in the correct location, including grade, in ink.
3. Ensured the completed DD Form 93 and SGLV Form 8286 are properly distributed. — —
- a. Verified the Soldier received one copy of each form.
 - b. Transmitted the form to the servicing MPD (RA) or USAREC G1 (AGR).

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
AR 600-8-1

Related

Review Flow of Personnel Actions
805B-79R-8109

Conditions: Given a requirement to identify the flow of personnel actions, AR 600-8-104 (Military Personnel Information Management/Records), DA Pam 600-8 (Management and Administrative Procedures) and a completed DA Form 4187 (Personnel Action Form).

- Standards:**
1. Review the contents of DA Form 4187 for completeness and accuracy.
 2. Verify the routing, submission, signature, and action items for DA Form 4187 are complete and accurate.
 3. Verify the proper filing of DA Form 4187 and supporting documents or attachments.
 4. Verify the Soldier is notified of the results of the DA Form 4187.

Performance Steps

- a. Verify the Soldier's name is correct.
 - b. Verify the Soldier's grade of rank and Primary Military Occupational Specialty (PMOS) (for enlisted personnel only) is correct.
 - c. Verify the Soldier's Social Security Number (SSN) is correct.
2. Review the contents of DA Form 4187, Section 2 (Duty Status Change) for completeness and accuracy.
- a. Verify any change(s) in a Soldier's duty status that appear on DA Form 4187.
 - (1) Verify the "change from" section contains the Soldier's current duty status.
 - (2) Verify the "to" section contains the new duty status designation.
 - b. Verify the "effective" time and date of the duty status change is complete.
 - (1) Verify the change of time in Duty Status is effective.
 - (2) Verify the change of date in Duty Status is effective.
 - c. Verify the Duty Status History changes are on the current report.
3. Review the contents of DA Form 4187, Section 3 (Request for Personnel Action) for completeness and accuracy.
- a. Verify a request to attend a Service School (enlisted personnel only) is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-10 is in the procedure column.
 - (3) Verify the appropriate Army Human Resources System (AHRS) procedure(s) is/are complete, if necessary.
 - b. Verify a request for Reserve Officers Training Corps (ROTC) or Reserve Component Duty status is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-12 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
 - c. Verify a request to volunteer for Overseas Service is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-14 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
 - d. Verify a request to apply for Ranger Training is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-15 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
 - e. Verify a request for re-assignment due to Extreme Family Problems is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-16 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
 - f. Verify a request for Exchange re-assignment (enlisted personnel only) is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-18 is in the procedure column.

Performance Steps

- (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- g. Verify a request to apply for Airborne Training is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-19 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- h. Verify a request to apply for Special Forces Training/Assignment is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-22 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- i. Verify a request to apply for On-the-job-training (OJT) (enlisted personnel only) is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-23 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- j. Verify a request for re-testing of Army Personnel Tests is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-25 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- k. Verify a request for reassignment of Married Army Couples is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-32 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- l. Verify a request to apply for Reclassification is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 3-46 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- m. Verify a request to apply for Officer Candidate School is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 4-10 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- n. Verify a request to apply for assignment of Persons with Exceptional Family Members action is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- o. Verify a request to issue an Identification Card is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 6-8 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- p. Verify a request to issue Identification Tags is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 6-9 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- q. Verify a request to receive Separate Rations is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 9-1 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- r. Verify a request to apply for Leave is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 9-4 is in the procedure column.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary.
- s. Verify a request for a change of Name, SSN, or Date of Birth (DOB) is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure 9-5 is in the procedure column.
 - (a) Circle "Name" if the action is a change in Name.
 - (b) Circle "SSN" if the action is a change in Social Security Number.
 - (c) Circle "DOB" if the action is a change in Date of Birth.

Performance Steps

- (3) Verify the appropriate AHRS procedure(s) is/are complete, if necessary
- t. Verify a request for other types of personnel action is complete.
 - (1) Verify the action request box is checked-off.
 - (2) Verify Procedure(s) appropriate for the requested action is/are listed.
 - (3) Verify the appropriate AHRS procedure(s) is/are complete.
- u. Verify the Soldier signs at the bottom of Section 3, when necessary.
- v. Verify the current date appears at the bottom of Section 3.
- 4. Review the contents of DA Form 4187, Section 4 (Remarks) for completeness and accuracy.
 - a. Review any comments written in Section 4 for appropriateness to the requested action.
 - b. Verify the attachment of any additional comment sheets to DA Form 4187.
- 5. Review the contents of DA Form 4187, Section 5 (Certification/Approval/Disapproval) for completeness and accuracy.
 - a. Review the information and requested action(s) contained in Section 2 and Section 3.
 - b. Verify the "verified" section is checked-off.
 - c. Verify either "recommended approval" or "recommended disapproval" has been checked-off for the requested action(s).
- 6. Verify the routing and submission information for DA Form 4187 is complete and accurate.
 - a. Verify the "Thru:" designation or address is correct.
 - b. Verify the "To:" designation or address is correct.
 - c. Verify the "From:" designation or address is correct.
 - d. Verify the submission of DA Form 4187 for approval/disapproval as stated in local SOP.
- 7. Verify the signature(s) and action item(s) on DA Form 4187 are complete and accurate.
 - a. Verify "is approved" or "is disapproved" is checked-off in DA Form 4187 Section 5.
 - b. Verify DA Form 4187 contains the appropriate command authority signature(s).
 - c. Assign and complete all action item(s) indicated by the appropriate signing authority as stated in appropriate regulation or local SOPs.
 - d. Verify a copy of the Soldier's action is maintained in the local suspense files as stated in appropriate regulation or local SOPs.
 - e. Forward DA Form 4187 to the appropriate agency.
- 8. Verify the Soldier is notified of the results of the DA Form 4187.
 - a. Verify the Soldier's action was returned from higher headquarters approved or disapproved.
 - b. Verify the DA Form 4187 and supporting documentation is properly routed to the Soldier.
 - c. Verify orders are published, if necessary.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Verified the Soldier's name is correct. <ul style="list-style-type: none"> a. Verified the Soldier's grade of rank and Primary Military Occupational Specialty (PMOS) (for enlisted personnel only) is correct. b. Verified the Soldier's Social Security Number (SSN) is correct. 	—	—
2. Reviewed the contents of DA Form 4187, Section 2 (Duty Status Change) for completeness and accuracy.	—	—

Performance Measures**GO** **NO-GO**

- a. Verified any change(s) in a Soldier's duty status that appear on DA Form 4187.
 - (1) Verified the "change from" section contains the Soldier's current duty status.
 - (2) Verified the "to" section contains the new duty status designation.
 - b. Verified the "effective" time and date of the duty status change is complete.
 - (1) Verified the change of time in Duty Status is effective.
 - (2) Verified the change of date in Duty Status is effective.
 - c. Verified the Duty Status History changes are on the current report.
3. Reviewed the contents of DA Form 4187, Section 3 (Request for Personnel Action) for completeness and accuracy. ——— ———
- a. Verified a request to attend a Service School (enlisted personnel only) is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-10 is in the procedure column.
 - (3) Verified the appropriate Army Human Resources System (AHRS) procedure(s) is/are complete, if necessary.
 - b. Verified a request for Reserve Officers Training Corps (ROTC) or Reserve Component Duty status is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-12 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
 - c. Verified a request to volunteer for Overseas Service is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-14 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
 - d. Verified a request to apply for Ranger Training is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-15 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
 - e. Verified a request for re-assignment due to Extreme Family Problems is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-16 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
 - f. Verified a request for Exchange re-assignment (enlisted personnel only) is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-18 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
 - g. Verified a request to apply for Airborne Training is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-19 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
 - h. Verified a request to apply for Special Forces Training/Assignment is complete.

Performance Measures**GO NO-GO**

- (1) Verified the action request box is checked-off.
- (2) Verified Procedure 3-22 is in the procedure column.
- (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- i. Verified a request to apply for On-the-job-training (OJT) (enlisted personnel only) is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-23 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- j. Verified a request for re-testing of Army Personnel Tests is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-25 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- k. Verified a request for reassignment of Married Army Couples is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-32 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- l. Verified a request to apply for Reclassification is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 3-46 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- m. Verified a request to apply for Officer Candidate School is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 4-10 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- n. Verified a request to apply for assignment of Persons with Exceptional Family Members action is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- o. Verified a request to issue an Identification Card is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 6-8 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- p. Verified a request to issue Identification Tags is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 6-9 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- q. Verified a request to receive Separate Rations is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 9-1 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.
- r. Verified a request to apply for Leave is complete.
 - (1) Verified the action request box is checked-off.
 - (2) Verified Procedure 9-4 is in the procedure column.
 - (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
<ul style="list-style-type: none"> s. Verified a request for a change of Name, SSN, or Date of Birth (DOB) is complete. <ul style="list-style-type: none"> (1) Verified the action request box is checked-off. (2) Verified Procedure 9-5 is in the procedure column. <ul style="list-style-type: none"> (a) Circled "Name" if the action is a change in Name. (b) Circled "SSN" if the action is a change in Social Security Number. (c) Circled "DOB" if the action is a change in Date of Birth. (3) Verified the appropriate AHRS procedure(s) is/are complete, if necessary t. Verified a request for other types of personnel action is complete. <ul style="list-style-type: none"> (1) Verified the action request box is checked-off. (2) Verified Procedure(s) appropriate for the requested action is/are listed. (3) Verified the appropriate AHRS procedure(s) is/are complete. u. u. Verified the Soldier signs at the bottom of Section 3, when necessary. v. Verified the current date appears at the bottom of Section 3. 		
<ul style="list-style-type: none"> 4. Reviewed the contents of DA Form 4187, Section 4 (Remarks) for completeness and accuracy. <ul style="list-style-type: none"> a. Reviewed any comments written in Section 4 for appropriateness to the requested action. b. Verified the attachment of any additional comment sheets to DA Form 4187. 	—	—
<ul style="list-style-type: none"> 5. Reviewed the contents of DA Form 4187, Section 5 (Certification/Approval/Disapproval) for completeness and accuracy. <ul style="list-style-type: none"> a. Reviewed the information and requested action(s) contained in Section 2 and Section 3. b. Verified the "verified" section is checked-off. c. Verified either "recommended approval" or "recommended disapproval" has been checked-off for the requested action(s). 	—	—
<ul style="list-style-type: none"> 6. Verified the routing and submission information for DA Form 4187 is complete and accurate. <ul style="list-style-type: none"> a. Verified the "Thru:" designation or address is correct. b. Verified the "To:" designation or address is correct. c. Verified the "From:" designation or address is correct. d. Verified the submission of DA Form 4187 for approval/disapproval as stated in local SOP. 	—	—
<ul style="list-style-type: none"> 7. Verified the signature(s) and action item(s) on DA Form 4187 are complete and accurate. <ul style="list-style-type: none"> a. Verified "is approved" or "is disapproved" is checked-off in DA Form 4187 Section 5. b. Verified DA Form 4187 contains the appropriate command authority signature(s). c. Assigned and completed all action item(s) indicated by the appropriate signing authority as stated in appropriate regulation or local SOPs. d. Verified a copy of the Soldier's action is maintained in the local suspense files as stated in appropriate regulation or local SOPs. e. Forwarded DA Form 4187 to the appropriate agency. 	—	—
<ul style="list-style-type: none"> 8. Verified the Soldier is notified of the results of the DA Form 4187. 	—	—

Performance Measures

GO **NO-GO**

- a. Verified the Soldier's action was returned from higher headquarters approved or disapproved.
- b. Verified the DA Form 4187 and supporting documentation is properly routed to the Soldier.
- c. Verified orders are published, if necessary.

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
AR 600-8-104

Related
DA MEMO 600-8-104

Manage Personnel Evaluation System
805B-79R-8110

Conditions: Given a requirement to manage the personnel evaluation system.

Standards: Ensure S1 responsibilities are accomplished when processing evaluations.

Performance Steps

- a. Maintain copies of current rating chains furnished by commanders.
- b. Ensure rating officials meet eligibility criteria.
- c. Establish proper suspense controls of evaluations to ensure reports are transmitted to HRC within 90 days after ending date of the report (or earlier to meet established policy).
- d. Assist the rated Soldier and rating officials in preparing reports, when needed.
- e. Review completed evaluations for accurate entries.
- f. Process mandatory reports (90-day minimum) according to appropriate guidelines.
- g. Process mandatory reports (other than 90-day minimum) according to appropriate guidelines.
- h. Process optional reports according to appropriate guidelines.
- i. Ensure requests for modifications to previously submitted reports meet appropriate guidelines.
- j. Notify rating officials of any discrepancies and advise them of corrective action.
- k. Ensure the rated Soldier is provided his/her completed evaluation before it is sent to HRC.
- l. Ensure reports identified by HRC for correction are revised by the appropriate officials and resubmitted no later than the suspense date.
- m. Advise and assist Soldiers in the preparation of evaluation appeals.
- n. Ensure evaluation redress procedures comply with regulatory guidelines.

2. Verify evaluation report receipt by obtaining evaluation processing reports from the Interactive Web Reporting System (IWRIS) website.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

GO NO-GO

- a. Maintained copies of current rating chains furnished by commanders.
- b. Ensured rating officials meet eligibility criteria.
- c. Established proper suspense controls of evaluations to ensure reports are transmitted to HRC within 90 days after ending date of the report (or earlier to meet established policy).
- d. Assisted the rated Soldier and rating officials in preparing reports, when needed.
- e. Reviewed completed evaluations for accurate entries.
- f. Processed mandatory reports (90-day minimum) according to appropriate guidelines.
- g. Processed mandatory reports (other than 90-day minimum) according to appropriate guidelines.
- h. Processed optional reports according to appropriate guidelines.
- i. Ensured requests for modifications to previously submitted reports meet appropriate guidelines.
- j. Notified rating officials of any discrepancies and advise them of corrective action.
- k. Ensured the rated Soldier is provided his/her completed evaluation before it is sent to HRC.

Performance Measures

GO **NO-GO**

- I. Ensured reports identified by HRC for correction are revised by the appropriate officials and resubmitted no later than the suspense date.
 - m. Advised and assisted Soldiers in the preparation of evaluation appeals.
 - n. Ensured evaluation redress procedures comply with regulatory guidelines.
2. Verified evaluation report receipt by obtaining evaluation processing reports from the Interactive Web Reporting System (IWRS) website. — —

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

- AR 623-3
- DA PAM 623-3

Related

**Review Processing of Enlisted Distribution Assignment
805B-79R-8111**

Conditions: Given special situations including information extracted from a Soldier's Enlisted Records Brief (ERB) and access to:

- a. DA Form 4036 (Medical and Dental Preparation for Overseas Movement)
- b. DA Form 4787 (Reassignment Processing)
- c. DA Form 5117 (Reassignment Control Sheet)
- d. DA Form 5118 (Reassignment Status and Election Statement)

Standards: Review the processing of Enlisted Distribution Assignment System (EDAS) to include the following:

- 1. Review the initial screening of the EDAS cycle.
- 2. Review the reassignment notification for eligible Soldiers.
- 3. Review Part 1 of a Soldier's DA Form 5118 to the Soldier's Enlisted Records Brief (ERB) to ensure all normal and special eligibility requirements for reassignment are met.
- 4. Review deletions/deferments request.
- 5. Ensure all departure documents are prepared and processed.
- 6. Ensure a date of loss (DLOS) transaction has been prepared.

Performance Steps

- 1. Review the screening of the EDAS cycle.
 - a. Review weekly EDAS cycle from Personnel Automation Section (PAS)/E-Milpo.
 - b. Ensure a reassignment file for each Soldier on the current EDAS cycle is complete.
 - (1) Verify there are copies of all reassignment forms and documents.
 - (a) Verify DA Form 4036 is included if Soldier is being assigned overseas.
 - (b) Verify DA Form 4787 is included if Soldier is being assigned overseas.
 - (c) Verify DA Form 5117 is included to monitor the Soldier through the reassignment process.
 - (d) Verify copies of any reclassification, medical examination board, physical evaluation board, or physical evaluation board actions that relate directly to the reassignment action and documents qualifying the Soldier for permanent change of station (PCS) movement, deletion or deferment are included.
 - (2) Ensure blocks 1 through 15 of DA Form 5118 are complete.
 - c. Review the Special Management Command (SMC) process of each Soldier using DA Form 5118.
 - d. Ensure ineligible Soldiers have been identified.
 - e. Ensure deferment/deletion tasks have been initiated for ineligible Soldiers.
 - f. Complete Sections II, III & IV of DA Form 5118.
 - g. Ensure the eligible Soldiers that require special handling procedures for processing are identified.
 - h. Ensure the appropriate tasks for Soldiers that require special handling are initiated.
 - i. Ensure eligible Soldiers who must acquire additional service time for reassignment are identified.
 - j. Ensure tasks for additional service remaining requirements are initiated.
 - k. Forward completed DA Form 5118 to the servicing military personnel division (MPD).
- 2. Review reassignment briefing and individual interview. Ensure any special processing requirements such as Exceptional Family Member Program (EFMP), Homebase Advance Assignment Program (HAAP), and married Army couples are identified.

Performance Steps

3. Complete and forward DA Form 4036, DA Form 5117, DA Form 4787, and a copy of DA Form 31 requesting PCS leave to the MPD.
4. Prepare request for deletion or deferment, if required, and forward to the servicing MPD.
5. Coordinate with the MPD reassignment section to obtain the PCS orders to allow the Soldier adequate time for out-processing.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Reviewed the screening of the EDAS cycle.	_____	_____
a. Reviewed weekly EDAS cycle from Personnel Automation Section (PAS)/E-Milpo.		
b. Ensured a reassignment file for each Soldier on the current EDAS cycle is complete.		
(1) Verified there are copies of all reassignment forms and documents.		
(a) Verified DA Form 4036 is included if Soldier is being assigned overseas.		
(b) Verified DA Form 4787 is included if Soldier is being assigned overseas.		
(c) Verified DA Form 5117 is included to monitor the Soldier through the reassignment process.		
(d) Verified copies of any reclassification, medical examination board, physical evaluation board, or physical evaluation board actions that relate directly to the reassignment action and documents qualifying the Soldier for permanent change of station (PCS) movement, deletion or deferment are included.		
(2) Ensured blocks 1 through 15 of DA Form 5118 are complete.		
c. Reviewed the Special Management Command (SMC) process of each Soldier using DA Form 5118.		
d. Ensured ineligible Soldiers have been identified.		
e. Ensured deferment/deletion tasks have been initiated for ineligible Soldiers.		
f. Completed Sections II, III & IV of DA Form 5118.		
g. Ensured the eligible Soldiers that require special handling procedures for processing are identified.		
h. Ensured the appropriate tasks for Soldiers that require special handling are initiated.		
i. Ensured eligible Soldiers who must acquire additional service time for reassignment are identified.		
j. Ensured tasks for additional service remaining requirements are initiated.		
k. Forwarded completed DA Form 5118 to the servicing military personnel division (MPD).		
2. Reviewed reassignment briefing and individual interview. Ensured any special processing requirements such as Exceptional Family Member Program (EFMP), Homebase Advance Assignment Program (HAAP), and married Army couples are identified.	_____	_____
3. Completed and forwarded DA Form 4036, DA Form 5117, DA Form 4787, and a copy of DA Form 31 requesting PCS leave to the MPD.	_____	_____

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
4. Prepared request for deletion or deferment, if required, and forward to the servicing MPD.	—	—
5. Coordinated with the MPD reassignment section to obtain the PCS orders to allow the Soldier adequate time for out-processing.	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

Related

- AR 600-8-105
- AR 600-8-11
- AR 614-30

**Review the Report Management Zone (RMZ) Unit Manning Report (UMR)
805B-79R-8112**

Conditions: Given the requirement to review the RMZ Unit Manning Report (UMR) for proper utilization, access to:

- a. RMZ
- b. Standard office supplies and equipment.

Standards: 1. Verify that personnel are properly assigned.
2. Verify that designated personnel are properly utilized.

Performance Steps

- 1. Verify that personnel are properly assigned.
 - a. Review the orders assigning the Soldier to the station and geographic location.
 - b. Ensure Officers are correctly slotted in position by specialty and component (RA/AGR).
 - c. Ensure Soldiers are correctly slotted in position by specialty and component (RA/AGR).
 - d. Review gain/loss dates to ensure dates are correct.
 - e. Ensure job class codes are correct for the duties the Soldier is performing.
 - f. Arrive Soldiers who have arrived to the unit and are still identified as pending gains on the Unit Manning Report.
 - g. Depart Soldiers who have departed and still appear on the Unit Manning Report.
 - h. Identify discrepancies, to brigade S1/USAREC G1 for resolution, between the incumbent lines and the authorization lines.
- 2. Maintain a working copy of the UMR for reference.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Verified that personnel are properly assigned.	—	—
a. Reviewed the orders assigning the Soldier to the station and geographic location.		
b. Ensured Officers are correctly slotted in position by specialty and component (RA/AGR).		
c. Ensured Soldiers are correctly slotted in position by specialty and component (RA/AGR).		
d. Reviewed gain/loss dates to ensure dates are correct.		
e. Ensured job class codes are correct for the duties the Soldier is performing.		
f. Arrived Soldiers who have arrived to the unit and are still identified as pending gains on the Unit Manning Report.		
g. Departed Soldiers who have departed and still appear on the Unit Manning Report.		
h. Identified discrepancies, to brigade S1/USAREC G1 for resolution, between the incumbent lines and the authorization lines.		
2. Maintained a working copy of the UMR for reference.	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

**References
Required**

Related
AR 614-200

**Review a Completed Noncommissioned Officer Evaluation Report
805B-79R-8113**

Conditions: Given the requirement to review the completed noncommissioned officer evaluation report (NCOER) (DA Form 2166-8).

Standards: Verify that parts I, II, III, IV, and V of the NCOER are administratively correct.

Performance Steps

1. Verify the data entered in blocks a through k and blocks n and o of part I (administrative data) are correct.
 - a. Verify the NCO's name, Social Security number (SSN), rank, date of rank, and primary MOS code (PMOSC) are entered correctly in blocks a through e.
 - b. Verify NCO's unit, organization, station, ZIP Code or Army Post Office (APO), and Army command (ACOM) are entered correctly in block f.
 - c. Verify block g (reason for submission) contains the correct report code and report title.
 - d. Verify the year, month, and day of the beginning date and the year, month, and day of the thru date of the evaluation period covered by this NCOER are entered correctly in block h.
 - e. Verify the actual number of rated months covered by this NCOER has been computed correctly and entered in block i.
 - f. Verify the correct non-rated codes, if any, have been recorded in block j.
 - g. Verify the number of authorized enclosures, if any, has been correctly entered in block k.
 - (1) Verify any enclosures do not exceed one page per enclosure.
 - (2) Verify each enclosure contains the rated NCO's full name, SSN, and grade.
 - (3) Verify each enclosure specifies the period covered by the NCOER.
 - (4) Verify the originator of any enclosure has stated a reason for its inclusion with the NCOER and has signed it.
 - h. Verify the correct two-place command code for the rated NCO is entered in block n.
 - i. Verify the correct four position alphanumeric personnel service battalion (PSB) Code is entered in block o.
2. Verify the information contained in part II (AUTHENTICATION) of the NCOER is complete and accurate.
 - a. Verify the name, SSN, rank, PMOS/Branch, organization, duty assignment, and AKO e-mail address for the rater, senior rater, and reviewer are entered correctly in their respective blocks.
 - b. Verify the senior rater obtained the rated NCO's signature or entered the appropriate "NCO refuses to sign" or "NCO unavailable for signature" and entered the date in block c.
 - c. Verify the rater, senior rater, and reviewer signed and dated the report in their respective blocks.
 - d. Verify the reviewer placed an X in the CONCUR WITH RATER AND SENIOR RATER EVALUATIONS box, or in the NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL box in block d.
 - e. Verify the reviewer included an enclosure with the NCOER to explain his or her placing an X in the NONCONCUR box.
3. Verify the information provided by the rater in part III (DUTY DESCRIPTION) of the NCOER is complete and accurate.
 - a. Verify the rated NCO's principal duty title and duty MOSC are recorded correctly in blocks a and b.
 - b. Verify the rated NCO's daily duties and the scope of those duties are recorded in block c in short, concise phrases which begin with action verbs and are separated by semi-colons.
 - c. Verify the rated NCO's areas of special emphasis are recorded in block d and his or her appointed duties listed in block e consist of a list of tasks and duties which are separated by semi-colons.
 - d. Verify the rated NCO's counseling dates are recorded in eight-digit year-month-and day sequence in the appropriate boxes in block f.

Performance Steps

- e. Verify that, in the absence of any counseling dates in block f, the senior rater entered a comment in part V, block e that explains why counseling of the rated NCO was not accomplished.
4. Verify the information provided by the rater in part IV (VALUES/NCO RESPONSIBILITIES) of the NCOER is complete and accurate.
 - a. Verify the rater entered an X in either the YES or NO box of each of the seven values/NCO responsibilities in block a.
 - b. Verify the rater entered mandatory bullet comments in the space provided at the bottom of the page for each X he or she placed in a NO box of block a.
 - c. Verify each bullet comment by the rater is short and concise, begins with an action verb or the possessive pronoun his or her.
 - d. Verify the rater avoided using the rated NCO's name or the personal pronouns he or she in any of the comment sections of part IV.
 - e. Verify that no comments refer to prior NCOERs of the rated NCO, to performance or incidents which occurred before or after this particular rating period, or to any punitive or administrative action being taken or planned against the rated NCO.
 - f. Verify no comments in the NCOER refer to unverified derogatory information concerning the rated NCO or contain inappropriate or arbitrary remarks related to race, color, religion, gender, or national origin.
 - g. Verify the rater placed an X in the appropriate box in each block, b through f.
 - h. Verify the rater explained all EXCELLENCE or NEEDS IMPROVEMENT ratings in blocks b through f with specific bullet comments in the space provided on the right side of each block.
 - i. Verify that the rater entered PASS, FAIL, or PROFILE in the APFT box of block c and the year and month of the APFT results or the year and month the profile was given.
 - j. Verify the rater entered a bullet comment in block c to explain why he or she rated the NCO as FAIL or PROFILE or left the APFT box blank.
 - k. Verify the rater completed the HEIGHT/WEIGHT box of block "c" by recording the rated NCO's verified height and weight as of the rater's signature date and denoting the rated NCO's compliance or noncompliance (YES or NO) with the provisions of AR 600-9.
 - (1) Verify the rater entered a bullet comment in block c to explain a noncompliance rating or to explain why he or she left the HEIGHT/WEIGHT box blank.
 - (2) Verify the rater entered a bullet comment in block c to explain a profile entry.
 - l. Work with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - m. Verify each comment is preceded by a lower case o (bullet), there is no more than one bullet comment per line, and all comments are double-spaced between bullets.
 - n. Verify these parts of the NCOER do not contain excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
 5. Verify the information provided by the rater and senior rater in part V (OVERALL PERFORMANCE AND POTENTIAL) of the NCOER is complete and accurate.
 - a. Verify the rater entered an X in the appropriate box in block a.
 - b. Verify a NCO who is rated as being AMONG THE BEST in block a has not been rated as NEEDS IMPROVEMENT in blocks b through f in part IV.
 - c. Verify the rater listed in block b at least two and no more than three future duty positions (job titles) in which the rated NCO could best serve the Army at his or her current or next higher grade.
 - d. Verify the senior rater evaluated the NCO's overall performance and potential for promotion and/or service in positions of greater responsibility by placing Xs in the appropriate boxes in blocks c and d if the senior rater meets minimum requirements.
 - (1) Verify the senior rater included bullet comments in block e to expand upon his or her overall performance/potential ratings in blocks c and d.
 - (2) Verify the senior rater addressed a MARGINAL rating by the rater in block a and Fair or Poor ratings by himself or herself (blocks c and d) with specific bullet comments in block e.

Performance Steps

- (3) Verify the senior rater included a bullet comment in block e which states, "Senior rater does not meet minimum qualifications," to explain why he or she left blocks c and d blank.
- 6. Verify part II of the NCOER is completed, and the form is distributed correctly and expeditiously.
 - a. Verify the completed NCOER and any authorized enclosures are forwarded to the rated NCO.
 - b. Verify the completed NCOER and any enclosures are uploaded via the AKO (Army Knowledge Online) Forms Portal to HRC within 90 days of the ending date of the report (or earlier to meet local policy).

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Verified the data entered in blocks a through k and blocks n and o of part I (administrative data) are correct. <ul style="list-style-type: none"> a. Verified the NCO's name, Social Security number (SSN), rank, date of rank, and primary MOS code (PMOSC) are entered correctly in blocks a through e. b. Verified NCO's unit, organization, station, ZIP Code or Army Post Office (APO), and Army command (ACOM) are entered correctly in block f. c. Verified block g (reason for submission) contains the correct report code and report title. d. Verified the year, month, and day of the beginning date and the year, month, and day of the thru date of the evaluation period covered by this NCOER are entered correctly in block h. e. Verified the actual number of rated months covered by this NCOER has been computed correctly and entered in block i. f. Verified the correct non-rated codes, if any, have been recorded in block j. g. Verified the number of authorized enclosures, if any, has been correctly entered in block k. <ul style="list-style-type: none"> (1) Verified any enclosures do not exceed one page per enclosure. (2) Verified each enclosure contains the rated NCO's full name, SSN, and grade. (3) Verified each enclosure specifies the period covered by the NCOER. (4) Verified the originator of any enclosure has stated a reason for its inclusion with the NCOER and has signed it. h. Verified the correct two-place command code for the rated NCO is entered in block n. i. Verified the correct four position alphanumeric personnel service battalion (PSB) Code is entered in block o. 	—	—
2. Verified the information contained in part II (AUTHENTICATION) of the NCOER is complete and accurate. <ul style="list-style-type: none"> a. Verified the name, SSN, rank, PMOS/Branch, organization, duty assignment, and AKO e-mail address for the rater, senior rater, and reviewer are entered correctly in their respective blocks. b. Verified the senior rater obtained the rated NCO's signature or entered the appropriate "NCO refuses to sign" or "NCO unavailable for signature" and entered the date in block c. c. Verified the rater, senior rater, and reviewer signed and dated the report in their respective blocks. d. Verified the reviewer placed an X in the CONCUR WITH RATER AND SENIOR RATER EVALUATIONS box, or in the NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL box in block d. 	—	—

Performance Measures	<u>GO</u>	<u>NO-GO</u>
e. Verified the reviewer included an enclosure with the NCOER to explain his or her placing an X in the NONCONCUR box.		
3. Verified the information provided by the rater in part III (DUTY DESCRIPTION) of the NCOER is complete and accurate.	—	—
a. Verified the rated NCO's principal duty title and duty MOSC are recorded correctly in blocks a and b.		
b. Verified the rated NCO's daily duties and the scope of those duties are recorded in block c in short, concise phrases which begin with action verbs and are separated by semi-colons.		
c. Verified the rated NCO's areas of special emphasis are recorded in block d and his or her appointed duties listed in block e consist of a list of tasks and duties which are separated by semi-colons.		
d. Verified the rated NCO's counseling dates are recorded in eight-digit year-month-and day sequence in the appropriate boxes in block f.		
e. Verified that, in the absence of any counseling dates in block f, the senior rater entered a comment in part V, block e that explains why counseling of the rated NCO was not accomplished.		
4. Verified the information provided by the rater in part IV (VALUES/NCO RESPONSIBILITIES) of the NCOER is complete and accurate.	—	—
a. Verified the rater entered an X in either the YES or NO box of each of the seven values/NCO responsibilities in block a.		
b. Verified the rater entered mandatory bullet comments in the space provided at the bottom of the page for each X he or she placed in a NO box of block a.		
c. Verified each bullet comment by the rater is short and concise, begins with an action verb or the possessive pronoun his or her.		
d. Verified the rater avoided using the rated NCO's name or the personal pronouns he or she in any of the comment sections of part IV.		
e. Verified that no comments refer to prior NCOERs of the rated NCO, to performance or incidents which occurred before or after this particular rating period, or to any punitive or administrative action being taken or planned against the rated NCO.		
f. Verified no comments in the NCOER refer to unverified derogatory information concerning the rated NCO or contain inappropriate or arbitrary remarks related to race, color, religion, gender, or national origin.		
g. Verified the rater placed an X in the appropriate box in each block, b through f.		
h. Verified the rater explained all EXCELLENCE or NEEDS IMPROVEMENT ratings in blocks b through f with specific bullet comments in the space provided on the right side of each block.		
i. Verified that the rater entered PASS, FAIL, or PROFILE in the APFT box of block c and the year and month of the APFT results or the year and month the profile was given.		
j. Verified the rater entered a bullet comment in block c to explain why he or she rated the NCO as FAIL or PROFILE or left the APFT box blank.		
k. Verified the rater completed the HEIGHT/WEIGHT box of block "c" by recording the rated NCO's verified height and weight as of the rater's signature date and denoting the rated NCO's compliance or noncompliance (YES or NO) with the provisions of AR 600-9.		
(1) Verified the rater entered a bullet comment in block c to explain a noncompliance rating or to explain why he or she left the HEIGHT/WEIGHT box blank.		
(2) Verified the rater entered a bullet comment in block c to explain a profile entry.		

Performance Measures

GO NO-GO

- l. Worked with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - m. Verified each comment is preceded by a lower case o (bullet), there is no more than one bullet comment per line, and all comments are double-spaced between bullets.
 - n. Verified these parts of the NCOER do not contain excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
5. Verified the information provided by the rater and senior rater in part V (OVERALL PERFORMANCE AND POTENTIAL) of the NCOER is complete and accurate.
- a. Verified the rater entered an X in the appropriate box in block a.
 - b. Verified a NCO who is rated as being AMONG THE BEST in block a has not been rated as NEEDS IMPROVEMENT in blocks b through f in part IV.
 - c. Verified the rater listed in block b at least two and no more than three future duty positions (job titles) in which the rated NCO could best serve the Army at his or her current or next higher grade.
 - d. Verified the senior rater evaluated the NCO's overall performance and potential for promotion and/or service in positions of greater responsibility by placing Xs in the appropriate boxes in blocks c and d if the senior rater meets minimum requirements.
 - (1) Verified the senior rater included bullet comments in block e to expand upon his or her overall performance/potential ratings in blocks c and d.
 - (2) Verified the senior rater addressed a MARGINAL rating by the rater in block a and Fair or Poor ratings by himself or herself (blocks c and d) with specific bullet comments in block e.
 - (3) Verified the senior rater included a bullet comment in block e which states, "Senior rater does not meet minimum qualifications," to explain why he or she left blocks c and d blank.
6. Verified part II of the NCOER is completed, and the form is distributed correctly and expeditiously.
- a. Verified the completed NCOER and any authorized enclosures are forwarded to the rated NCO.
 - b. Verified the completed NCOER and any enclosures are uploaded via the AKO (Army Knowledge Online) Forms Portal to HRC within 90 days of the ending date of the report (or earlier to meet local policy).

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

Related

- AR 40-501
- AR 600-9
- AR 623-3
- DA PAM 623-3

Review a Completed Officer Evaluation Report (OER)
805B-79R-8114

Conditions: Given a requirement to review a completed OER and access to AR 623-3, DA Pam 623-3, , AR 600-9 and AR 40-501.

Standards: Review a completed OER to include verifying that parts I, II, III, IV, and V of the OER are administratively correct.

Performance Steps

1. Verify the data entered in blocks a through p of part I are correct.
 - a. Verify the officer's name is entered in all capital letters in block a.
 - b. Verify the officer's Social Security number (SSN) is entered in block b.
 - c. Verify the officer's rank is entered in block c.
 - d. Verify the officer's date of rank is entered using the eight-digit year format in block d.
 - e. Verify the officer's branch (BR) is entered in block e.
 - f. Verify the officer's designated specialties are entered in block f.
 - g. Verify officer's unit, organization, station, ZIP Code or APO, and command code are entered in block g1.
 - h. Verify officer's status code is entered correctly in block g2.
 - i. Verify block h contains the correct reason for submission code and title.
 - j. Verify the year, month, and day of the beginning date and the year, month, and day of the thru date of the evaluation period covered by this OER are entered in block i.
 - k. Verify the actual number of rated months covered by this OER has been computed and entered in block j.
 - l. Verify the appropriate non-rated codes are entered in block k, if applicable.
 - m. Verify the total number of enclosures or 0 is entered in block l.
 - n. Verify the rated officer's AKO e-mail address is entered in block m.
 - o. Verify the UIC is entered in block n.
 - p. Verify the command code is entered in block o.
 - q. Verify the four-character alphanumeric personnel service battalion (PSB) code is entered in block p.

2. Verify the information contained in part II of the OER is complete.
 - a. Verify the name, SSN, rank, and position of the rater are entered in block a by referring to the rating scheme.
 - b. Verify the name, SSN, rank, and position of the intermediate rater, if applicable, are entered in block b by referring to the rating scheme.
 - c. Verify the name, SSN, rank, position, organization, branch, telephone number, and AKO e-mail address of the senior rater are entered in block c by referring to the rating scheme.
 - d. If the report is a referred report, ensure the appropriate entries are made in block d.
 - e. Verify the senior rater obtained the rated officer's signature. If the rated officer is unavailable, unable, or fails to sign the DA Form 67-9 for any reason, the senior rater will either resolve the problem or explain why in DA Form 67-9, Part VIIc and the rated officer's signature is left blank.
 - f. Verify the rater signed and dated the report in block a.
 - g. Verify the intermediate rater, if appropriate, signed and dated the report in block b.
 - h. Verify the senior rater signed and dated the report in block c.

3. Verify the information provided by the rater in part III of the OER is complete.
 - a. Verify the rated officer's principal duty title and duty Area of Concentration (AOC)/Military Occupational Specialty (MOS) are recorded in blocks a and b.
 - b. Verify the rated officer's daily duties and the scope of those duties are recorded in block c in a succinct narrative, written in prose (not bullet) format.
 - c. Verify specific functions required of the rated officer are written in block c.

Performance Steps

- d. Verify if the rated officer is serving under dual supervision, the statement "Officer serving under dual supervision" is entered as the first line of block c.
 - e. Work with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - f. Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
4. Verify the information provided by the rater in part IV of the OER is complete and accurate.
 - a. Verify the rater placed an "x" in either the "yes" or "no" block of each of 7 values in part IVa.
 - b. Verify the rater placed an "x" in either the "yes" or "no" block for each attributes/skills/actions in part IVb. Ensure one attribute is selected in block b1; two skills are selected in b2; and three actions are selected in b3.
 - c. Verify the rater entered the officer's physical fitness test results, height, weight, and date in part IVc.
 - d. Determine if rater is rating a CPT, LT, CW2, or WO1.
 - (1) If rating a CPT, LT, CW2, or WO1, verify the rater placed an "x" either in the "yes" or "no" block in part IVd to indicate compliance with the requirements of the Junior Officer Developmental Support Form.
 - (2) For rating all other officers, verify the rater placed an "x" in the "NA" block in part IVd.
 5. Verify the information provided by the rater in part V of the OER is complete.
 - a. Verify rater placed an "x" in the appropriate box in part Va.
 - b. Verify rater entered comments on specific aspects of performance and potential in part Vb.
 - (1) Verify a comment is entered if rated officer received a "no" rating in part IVa or IVb.
 - (2) Verify "Exempt from APFT requirement" is entered if rated officer has not taken the APFT within the last 12 months.
 - (3) An APFT entry is not required for Soldiers 60 years of age or older and pregnant officers who are exempt from the APFT in accordance with AR 40-501. Pregnant officers who have not taken the APFT within the last 12 months due to pregnancy, convalescent leave and temporary profile, the rater will enter the following statement in Part Vb: "Exempt from APFT requirement in accordance with AR 40-501."
 - (4) Verify a comment is made if rated officer received a "FAIL" in the APFT entry or a "no" in height/weight entry. As directed by HQDA, Deputy Chief of Staff G-3, and distributed in All Army Messages, deployed units unable to administer the APFT due to mission or conditions will annotate OERs with the following statement: "Officer was unable to take the APFT during this period due to deployment for combat operations/contingency operations."
 - (5) For pregnant officers, the entire entry is left blank. The rater will enter the following statement in Part Vb: "Exempt from weight control standards of AR 600-9."
 - c. Verify the information in part V.
 - (1) Ensure the rater checked the appropriate block in part Va.
 - (2) Verify rater entered an explanation for "other" rating in part Va.
 - (3) Ensure the rater comments on specific aspects of performance in part Vb.
 - (4) Ensure the rater comments on specific aspects of the rated officer's potential as outlined in table 2-5, DA Pam 623-3.
 - d. Work with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - e. Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
 - f. Verify this part of the OER does not contain reference to unproven derogatory information IAW para 3-23, AR 623-3.
 - g. Verify this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin IAW para 3 24, AR 623-3.
 - h. Ensure any comments about marital status and spouse meet the requirements outlined in para 3 25, AR 623-3.

Performance Steps

6. Verify the information provided by the intermediate rater, if applicable, in part VI of the OER is complete.
 - a. Verify the intermediate rater included specific comments which address the rated officer's performance and potential.
 - b. Verify the intermediate rater has entered the statement, "I am unable to evaluate the rated officer because I have not been (his or her) rater for the required number of days," when it is appropriate.
 - c. Verify for an intermediate rater who assumes the role of the rater he or she cites the authority and reasons for doing so in part VI.
 - d. Work with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - e. Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
 - f. Verify this part of the OER does not contain reference to unproven derogatory information IAW para 3-23, AR 623-3.
 - g. Verify this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin IAW para 3 24, AR 623-3.
 - h. Ensure any comments about marital status and spouse meet the requirements outlined in para 3 25, AR 623-3.

7. Verify the information provided by the senior rater in part VII of the OER is complete.
 - a. Verify the senior rater placed an "x" in the appropriate box of part VIIa and entered the total number of officers of the same grade that he/she senior rates.
 - b. Determine if rated officer is a general officer.
 - (1) Verify the senior rater did not complete part VIIb if rated officer is a general officer.
 - (2) Verify the senior rater placed an "x" in the appropriate box in part VIIb identifying the potential of the rated officer compared with officers senior rated in the same grade, if rated officer is CW3, CW4, CW5, MAJ, LTC, or COL.
 - c. Verify the senior rater entered narrative comments in part VIIc.
 - (1) Verify comments were made focusing on rated officer's potential and future assignments.
 - (2) Verify comments were made referencing anything unusual about the report.
 - (3) Verify the following statement was entered if the minimum number of days of supervision is not met: "I am unable to evaluate the rated officer because I have not been (his or her) senior rater for the required number of days."
 - d. Verify the senior rater completed part VIIc.
 - (1) Verify senior rater entered three future assignments for which the officer is best suited.
 - (2) Verify the senior rater has recommended a career field and branch or potential career field and functional area if rated officer is an Army competitive category CPT.
 - e. Work with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - f. Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
 - g. Verify this part of the OER does not contain reference to unproven derogatory information IAW para 3-23, AR 623-3.
 - h. Verify this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin IAW para 3 24, AR 623-3.
 - i. Ensure any comments about marital status and spouse meet the requirements outlined in para 3 25, AR 623-3.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
<p>1. Verified the data entered in blocks a through p of part I are correct.</p> <ul style="list-style-type: none"> a. Verified the officer's name is entered in all capital letters in block a. b. Verified the officer's Social Security number (SSN) is entered in block b. c. Verified the officer's rank is entered in block c. d. Verified the officer's date of rank is entered using the eight-digit year format in block d. e. Verified the officer's branch (BR) is entered in block e. f. Verified the officer's designated specialties are entered in block f. g. Verified officer's unit, organization, station, ZIP Code or APO, and command code are entered in block g1. h. Verified officer's status code is entered correctly in block g2. i. Verified block h contains the correct reason for submission code and title. j. Verified the year, month, and day of the beginning date and the year, month, and day of the thru date of the evaluation period covered by this OER are entered in block i. k. Verified the actual number of rated months covered by this OER has been computed and entered in block j. l. Verified the appropriate non-rated codes are entered in block k, if applicable. m. Verified the total number of enclosures or 0 is entered in block l. n. Verified the rated officer's AKO e-mail address is entered in block m. o. Verified the UIC is entered in block n. p. Verified the command code is entered in block o. q. Verified the four-character alphanumeric personnel service battalion (PSB) code is entered in block p. 	—	—
<p>2. Verified the information contained in part II of the OER is complete.</p> <ul style="list-style-type: none"> a. Verified the name, SSN, rank, and position of the rater are entered in block a by referring to the rating scheme. b. Verified the name, SSN, rank, and position of the intermediate rater, if applicable, are entered in block b by referring to the rating scheme. c. Verified the name, SSN, rank, position, organization, branch, telephone number, and AKO e-mail address of the senior rater are entered in block c by referring to the rating scheme. d. If the report is a referred report, ensure the appropriate entries are made in block d. e. Verified the senior rater obtained the rated officer's signature. If the rated officer is unavailable, unable, or fails to sign the DA Form 67-9 for any reason, the senior rater will either resolve the problem or explain why in DA Form 67-9, Part VIIc and the rated officer's signature is left blank. f. Verified the rater signed and dated the report in block a. g. Verified the intermediate rater, if appropriate, signed and dated the report in block b. h. Verified the senior rater signed and dated the report in block c. 	—	—
<p>3. Verified the information provided by the rater in part III of the OER is complete.</p>	—	—

Performance Measures**GO** **NO-GO**

- a. Verified the rated officer's principal duty title and duty Area of Concentration (AOC)/Military Occupational Specialty (MOS) are recorded in blocks a and b.
 - b. Verified the rated officer's daily duties and the scope of those duties are recorded in block c in a succinct narrative, written in prose (not bullet) format.
 - c. Verified specific functions required of the rated officer are written in block c.
 - d. Verified if the rated officer is serving under dual supervision, the statement "Officer serving under dual supervision" is entered as the first line of block c.
 - e. Worked with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - f. Verified this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
4. Verified the information provided by the rater in part IV of the OER is complete and accurate.
- a. Verified the rater placed an "x" in either the "yes" or "no" block of each of 7 values in part IVa.
 - b. Verified the rater placed an "x" in either the "yes" or "no" block for each attributes/skills/actions in part IVb. Ensured one attribute is selected in block b1; two skills are selected in b2; and three actions are selected in b3.
 - c. Verified the rater entered the officer's physical fitness test results, height, weight, and date in part IVc.
 - d. Determined if rater is rating a CPT, LT, CW2, or WO1.
 - (1) If rating a CPT, LT, CW2, or WO1, verify the rater placed an "x" either in the "yes" or "no" block in part IVd to indicate compliance with the requirements of the Junior Officer Developmental Support Form.
 - (2) For rating all other officers, verify the rater placed an "x" in the "NA" block in part IVd.
5. Verified the information provided by the rater in part V of the OER is complete.
- a. Verified rater placed an "x" in the appropriate box in part Va.
 - b. Verified rater entered comments on specific aspects of performance and potential in part Vb.
 - (1) Verified a comment is entered if rated officer received a "no" rating in part IVa or IVb.
 - (2) Verified "Exempt from APFT requirement" is entered if rated officer has not taken the APFT within the last 12 months.
 - (3) An APFT entry is not required for Soldiers 60 years of age or older and pregnant officers who are exempt from the APFT in accordance with AR 40-501. Pregnant officers who have not taken the APFT within the last 12 months due to pregnancy, convalescent leave and temporary profile, the rater will enter the following statement in Part Vb: "Exempt from APFT requirement in accordance with AR 40-501."
 - (4) Verified a comment is made if rated officer received a "FAIL" in the APFT entry or a "no" in height/weight entry. As directed by HQDA, Deputy Chief of Staff G-3, and distributed in All Army Messages, deployed units unable to administer the APFT due to mission or conditions will annotate OERs with the following statement: "Officer was unable to take the APFT during this period due to deployment for combat operations/contingency operations."

Performance Measures**GO** **NO-GO**

- (5) For pregnant officers, the entire entry was left blank. The rater will enter the following statement in Part Vb: "Exempt from weight control standards of AR 600-9."
- c. Verified the information in part V.
- (1) Ensured the rater checked the appropriate block in part Va.
 - (2) Verified rater entered an explanation for "other" rating in part Va.
 - (3) Ensured the rater comments on specific aspects of performance in part Vb.
 - (4) Ensured the rater comments on specific aspects of the rated officer's potential as outlined in table 2-5, DA Pam 623-3.
- d. Worked with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
- e. Verified this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
- f. Verified this part of the OER does not contain reference to unproven derogatory information IAW para 3-23, AR 623-3.
- g. Verified this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin IAW para 3 24, AR 623-3.
- h. Ensured any comments about marital status and spouse meet the requirements outlined in para 3 25, AR 623-3.
6. Verified the information provided by the intermediate rater, if applicable, in part VI of the OER is complete.
- a. Verified the intermediate rater included specific comments which address the rated officer's performance and potential.
 - b. Verified the intermediate rater has entered the statement, "I am unable to evaluate the rated officer because I have not been (his or her) rater for the required number of days," when it is appropriate.
 - c. Verified for an intermediate rater who assumes the role of the rater he or she cites the authority and reasons for doing so in part VI.
 - d. Worked with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
 - e. Verified this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
 - f. Verified this part of the OER does not contain reference to unproven derogatory information IAW para 3-23, AR 623-3.
 - g. Verified this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin IAW para 3 24, AR 623-3.
 - h. Ensured any comments about marital status and spouse meet the requirements outlined in para 3 25, AR 623-3.
7. Verified the information provided by the senior rater in part VII of the OER is complete.
- a. Verified the senior rater placed an "x" in the appropriate box of part VIIa and entered the total number of officers of the same grade that he/she senior rates.
 - b. Determined if rated officer is a general officer.
 - (1) Verified the senior rater did not complete part VIIb if rated officer is a general officer.

Performance Measures**GO** **NO-GO**

- (2) Verified the senior rater placed an "x" in the appropriate box in part VIIb identifying the potential of the rated officer compared with officers senior rated in the same grade, if rated officer is CW3, CW4, CW5, MAJ, LTC, or COL.
- c. Verified the senior rater entered narrative comments in part VIIc.
 - (1) Verified comments were made focusing on rated officer's potential and future assignments.
 - (2) Verified comments were made referencing anything unusual about the report.
 - (3) Verified the following statement was entered if the minimum number of days of supervision is not met: "I am unable to evaluate the rated officer because I have not been (his or her) senior rater for the required number of days."
- d. Verified the senior rater completed part VIIc.
 - (1) Verified senior rater entered three future assignments for which the officer is best suited.
 - (2) Verified the senior rater has recommended a career field and branch or potential career field and functional area if rated officer is an Army competitive category CPT.
- e. Worked with raters to minimize excessive use of technical acronyms or phrases not commonly recognized.
- f. Verified this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
- g. Verified this part of the OER does not contain reference to unproven derogatory information IAW para 3-23, AR 623-3.
- h. Verified this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin IAW para 3 24, AR 623-3.
- i. Ensured any comments about marital status and spouse meet the requirements outlined in para 3 25, AR 623-3.

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References**Required****Related**

AR 40-501
 AR 600-9
 AR 623-3
 DA PAM 623-3

**Review the Processing of a Request and Authority for Leave, Pass, or Permissive Temporary Duty.
805B-79R-8115**

Conditions: Given a requirement to review the processing of a Request and Authority for Leave, Pass, or Permissive Temporary Duty (PTDY).

- Standards:**
1. Review DA Form 31 for accuracy and completeness.
 2. Determine the number of days of chargeable and non-chargeable leave.
 3. Update the Leave Control Log.
 4. Void Soldier's leave when leave has been canceled.
 5. Ensure Soldier's leave is extended when applicable.
 6. Cross-check the Leave Control Log daily with DA Form 647 or DA Form 647-1 for current departures.
 7. Route DA Form 31 properly after a Soldier has departed on leave.
 8. Process Soldier's return from leave.
 9. Correct errors on chargeable leave.

Performance Steps

1. Review DA Form 31 for accuracy and completeness.
 - a. Check the form is legible and all blocks are filled out for the appropriate type of leave.
 - b. Determine the type of leave being processed.
 - (1) Verify block 7 is checked for the type of leave requested and is compared to the guidelines for leave.
 - (2) Verify the Soldier has noted his or her leave address and phone number in block 6.
 - (3) Verify the Soldier signed the form in block 11.
 - c. Determine the leave was properly approved.
 - d. Verify the leave control log.
 - (1) Ensure the leave control log number in block 1 of DA Form 31 is entered correctly.
 - (2) Enter approved leaves on the leave control log.
 - (3) Make corrections by lining through the incorrect data with one neat line and enter the correct data above.
 - (4) When initiating the leave control log for a new fiscal year, begins the control numbers with "0001" with the first leave that begins in the fiscal year.
 - (5) Use of electronic or hardcopy DA Form 4179 is permitted.
2. Maintain file copies of DA Form 31 for 6 months, and copies of DA Form 4179 for 1 year.
3. Determine the number of days of chargeable and non-chargeable leave.
 - a. Verify the Soldier requesting leave was queried regarding his or her travel days and duty days relative to the start and end dates of requested leave.
 - b. Verify the departure day was charged as start of leave if the departure date is a leave or travel day.
 - c. Verify the date chargeable as the End of Leave was determined.
 - (1) Verify the return date was charged as End of Leave if the Soldier does not work on that date.
 - (2) Verify the day prior to return was charged as End of Leave if the Soldier works for more than half of a normal scheduled workday on the return date.
 - (3) Verify the day prior to return was charged as End of Leave if the Soldier returns on a scheduled non-duty day.
 - d. Determine the days that qualify as non-chargeable leave.
 - (1) Verify the dates of leave that do not match the guidelines for chargeable leave are identified.
 - (2) Verify these leave conditions were compared to the guidelines for non-chargeable leave.
 - (3) Verify the leave matches the guidelines for non-chargeable leave.
 - e. Verify the number of days from the chargeable start of leave date and chargeable end of leave date were counted as chargeable leave.
 - f. Verify the period of non-chargeable absence was subtracted from chargeable leave.

Performance Steps

- g. Verify the resulting chargeable leave dates are entered in block 17.
 - h. Verify block 17 is left blank if leave is never charged, such as convalescent leave.
4. Update the leave control log.
 - a. Ensure the Soldier's name and Social Security number (SSN) were correctly entered.
 - b. Ensure the type of leave requested was correctly entered.
 - c. Ensure the departure date was correctly entered.
 - d. Ensure the return date was correctly entered.
 5. Ensure a Soldier's leave is voided when leave has been canceled.
 - a. Verify the leave is voided on DA Form 31.
 - (1) Verify a line is drawn through DA Form 31.
 - (2) Verify "VOID" is written on the form.
 - (3) Verify an authenticating battalion S1's adjutant or commander's signature was obtained in block 17.
 - (4) Verify the voided DA Form 31 is filed for a period of 6 months.
 - b. Verify the leave was voided on the leave control log.
 6. Void the leave on the leave control log.
 - a. Verify block 21 of DA Form 31 is checked for approval of the leave extension.
 - b. Verify the leave extension dates are entered in block 15 on the copy of DA Form 31 being maintained in the suspense file.
 - c. Verify the extension dates are posted to the leave control log.
 - d. Verify the original DA Form 31 is forwarded to the Finance Office.
 7. Cross-check the leave control log daily with DA Form 647 or DA Form 647-1 for current departures.
 - a. Verify a leave departure report was produced.
 - b. Verify the report was cross-checked with DA Form 647 or DA Form 647-1 for Soldiers departing on the date of the report.
 - c. Verify DA Form 31 is retrieved from the suspense file for a departing Soldier.
 - d. Verify the departure date, time and authority are entered in block 1.
 - e. Verify one copy of DA Form 31 was given to the departing Soldier prior to his or her departure.
 - f. Verify the suspense copy of DA Form 31 is retained until the day before the last day of authorized absence or until the Soldier's duty status changes.
 8. Route DA Form 31 properly after a Soldier has departed on leave.
 - a. Ensure the type of leave noted on DA Form 31, block 7 was verified.
 - b. Route or file DA Form 31 as appropriate.
 - (1) Route the original copy of DA Form 31 to the Finance Office within 3 workdays of the Soldier returning from starting ordinary leave.
 - (2) Route the original copy of DA Form 31 on the UTM to the Finance Office within 2 workdays of the Soldier starting leave if this is an approved Transition Leave and the Soldier's assigned unit is at the same location with a separation transfer point.
 - (3) Route the original copy of DA Form 31 to the Finance Office on the Soldier's departure day if this is an approved Transition Leave and the Soldier is not assigned where there is a separation transfer point.
 - (4) Route the original copy of DA Form 31 MPD for completion of Parts II, III and IV if this is an approved Emergency Leave involving travel.
 - (5) Route the original copy of DA Form 31 and DD Form 1351-2 to the Finance Office within 3 workdays of the Soldier completing an approved Emergency Leave.
 - (6) Route the original copy of DA Form 31 with an attached TDY voucher to the Finance Office within 10 workdays if TDY is involved.
 - (7) Give the original copy of DA Form 31 to the Soldier if this is an ordinary PCS leave.
 - (8) File the organizational copy of DA Form 31 in the functional files for 6 months.
 9. Process a Soldier's return from leave.
 - a. Check the Leave Control Log daily for current returns.

Performance Steps

- b. Produce a Leave Returning Report.
 - c. Cross-check the Leave Returning Report with DA Form 647 or DA Form 647-1 for Soldiers returning on the date of the report.
 - d. Retrieve DA Form 31 from the suspense file for returning Soldiers.
 - e. Enter the Returning Date, Time and Authority in block 16.
 - f. Update the Leave Control Log to reflect the Soldier's return from leave.
 - g. Enter the Leave Completion data.
 - h. Route the original copy of DA Form 31 to the finance office within 3 working days after completion of ordinary leave.
10. Correct errors on chargeable leave.
- a. Review the Chargeable Leave Reconciliation Report from the Finance Office for discrepancies in chargeable leave.
 - b. Create a revised Leave Control Log entry.
 - (1) Void the original log entry containing the erroneous dates.
 - (2) Create a new Leave Control Log entry for the revised dates.
 - (3) Create a reconciliation memo stating the reason for the change and the new control number.
 - c. Post the date changes to the affected DA Form 31.
 - (1) Record the changes in block 17.
 - (a) Annotate DA Form 31 with the message "Corrected Leave Charges."
 - (b) List the revised chargeable dates and indicate the reason for the correction.
 - (2) Annotate block 1 with the corrected leave control log number.
 - d. Route the revised DA Form 31 and the reconciliation memo to the Finance Office within 3 workdays after completing the corrections.
 - e. File the organizational copy of DA Form 31 the functional files for 6 months.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Reviewed DA Form 31 for accuracy and completeness.	_____	_____
a. Checked the form is legible and all blocks are filled out for the appropriate type of leave.		
b. Determined the type of leave being processed.		
(1) Verified block 7 is checked for the type of leave requested and is compared to the guidelines for leave.		
(2) Verified the Soldier has noted his or her leave address and phone number in block 6.		
(3) Verified the Soldier signed the form in block 11.		
c. Determined the leave was properly approved.		
d. Verified the leave control log.		
(1) Ensured the leave control log number in block 1 of DA Form 31 is entered correctly.		
(2) Entered approved leaves on the leave control log.		
(3) Made corrections by lining through the incorrect data with one neat line and enter the correct data above.		
(4) When initiating the leave control log for a new fiscal year, began the control numbers with "0001" with the first leave that begins in the fiscal year.		
(5) Used of electronic or hardcopy DA Form 4179 is permitted.		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
2. Maintained file copies of DA Form 31 for 6 months, and copies of DA Form 4179 for 1 year.	—	—
3. Determined the number of days of chargeable and non-chargeable leave. <ul style="list-style-type: none"> a. Verified the Soldier requesting leave was queried regarding his or her travel days and duty days relative to the start and end dates of requested leave. b. Verified the departure day was charged as start of leave if the departure date is a leave or travel day. c. Verified the date chargeable as the End of Leave was determined. <ul style="list-style-type: none"> (1) Verified the return date was charged as End of Leave if the Soldier does not work on that date. (2) Verified the day prior to return was charged as End of Leave if the Soldier works for more than half of a normal scheduled workday on the return date. (3) Verified the day prior to return was charged as End of Leave if the Soldier returns on a scheduled non-duty day. d. Determined the days that qualify as non-chargeable leave. <ul style="list-style-type: none"> (1) Verified the dates of leave that do not match the guidelines for chargeable leave are identified. (2) Verified these leave conditions were compared to the guidelines for non-chargeable leave. (3) Verified the leave matches the guidelines for non-chargeable leave. e. Verified the number of days from the chargeable start of leave date and chargeable end of leave date were counted as chargeable leave. f. Verified the period of non-chargeable absence was subtracted from chargeable leave. g. Verified the resulting chargeable leave dates are entered in block 17. h. Verified block 17 is left blank if leave is never charged, such as convalescent leave. 	—	—
4. Updated the leave control log. <ul style="list-style-type: none"> a. Ensured the Soldier's name and Social Security number (SSN) were correctly entered. b. Ensured the type of leave requested was correctly entered. c. Ensured the departure date was correctly entered. d. Ensured the return date was correctly entered. 	—	—
5. Ensured a Soldier's leave is voided when leave has been canceled. <ul style="list-style-type: none"> a. Verified the leave is voided on DA Form 31. <ul style="list-style-type: none"> (1) Verified a line is drawn through DA Form 31. (2) Verified "VOID" is written on the form. (3) Verified an authenticating battalion S1's adjutant or commander's signature was obtained in block 17. (4) Verified the voided DA Form 31 is filed for a period of 6 months. b. Verified the leave was voided on the leave control log. 	—	—
6. Voided the leave on the leave control log. <ul style="list-style-type: none"> a. Verified block 21 of DA Form 31 is checked for approval of the leave extension. b. Verified the leave extension dates are entered in block 15 on the copy of DA Form 31 being maintained in the suspense file. c. Verified the extension dates are posted to the leave control log. d. Verified the original DA Form 31 is forwarded to the Finance Office. 	—	—
7. Cross-checked the leave control log daily with DA Form 647 or DA Form 647-1 for current departures.	—	—

Performance Measures

GO NO-GO

- a. Verified a leave departure report was produced.
 - b. Verified the report was cross-checked with DA Form 647 or DA Form 647-1 for Soldiers departing on the date of the report.
 - c. Verified DA Form 31 is retrieved from the suspense file for a departing Soldier.
 - d. Verified the departure date, time and authority are entered in block 1.
 - e. Verified one copy of DA Form 31 was given to the departing Soldier prior to his or her departure.
 - f. Verified the suspense copy of DA Form 31 is retained until the day before the last day of authorized absence or until the Soldier's duty status changes.
8. Routed DA Form 31 properly after a Soldier has departed on leave. _____ _____
- a. Ensured the type of leave noted on DA Form 31, block 7 was verified.
 - b. Routed or file DA Form 31 as appropriate.
 - (1) Routed the original copy of DA Form 31 to the Finance Office within 3 workdays of the Soldier returning from starting ordinary leave.
 - (2) Routed the original copy of DA Form 31 on the UTM to the Finance Office within 2 workdays of the Soldier starting leave if this is an approved Transition Leave and the Soldier's assigned unit is at the same location with a separation transfer point.
 - (3) Routed the original copy of DA Form 31 to the Finance Office on the Soldier's departure day if this is an approved Transition Leave and the Soldier is not assigned where there is a separation transfer point.
 - (4) Routed the original copy of DA Form 31 MPD for completion of Parts II, III and IV if this is an approved Emergency Leave involving travel.
 - (5) Routed the original copy of DA Form 31 and DD Form 1351-2 to the Finance Office within 3 workdays of the Soldier completing an approved Emergency Leave.
 - (6) Routed the original copy of DA Form 31 with an attached TDY voucher to the Finance Office within 10 workdays if TDY is involved.
 - (7) Gave the original copy of DA Form 31 to the Soldier if this is an ordinary PCS leave.
 - (8) Filed the organizational copy of DA Form 31 in the functional files for 6 months.
9. Processed a Soldier's return from leave. _____ _____
- a. Checked the Leave Control Log daily for current returns.
 - b. Produced a Leave Returning Report.
 - c. Cross-checked the Leave Returning Report with DA Form 647 or DA Form 647-1 for Soldiers returning on the date of the report.
 - d. Retrieved DA Form 31 from the suspense file for returning Soldiers.
 - e. Entered the Returning Date, Time and Authority in block 16.
 - f. Updated the Leave Control Log to reflect the Soldier's return from leave.
 - g. Entered the Leave Completion data.
 - h. Routed the original copy of DA Form 31 to the finance office within 3 working days after completion of ordinary leave.
10. Corrected errors on chargeable leave. _____ _____
- a. Reviewed the Chargeable Leave Reconciliation Report from the Finance Office for discrepancies in chargeable leave.
 - b. Created a revised Leave Control Log entry.
 - (1) Voided the original log entry containing the erroneous dates.
 - (2) Created a new Leave Control Log entry for the revised dates.
 - (3) Created a reconciliation memo stating the reason for the change and the new control number.
 - c. Posted the date changes to the affected DA Form 31.
 - (1) Recorded the changes in block 17.

Performance Measures

GO NO-GO

- (a) Annotated DA Form 31 with the message "Corrected Leave Charges."
- (b) Listed the revised chargeable dates and indicate the reason for the correction.
- (2) Annotated block 1 with the corrected leave control log number.
- d. Routed the revised DA Form 31 and the reconciliation memo to the Finance Office within 3 workdays after completing the corrections.
- e. Filed the organizational copy of DA Form 31 the functional files for 6 months.

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

- AR 600-8-10
- AR 600-8-6

Related

**Review Personnel Asset Inventory (PAI)
805B-79R-8116**

Conditions: Given the requirement to review the processing of a PAI, access to a AAA-162 (Unit Personnel Accountability Report (AAA 162)), DA Form 3986-R (Personnel Asset Inventory) and information indicating the reason that a Soldier is not physically at formation, AR 600-8-6 (Personnel Accounting and Strength Reporting), standing operating procedures (SOP), and standard office supplies and equipment.

- Standards:**
1. Review the Unit Personnel Accountability Report (AAA 162).
 2. Review the Unit Personnel Accountability Notice (AAA 165).
 3. Verify the correct information is entered in the appropriate blocks of DA Form 3986-R for the unit conducting the PAI by comparing the PAI to the AAA 162.
 4. Ensure discrepancies are resolved.
 5. Route the PAI to the appropriate agencies.
 6. Verify that PAI documents are correctly filed.

Performance Steps

1. Review the AAA 162.
 - a. Check the cycle date of the report.
 - b. Check the report title.
 - c. Check the date of the report.
 - d. Check that the unit identification code (UIC) is for the unit conducting the PAI.
 - e. Check the date the Soldier was assigned to the unit (gain date).
 - f. Check the date the Soldier was attached to the unit (attach date).
 - g. Check the duty status of the Soldiers appearing on the report.
 - h. Check the date of the duty status of Soldiers appearing on the report.
 - i. Check the sum on the report.
2. Review the AAA 165.
 - a. Check the cycle date of the report.
 - b. Check the report title.
 - c. Check the date of the report.
 - d. Check that the report is for the unit conducting the PAI.
 - e. Check that the UIC is for the unit conducting the PAI.
 - f. Check the names, ranks and Social Security numbers (SSNs) of the Soldiers appearing on the report.
 - g. Check the type of notice for each Soldier listed on the report.
 - h. Check the number of notices for the UIC.
 - i. Check the total number of personnel notices for failure to gain.
 - j. Check the total number of personnel notices for failure to lose.
 - k. Check the total number of personnel notices for absence without leave (AWOL) for over 25 days
 - l. Check the total number of personnel notices for expired date of return from overseas (DEROS).
 - m. Check the total number of personnel notices for assigned not joined over 10 days.
 - n. Check the total number of personnel notices for expired expiration term of service/expiration of service agreement (ETS/ESA).
 - o. Check the total number of personnel notices for Soldiers discharged by HRC.
3. Verify that the correct information is entered in the appropriate blocks of DA Form 3986-R for the unit conducting the PAI by comparing it to the AAA 162 and AAA165.
 - a. Verify the date the PAI was conducted is entered in block 1.
 - b. Verify the name of the unit conducting the PAI is entered in block 2.
 - c. Verify the name of the next higher unit in the chain of command is entered in block 3.
 - d. Verify the appropriate major command of the unit conducting the PAI is entered in block 4.

Performance Steps

- e. Verify the complete unit address is entered in block 5.
- f. Verify the unit processing code (UPC) from the AAA 162 is entered in block 6.
- g. Verify the correct data is entered in blocks 7a, c, d, e, and f.
 - (1) Verify the correct "as of date" is entered in block 7a.
 - (2) Verify the correct number of officers currently assigned is entered in block 7c (assigned).
 - (3) Verify the correct number of warrant officers currently assigned is entered in block 7d (assigned).
 - (4) Verify the correct number of warrant officers currently assigned is entered in block 7e (assigned).
 - (5) Verify the total number of officers, warrant officers, and enlisted Soldiers entered in blocks 7c, d, and e (assigned) is entered in block 7f (assigned).
 - (6) Verify the correct number of officers currently attached is entered in block 7c (attached).
 - (7) Verify the correct number of warrant officers currently attached is entered in block 7d (attached).
 - (8) Verify the correct number of warrant officers currently attached is entered in block 7e (attached).
 - (9) Verify the total number of officers, warrant officers, and enlisted Soldiers entered in blocks 7c, d, and e (attached) is entered in block 7f (attached).
- h. Verify the correct data is entered in blocks 8c, d, e, and f.
 - (1) Verify orders are enclosed for newly assigned officers and the number of new officers assigned is entered in block 8c (assigned).
 - (2) Verify orders are enclosed for newly assigned warrant officers and the number of new warrant officers assigned is entered in block 8d (assigned).
 - (3) Verify orders are enclosed for newly assigned enlisted Soldiers and the number of new enlisted Soldiers assigned is entered in block 8e (assigned).
 - (4) Verify the total number of new officers, warrant officers, and enlisted Soldiers entered in blocks 8c, d, and e (assigned) is entered block 8f (assigned).
 - (5) Verify orders are enclosed for newly attached officers and the number of new officers assigned is entered in block 8c (attached).
 - (6) Verify orders are enclosed for newly attached warrant officers and the number of new warrant officers assigned is entered in block 8d (attached).
 - (7) Verify orders are enclosed for newly attached enlisted Soldiers and the number of new enlisted Soldiers assigned is entered in block 8e (attached).
 - (8) Verify the total number of new officers, warrant officers, and enlisted Soldiers entered in blocks 8c, d, and e (attached) is entered in block 7f (attached).
- i. Verify the correct data is entered in blocks 9c, d, e, and f.
 - (1) Verify orders are enclosed for departing officers assigned and the number is entered in block 9c (assigned).
 - (2) Verify orders are enclosed for departing warrant officers and the number of departing warrant officers assigned is entered in block 9d (assigned).
 - (3) Verify orders are enclosed for departing enlisted Soldiers and the number of departing enlisted Soldiers assigned is entered in block 9e (assigned).
 - (4) Verify the total number of departing officers, warrant officers, and enlisted Soldiers entered in blocks 9c, d, and e (assigned) is entered in block 9f (assigned).
 - (5) Verify orders are enclosed for departing officers attached and the number is entered in block 9c (attached).
 - (6) Verify orders are enclosed for departing warrant officers and the number of departing warrant officers attached is entered in block 9d (attached).
 - (7) Verify orders are enclosed for departing enlisted Soldiers and the number of departing enlisted Soldiers attached is entered in block 9e (attached).
 - (8) Verify the total number of departing officers, warrant officers, and enlisted Soldiers entered in blocks 9c, d, and e (attached) is entered in block 9f (attached).
- j. Verify the correct data is entered in blocks 10 a, c, d, e, and f.
 - (1) Verify the correct "as of date" from block 1 of DA Form 3986-R is entered in block 10a.

Performance Steps

- (2) Verify the correct adjusted assigned strengths are entered in blocks 10 c, d, e, and f (assigned) by adding blocks 7, 8, and 9 (assigned).
- (3) Verify the correct adjusted attached strengths are entered in blocks 10 c, d, e, and f (attached) by adding blocks 7, 8, and 9 (attached).
- k. Verify the correct data is entered in blocks 11 a, c, d, e, and f.
 - (1) Verify the date the muster formation was physically held is entered in block 11a.
 - (2) Verify documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (assigned).
 - (3) Verify documentation is enclosed for the number of warrant officers not physically at the formation and the number is entered in block 11d (assigned).
 - (4) Verify documentation is enclosed for the number of enlisted Soldiers not physically at the formation and the number is entered in block 11e (assigned).
 - (5) Verify documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (attached).
 - (6) Verify documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (attached).
 - (7) Verify documentation is enclosed for the number of warrant officers not physically at the formation and the number is entered in block 11d (attached).
 - (8) Verify documentation is enclosed for the number of enlisted Soldiers not physically at the formation and the number is entered in block 11e (attached).
 - (9) Verify the total number of officers, warrant officers, and enlisted Soldiers physically present at the muster formation entered in blocks 11c, d, and e (attached) is entered in block 11f (attached).
- l. Verify the type of PAI is annotated in block 12.
- m. Verify the correct data is entered in block 13.
 - (1) Verify the grade, name, Social Security number (SSN), and status of Soldiers assigned (gains) to the unit, but do not appear on the AAA 162, are listed in block 13.
 - (2) Verify the grade, name, SSN, and status of Soldiers departing (losses) the unit are listed in block 13.
 - (3) Verify the grade, name, SSN, and status of Soldiers who appear on the AAA 162 but are not present at the muster formation are listed in block 13.
 - (4) Verify the grades, names, SSN, and status of Soldiers who are listed in block 13 are continued on a separate sheet of paper if needed.
- n. Verify the correct data is entered in block 14 a, b, and c.
 - (1) Verify the name, grade, branch, and title of the commander of the unit conducting the PAI is entered in block 14a.
 - (2) Verify the signature of the commander of the unit conducting the PAI is entered in block 14b.
 - (3) Verify the commander of the unit conducting the PAI entered the date of his or her signature in block 14c.
- o. Verify the correct data is entered in block 15 if the PAI was conducted as a result of a change of command.
 - (1) Verify the appropriate block is checked, "concur" or "nonconcur."
 - (2) Verify an explanation is entered in block 15 if "nonconcur" is checked.
 - (3) Verify the explanation is continued on a separate sheet of paper if needed.
- p. Verify the correct data is entered in block 16 a, b, and c if the PAI was conducted as a result of a change of command.
 - (1) Verify the name, grade, branch, and title of the new commander of the unit conducting the PAI is entered in block 16a.
 - (2) Verify the signature of the new commander of the unit conducting the PAI is entered in block 16b.
 - (3) Verify the new commander of the unit conducting the PAI entered the date of his or her signature in block 16c.
- q. Enter the correct data in item 17.
 - (1) Annotate the appropriate block, "concur" or "nonconcur."
 - (2) Enter an explanation if "nonconcur" is checked.

Performance Steps

- (3) Continue the explanation on a separate sheet of paper if needed.
- r. Enter the correct data in block 18 a, b, and c.
 - (1) Enter the name, grade, branch, and title of the personnel automation section supervisor in block 18a.
 - (2) Obtain the signature of the personnel automation section supervisor in block 18b.
 - (3) Ensure the personnel automation section supervisor entered the date of his or her signature in block 18c.
- s. Verify the commander authentication data is completed.
 - (1) Verify PAI was forwarded through command channels.
 - (2) Verify blocks 19-33b are completed by the chain of command and all necessary signatures are present according to local policy.
- 4. Ensure discrepancies are resolved.
- 5. Route the PAI to the appropriate agencies.
 - a. Forward the original document through the Personnel Automation Section (PAS) to the MPSM within 5 working days of the PAI.
 - b. Ensure the battalion S1 retains the original document after processing through command channels according to the local SOP.
 - c. Ensure one copy is provided to the departing commander, if it is a change-of-command PAI.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Reviewed the AAA 162.	_____	_____
a. Checked the cycle date of the report.		
b. Checked the report title.		
c. Checked the date of the report.		
d. Checked that the unit identification code (UIC) is for the unit conducting the PAI.		
e. Checked the date the Soldier was assigned to the unit (gain date).		
f. Checked the date the Soldier was attached to the unit (atch date).		
g. Checked the duty status of the Soldiers appearing on the report.		
h. Checked the date of the duty status of Soldiers appearing on the report.		
i. Checked the sum on the report.		
2. Reviewed the AAA 165.	_____	_____
a. Checked the cycle date of the report.		
b. Checked the report title.		
c. Checked the date of the report.		
d. Checked that the report is for the unit conducting the PAI.		
e. Checked that the UIC is for the unit conducting the PAI.		
f. Checked the names, ranks and Social Security numbers (SSNs) of the Soldiers appearing on the report.		
g. Checked the type of notice for each Soldier listed on the report.		
h. Checked the number of notices for the UIC.		
i. Checked the total number of personnel notices for failure to gain.		
j. Checked the total number of personnel notices for failure to lose.		
k. Checked the total number of personnel notices for absence without leave (AWOL) for over 25 days		
l. Checked the total number of personnel notices for expired date of return from overseas (DEROS).		

Performance Measures**GO** **NO-GO**

- m. Checked the total number of personnel notices for assigned not joined over 10 days.
 - n. Checked the total number of personnel notices for expired expiration term of service/expiration of service agreement (ETS/ESA).
 - o. Checked the total number of personnel notices for Soldiers discharged by HRC.
3. Verified that the correct information is entered in the appropriate blocks of DA Form 3986-R for the unit conducting the PAI by comparing it to the AAA 162 and AAA165. — —
- a. Verified the date the PAI was conducted is entered in block 1.
 - b. Verified the name of the unit conducting the PAI is entered in block 2.
 - c. Verified the name of the next higher unit in the chain of command is entered in block 3.
 - d. Verified the appropriate major command of the unit conducting the PAI is entered in block 4.
 - e. Verified the complete unit address is entered in block 5.
 - f. Verified the unit processing code (UPC) from the AAA 162 is entered in block 6.
 - g. Verified the correct data is entered in blocks 7a, c, d, e, and f.
 - (1) Verified the correct "as of date" is entered in block 7a.
 - (2) Verified the correct number of officers currently assigned is entered in block 7c (assigned).
 - (3) Verified the correct number of warrant officers currently assigned is entered in block 7d (assigned).
 - (4) Verified the correct number of warrant officers currently assigned is entered in block 7e (assigned).
 - (5) Verified the total number of officers, warrant officers, and enlisted Soldiers entered in blocks 7c, d, and e (assigned) is entered in block 7f (assigned).
 - (6) Verified the correct number of officers currently attached is entered in block 7c (attached).
 - (7) Verified the correct number of warrant officers currently attached is entered in block 7d (attached).
 - (8) Verified the correct number of warrant officers currently attached is entered in block 7e (attached).
 - (9) Verified the total number of officers, warrant officers, and enlisted Soldiers entered in blocks 7c, d, and e (attached) is entered in block 7f (attached).
 - h. Verified the correct data is entered in blocks 8c, d, e, and f.
 - (1) Verified orders are enclosed for newly assigned officers and the number of new officers assigned is entered in block 8c (assigned).
 - (2) Verified orders are enclosed for newly assigned warrant officers and the number of new warrant officers assigned is entered in block 8d (assigned).
 - (3) Verified orders are enclosed for newly assigned enlisted Soldiers and the number of new enlisted Soldiers assigned is entered in block 8e (assigned).
 - (4) Verified the total number of new officers, warrant officers, and enlisted Soldiers entered in blocks 8c, d, and e (assigned) is entered block 8f (assigned).
 - (5) Verified orders are enclosed for newly attached officers and the number of new officers assigned is entered in block 8c (attached).

Performance Measures**GO NO-GO**

- (6) Verified orders are enclosed for newly attached warrant officers and the number of new warrant officers assigned is entered in block 8d (attached).
- (7) Verified orders are enclosed for newly attached enlisted Soldiers and the number of new enlisted Soldiers assigned is entered in block 8e (attached).
- (8) Verified the total number of new officers, warrant officers, and enlisted Soldiers entered in blocks 8c, d, and e (attached) is entered in block 7f (attached).
- i. Verified the correct data is entered in blocks 9c, d, e, and f.
 - (1) Verified orders are enclosed for departing officers assigned and the number is entered in block 9c (assigned).
 - (2) Verified orders are enclosed for departing warrant officers and the number of departing warrant officers assigned is entered in block 9d (assigned).
 - (3) Verified orders are enclosed for departing enlisted Soldiers and the number of departing enlisted Soldiers assigned is entered in block 9e (assigned).
 - (4) Verified the total number of departing officers, warrant officers, and enlisted Soldiers entered in blocks 9c, d, and e (assigned) is entered in block 9f (assigned).
 - (5) Verified orders are enclosed for departing officers attached and the number is entered in block 9c (attached).
 - (6) Verified orders are enclosed for departing warrant officers and the number of departing warrant officers attached is entered in block 9d (attached).
 - (7) Verified orders are enclosed for departing enlisted Soldiers and the number of departing enlisted Soldiers attached is entered in block 9e (attached).
 - (8) Verified the total number of departing officers, warrant officers, and enlisted Soldiers entered in blocks 9c, d, and e (attached) is entered in block 9f (attached).
- j. Verified the correct data is entered in blocks 10 a, c, d, e, and f.
 - (1) Verified the correct "as of date" from block 1 of DA Form 3986-R is entered in block 10a.
 - (2) Verified the correct adjusted assigned strengths are entered in blocks 10 c, d, e, and f (assigned) by adding blocks 7, 8, and 9 (assigned).
 - (3) Verified the correct adjusted attached strengths are entered in blocks 10 c, d, e, and f (attached) by adding blocks 7, 8, and 9 (attached).
- k. Verified the correct data is entered in blocks 11 a, c, d, e, and f.
 - (1) Verified the date the muster formation was physically held is entered in block 11a.
 - (2) Verified documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (assigned).
 - (3) Verified documentation is enclosed for the number of warrant officers not physically at the formation and the number is entered in block 11d (assigned).
 - (4) Verified documentation is enclosed for the number of enlisted Soldiers not physically at the formation and the number is entered in block 11e (assigned).
 - (5) Verified documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (attached).

Performance Measures**GO NO-GO**

- (6) Verified documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (attached).
- (7) Verified documentation is enclosed for the number of warrant officers not physically at the formation and the number is entered in block 11d (attached).
- (8) Verified documentation is enclosed for the number of enlisted Soldiers not physically at the formation and the number is entered in block 11e (attached).
- (9) Verified the total number of officers, warrant officers, and enlisted Soldiers physically present at the muster formation entered in blocks 11c, d, and e (attached) is entered in block 11f (attached).
- I. Verified the type of PAI is annotated in block 12.
- m. Verified the correct data is entered in block 13.
 - (1) Verified the grade, name, Social Security number (SSN), and status of Soldiers assigned (gains) to the unit, but do not appear on the AAA 162, are listed in block 13.
 - (2) Verified the grade, name, SSN, and status of Soldiers departing (losses) the unit are listed in block 13.
 - (3) Verified the grade, name, SSN, and status of Soldiers who appear on the AAA 162 but are not present at the muster formation are listed in block 13.
 - (4) Verified the grades, names, SSN, and status of Soldiers who are listed in block 13 are continued on a separate sheet of paper if needed.
- n. Verified the correct data is entered in block 14 a, b, and c.
 - (1) Verified the name, grade, branch, and title of the commander of the unit conducting the PAI is entered in block 14a.
 - (2) Verified the signature of the commander of the unit conducting the PAI is entered in block 14b.
 - (3) Verified the commander of the unit conducting the PAI entered the date of his or her signature in block 14c.
- o. Verified the correct data is entered in block 15 if the PAI was conducted as a result of a change of command.
 - (1) Verified the appropriate block is checked, "concur" or "nonconcur."
 - (2) Verified an explanation is entered in block 15 if "nonconcur" is checked.
 - (3) Verified the explanation is continued on a separate sheet of paper if needed.
- p. Verified the correct data is entered in block 16 a, b, and c if the PAI was conducted as a result of a change of command.
 - (1) Verified the name, grade, branch, and title of the new commander of the unit conducting the PAI is entered in block 16a.
 - (2) Verified the signature of the new commander of the unit conducting the PAI is entered in block 16b.
 - (3) Verified the new commander of the unit conducting the PAI entered the date of his or her signature in block 16c.
- q. Entered the correct data in item 17.
 - (1) Annotated the appropriate block, "concur" or "nonconcur."
 - (2) Entered an explanation if "nonconcur" is checked.
 - (3) Continued the explanation on a separate sheet of paper if needed.
- r. Entered the correct data in block 18 a, b, and c.
 - (1) Entered the name, grade, branch, and title of the personnel automation section supervisor in block 18a.
 - (2) Obtained the signature of the personnel automation section supervisor in block 18b.

Subject Area 3: S2

**Assess a Recruiting Market
805B-79R-8202**

Conditions: The senior master trainer informed you that a station commander is struggling and is requesting your assistance in understanding the market and has access to Recruiter Management Zone (RMZ), Graphical Accessions Mapping Analysis Tool (GAMAT), G2-graphical representation of USAREC's market place (Grump), MapInfo, complete position, analysis, and evaluation (PAE), and all applicable regulations or publications.

Standards: Conduct an assessment of the recruiting market, analyze and identify strengths, weaknesses, and training indicators. Make recommendations and provide corrective training.

Performance Steps

1. Prepare for recruiting market assessment
 - a. Log on to G2 website and/or RMZ
 - b. Pull competitive reports
 - (1) Market Share
 - (2) Recruiter Share
 - (3) Race College Report
 - (4) Top to Bottom
 - (5) Other reports as needed (i.e. ARNG, USAR data etc...)
 - c. Pull out of area contracts
 - d. Pull Automated Territorial Alignment System (ATAS) report from MapInfo
 - e. Pull Dime Report
2. Conduct recruiting market assessment
 - a. Understand commander's intent
 - b. Follow approved USAREC, brigade and battalion checklist
 - c. Note deficiencies and observations within the reports pulled
 - d. Conduct a verbal communication with level being assessed, GAMAT brief at company level and below.
3. Provide a written assessment of strengths and weaknesses and training indicators to commander.
 - a. Complete memorandum for record (MFR) finding sheet for current and next level higher
 - b. Conduct back brief, courses of actions and complete USAREC Form 1117 prior to departure
 - c. Schedule follow up assessment (If necessary)

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

1. Prepared for recruiting market assessment
 - a. Logged on to G2 website and/or RMZ
 - b. Pulled competitive reports
 - (1) Market Share
 - (2) Recruiter Share
 - (3) Race College Report
 - (4) Top to Bottom
 - (5) Other reports as needed (i.e. ARNG, USAR data etc...)

<u>GO</u>	<u>NO-GO</u>
_____	_____

Performance Measures	<u>GO</u>	<u>NO-GO</u>
<ul style="list-style-type: none"> c. Pulled out of area contracts d. Pulled Automated Territorial Alignment System (ATAS) report from MapInfo e. Pulled Dime Report 	—	—
<ul style="list-style-type: none"> 2. Conducted recruiting market assessment <ul style="list-style-type: none"> a. Understood commander's intent b. Followed approved USAREC, brigade and battalion checklist c. Noted deficiencies and observations within the reports pulled d. Conducted a verbal communication with level being assessed, GAMAT brief at company level and below. 	—	—
<ul style="list-style-type: none"> 3. Provided a written assessment of strengths and weaknesses and training indicators to commander. <ul style="list-style-type: none"> a. Completed memorandum for record (MFR) finding sheet for current and next level higher b. Conducted back brief, courses of actions and completed USAREC Form 1117 prior to departure c. Scheduled follow up assessment (If necessary) 	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

- USAREC MANUAL 3-01
- USAREC REG 601-73
- USAREC REG 601-87

Related

Assess the Competition
805B-79R-8203

Conditions: You have an upcoming positioning analysis and evaluation (PAE) and have received the annual or quarterly command guidance and have access to Report Management Zone (RMZ), Graphical Accessions Mapping Analysis Tool (GAMAT), G2 - graphical representation of USAREC's market place (Grump), MapInfo, a complete PAE, and all applicable regulations and publications.

Standards: Conduct assessment of the recruiting competition. Make recommendations and provide COA's for PAE if needed.

Performance Steps

1. Prepare to assess the competition
 - a. Log on to G2 website and/or RMZ
 - b. Pull competitive reports
 - (1) Market Share
 - (2) Recruiter Share
 - (3) Race/College Report
 - (4) Top to Bottom
 - (5) Other reports as needed (i.e. ARNG, USAR data etc.)
 - c. Pull out-of-area contracts
 - d. Pull the Automated Territorial Alignment System (ATAS) report as needed from MapInfo (example: Detailed Station Report)
2. Conduct assessment of the competition.
 - a. Understand the commander's intent
 - b. Know the unit demographic makeup and force structure
 - c. Be familiar with recruiter share
 - d. Communicate clear and concise with unit being assessed
3. Determine the Army's and DOD's penetration of an area:
 - a. Understand Army penetration versus DOD penetration.
 - b. Determine market propensity.
 - c. Determine market potential.
4. Analyze recruiting zones:
 - a. Ensure qualified military available (QMA) population will support recruiters in their zone.
 - b. Consider barriers to recruiting operations.
 - c. De-conflict college populations related to their zone based on feeder ZIP Codes.
5. Provide a written assessment of the competition.
 - a. Complete memorandum for record (MFR) finding sheet for the command and next higher level
 - b. Conduct back brief, courses of action and complete USAREC Form 1117 prior to departure
 - c. Schedule follow up assessment (If necessary)

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Prepared to assess the competition	—	—
a. Logged on to G2 website and/or RMZ		
b. Pulled competitive reports		
(1) Market Share		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
(2) Recruiter Share		
(3) Race/College Report		
(4) Top to Bottom		
(5) Other reports as needed (i.e. ARNG, USAR data etc.)		
c. Pulled out-of-area contracts		
d. Pulled the Automated Territorial Alignment System (ATAS) report as needed from MapInfo (example: Detailed Station Report)		
 2. Conducted assessment of the competition.	—	—
a. Understood the commander's intent		
b. Knew the unit demographic makeup and force structure		
c. Was familiar with recruiter share		
d. Communicated clear and concise with unit being assessed		
 3. Determined the Army's and DOD's penetration of an area:	—	—
a. Understood Army penetration versus DOD penetration.		
b. Determined market propensity.		
c. Determined market potential.		
 4. Analyzed recruiting zones:	—	—
a. Ensured qualified military available (QMA) population will support recruiters in their zone.		
b. Considered barriers to recruiting operations.		
c. De-conflicted college populations related to their zone based on feeder ZIP Codes.		
 5. Provided a written assessment of the competition.	—	—
a. Completed memorandum for record (MFR) finding sheet for the command and next higher level		
b. Conducted back brief, courses of action and completed USAREC Form 1117 prior to departure		
c. Scheduled follow up assessment (If necessary)		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

USAREC REG 601-87

Related

**Develop Recommendations for Positioning the Recruiting Force Structure
805B-79R-8204**

Conditions: The position, analysis, and evaluation (PAE) has been completed, you have completed a market assessment (805B-79R-8202), and you have been notified of a change in authorizations, requirements, and/or boundaries. You have access to:

- o RIIFMIS-Facilities Report
- o Headquarters support system (HSS)- force structure address and ZIP Code realignment (FAZR)-current table of distribution and alignment (TDA)
- o HSS-FAZR-school update
- o USAREC Reg 601-87
- o USAREC Manual 3 series
- o G2 Web site
- o Graphical representation of USAREC's market place (GRUMP) GRUMP.NET
- o MapInfo- GRUMP-Automated Territorial Alignment System (ATAS)
- o Updated Schools Report
- o Troop Program Unit (TPU) command plan
- o TPU Unit Vacancy Report
- o Last completed PAE

Special conditions: Commander's request, or change in market conditions

Standards: Recommend multiple courses of action that equitably distribute the recruiting force structure to the appropriate echelon(s).

Performance Steps

1. Prepare for recommendation phase:

- a. Inform all leaders and recommended staff sections of the intent to conduct a PAE IAW USAREC Reg 601-87. Even though the recruiting market should be the primary factor in determining the positioning of the recruiting force, staff integration is also critical. Internal and external factors such as S1 language requirements, permanent change of station (PCS) costs, S4 facility requirements and constraints, Corp of Engineers, budget constraints, information technology (IT) requirements, and command and control all contribute to the development of recommendations/COAs.
- b. Obtain the most updated PAE data bases from the G2 Web site. This is accomplished by running the United States Army.NET from the programs menu. If prompted that new files are available, it is recommended the user accept the new files. This will automatically update the files (i.e. MSTRZIP, ATAS, MKTSHR, RCTOT) that are required to conduct a PAE. A backup folder will be automatically created that will archive the previous PAE files. The MapInfo program will automatically launch in the background.

NOTE: This procedure may take a while to complete while new files are being downloaded.

- c. MapInfo is now displayed and "GRUMP" will appear on top of the browser window. Select "GRUMP" then select "Setup Recruiting Data", input appropriate RSID and ensure the RMA directory is pointed to the correct path (c:Files**). A geographical map will be displayed of the unit you have selected.
- d. At the top of the browser window select "ATAS", "Reports", select appropriate level (battalion, company or station) and select and print ASRPT, SSRPT, DSRPT, ATRPT, UTSRPT, DUTRPT, High School Enrollment Report, USAR Territory Report (878) and maps (as required) for each echelon involved in the PAE.

NOTE: ** indicates the two character battalion recruiting station identification (RSID). Brigade and higher use different file naming conventions. Check with G2 for appropriate naming conventions.

2. Recommend COAs for specific actions necessary for mission accomplishment:

Performance Steps

- a. Update all school data via the ATAS "Update", "Edit School Data" within the GRUMP.NET program. All schools (high schools, colleges, trade schools, etc.) will be listed, prioritized 1, 2 or 3 and categorized high schools public (PUB) or private (PVT), and colleges 2 or 4 year, IAW current command guidance.
- b. Change and annotate all ZIP Code changes for the RA and USAR in ATAS as necessary to reflect the new configuration. Adding new or deleting any ZIP Codes must be coordinated with G2 prior to doing so. Save all ATAS and school data browsers upon completion of data edits.
- c. Update the recruiting station (RS) browser via the ATAS "Update", "Update RS Data" and update RS structure based upon staff analysis and recommendations. If adding new RSIDs or closing RSIDs, coordinate with G2 prior to doing so. All new recruiting stations that may not be activated right away, are required to have the "C_90" column of the RS browser indicated with a "P" (pending). The "Hold_RSID" column must indicate the RSID of the recruiting station where the recruiters will be working until the new recruiting station opens. The RS holding the recruiters should have an "H" (holding) in the "C_90" column, and input the RSID it is holding recruiters for in the "Hold_RSID" column. Save and recalculate RS data upon completion of edits.
- d. Run verify reports via the ATAS "Utilities", "Master Verify", to ensure ZIP Codes, schools, boundaries, and USAR territory are correct. Resolve any data issues that are identified, update appropriate databases, save and recalculate market data. De-conflict and resolve staff issues and/or concerns.
- e. Upon completion of all updates and all resolved issues, rebuild the new boundaries via the ATAS "Build Boundaries"
- f. Print reports via the ATAS "Reports" (i.e., the ASRPT, ATRPT, SSRPT, DSRPT, and High School Enrollment Report), any maps as required via the ATAS "Utilities", "Mapping" and prepare individual standardized recommendations/COAs presentations.

3. Brief commander on recommendations/COAs.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

GO NO-GO

1. Prepared for recommendation phase:

- a. Informed all leaders and recommended staff sections of the intent to conduct a PAE IAW USAREC Reg 601-87. Even though the recruiting market should be the primary factor in determining the positioning of the recruiting force, staff integration is also critical. Internal and external factors such as S1 language requirements, permanent change of station (PCS) costs, S4 facility requirements and constraints, Corp of Engineers, budget constraints, information technology (IT) requirements, and command and control all contribute to the development of recommendations/COAs.
- b. Obtained the most updated PAE data bases from the G2 Web site. This is accomplished by running the United States Army.NET from the programs menu. If prompted that new files are available, it is recommended the user accept the new files. This will automatically update the files (i.e. MSTRZIP, ATAS, MKTSHR, RCTOT) that are required to conduct a PAE. A backup folder will be automatically created that will archive the previous PAE files. The MapInfo program will automatically launch in the background.

NOTE: This procedure may take a while to complete while new files are being downloaded.

Performance Measures

GO NO-GO

- c. MapInfo is now displayed and "GRUMP" will appear on top of the browser window. Selected "GRUMP" then selected "Setup Recruiting Data", input appropriate RSID and ensured the RMA directory is pointed to the correct path (c:Files**). A geographical map will be displayed of the unit you have selected.
- d. At the top of the browser window select "ATAS", "Reports", selected appropriate level (battalion, company or station) and select and print ASRPT, SSRPT, DSRPT, ATRPT, UTSRPT, DUTRPT, High School Enrollment Report, USAR Territory Report (878) and maps (as required) for each echelon involved in the PAE.

NOTE: ** indicates the two character battalion recruiting station identification (RSID). Brigade and higher use different file naming conventions. Check with G2 for appropriate naming conventions.

- 2. Recommended COAs for specific actions necessary for mission accomplishment:
 - a. Updated all school data via the ATAS "Update", "Edit School Data" within the GRUMP.NET program. All schools (high schools, colleges, trade schools, etc.) will be listed, prioritized 1, 2 or 3 and categorized high schools public (PUB) or private (PVT), and colleges 2 or 4 year, IAW current command guidance.
 - b. Changed and annotated all ZIP Code changes for the RA and USAR in ATAS as necessary to reflect the new configuration. Adding new or deleting any ZIP Codes must be coordinated with G2 prior to doing so. Save all ATAS and school data browsers upon completion of data edits.
 - c. Updated the recruiting station (RS) browser via the ATAS "Update", "Update RS Data" and update RS structure based upon staff analysis and recommendations. If adding new RSIDs or closing RSIDs, coordinate with G2 prior to doing so. All new recruiting stations that may not be activated right away, are required to have the "C_90" column of the RS browser indicated with a "P" (pending). The "Hold_RSID" column must indicate the RSID of the recruiting station where the recruiters will be working until the new recruiting station opens. The RS holding the recruiters should have an "H" (holding) in the "C_90" column, and input the RSID it is holding recruiters for in the "Hold_RSID" column. Save and recalculate RS data upon completion of edits.
 - d. Ran verify reports via the ATAS "Utilities", "Master Verify", to ensure ZIP Codes, schools, boundaries, and USAR territory are correct. Resolve any data issues that are identified, update appropriate databases, save and recalculate market data. De-conflict and resolve staff issues and/or concerns.
 - e. Upon completion of all updates and all resolved issues, rebuilt the new boundaries via the ATAS "Build Boundaries"
 - f. Printed reports via the ATAS "Reports" (i.e., the ASRPT, ATRPT, SSRPT, DSRPT, and High School Enrollment Report), any maps as required via the ATAS "Utilities", "Mapping" and prepare individual standardized recommendations/COAs presentations.

- 3. Briefed commander on recommendations/COAs.

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
USAREC REG 601-87

Related

**Develop Recommendations for Priority Targets
805B-79R-8205**

Conditions: The commander has decided to convene a targeting board and you have access to:

- o Report Management Zone (RMZ)
- o Command guidance
- o Marketing plan
- o Assess a recruiting market (805B-79R-8202)
- o Perform missioning procedures (805B-79R-8206)
- o Competitive analysis
- o G2 Website
- o Collective plan
- o Marketing sync matrix

Standards: Identify priority targets within the recruiting area

Performance Steps

1. Prepare for developing priority targets:
 - a. Log on to the G2 Website and/or RMZ
 - b. Pull competitive reports
 - (1) Market share
 - (2) Recruiter share
 - (3) Race college and/ school report
 - (4) Top to bottom
 - (5) Other reports as needed (i.e. ARNG, AR data etc...)
 - c. Pull detail ZIP Code Report
 - d. Pull essential elements of information (EEI) for production to population data
 - e. Pull production by tactical segment
2. Conduct market analysis.
 - a. Determine market competition
 - b. Assess demographics in the market (Dime, segmentation, college/race)
 - c. Use potential reports (must keep/must win)
 - d. Determine high market payoff ZIP Codes
3. Determine priority targets.
 - a. Understand commander's intent
 - b. Identify high payoff grad and senior markets
 - c. Identify ethnic markets
4. Deliver recommendation to targeting board.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

1. Prepared for developing priority targets:
 - a. Logged on to the G2 Website and/or RMZ
 - b. Pulled competitive reports
 - (1) Market share
 - (2) Recruiter share

<u>GO</u>	<u>NO-GO</u>
—	—

Performance Measures	<u>GO</u>	<u>NO-GO</u>
(3) Race college and/ school report		
(4) Top to bottom		
(5) Other reports as needed (i.e. ARNG, AR data etc...)		
c. Pulled detail ZIP Code Report		
d. Pulled essential elements of information (EEI) for production to population data		
e. Pulled production by tactical segment		
 2. Conducted market analysis.	—	—
a. Determined market competition		
b. Assessed demographics in the market (Dime, segmentation, college/race)		
c. Used potential reports (must keep/must win)		
d. Determined high market payoff ZIP Codes		
 3. Determined priority targets.	—	—
a. Understood commander's intent		
b. Identified high payoff grad and senior markets		
c. Identified ethnic markets		
 4. Delivered recommendation to targeting board.	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

USAREC REG 601-87

Related

Perform Missioning Procedures
805B-79R-8206

Conditions: USAREC has posted your new mission requirements and you have access to:

- o USAREC Reg 601-73
- o Assess a recruiting market (805B-79R-8202)
- o Schools report
- o Current Table of Distribution and Allowances (TDA)
- o Facilities Report
- o Headquarters Support System(HSS)/Force Structure Application and ZIP Code Realignment (FAZR)
- o Mission Production and Awards (MPA) reports
- o Demographic Report
- o Troop Program Unit (TPU) Vacancy Reports
- o Automated Territorial Alignment System (ATAS) reports
- o Out of Area Reports

Standards: Distribute RA, AR, and special missions. Update and use current mission model to ensure fair and equitable distribution.

Performance Steps

1. Establish timeline for mission development, release, acceptance, adjustment and validation.
 - a. Review command timeline
 - b. Review recruiting calendar
 - c. Distribute mission prior to T-4
2. Analyze assigned battalion mission:
 - a. Compare mission and accomplishments using the most recent and previous like time frames.
 - b. Compare percent of unit mission to percent of unit historical DOD production by mission category.
 - c. Determine required DOD market share.
3. Develop courses of action for subordinate unit's mission:
 - a. Input mission into mission model.
 - b. Review latest market assessment.
 - c. Identify changes in DOD competition.
 - d. Identify market shifts (socioeconomic/DOD).
 - e. Identify resource availability (on production fill, recruiting station activations)
4. Prepare decision brief to commander and and/or staff
 - a. Schedule a date.
 - b. Prepare assessment of mission slide for each component.
 - c. Prepare presentation of COAs with recommendation
5. Present decision brief to commander and/or staff
 - a. Schedule a date
 - b. Discuss assessment of mission slide for each component
 - c. Present COA presentation with recommendation

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Established timeline for mission development, release, acceptance, adjustment and validation.	—	—
a. Reviewed command timeline		
b. Reviewed recruiting calendar		
c. Distributed mission prior to T-4		
2. Analyzed assigned battalion mission:	—	—
a. Compared mission and accomplishments using the most recent and previous like time frames.		
b. Compared percent of unit mission to percent of unit historical DOD production by mission category.		
c. Determined required DOD market share.		
3. Developed courses of action for subordinate unit's mission:	—	—
a. Inputted mission into mission model.		
b. Reviewed latest market assesement.		
c. Identified changes in DOD competition.		
d. Identified market shifts (socioeconomic/DOD).		
e. Identified resource availability (on production fill, recruiting station activations)		
4. Prepared decision brief to commander and and/or staff	—	—
a. Scheduled a date.		
b. Prepared assessment of mission slide for each component.		
c. Prepared presentation of COAs with recommendation		
5. Presented decision brief to commander and/or staff	—	—
a. Scheduled a date		
b. Discussed assessment of mission slide for each component		
c. Presented COA presentation with recommendation		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

USAREC REG 601-73

Related

Train the Recruiting Force on Their Market and Missioning Procedures
805B-79R-8207

Conditions: You have been directed to train a new company commander on the battalion's market and missioning procedures and you have access to:

- o G2 Website
- o Report Management Zone (RMZ)
- o Graphical Accessions Mapping Analysis Tool (GAMAT)
- o MapInfo
- o USAREC Reg 601-73
- o USAREC Reg 601-87
- o Completed Position, Analysis and Evaluation (PAE)
- o USAREC Manual 3.0 series
- o Headquarters Support System (HSS)
- o Command policy letters
- o Complete market analysis
- o Out of Area report
- o Automated Territorial Alignment System (ATAS) reports
- o Vacancy reports
- o Targeting plan

Special conditions: Command inspection policy (CIP), Inspector General (IG), leadership request, Annual Training Conference (ATC), and personnel movements

Standards: The new leader will be able to accurately assess, define, and describe their market and mission assignment process and develop a solid market penetration plan.

Performance Steps

1. Collect the unit's reports related to market intelligence procedures to include:
 - a. PAE- current unit structure, personnel and station boundaries
 - b. Table of Distribution and Allowances (TDA), authorized and required recruiting force structure
 - c. Mission
 - d. Pull Competition reports
 - (1) Market Share
 - (2) Recruiter Share
 - (3) Race College
 - (4) Top to Bottom
 - (5) Other reports as needed (i.e. ARNG, USAR data etc.)
 - e. Dime Report
 - f. Out of Area Contracts
 - g. GAMAT
 - h. Segmentation Report
 - i. Review past inspection records
 - j. Review current command guidance
 - k. Review current targeting and/or marketing plans
2. Conduct basic market analysis:
 - a. Review the Market Share Report to determine the following (market share, top to bottom):
 - (1) Determine the dominant categories of the market (DOD) by ZIP Code.
 - (2) Determine the primary competition in the market.
 - (3) Determine the average number of contracts written annually by DOD (over last 3-5 completed fiscal years).

Performance Steps

- (4) Compare current year data to the average for each ZIP Code to uncover potential markets of opportunity.
 - b. Assess competition in the market (recruiter share):
 - (1) Review recruiter share
 - (2) Determine primary competition categorically in each market
 - (3) Compare and contrast other services/competitions strengths and weaknesses in each market
 - c. Assess current demographics in the market (DIME, segmentation, college/race):
 - (1) Determine categorical shortfalls or strengths in each market
 - (2) Review segmentation for accuracy
 - d. Assess positioning in the market (PAE, OAC)
 - (1) Determine if area is properly aligned with the market geographically
 - (2) Know the unit demographic makeup and force structure
 - (3) Determine if recruiters are provided with adequate assets to make mission (proper number of high schools in market, proper number of ZIP Codes assigned, adequate qualified marker available (QMA) population, etc)
 - e. Develop courses of action for improvement
 - (1) Establish market factors negatively impacting mission accomplishment
 - (2) Determine positive actions influencing mission accomplishment
 - (3) Define future operations that will result in improved performance in the market
 - (4) Determine training shortfalls
3. Brief current unit position in the market:
- a. Provide current situational brief:
 - (1) Situational awareness brief (SAB)
 - (2) GAMAT Brief.
 - b. Explain current standings in the market:
 - (1) Market share
 - (2) Competition
 - (3) Schools
 - (4) Industry
 - c. Review past and current operations
 - (1) What has worked well
 - (2) What could have worked better
 - d. Brief future shaping operations
 - (1) Personnel
 - (2) Market changes
 - (3) School plans
 - (4) Asset Use
 - (5) Expected outcomes/return on investment (ROI)
4. Review mission development and assignment:
- a. Understand current missioning guidance and explain mission adjudication procedures
 - b. Assess units ability to achieve mission
 - (1) Market
 - (2) Competition
 - (3) Schools
 - (4) Assets

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.
Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Collected the unit's reports related to market intelligence procedures to include:	—	—
a. PAE- current unit structure, personnel and station boundaries		
b. Table of Distribution and Allowances (TDA), authorized and required recruiting force structure		
c. Mission		
d. Pulled Competition reports		
(1) Market Share		
(2) Recruiter Share		
(3) Race College		
(4) Top to Bottom		
(5) Other reports as needed (i.e. ARNG, USAR data etc.)		
e. Dime Report		
f. Out of Area Contracts		
g. GAMAT		
h. Segmentation Report		
i. Reviewed past inspection records		
j. Reviewed current command guidance		
k. Reviewed current targeting and/or marketing plans		
2. Conducted basic market analysis:	—	—
a. Reviewed the Market Share Report to determine the following (market share, top to bottom):		
(1) Determined the dominant categories of the market (DOD) by ZIP Code.		
(2) Determined the primary competition in the market.		
(3) Determined the average number of contracts written annually by DOD (over last 3-5 completed fiscal years).		
(4) Compared current year data to the average for each ZIP Code to uncover potential markets of opportunity.		
b. Assessed competition in the market (recruiter share):		
(1) Reviewed recruiter share		
(2) Determined primary competition categorically in each market		
(3) Compared and contrasted other services/competitions strengths and weaknesses in each market		
c. Assessed current demographics in the market (DIME, segmentation, college/race):		
(1) Determined categorical shortfalls or strengths in each market		
(2) Reviewed segmentation for accuracy		
d. Assessed positioning in the market (PAE, OAC)		
(1) Determined if area is properly aligned with the market geographically		
(2) Knew the unit demographic makeup and force structure		
(3) Determined if recruiters are provided with adequate assets to make mission (proper number of high schools in market, proper number of ZIP Codes assigned, adequate qualified marker available (QMA) population, etc)		
e. Developed courses of action for improvement		
(1) Established market factors negatively impacting mission accomplishment		
(2) Determined positive actions influencing mission accomplishment		
(3) Defined future operations that will result in improved performance in the market		
(4) Determined training shortfalls		
3. Briefed current unit position in the market:	—	—
a. Provided current situational brief:		
(1) Situational awareness brief (SAB)		

Subject Area 4: S3

**Develop a Recruiting BN Operational Plan
805B-79R-7102**

Conditions: You just received the battalion's recruiting mission. You have full access to all reference materials, training aids, equipment, and the commander's guidance.

Standards: Develop a Battalion Recruiting Operational Plan (ROP) that consists of the following elements:

1. Constructed graphically or in written format
2. Follow the OPORD format as outlined in FM 5.0
3. Establishes operational priorities (synch matrix format)
4. Identifies resources and assets
5. Synchronizes efforts in all Recruiting Functions
6. Coordinates Decisive, Shaping and Sustaining Operations
7. Initiates a quarterly process of 60, 90, and 120 day issue policy
8. Adapts continually to the contemporary operating environment

Develop a Battalion Recruiting Operational Plan (ROP) that consists of the following elements:

1. Constructed graphically or in written format.
2. Follows the 5 paragraph OPORD format (See Annex G, Figure G-2 in FM 5.0)

3. Establishes operational priorities (synch matrix format).
4. Identifies resources and assets.
5. Synchronizes efforts in all Recruiting Operating Systems.
6. Coordinates Decisive, Shaping and Sustaining Operations.
7. Initiates a quarterly process of 60, 90, and 120 day issue policy.
8. Adapts continually to the contemporary operating environment.

Performance Steps

1. Analyze reports to determine the operational effectiveness of the unit.
2. Review initial company operation plans.
3. Prepare staff estimates as necessary (Annex A, Staff Estimate).
4. Establish priorities, synchronize the recruiting operating systems, then identify and allocate resources appropriately
5. Manage applicant processing:
 - a. Ensure synchronization of processing throughout the period.
 - b. Balance prospecting and processing requirements so that one is not sacrificed for the other, and ensure that they are simultaneously executed
 - c. Facilitate the processing through coordinated efforts between MEPS and the staff.
6. Oversee the battalion's Future Soldier Training Program (FSTP)
 - a. Ensure program's compliance with USAREC Reg 601-95.
 - b. Coordinate battalion level FSTP events.
 - c. Incorporate FSTP guidance in battalion's OPORD and report results when required
7. Train the recruiting force.
 - a. Review the Unit's FSO METL prior to executing the current training plan.
 - b. Determine training needs through Report Management Zone (RMZ) data analysis.
 - c. Focus battalion level training on METL deficiencies.
 - d. Provide critical task training for staff and subordinate units.
 - e. Plan training to minimally affect decisive recruiting operations.
 - f. Execute training and assess the results.
8. Manage the Active Duty for Operational Support-Reserve Component (ADOS-RC)
 - a. Maintain the ADOS-RC management binder and usage report
 - b. Submit ADOS-RC funding plan and coordinate with Regional Support Command for funding
 - c. Brief the battalion commander and CSM on expenditures, return on investment (ROI), and overall effectiveness of the program
9. Coordinate a Reserve Partnership Counsel (RPC)
 - a. Coordinate council activities
 - b. Inform RPC council members of time, date, and location of meeting
 - c. Review previously solicited agenda items
 - d. Review new issues and challenges in USAR Recruiting
 - e. Formulate mutually agreeable solutions to increase production
 - f. Select date, time, and location of next meeting
 - g. Record and publish minutes for RPC members

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Analyzed reports to determine the operational effectiveness of the unit.	—	—
2. Reviewed initial company operation plans.	—	—
3. Prepared staff estimates as necessary (Annex A, Staff Estimate).	—	—
4. Established priorities, synchronized the recruiting operating systems, then identified and allocated resources appropriately	—	—
5. Managed applicant processing:	—	—
a. Ensured synchronization of processing throughout the period.		
b. Balanced prospecting and processing requirements so that one was not sacrificed for the other, and ensured that they were simultaneously executed		
c. Facilitated the processing through coordinated efforts between MEPS and the staff.		
6. Oversaw the battalion's Future Soldier Training Program (FSTP)	—	—
a. Ensured program's compliance with USAREC Reg 601-95.		
b. Coordinated battalion level FSTP events.		
c. Incorporated FSTP guidance in battalion's OPORD and reported results when required		
7. Trained the recruiting force.	—	—
a. Reviewed the unit's FSO METL prior to executing the current training plan.		
b. Determined training needs through Report Management Zone (RMZ) data analysis.		
c. Focused battalion level training on METL deficiencies.		
d. Provided critical task training for staff and subordinate units.		
e. Planned training to minimally affect decisive recruiting operations.		
f. Executed training and assess the results.		
8. Managed the Active Duty for Operational Support-Reserve Component (ADOS-RC)	—	—
a. Maintain the ADOS-RC management binder and usage report		
b. Submitted ADOS-RC funding plan and coordinated with Regional Support Command for funding		
c. Briefed the battalion commander and CSM on expenditures, return on investment (ROI), and overall effectiveness of the program		
9. Coordinated a Reserve Partnership Counsel (RPC)	—	—
a. Coordinated council activities		
b. Informed RPC council members of time, date, and location of meeting		
c. Reviewed previously solicited agenda items		
d. Reviewed new issues and challenges in USAR Recruiting		
e. Formulated mutually agreeable solutions to increase production		
f. Selected date, time, and location of next meeting		
g. Recorded and published minutes for RPC members		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

USAREC FORM 446
USAREC MANUAL 3-0

Related

References

Required

USAREC MANUAL 3-01
USAREC MANUAL 3-02
USAREC MANUAL 3-03
USAREC REG 350-8
USAREC REG 600-22
USAREC REG 600-25
USAREC REG 601-104
USAREC REG 601-95

Related

Manage the Battalion Training Management Program
805B-79R-7103

Conditions: The battalion has training events that are ongoing, currently scheduled or need to be scheduled. You have access to all reference materials, training schedules, Digital Training Management System (DTMS) and training aids.

Standards: Initiate a battalion training management program that addresses immediate needs based training, mandatory training and focused Mission Essential Task List (METL) training and assessment as indicated on the near term, short-range and long-range training calendars.

Performance Steps

1. Assess the battalion's FSO METL
 - a. Collect and analyze subordinate unit METL assessments.
 - b. Compare and contrast subordinate METLs to BN FSO METL.
 - c. Review the brigade's FSO METL
 - d. Ensure that all METLs are mutually supportive.
 - e. Make recommendations to the battalion commander
2. Consolidate company training schedules
3. Monitor the battalion's professional development program:
 - a. Review the Order of Merit List (OML) for, NCOES schools, DA courses, and professional course prerequisites.
 - b. Review Soldier identification and selection.
 - c. Ensure regulatory compliance.
4. Monitor mandatory training requirements.
 - a. Review training guidance for mandatory training requirements.
 - b. Disseminate mandatory training requirements to subordinate units.
 - c. Review tracking mechanisms obtained from the master trainer.
 - d. Monitor all mandatory training requirements/certifications using DTMS.
5. Monitor New Recruiter Certification Program (NRCP)
 - a. Inspect tracking log UF 1006.
 - b. Ensure all new recruiters are entered into UF 1006.
 - c. Review the NRCP for evaluations and training at 3rd and 4th months.
6. Manage the quarterly station commander after action review (SCAAR) training plan.
 - a. Review SCAAR training schedules provided by the MT.
 - b. Obtain the commander's signature on training schedules at least six weeks prior to the training event.
 - c. Direct MT to publish schedules.
 - d. Monitor training event execution.
 - e. Monitor training recovery and evaluation.
 - f. Provide SCAAR feedback to the field.
 - g. Validate training effectiveness through recruiting performance data
7. Manage quarterly Active Guard and Reserve (AGR) training plans
 - a. Review training schedules provided by the MT.
 - b. Obtain commander's signature on training schedules at least six weeks prior to the training event.
 - c. Direct MT to publish schedules.
 - d. Monitor training event execution.
 - e. Monitor training recovery and evaluation.
 - f. Provide SCAAR feedback to the field.

Performance Steps

- g. Validate training effectiveness by reviewing recruiting performance data.
- 8. Prepare the semi-annual training brief (STB) presentation
 - a. Coordinate with executive officer for staff's slide deck assembly and completion.
 - b. Review completed slide deck with commander and CSM.
 - c. Forward completed slide deck to brigade S-3 operations
- 9. Publish Annual and quarterly training guidance
 - a. Review higher headquarters training guidance.
 - b. Recommend training guidance to BN commander based on identified needs.
 - c. Publish final training guidance.
- 10. Maintain the battalion training calendar
 - a. Review higher headquarters training calendar.
 - b. Consolidate subordinate unit training calendars.
 - c. Brief training calendar to battalion staff
 - d. Publish approved training calendar.
- 11. Review company training schedules:
 - a. Coordinate the training schedules with battalion staff to ensure training is properly supported.
 - b. Ensure company training can be resourced and supported through the MT, the XO, and other staff elements.
 - c. Validate that training is based on company FSO METL assessment
 - d. Obtain commander's approval for training schedules six weeks prior to training event.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Assessed the battalion's FSO METL <ul style="list-style-type: none"> a. Collected and analyzed subordinate unit METL assessments. b. Compared and contrasted subordinate METLs to BN FSO METL. c. Reviewed the brigade's FSO METL d. Ensured that all METLs are mutually supportive. e. Made recommendations to the battalion commander 	—	—
2. Consolidated company training schedules	—	—
3. Monitored the battalion's professional development program: <ul style="list-style-type: none"> a. Reviewed the Order of Merit List (OML) for, NCOES schools, DA courses, and professional course prerequisites. b. Reviewed Soldier identification and selection. c. Ensured regulatory compliance. 	—	—
4. Monitored mandatory training requirements. <ul style="list-style-type: none"> a. Reviewed training guidance for mandatory training requirements. b. Disseminated mandatory training requirements to subordinate units. c. Reviewed tracking mechanisms obtained from the master trainer. d. Monitored all mandatory training requirements/certifications using DTMS. 	—	—
5. Monitored New Recruiter Certification Program (NRCP) <ul style="list-style-type: none"> a. Inspected tracking log UF 1006. b. Ensured all new recruiters are entered into UF 1006. c. Reviewed the NRCP for evaluations and training at 3rd and 4th months. 	—	—

Performance Measures	<u>GO</u>	<u>NO-GO</u>
6. Managed the quarterly station commander after action review (SCAAR) training plan.	—	—
a. Reviewed SCAAR training schedules provided by the MT.		
b. Obtained the commander's signature on training schedules at least six weeks prior to the training event.		
c. Directed MT to publish schedules.		
d. Monitored training event execution.		
e. Monitored training recovery and evaluation.		
f. Provided SCAAR feedback to the field.		
g. Validated training effectiveness through recruiting performance data		
7. Managed quarterly Active Guard and Reserve (AGR) training plans	—	—
a. Reviewed training schedules provided by the MT.		
b. Obtained commander's signature on training schedules at least six weeks prior to the training event.		
c. Directed MT to publish schedules.		
d. Monitored training event execution.		
e. Monitored training recovery and evaluation.		
f. Provided SCAAR feedback to the field.		
g. Validated training effectiveness by reviewing recruiting performance data.		
8. Prepared the semi-annual training brief (STB) presentation	—	—
a. Coordinated with executive officer for staff's slide deck assembly and completion.		
b. Reviewed completed slide deck with commander and CSM.		
c. Forwarded completed slide deck to brigade S-3 operations		
9. Published Annual and quarterly training guidance	—	—
a. Reviewed higher headquarters training guidance.		
b. Recommended training guidance to BN commander based on identified needs.		
c. Published final training guidance.		
10. Maintained the battalion training calendar	—	—
a. Reviewed higher headquarters training calendar.		
b. Consolidated subordinate unit training calendars.		
c. Briefed training calendar to battalion staff		
d. Published approved training calendar.		
11. Reviewed company training schedules:	—	—
a. Coordinated the training schedules with battalion staff to ensure training is properly supported.		
b. Ensured company training can be resourced and supported through the MT, the XO, and other staff elements.		
c. Validated that training is based on company FSO METL assessment		
d. Obtained commander's approval for training schedules six weeks prior to training event.		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

USAREC MANUAL 3-0

Related

AR 350-1

References

Required

USAREC MANUAL 3-01
USAREC MANUAL 3-02
USAREC REG 1-21
USAREC REG 350-8
USAREC REG 600-25
USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95

Related

FM 3-0
FM 7-0

**Monitor the Battalion Future Soldier Training Program
805B-79R-7104**

Conditions: The battalion is experiencing a high rate of Future Soldier losses. As overseer of the battalion's Future Soldier Training Program (FSTP) you must try to determine the cause. You have access to all applicable regulations, reference material, program data, and commander's guidance.

Standards: Analyze the battalion's Future Soldier Training Program tracking data to uncover any systemic or execution shortfalls.

- o Monitor FSTP functions for frequency and return on investment.
- o Initiate an FSTP trend analysis IAW USAREC Reg 601-95.
- o Brief the commander and responsible staff regarding Delayed Entry Program (DEP)/Delayed Training Program (DTP) renegotiation and separation trends by company.
- o Monitor company level Future Soldier Asset Inventories as required.

Performance Steps

1. Manage renegotiations
 - a. Identify trends in DEP/DTP renegotiations by volume, reason, and company.
 - b. Ensure renegotiation requests are forwarded to appropriate approval authority.
 - c. Ensure OPNS NCO notifies company leadership and monitors the renegotiation of Future Soldiers
2. Monitor DEP/DTP separations
 - a. Identify trends in DEP/DTP separations by volume, reason, company, and proximity to ship date.
 - b. Analyze contact history
 - c. Ensure proper coding for losses are entered into Recruit Quota System (REQUEST) IAW USAREC Reg 601-96 and the Command Situational Awareness Report (CSA).
3. Monitor Future Soldier functions
 - a. Evaluate required frequency
 - b. Calculate the return on investment (ROI) of FS function referrals
 - c. Analyze trends established during FSTP functions for similar time periods
 - d. Identify if referrals from FSTP functions increase or decrease during similar time periods
4. Analyze Future Soldier Log.
 - a. Ensure the Future Soldier Log is generated and updated with current Red, Amber, or Green status
 - b. Identify trends
 - c. Brief commander on Future Soldier pool status

Evaluation Preparation: SETUP: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Managed renegotiations	_____	_____
a. Identified trends in DEP/DTP renegotiations by volume, reason, and company.		
b. Ensured renegotiation requests were forwarded to appropriate approval authority.		
c. Ensured OPNS NCO notified company leadership and monitored the renegotiation of Future Soldiers		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
2. Monitored DEP/DTP separations	_____	_____
a. Identified trends in DEP/DTP separations by volume, reason, company, and proximity to ship date.		
b. Analyzed contact history		
c. Ensured proper coding for losses were entered into Recruit Quota System (REQUEST) IAW USAREC Reg 601-96 and the Command Situational Awareness Report (CSA).		
3. Monitored Future Soldier functions	_____	_____
a. Evaluated required frequency		
b. Calculated the return on investment (ROI) of FS function referrals		
c. Analyzed trends established during FSTP functions for similar time periods		
d. Identified if referrals from FSTP functions increased or decreased during similar time periods		
4. Analyzed Future Soldier Log.	_____	_____
a. Ensured the Future Soldier Log was generated and updated with current Red, Amber, or Green status		
b. Identified trends		
c. Briefed commander on Future Soldier pool status		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required	Related
USAREC FORM 446	
USAREC MANUAL 3-0	
USAREC MANUAL 3-01	
USAREC MANUAL 3-02	
USAREC REG 1-21	
USAREC REG 600-22	
USAREC REG 600-25	
USAREC REG 601-101	
USAREC REG 601-104	
USAREC REG 601-95	
USAREC REG 601-96	

**Supervise the Battalion Enlistment Waiver Program
805B-79R-7109**

Conditions: You received an e-mail in your Enlisted Records Management (ERM) box regarding the status of applicants who require waiver processing. You have access to Guidance Counselor Resource Center (GCRc), all required regulations, and the commander's guidance.

Standards: Supervise a recruiting battalion enlistment waiver program that:

- o Collates waiver logs and GCRc workflows.
- o Analyzes and reports waiver trends to the battalion commander
- o Ensures all required waivers are processed without error IAW regulatory and command policy guidance.

Performance Steps

1. Inspect Waiver Log
 - a. Verify timelines
 - b. Check routing procedures
 - c. Identify trends by volume, type, frequency and company
 - d. Ensure reports are disseminated.
2. Monitor suitability process
 - a. Verify that appropriate level interviews are conducted.
 - b. Ensure approval entries are entered on DD Form 1966 remarks section.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Inspected Waiver Log	_____	_____
a. Verified timelines		
b. Checked routing procedures		
c. Identified trends by volume, type, frequency and company		
d. Ensured reports were disseminated.		
2. Monitored suitability process	_____	_____
a. Verified that appropriate level interviews were conducted.		
b. Ensured approval entries were entered on DD Form 1966 remarks section.		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required	Related
USAREC FORM 446	AR 40-501
USAREC MANUAL 3-0	AR 601-210
USAREC MANUAL 3-01	
USAREC MANUAL 3-02	
USAREC REG 1-21	
USAREC REG 350-8	

References

Required

USAREC REG 360-2
USAREC REG 37-12
USAREC REG 56-1
USAREC REG 600-22
USAREC REG 600-25
USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95
USAREC REG 601-96
USAREC REG 690-6
USAREC/FORSCOM REG 140-1

Related

Supervise the Battalion Suitability Program
805B-79R-7110

Conditions: You have a requirement to supervise the battalion's suitability program. You have access to all required reference materials, regulations, supplies and equipment

Standards: Supervise a Battalion suitability program that:

- o Identifies potential fraudulent / erroneous enlistments prior to accessing.
- o Determine if applicant intentionally concealed medical condition or law violation.
- o Successfully qualifies all Future Soldiers with appropriate clearance.
- o Identifies trends and training indicators that could have an adverse effect on the Battalion's ability to properly process Future Soldiers.
- o Inform the Battalion leadership about all suitability issues.

Performance Steps

1. Perform Regular Army match interview procedures.
 - a. Ensure interview is completed within seven days of notification.
 - b. Determine if applicant intentionally concealed law violation.
 - c. Determine if there was Recruiter or Guidance Counselor involvement (initiate SI investigation if founded).
 - d. Determine retainability of applicant.
 - (1) Immediately discharge FS if fraudulent enlistment occurs.
 - (2) Submit waiver or retain in FSTP to approving authority if applicable.
 - e. Notify Company leadership of results.
 - f. Complete MFR on battalion letterhead documenting interview and final determination of eligibility.
 - g. Scan document into correct folder within ERM.
 - h. Update UR 1054 (Match Log)
2. Perform Army Reserve match interview procedures
 - a. Ensure interview is completed within seven days of notification.
 - b. Determine if applicant intentionally concealed law violation.
 - c. Determine if there was Recruiter or Guidance Counselor involvement (initiate SI investigation if founded).
 - d. Conduct MATCH interview IAW UR 601-96 app J9.
 - (1) If a waiver is required, the unit commander is the approving authority.
 - (2) If waiver threshold is exceeded, the RSC assumes discharge authority and must provide MFR requesting reservation cancellation.
 - e. Complete MFR addressing the seven areas IAW UR 601-96 app J9 4-b.
 - f. Forward to TPU / RSC commander for authorization to ship.
 - g. Update UR 1054 (Match Log)
3. Manage the battalion JPAS report.
4. Perform a suitability review prior to accession date to ensure timely shipping of Future Soldiers.
 - a. Ensure all efforts were made by the SGC to get results.
 - b. Interview applicant IAW UR 601-96 J-9.
 - c. Prepare a MFR on battalion letterhead detailing the results of the interview.
 - d. Scan MFR into Core Admin folder "memorandum ENTNAC interview".
 - e. Forward exception to policy (ETP) to higher headquarters for approval and assignment of a control number.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Performed RA match interview procedures.	_____	_____
a. Ensured interview was completed within seven days of notification.		
b. Determined if applicant intentionally concealed law violation.		
c. Determined if there was Recruiter or Guidance Counselor involvement (initiate SI investigation if founded).		
d. Determined retainability of applicant.		
(1) Immediately discharged FS if fraudulent enlistment occurs.		
(2) Submitted waiver or retained in FSTP to approving authority if applicable.		
e. Notified Company leadership of results.		
f. Completed MFR on battalion letterhead documenting interview and final determination of eligibility.		
g. Scanned document into correct folder within ERM.		
h. Updated UR 1054 (Match Log)		
2. Performed Army Reserve match procedures.	_____	_____
a. Ensured interview was completed within seven days of notification.		
b. Determined if applicant intentionally concealed law violation.		
c. Determined if there was Recruiter or Guidance Counselor involvement (initiate SI investigation if founded).		
d. Conducted MATCH interview IAW UR 601-96 app J9.		
(1) If a waiver was required, the unit commander was the approving authority.		
(2) If waiver threshold was exceeded, the RSC assumed discharge authority and must provide MFR requesting reservation cancellation.		
e. Completed MFR addressing the seven areas IAW UR 601-96 app J9 4-b.		
f. Forwarded to TPU / RSC commander for authorization to ship.		
g. Updated UR 1054 (Match Log)		
3. Managed the battalion JPAS report.	_____	_____
4. Performed a suitability review prior to accession date to ensure timely shipping of Future Soldiers.	_____	_____
a. Ensured all efforts were made by the SGC to get results.		
b. Interviewed applicant IAW UR 601-96 J-9.		
c. Prepared a MFR on battalion letterhead detailing the results of the interview.		
d. Scanned MFR into Core Admin folder "memorandum ENTNAC interview".		
e. Forwarded exception to policy (ETP) to higher headquarters for approval and assignment of a control number.		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

- USAREC FORM 446
- USAREC MANUAL 3-0
- USAREC MANUAL 3-01
- USAREC MANUAL 3-02

Related

- AR 601-210

References

Required

USAREC REG 1-21
USAREC REG 350-8
USAREC REG 360-2
USAREC REG 37-12
USAREC REG 56-1
USAREC REG 600-22
USAREC REG 600-25
USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95
USAREC REG 601-96
USAREC REG 690-6
USAREC/FORSCOM REG 140-1

Related

Subject Area 5: S4

Manage Telecommunications
805B-79R-8400

Performance Steps

1. Obtain training on the following:
 - a. Telecommunication Ordering and Pricing System (TOPS)
 - b. Telecommunications Management System (TMS)
 - c. E-Wireless Sprint
 - d. Joint Recruiting Management System (JRMS)
2. Manage cell phones
 - a. Order or reassign cell phone in JRMS
 - b. Add, change, delete users
 - c. Program phones
 - d. Suspend excess phones
 - e. Account for cell phones
 - f. Replace damaged or lost cell phones
 - g. Maintaining hand receipts
3. Manage land lines
 - a. Verify basis of issue (BOI) for land line authorizations
 - b. Pull monthly reports
 - c. Request repairs replacements and installations as needed
 - d. Enter action into TOPS
 - e. Check TMS for telephone lines
 - f. Coordinate with General Services Administration (GSA)/telephone company (TELCO) on repairs before submission of telephone repairs thru USAREC
4. Install wireless systems
 - a. Place purposed address in headquarters support system (HSS)
 - b. Submit request for supplies (RFS) to relocate wireless
 - c. Coordinate with USAAC
 - d. Manage progress to ensure installation is complete
5. Manage Air Cards
 - a. Verify authorization IAW BOI and thru JRMS and USAAC
 - b. Replace inoperable cards and reassign air cards thru USAAC
 - c. Reactivate air cards thru customer support center (CSC)
 - d. Maintain accountability using hand receipts

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

GO **NO-GO**

1. Obtained training on the following:
 - a. Telecommunication Ordering and Pricing System (TOPS)
 - b. Telecommunications Management System (TMS)
 - c. E-Wireless Sprint
 - d. Joint Recruiting Management System (JRMS)

_____ _____

Performance Measures	<u>GO</u>	<u>NO-GO</u>
2. Managed cell phones	—	—
a. Ordered or reassigned cell phone in JRMS		
b. Added, changed, deleted users as needed		
c. Programmed phones		
d. Suspended excess phones		
e. Accounted for cell phones		
f. Replaced damaged or lost cell phones		
g. Maintained hand receipts		
3. Managed land lines	—	—
a. Verified basis of issue (BOI) for land line authorizations		
b. Pulled monthly reports		
c. Requested repairs replacements and installations as needed		
d. Entered action into TOPS		
e. Checked TMS for telephone lines		
f. Coordinated with General Services Administration (GSA)/telephone company (TELCO) on repairs before submission of telephone repairs thru USAREC		
4. Installed wireless systems	—	—
a. Placed purposed address in headquarters support system (HSS)		
b. Submitted request for supplies (RFS) to relocate wireless		
c. Coordinated with USAAC		
d. Managed progress to ensure installation is complete		
5. Managed Air Cards	—	—
a. Verified authorization IAW BOI and thru JRMS and USAAC		
b. Replaced inoperable cards and reassigned air cards thru USAAC		
c. Reactivated air cards thru customer support center (CSC)		
d. Maintained accountability using hand receipts		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
AR 735-5

Related
AR 700-4

Manage Procurement Procedures
805B-79R-8401

Conditions: You are the battalion S4 and responsible to manage procurement procedures, validate certifications, and execute the purchasing process

Standards: Successfully complete 100% of certifications prior to making purchases, manage the procurement of product and services within fiscal parameters, and execute the Government Purchase Card (GPC) purchasing process within the ACCESS On-line (US Bank) framework.

Performance Steps

1. Obtain training and certification on the following:
 - a. GPC
 - b. Defense Acquisition University (DAU) (CLG-0001-Initial and CLG 0004-Refresher)
 - c. ACCESS On-Line
2. Manage procurement of product and services
 - a. Expendable/durable/services
 - b. Accountability requirements
3. Manage purchases
 - a. Maintain ACCESS/GPC
 - b. Request contract for purchases over \$3000.00

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Obtained training and certification on the following:	_____	_____
a. GPC		
b. Defense Acquisition University (DAU) (CLG-0001-Initial and CLG 0004-Refresher)		
c. ACCESS On-Line		
2. Managed procurement of product and services	_____	_____
a. Expendable/durable/services		
b. Accountability requirements		
3. Managed purchases	_____	_____
a. Maintained ACCESS/GPC		
b. Requested contracts for purchases over \$3000.00		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
USAREC REG 715-1

Related
AR 700-4

**Manage Facility Inspections
805B-79R-8402**

Conditions: You are the battalion's facility manager and directed by regulatory guidance to conduct inspections. You have access to all pertinent regulations and commander's guidance

Standards: Identify facility inspections required using Recruiting Facilities Management Information System-Redesign (RFMIS-RD) and USAREC Reg 700-5; schedule required facility inspections with the station commander within JRFC timelines; complete inspections using the RFMIS-RD checklist; enter inspection results into RFMIS-RD in a timely manner; Create and maintain a facility maintenance program database for year out programs with suspense established by USAREC/Army Corps of Engineers (ACOE).

Performance Steps

1. Identify facility requiring inspections within JFRC policy.
2. Coordinate with station commander to inspect facility
3. Use the inspection checklist in RFMIS-RD program
4. Enter inspection data and program actions into RFMIS-RD
 - a. Access RFMIS-RD
 - b. Enter facilities screen
 - c. Identify RSID and review current program to ensure action is not already entered
 - d. Select link to enter inspection
 - e. Select link to enter facility maintenance program
5. Manage facility action report for preparation of out-year facility program

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Identified facility requiring inspections within JFRC policy.	—	—
2. Coordinated with station commander to inspect facility	—	—
3. Used the inspection checklist in RFMIS-RD program	—	—
4. Entered inspection data and programmed actions into RFMIS-RD <ol style="list-style-type: none"> a. Accessed RFMIS-RD b. Entered facilities screen c. Identified RSID and reviewed current program to ensure action was not already entered d. Selected link to enter inspection e. Selected link to enter facility maintenance program 	—	—
5. Managed facility action report for preparation of out-year facility program	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

STP 12-79R-OCFS

References

Required

USAREC REG 405-1

Related

AR 700-4

**Manage Accountable Property
805B-79R-8403**

Conditions: You are the hand receipt accountability agent and have access to HR 21, all current hand receipts and logs, all applicable regulations, and commander's guidance.

Standards: Manage accountable property by conducting error free inventories with no errors, employ hand receipt procedures on all property to maintain 100% accountability, manage lost / damaged equipment within the timelines established in AR 735-5, and successfully direct or achieve initial training certification prior to utilizing systems and annual recertification.

Performance Steps

1. Conduct inventories on the following:
 - a. Primary Hand Receipt Holder (PHRH) inventory
 - b. Change of command inventory
 - c. Cyclic inventory
 - d. Property Book Officer (PBO) directed (Property Book Office)
 - e. Annual durable property inventory
 - f. Command directed inventory

2. Employ hand receipt procedures on the following:
 - a. Review Primary Hand Receipt (PHR)
 - (1) Increases thru PBO using DD form 250/DA Form 3161
 - (2) Changes thru PBO using DA Form 4949
 - (3) Deletions thru PBO using DD Form 1348-1 (turn-in to DRMS)
 - b. Assign sub-hand receipts
 - c. Change documents
 - (1) Additions to sub-hand receipts
 - (2) Deletions from sub-hand receipts

3. Manage lost equipment / damaged equipment
 - a. Initiate DD 362, Statement of Charges/Cash Collection
 - b. Initiate Financial Liability Investigation for Property Loss (FLIPL)
 - c. Process damage statements

4. Direct and receive training on the following:
 - a. Command Supply Discipline Program (CSDP)
 - b. Property Book Unit Supply Enhanced (PBUSE) Initial and annual recertification

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Conducted inventories on the following:	_____	_____
a. Primary Hand Receipt Holder (PHRH) inventory		
b. Change of command inventory		
c. Cyclic inventory		
d. Property Book Officer (PBO) directed (Property Book Office)		
e. Annual durable property inventory		
f. Command directed inventory		
2. Employed hand receipt procedures on the following:	_____	_____

Performance Measures	<u>GO</u>	<u>NO-GO</u>
a. Reviewed Primary Hand Receipt (PHR)		
(1) Increases thru PBO using DD form 250/DA Form 3161		
(2) Changes thru PBO using DA Form 4949		
(3) Deletions thru PBO using DD Form 1348-1 (turn-in to DRMS)		
b. Assigned sub-hand receipts		
c. Changed documents		
(1) Additions to sub-hand receipts		
(2) Deletions from sub-hand receipts		
3. Managed lost equipment / damaged equipment	—	—
a. Initiated DD 362, Statement of Charges/Cash Collection		
b. Initiated Financial Liability Investigation for Property Loss (FLIPL)		
c. Processed damage statements		
4. Directed and received training on the following:	—	—
a. Command Supply Discipline Program (CSDP)		
b. Property Book Unit Supply Enhanced (PBUSE) Initial and annual recertification		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

AR 710-2

AR 735-5

USAREC REG 735-3

Related

**Manage Unaccompanied Family Housing Program
805B-79R-8404**

Conditions: You received notification that a leased housing action is required. You have access to:

USAREC Reg 700-5, Integrated Logistics Support
General office supplies

Standards: Soldier/family receives government leased housing.

Performance Steps

1. Receive housing application from Soldier and review application for accuracy
2. Submit application to Brigade Facility Manager for review and approval
3. Conduct follow-up with Brigade Facility Manager until Soldier signs a lease
4. Conduct initial housing inspection with the lessor and Soldier
5. Acquire government leased housing for Soldier

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Received housing application from Soldier and reviewed application for accuracy	—	—
2. Submitted application to Brigade Facility Manager for review and approval	—	—
3. Conducted initial housing inspection with the lessor and Soldier	—	—
4. Conducted follow-up with Brigade Facility Manager until Soldier signed a lease	—	—
5. Acquired government leased housing for Soldier	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

Related

USAREC REG 210-4

**Manage Fleet Vehicle Program
805B-79R-8405**

Conditions: You are the fleet vehicle manager and have access to all pertinent regulations and command guidance

Standards: Verify authorizations IAW Table of Distribution and Allowances (TDA) and basis of issue plan (BOIP); supervise vehicle rotations within General Services Administration (GSA) fleet guidelines and command policy; validate/interpret reports to maintain vehicles and maximize life expectancy as directed by GSA; report accidents to GSA within 24 hours of field notification to assist with timely repairs IAW USAREC Reg 700-5 and process all liability/non-liability assessments IAW AR 735-5; and administer personnel records to verify operator qualifications IAW AR 600-55

Performance Steps

1. Validate Vehicle authorization
 - a. Review USAREC BOIP
 - b. Review TDA Authorization
2. Conduct annual vehicle rotation
 - a. Review fleet mileage
 - b. Coordinate with GSA fleet management
3. Conduct/review monthly vehicle reports
 - a. Validate Mileage Plus data
 - b. Review USAREC Form 584, Motor Vehicle Usage Record
 - c. Initiate monthly maintenance actions
4. Manage Accident Reporting
 - a. Inform GSA of accident
 - b. Submit accident packets to GSA
 - c. Complete FLIPL (Financial liability Investigation of Property Loss) and/or damage statement
5. Maintain personnel folders
 - a. Conduct licensing of vehicle operators (DA form 348)
 - b. Conduct annual review of state driver's licenses
 - c. Validate Accident Avoidance Course (AAC) certifications

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Validated Vehicle authorization	_____	_____
a. Reviewed USAREC BOIP		
b. Reviewed TDA Authorization		
2. Conducted annual vehicle rotation	_____	_____
a. Reviewed fleet mileage		
b. Coordinated with GSA fleet management		
3. Conducted/reviewed monthly vehicle reports	_____	_____
a. Validated Mileage Plus data		
b. Reviewed USAREC Form 584, Motor Vehicle Usage Record		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
c. Initiated monthly maintenance actions	_____	_____
4. Managed Accident Reporting	_____	_____
a. Informed GSA of accident		
b. Submitted accident packets to GSA		
c. Completed FLIPL (Financial liability Investigation of Property Loss) and/or damage statement		
5. Maintained personnel folders	_____	_____
a. Conducted licensing of vehicle operators (DA form 348)		
b. Conducted annual review of state driver's licenses		
c. Validated Accident Avoidance Course (AAC) certifications		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required
USAREC REG 56-1

Related
AR 58-1
AR 600-55
AR 735-5

Subject Area 7: S6

**Verify Systems Compliance of Information Assurance
805B-79R-8602**

Conditions: You are assigned as the information management officer (IMO) within your area of operation. You have access to reference material, all required equipment, and the local leader's policy and guidance.

Standards: Verify systems compliance of information assurance by:

- o Verifying individual certification requirements
- o Verifying workstation information assurance requirements
- o Monitoring and reporting annual training requirements

Performance Steps

1. Verify Individual certification requirements
 - a. USAAC Form 101, USAAC Information System Access Request
 - b. DA Form 87 Information Assurance Training (annual)
 - c. Acceptable use policy signed (annual)
2. Verify workstation Information assurance requirements
 - a. Monitor the master vulnerability report through the Enterprise Portal (daily)
 - b. Verify the security inventory report) (as required)
 - c. Check the common access card (CAC) cryptographic logon (CCL) report (monthly)
3. Monitor and report annual training requirements
 - a. Report annual requirements as directed
 - b. Individual required documentation filed by the IMOs
 - (1) USAAC Form 101s are kept on file for 1 year, then destroyed
 - (2) Remaining Individual documentation will be filed IAW Army Records Information Management System (ARIMS)

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Verified Individual certification requirements <ol style="list-style-type: none"> a. USAAC Form 101, USAAC Information System Access Request b. DA Form 87 Information Assurance Training (annual) c. Acceptable use policy signed (annual) 	—	—
2. Verified workstation Information assurance requirements <ol style="list-style-type: none"> a. Monitored the master vulnerability report through the Enterprise Portal (daily) b. Verified the security inventory report) (as required) c. Checked the common access card (CAC) cryptographic logon (CCL) report (monthly) 	—	—
3. Monitored and reported annual training requirements <ol style="list-style-type: none"> a. Reported annual requirements as directed b. Filed Individual required documentation by the IMOs <ol style="list-style-type: none"> (1) USAAC Form 101s are kept on file for 1 year, then destroyed 	—	—

Performance Measures**GO** **NO-GO**

- (2) Remaining Individual documentation will be filed IAW Army Records Information Management System (ARIMS)

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References**Required**

AR 25-2
USAREC MESSAGE
USAREC REG 25-2

Related

Configure a Workstation
805B-79R-8604

Conditions: You are the Information Management Officer (IMO) in your area of operation. You have all required references, equipment, and commander's guidance.

Standards: Configure a work station by determining appropriate course of action and performing the following performance steps without error.

- a) Configuring automation information system
- b) Configuring peripherals and software

Performance Steps

1. Configure automation information system
 - a. Identify workstation authorized for use by user
 - (1) Verify user's role (i.e. recruiter, guidance counselor, office staff).
 - (2) Obtain USAREC approved operating system for workstation.
 - (3) Obtain USAREC administrative guide pertinent to the operating system being installed.
 - (4) Obtain all operating system updates for inclusion in installation.
 - b. Install USAREC operating system onto user workstation IAW field administrators guide and all applicable appendices.
 - c. Load all USAREC updates (i.e. IAVA, patches, program updates)
 - d. Configure newly installed operating system
 - e. Configure user account and migrate user data if a previous account existed
 - f. Install, test and verify system compliance with applicable USAREC IT policies.
2. Configure peripherals and software
 - a. Identify peripherals authorized for use by user.
 - (1) Verify user role (i.e. recruiter, guidance counselor, and staff).
 - (2) Select USAREC approved peripheral device.
 - b. Install authorized peripherals on user's assigned workstation
 - (1) Obtain hardware.
 - (2) Obtain operating software for hardware.
 - (3) Obtain hardware installation instructions and technical data as required.
 - (4) Install peripherals with proper administrative/user rights.
 - (5) Configure peripherals for use
 - (6) Test peripherals for proper operation.
 - c. Identify software authorized for use by user.
 - (1) Verify user role (i.e. recruiter, guidance counselor, staff).
 - (2) Select user software
 - d. Install authorized software onto user's assigned workstation.
 - (1) Obtain authorized software.
 - (2) Obtain installation guide.
 - (3) Install software.
 - (4) Configure software.
 - (5) Test software.
 - e. Maintain approved USAREC software package w/ all updates (i.e. IAVA, patches, program updates)
 - (1) Track IAVA, patches, and program updates
 - (2) Provide support based on noncompliance issues identified

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Configured automation information system	_____	_____
a. Identified workstation authorized for use by user		
(1) Verified user's role (i.e. recruiter, guidance counselor, office staff).		
(2) Obtained USAREC approved operating system for workstation.		
(3) Obtained USAREC administrative guide pertinent to the operating system being installed.		
(4) Obtained all operating system updates for inclusion in installation.		
b. Installed USAREC operating system onto user workstation IAW field administrators guide and all applicable appendices.		
c. Loaded all USAREC updates (i.e. IAVA, patches, program updates)		
d. Configured newly installed operating system		
e. Configured user account and migrated user data if a previous account existed		
f. Installed, tested and verified system compliance with applicable USAREC IT policies.		
2. Configured peripherals and software	_____	_____
a. Identified peripherals authorized for use by user.		
(1) Verified user role (i.e. recruiter, guidance counselor, and staff).		
(2) Selected USAREC approved peripheral device.		
b. Installed authorized peripherals on user's assigned workstation		
(1) Obtained hardware.		
(2) Obtained operating software for hardware.		
(3) Obtained hardware installation instructions and technical data as required.		
(4) Installed peripherals with proper administrative/user rights.		
(5) Configured peripherals for use		
(6) Tested peripherals for proper operation.		
c. Identified software authorized for use by user.		
(1) Verified user role (i.e. recruiter, guidance counselor, staff).		
(2) Selected user software		
d. Install authorized software onto user's assigned workstation.		
(1) Obtained authorized software.		
(2) Obtained installation guide.		
(3) Installed software.		
(4) Configured software.		
(5) Tested software.		
e. Maintained approved USAREC software package w/ all updates (i.e. IAVA, patches, program updates)		
(1) Tracked IAVA, patches, and program updates		
(2) Provided support based on noncompliance issues identified		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References
Required
 AR 25-1

Related

In-Process Personnel
805B-79R-8605

Conditions: You are working as information management officer (IMO) for your operational area. You have access to all reference material, required equipment and commander's guidance.

Standards: Conduct in-processing of personnel allowing them access to the United States Army Accessions Command (USAAC) Enterprise Portal. Steps include:

- o Authenticating users
- o Verifying completion of USAAC Form 101
- o Conducting security briefings
- o Granting user roles in the identity management system (IMS)

Performance Steps

1. Authenticate User.
 - a. Visually verify that the user is the one pictured on his/her CAC.
 - b. Verify that the user's information on his/her CAC matches the information listed on the USAAC Form 101.
 - c. Verify embedded CAC data (i.e. AKO, certificates, expiration, name)
 - d. If either "a", "b" or "c" cannot be verified, stop process and send user back to S1.
 - e. If "a", "b", and "c" can be verified, proceed to step "2".
2. Verify USAAC Form 101 is complete.
 - a. If Part III shows a background check has been done, proceed to step "3".
 - b. If Part III shows a background check has not been done, stop process and return USAAC Form 101 to the Security Manager, to complete background check.
3. Conduct Security Brief.
 - a. Give user a copy of: AR 350-19, USAAC Acceptable Use Policy (AUP), Command Policy Letters and Unit SOP.
 - b. Verify information assurance training has been completed within last 12 months
 - c. Brief user on the contents of the above listed documents.
 - d. Have user acknowledge receipt of copy and understanding of the briefing given, by signing the appropriate log and/or documents for IM records.
 - e. Sign user's in-process sheet.
4. Grant user roles in IMS.
 - a. Login to IMS.
 - b. Select recruiting station identification (RSID) to see users under that RSID.
 - c. If user exists, proceed to sub-step "e".
 - d. If user does not exist, return user to S1 and request S1 verify user has been properly processed into the personnel system.
 - e. Enter user's AKO email address.
 - f. Select the user's "Applicant Type".
 - g. Select the applications that the user is required to have access to.
 - h. Check the box to acknowledge that a valid USAAC Form101 is on file.
 - i. Select the "Update" button.
 - j. Select the role(s) that apply to the user.
 - k. Select the "Update" button.
 - l. Log out of IMS.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Authenticated User.	_____	_____
a. Visually verified that the user is the one pictured on his/her CAC.		
b. Verified that the user's information on his/her CAC matches the information listed on the USAAC Form 101.		
c. Verified embedded CAC data (i.e. AKO, certificates, expiration, name)		
d. If either "a", "b" or "c" cannot be verified, stopped process and sent user back to S1.		
e. If "a", "b", and "c" can be verified, proceeded to step "2".		
2. Verified USAAC Form 101 is complete.	_____	_____
a. If Part III shows a background check was done, proceeded to step "3".		
b. If Part III shows a background check has not been done, stopped process and returned USAAC Form 101 to the Security Manager, to complete background check.		
3. Conducted Security Brief.	_____	_____
a. Gave user a copy of: AR 350-19, USAAC Acceptable Use Policy (AUP), Command Policy Letters and Unit SOP.		
b. Verified information assurance training was completed within last 12 months		
c. Briefed user on the contents of the above listed documents.		
d. Had user acknowledge receipt of copy and understanding of the briefing given, by signing the appropriate log and/or documents for IM records.		
e. Signed user's in-process sheet.		
4. Granted user roles in IMS.	_____	_____
a. Logged into IMS.		
b. Selected recruiting station identification (RSID) to see users under that RSID.		
c. If user exists, proceeded to sub-step "e".		
d. If user does not exist, returned user to S1 and requested S1 to verify user is properly processed into the personnel system.		
e. Entered user's AKO email address.		
f. Selected the user's "Applicant Type".		
g. Selected the applications that the user is required to have access to.		
h. Checked the box to acknowledge that a valid USAAC Form101 is on file.		
i. Selected the "Update" button.		
j. Selected the role(s) that apply to the user.		
k. Selected the "Update" button.		
l. Logged out of IMS.		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required
AR 380-5

Related

Out Process Personnel

805B-79R-8606

Conditions: You are information management officer for your operational area. You have access to all reference material, required equipment, and commander's guidance.

Standards: Out-process personnel by completing all below identified steps with 100% accuracy:

- o Verify user's information technology (IT) hand-receipted equipment per command guidance
- o Remove user's account(s) from information management system (IMS)
- o Remove user's computer account from active directory server
- o Sign the user's out-processing form
- o Notify S4 of equipment's condition

Performance Steps

1. Verify user's IT hand-receipted equipment IAW local command guidance.
 - a. Accountability of equipment.
 - b. Serviceability of equipment.
 - (1) If any of the user's IT hand-receipted items are missing and/or not serviceable, do not sign out-process form and immediately notify the chain of command.
 - (2) If all of user's IT hand-receipted items are in usable condition, continue to step 2.
2. Remove User's Account(s) from IMS
 - a. Log into IMS
 - b. Locate the users record using either social security number (SSN) or recruiting station identification (RSID)
 - c. Uncheck all applications within IMS other than common access card (CAC), Lightweight Directory Access Protocol (LDAP), and Windows which is disabled when windows is unchecked. The account is deleted by S1

NOTE: If S1 does not depart a Soldier they will not be removed from Windows

- d. logout
3. Remove computer account from active directory server
 - a. Login to active directory server
 - b. Locate computer account
 - c. Select the account for deletion by double clicking it then selecting the delete button
 - d. Confirm deletion
 - e. Verify deletion by going into active directory
 - f. Logout
4. Update user's USAAC Form 101
 - a. Mark the user's account for deletion.
 - b. Keep record on file for one year.
5. Sign the user's out-processing form.
6. Notify S4 of equipment's condition.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Verified user's IT hand-receipted equipment IAW local command guidance.	—	—
a. Accountability of equipment.		
b. Serviceability of equipment.		
(1) If any of the user's IT hand-receipted items are missing and/or not serviceable, do not sign out-process form and immediately notify the chain of command.		
(2) If all of user's IT hand-receipted items are in usable condition, continue to step 2.		
2. Removed User's Account(s) from IMS	—	—
a. Logged into IMS		
b. Located the users record using either social security number (SSN) or recruiting station identification (RSID)		
c. Unchecked all applications within IMS other than common access card (CAC), Lightweight Directory Access Protocol (LDAP), and Windows which is disabled when windows is unchecked. The account is deleted by S1		
NOTE: If S1 does not depart a Soldier, they will not be removed from Windows		
d. Logged out		
3. Removed computer account from active directory server	—	—
a. Logged in to active directory server		
b. Located computer account		
c. Selected the account for deletion by double clicking it then selecting the delete button		
d. Confirmed deletion		
e. Verified deletion by going into active directory		
f. Logged out		
4. Updated user's USAAC Form 101	—	—
a. Marked the user's account for deletion.		
b. Kept record on file for one year.		
5. Signed the user's out-processing form.	—	—
6. Notified S4 of equipment's condition.	—	—

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

- AR 735-5
- DA PAM 710-2-1

Related

**Perform Technical Support
805B-79R-8607**

Conditions: You are the Information Management Officer within your operational area. You have access to all reference material, required equipment, and commander's guidance and policy

Standards: Perform technical support for information technology (IT) requests by completing all required steps which include:

- o Determining if information technology support is required
- o Identifying the specific problem
- o Determining the course of action or level of support needed
- o Ensure IT support issue is resolved.

Performance Steps

1. Determine if IT support is required.
2. Identify the specific technical problem
 - a. Ask fact finding questions to determine the specific problem
 - b. Select Individual equipment users guide
 - c. Query Knowledge Zone for specific solutions (Knowledge Zone is reached by selecting help in the upper right hand corner from the United States Army Accessions Command (USAAC) Enterprise Portal Homepage)
 - d. Use "Tools" to identify problem
3. Determine course of action or level of support required
 - a. Consider policy
 - b. Consider local IT resources.
 - c. Consider brigade IT support
 - d. Consider USAREC IT support
 - e. Consider 3rd party IT support (i.e. Dell, IBM, HP etc.)
4. Ensure IT technical support issue is resolved.
 - a. Use local IT resources.
 - b. Use brigade IT support
 - c. Use USAREC IT support
 - d. Use 3rd party IT support (i.e. Dell, IBM, HP etc.)

NOTE: Use of the "Support Bridge" can be used throughout the process to assist in resolving technical issue.

REFERENCE: CA Support Bridge Live Automation 6.0, Technicians User Guide

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Determined if IT support is required.	_____	_____
2. Identified the specific technical problem	_____	_____
a. Asked fact finding questions to determine the specific problem		
b. Selected Individual equipment users guide		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
<ul style="list-style-type: none"> c. Queried Knowledge Zone for specific solutions (Knowledge Zone is reached by selecting help in the upper right hand corner from the United States Army Accessions Command (USAAC) Enterprise Portal Homepage) d. Used "Tools" to identify problem 	—	—
<ul style="list-style-type: none"> 3. Determined course of action or level of support required <ul style="list-style-type: none"> a. Considered policy b. Considered local IT resources. c. Considered brigade IT support d. Considered USAREC IT support e. Considered 3rd party IT support (i.e. Dell, IBM, HP etc.) 	—	—
<ul style="list-style-type: none"> 4. Ensured IT technical support issue is resolved. <ul style="list-style-type: none"> a. Used local IT resources. b. Used brigade IT support c. Used USAREC IT support d. Used 3rd party IT support (i.e. Dell, IBM, HP etc.) 	—	—

NOTE: Use of the "Support Bridge" can be used throughout the process to assist in resolving technical issue.

REFERENCE: CA Support Bridge Live Automation 6.0, Technicians User Guide

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
 SMTC16
 SMTC17

Related

Subject Area 8: ESS

**Advise The Battalion Commander on Education Information
805B-79R-8301**

Conditions: The battalion commander has requested a desk-side brief to discuss the education environment and any issues that may affect mission accomplishment.

Standards: Prepare a decision brief that addresses the current education operating environment and communicate any issues that may affect recruiting operations.

Performance Steps

1. Prepare a decision Brief
 - a. Collect, extract and verify data from various sources that affect mission position
 - b. Analyze the school market data
 - c. Develop appropriate courses of action (COA)
2. Prepare an information brief
 - a. Extract information from various sources that affect mission posture
 - b. Analyze and evaluate extracted information
 - c. Articulate appropriate findings

Evaluation Preparation: This task can be evaluated by use of the evaluation guide. Evaluation Guide. Perform this task on the job using the materials listed in the CONDITIONS statement above. Evaluate individuals using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Prepared a decision Brief	_____	_____
a. Collected, extracted and verified data from various sources that affect mission position		
b. Analyzed the school market data		
c. Developed appropriate courses of action (COA)		
2. Prepared an information brief	_____	_____
a. Extracted information from various sources that affect mission posture		
b. Analyzed and evaluated extracted information		
c. Articulated appropriate findings		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

- USAREC MANUAL 3-0
- USAREC MANUAL 3-03
- USAREC MESSAGE
- USAREC PAM 350-13
- USAREC REG 601-104

Related

- USAREC REG 601-81
- USAREC REG 601-85
- USAREC REG 601-87
- USAREC REG 601-89

**Assist with Acquiring Student Directories
805B-79R-8302**

Conditions: There are secondary and postsecondary schools located within the battalion's AO that prohibit release of student directories to recruiters.

Standards: Obtain release of student directories for recruiters.

Performance Steps

1. Identify nature of the problem
 - a. Identify facts and assumptions
 - b. Query company, station, and recruiter
 - c. Generate alternative COAs
 - d. Review outcome(s) and follow-up as necessary
2. Determine the appropriate persons/organizations to contact
 - a. Confirm and clarify the problem
 - b. Generate alternative COAs
 - c. Negotiate settlement and execute appropriate action
 - d. Review outcome(s) and follow-up as necessary and inform company commander
3. Report unresolved issues to chain of command
 - a. Inform company commander, XO, and battalion commander
 - b. Inform Brigade ESS

Evaluation Preparation: This task can be evaluated by use of the evaluation guide.

Evaluation Guide. Perform this task on the job using the materials listed in the CONDITIONS statement above. Evaluate individuals using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Identified nature of the problem <ol style="list-style-type: none"> a. Identified facts and assumptions b. Queried company, station, and recruiter c. Generated alternative COAs d. Reviewed outcome(s) and followed-up as necessary 	_____	_____
2. Determined the appropriate persons/organizations to contact <ol style="list-style-type: none"> a. Confirmed and clarified the problem b. Generated alternative COAs c. Negotiated settlement and executed appropriate action d. Reviewed outcome(s) and followed-up as necessary and informed company commander 	_____	_____
3. Reported unresolved issues to chain of command <ol style="list-style-type: none"> a. Informed company commander, XO, and battalion commander b. Informed Brigade ESS 	_____	_____

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

STP 12-79R-OCFS

References

Required

USAREC PAM 350-13
USAREC REG 601-104

Related

**Assist with Gaining School Access
805B-79R-8303**

Conditions: Secondary and postsecondary schools have been identified, within the battalion's AO, that prohibit recruiter access.

Standards: Obtain recruiter access to schools.

Performance Steps

1. Identify schools that prohibit or limit access
 - a. Identify facts and assumptions
 - b. Query company, station commander, and recruiter
 - c. Develop COAs
 - d. Review outcome(s) and follow-up as necessary
2. Determine the appropriate person/organization to contact
 - a. Clarify and confirm the problem
 - b. Generate alterative COAs
 - c. Negotiate settlement and execute appropriate action
 - d. Review outcome(s) and follow-up as necessary
3. Report unresolved issues to chain of command
 - a. Inform company commander, XO, and battalion commander
 - b. Inform brigade ESS

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Identified schools that prohibit or limit access <ol style="list-style-type: none"> a. Identified facts and assumptions b. Queried company, station commander, and recruiter c. Developed COAs d. Reviewed outcome(s) and followed-up as necessary 	_____	_____
2. Determined the appropriate person/organization to contact <ol style="list-style-type: none"> a. Clarified and confirmed the problem b. Generated alterative COAs c. Negotiated settlement and executed appropriate action d. Reviewed outcome(s) and followed-up as necessary 	_____	_____
3. Reported unresolved issues to chain of command <ol style="list-style-type: none"> a. Informed company commander, XO, and battalion commander b. Informed brigade ESS 	_____	_____

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required	Related
USAREC PAM 350-13	

STP 12-79R-OCFS

References

Required

USAREC REG 601-104

Related

**Develop BN School Recruiting Plan
805B-79R-8304**

Conditions: The school year has just ended and it is time to develop a new battalion school recruiting plan.

Standards: Prepare a Battalion School Plan that culminates with the Battalion Commanders signature.

Performance Steps

1. Solicit input from targeting board members to formulate the battalion's School Recruiting Program (SRP) that meets USAREC and brigade guidance, and the commander's intent
2. Identify areas that need improvement
 - a. Adjust current plan to reflect identified needs with USAREC, brigade and battalion guidance
 - b. Staff school plan
 - c. Adjust plan to reflect staff recommendations
 - d. Prepare plan for battalion commander's signature
 - e. Provide an AAR to company commanders

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Solicited input from targeting board members to formulate the battalion's School Recruiting Program (SRP) that meets USAREC and brigade guidance, and the commander's intent	—	—
2. Identified areas that need improvement	—	—
a. Adjusted current plan to reflect identified needs with USAREC, brigade and battalion guidance		
b. Staffed school plan		
c. Adjusted plan to reflect staff recommendations		
d. Prepared plan for battalion commander's signature		
e. Provided an AAR to company commanders		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

Related

- USAREC MANUAL 3-0
- USAREC MANUAL 3-01
- USAREC REG 601-101
- USAREC REG 601-107
- USAREC REG 601-59
- USAREC REG 601-81
- USAREC REG 601-85
- USAREC REG 601-87
- USAREC REG 601-95

**Evaluate Education Credentials
805B-79R-8305**

Conditions: Education documents have been identified that require a school evaluation

Standards: Conduct a school evaluation to determine the school's tier status.

Performance Steps

1. Determine the status of the institution using USAREC Form 1015, School Profile - On-Site Visit
 - a. Evaluate transcripts/credentials
 - b. Collect all transcripts, and other required educational documents to determine tier status and conduct onsite visits as required
 - c. Verify validation check on evaluations conducted by other than ESS
 - d. Document/file/store USAREC Form 1015, for inspection

2. Determine the tier status of the applicant's credentials using USAREC Form 1015A, Tier Evaluation Worksheet.
 - a. Contact school officials to verify applicant's education program
 - b. Document/file/store USAREC Form 1015A for inspection

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Determined the status of the institution using USAREC Form 1015, School Profile - On-Site Visit <ol style="list-style-type: none"> a. Evaluated transcripts/credentials b. Collected all transcripts, and other required educational documents to determine tier status and conducted onsite visits as required c. Verified validation check on evaluations conducted by other than ESS d. Documented/filed/stored USAREC Form 1015, for inspection 	—	—
2. Determined the tier status of the applicant's credentials using USAREC Form 1015A, Tier Evaluation Worksheet. <ol style="list-style-type: none"> a. Contacted school officials to verify applicant's education program b. Documented/filed/stored USAREC Form 1015A for inspection 	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

AR 601-210
USAREC REG 601-101

Related

USAREC MESSAGE
USAREC REG 601-87

Maintain Liaison with the Education Community
805B-79R-8306

Conditions: The battalion commander wants to increase Army awareness in the education community to improve recruiter access to the school market.

Standards: Establish and maintain a working relationship with education officials, faculty and staff to improve recruiter and school relations.

Performance Steps

1. Plan an educator/center of influence (COI) tour
 - a. Review past educator/COI tour after action reviews (AAR)
 - b. Assist battalion commander in developing a plan
 - c. Submit tentative plan and budget to brigade
 - d. Coordinate with associated agencies
2. Execute an educator/COI tour
 - a. Confirm participants
 - b. Conduct tour
 - c. Perform an AAR
 - d. Follow up with event participants (COIs) to reinforce the Army message and enhance market penetration
3. Develop working relationships
 - a. Attend education association board meetings (professional)
 - b. Attend school board meetings
 - c. Meet with local and state education officials
 - d. Attend local, state, and national conferences and conventions
 - e. Network with educators at all school events
4. Participate in educator conferences
 - a. Present or exhibit Army programs and opportunities
 - b. Attend training sessions (general, breakout, and workshops)
5. Conduct battalion COI events
 - a. Develop plan
 - b. Submit tentative plan to commander
 - c. Coordinate with associated agencies
 - d. Confirm participants
 - e. Conduct event
 - f. Perform AAR
 - g. Follow up with event participants (COIs) to reinforce the Army message and enhance market penetration

Evaluation Preparation: This task can be evaluated by use of the evaluation guide.

Evaluation Guide. Perform this task on the job using the materials listed in the CONDITIONS statement above. Evaluate individuals using the evaluation guide.

Performance Measures

- | | <u>GO</u> | <u>NO-GO</u> |
|---|-----------|--------------|
| 1. Planned an educator/center of influence (COI) tour | — | — |
| a. Reviewed past educator/COI tour after action reviews (AAR) | | |
| b. Assisted battalion commander in developing a plan | | |

Performance Measures	<u>GO</u>	<u>NO-GO</u>
c. Submitted tentative plan and budget to brigade		
d. Coordinated with associated agencies		
2. Executed an educator/COI tour	—	—
a. Confirmed participants		
b. Conducted tour		
c. Performed an AAR		
d. Followed up with event participants (COIs) to reinforce the Army message and enhance market penetration		
3. Developed working relationships	—	—
a. Attended education association board meetings (professional)		
b. Attended school board meetings		
c. Met with local and state education officials		
d. Attended local, state, and national conferences and conventions		
e. Networked with educators at all school events		
4. Participated in educator conferences	—	—
a. Presented or exhibit Army programs and opportunities		
b. Attended training sessions (general, breakout, and workshops)		
5. Conducted battalion COI events	—	—
a. Developed plan		
b. Submitted tentative plan to commander		
c. Coordinated with associated agencies		
d. Confirmed participants		
e. Conducted event		
f. Performed AAR		
g. Followed up with event participants (COIs) to reinforce the Army message and enhance market penetration		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

**References
Required**

- Related**
 USAREC MANUAL 3-0
 USAREC REG 601-101
 USAREC REG 601-107
 USAREC REG 601-59
 USAREC REG 601-81
 USAREC REG 601-85
 USAREC REG 601-87
 USAREC REG 601-95
 USAREC REG 621-2

Manage the Battalion's ASVAB-Career Exploration Program (ASVAB-CEP)
805B-79R-8307

Conditions: The battalion has just concluded the ASVAB-Career Exploration testing year.

Standards: Establish goals, milestones, guidance and training that support the recruiting force and the commander's intent.

Performance Steps

1. Establish the battalion's Armed Services Vocational Aptitude Battery (ASVAB) goals
 - a. Review historical data
 - b. Identify testing trends
 - c. Submit proposed goals to brigade ESS
2. Establish administrative guidelines for executing the ASVAB-CEP within the battalion AO.
 - a. Review previous ASVAB-CEP administrative guidelines
 - b. Collaborate with all servicing MEPS ESS to refine administrative guidelines
 - c. Publish guidelines in the battalion SOP
3. Provide training to recruiting force, educators, and post secondary students
 - a. Develop Training package
 - b. Conduct Training
 - c. Evaluate and update training as necessary
 - d. Provide training aids to assist recruiters with this task
4. Evaluate program effectiveness
 - a. Assist recruiting force with schools that do not offer the ASVAB-CEP
 - b. Assist recruiting force with promoting, scheduling, and post test services
 - c. Resolve any issues identified during ASVAB-CEP testing
 - d. Monitor milestone achievements and overall efficiency of the battalion ASVAB-CEP program
 - e. Advise commander on progress of battalion ASVAB-CEP goals.
 - f. Provide ASVAB testing data and market conditions during the positioning, analysis, and evaluation (PAE) process

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Established the battalion's Armed Services Vocational Aptitude Battery (ASVAB) goals <ol style="list-style-type: none"> a. Reviewed historical data b. Identified testing trends c. Submitted proposed goals to brigade ESS 	—	—
2. Established administrative guidelines for executing the ASVAB-CEP within the battalion AO. <ol style="list-style-type: none"> a. Reviewed previous ASVAB-CEP administrative guidelines b. Collaborated with all servicing MEPS ESS to refine administrative guidelines c. Published guidelines in the battalion SOP 	—	—
3. Provided training to recruiting force, educators, and post secondary students <ol style="list-style-type: none"> a. Developed Training package 	—	—

Performance Measures

GO **NO-GO**

- b. Conducted Training
 - c. Evaluated and updated training as necessary
 - d. Provided training aids to assist recruiters with this task
4. Evaluated program effectiveness
- a. Assisted recruiting force with schools that do not offer the ASVAB-CEP
 - b. Assisted recruiting force with promoting, scheduling, and post test services
 - c. Resolved any issues identified during ASVAB-CEP testing
 - d. Monitored milestone achievements and overall efficiency of the battalion ASVAB-CEP program
 - e. Advised commander on progress of battalion ASVAB-CEP goals.
 - f. Provided ASVAB testing data and market conditions during the positioning, analysis, and evaluation (PAE) process

_____ _____

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

Related

USAREC REG 601-59

**Manage USAREC Education Program
805B-79R-8308**

Conditions: You are the Education Services Specialist (ESS) and are responsible for the management of USAREC education programs.

Standards: Establish goals, milestones, guidance and training for each education program that supports the recruiting force and complies with the commander's intent.

Performance Steps

1. Manage the Concurrent Admissions Program (CONAP)
 - a. Brief educators on features and benefits
 - b. Provide guidance on the use of CONAP
 - c. Provide training to recruiters, faculty, and staff
 - d. Develop goals
 - e. Maintain monthly CONAP reports
 - f. Assist in developing partnerships with colleges
 - g. Update point of contact (POC) information
2. Supervise March 2 Success program
 - a. Train recruiting force on marketing and use of the program
 - b. Communicate program benefits to the educational community
3. Assist and train the recruiting force with Tier Two Attrition Screening (TTAS)
 - a. Assist recruiting force with home schooling, General Educational Development (GED), Education Plus, and other educational programs as current
 - b. Instruct recruiting force on how to process individuals for the TTAS and Education Plus program.
4. Develop a needs based training plan for the recruiting force.
 - a. Provide collective training on education programs at station, company, and battalion levels
 - b. Provide updates on USAREC education program awareness
 - c. Develop a school contact strategy
5. Assist Soldiers with Army Continuing Education System (ACES) programs
 - a. Refer to the servicing education center when necessary
 - b. Provide training on new education programs
 - c. Provide Soldiers with web based resources, Veterans Administration (VA) numbers, and DA ACES information

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Managed the Concurrent Admissions Program (CONAP)	_____	_____
a. Briefed educators on features and benefits		
b. Provided guidance on the use of CONAP		
c. Provided training to recruiters, faculty, and staff		
d. Developed goals		
e. Maintained monthly CONAP reports		
f. Assisted in developing partnerships with colleges		
g. Updated point of contact (POC) information		
2. Supervised March 2 Success program	_____	_____

Performance Measures	<u>GO</u>	<u>NO-GO</u>
a. Trained recruiting force on marketing and use of the program		
b. Communicated program benefits to the educational community		
3. Assisted and trained the recruiting force with Tier Two Attrition Screening (TTAS)	—	—
a. Assisted recruiting force with home schooling, General Educational Development (GED), Education Plus, and other educational programs as current		
b. Instructed recruiting force on how to process individuals for the TTAS and Education Plus program.		
4. Developed a needs based training plan for the recruiting force.	—	—
a. Provided collective training on education programs at station, company, and battalion levels		
b. Provided updates on USAREC education program awareness		
c. Developed a school contact strategy		
5. Assisted Soldiers with Army Continuing Education System (ACES) programs	—	—
a. Referred to the servicing education center when necessary		
b. Provided training on new education programs		
c. Provided Soldiers with web based resources, Veterans Administration (VA) numbers, and DA ACES information		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

USAREC PAM 350-13

Related

Subject Area 9: CO CDR

Manage the Company Future Soldier Training Program
805B-79R-7004

Conditions: The company added five new Future Soldiers to the existing pool. You have access to Report Management Zone (RMZ), Leader Zone (LZ), applicable regulations, command guidance, company calendar and recruiter work station (RWS).

Standards: Prepare all Future Soldiers for Basic Combat Training (BCT) and achieve a 90% accession rate to include:

- o Analyze the current FSTP
- o Update the company FSTP
- o Implement changes to the company FSTP
- o Validate FSTP

Performance Steps

1. Analyze the current FSTP
 - a. Identify potential losses and reason why with input from station commanders.
 - b. Determine ship potential as Red, Amber, or Green based on current information.
 - c. Evaluate station level FSTP.
 - d. Attend Future Soldier functions at station level.
 - e. Identify shortfalls with the current FSTP IAW applicable regulations.
2. Update the company FSTP
 - a. Direct training requirements.
 - b. Plan for Future Soldier contact.
 - c. Determine additional ship code criteria.
 - d. Determine qualifications: AR 601-210
 - (1) Height/weight
 - (2) Moral
 - (3) Education/graduation potential
 - (4) Physical Fitness Assessment (PFA)
 - (5) Well-being
 - (6) Additional administrative requirements (flight physical, typing test, background, etc...)
 - (7) Moral and administration waivers
 - e. Create company FSTP plan.
3. Implement changes to the company FSTP.
 - a. Brief FSTP plan to station commanders.
 - b. Establish training plan with station commander's input per RSID.
 - c. Conduct company level Future Soldier function.
4. Validate FSTP
 - a. Inspect the training, academic standing, fitness, and physical/moral eligibility.
 - b. Verify your stations are in compliance with USAREC Regulation 601-95 and the company standing operating procedure (SOP).
 - c. Annotate your Future Soldiers' comments in LZ.
 - d. Provide guidance and suspense dates on USAREC Form 1117.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement

above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Analyzed the current FSTP <ul style="list-style-type: none"> a. Identified potential losses and reason why with input from station commanders. b. Determined ship potential as Red, Amber, or Green based on current information. c. Evaluated station level FSTP. d. Attended Future Soldier functions at station level. e. Identified shortfalls with the current FSTP IAW applicable regulations. 	—	—
2. Updated the company FSTP <ul style="list-style-type: none"> a. Directed training requirements. b. Planned for Future Soldier contact. c. Determined additional ship code criteria. d. Determined qualifications: AR 601-210 <ul style="list-style-type: none"> (1) Height/weight (2) Moral (3) Education/graduation potential (4) Physical Fitness Assessment (PFA) (5) Well-being (6) Additional administrative requirements (flight physical, typing test, background, etc...) (7) Moral and administration waivers e. Created company FSTP plan. 	—	—
3. Implemented changes to the company FSTP. <ul style="list-style-type: none"> a. Briefed FSTP plan to station commanders. b. Established training plan with station commander's input per RSID. c. Conducted company level Future Soldier function. 	—	—
4. Validated FSTP <ul style="list-style-type: none"> a. Inspected the training, academic standing, fitness, and physical/moral eligibility. b. Verified your stations are in compliance with USAREC Regulation 601-95 and the company standing operating procedure (SOP). c. Annotated Future Soldiers' comments in LZ. d. Provided guidance and suspense dates on USAREC Form 1117. 	—	—

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-development for soldiers who experience major difficulties in task performance.

References

Required	Related
AR 601-210	
USAREC FORM 446	
USAREC MANUAL 3-0	
USAREC MANUAL 3-01	
USAREC MANUAL 3-02	
USAREC REG 1-21	
USAREC REG 600-22	
USAREC REG 600-25	

References

Required

USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95

Related

Plan Company Training
805B-79R-7006

Conditions: Today is the end of the phase line and you have scheduled a meeting with your 1SG and station commanders to address training indicators. You have access to Report Management Zone (RMZ) and Leader Zone (LZ) reports, applicable regulations, command guidance, company calendar and a recruiter work station (RWS).

Standards: Train the company on recruiting tasks that address recruiting performance deficiencies and provide mandatory training monthly, quarterly and annually.

Performance Steps

1. Conduct a training assessment.
 - a. Review the battalion METL.
 - b. Assess the company METL.
 - c. Receive input from subordinate leaders.
 - d. Review previous after action reviews (AARs), current tactics, techniques, and procedures (TTPs), and trends.
2. Review training guidance.
 - a. Review AR 350-1 and USAREC Regulation 350-1
 - b. Review USAREC, brigade, and battalion command training guidance.
 - c. Review previous company training guidance.
 - d. Review calendars from higher units.
3. Develop the company training plan.
 - a. Conduct a training meeting
 - b. Incorporate training guidance.
 - c. Align training priorities.
 - d. Allocate training resources.
 - e. Plan discretionary time for short suspense training requirements.
 - f. Develop near term, short range, and long-range training calendars addressing the most critically identified training indicators first.
 - g. Develop training schedules.
4. Implement company training plan.
 - a. Prepare for training (equipment, resources, doctrine, facilities).
 - b. Certify trainers for period of instruction.
 - c. Integrate risk management.
 - d. Execute training event while conducting an in-process review (IPR).

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Conducted a training assessment.	_____	_____
a. Reviewed the battalion METL.		
b. Assessed the company METL.		
c. Received input from subordinate leaders.		
d. Reviewed previous after action reviews (AARs), current tactics, techniques, and procedures (TTPs), and trends.		
2. Reviewed training guidance.	_____	_____

Performance Measures	<u>GO</u>	<u>NO-GO</u>
<ul style="list-style-type: none"> a. Reviewed AR 350-1 and USAREC Regulation 350-1 b. Reviewed USAREC, brigade, and battalion command training guidance. c. Reviewed previous company training guidance. d. Reviewed calendars from higher units. 	—	—
<ul style="list-style-type: none"> 3. Developed the company training plan. <ul style="list-style-type: none"> a. Conducted a training meeting b. Incorporated training guidance. c. Aligned training priorities. d. Allocated training resources. e. Planned discretionary time for short suspense training requirements. f. Developed near term, short range, and long-range training calendars addressing the most critically identified training indicators first. g. Developed training schedules. 	—	—
<ul style="list-style-type: none"> 4. Implemented company training plan. <ul style="list-style-type: none"> a. Prepared for training (equipment, resources, doctrine, facilities). b. Certified trainers for period of instruction. c. Integrated risk management. d. Executed training event while conducting an in-process review (IPR). 	—	—

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required	Related
AR 350-1	
USAREC FORM 446	
USAREC MANUAL 3-0	
USAREC MANUAL 3-01	
USAREC MANUAL 3-02	
USAREC REG 1-21	
USAREC REG 350-8	
USAREC REG 360-2	
USAREC REG 37-12	
USAREC REG 56-1	
USAREC REG 600-22	
USAREC REG 600-25	
USAREC REG 601-101	
USAREC REG 601-104	
USAREC REG 601-95	
USAREC REG 601-96	
USAREC REG 690-6	
USAREC/FORSCOM REG 140-1	

Conduct a Company AAR
805B-79R-7007

Conditions: You have just completed a phase line and have scheduled a meeting with your 1SG and station commanders to identify what went right and what went wrong. You have access to Report Management Zone (RMZ) and Leader Zone (LZ) reports, applicable regulations, the commander's intent, company calendar and recruiter work station (RWS).

Standards: Review the company's performance against phase line goals to determine positive performance, deficiencies, and lessons learned to improve the companies recruiting operation plan (ROP) and training plans.

Performance Steps

1. Prepare to conduct an AAR.
 - a. Analyze reports and data.
 - b. Review the station's plan, goals, and milestones.
2. Conduct an AAR.
 - a. Explain the AAR agenda.
 - b. Discuss previous phase line goals and mission accomplishments.
 - c. Discuss obstacles and lessons learned from the previous phase line:
 - (1) Future Soldier Losses
 - (2) Possible matches (law violations)
 - (3) Positive Drug and Alcohol Test (DAT) results
 - (4) Administrative and medical issues
 - d. Discuss tactics, techniques and procedures (TTP) and training needs.
 - e. Discuss current mission requirements and update plan of action.
 - f. Identify resources required.
 - g. Summarize and conclude AAR.
3. Update the company operational plan.
 - a. Provide direction to the station commander to conduct station strengths, weaknesses, opportunities, and threats (SWOT).
 - b. Update the company SWOT.
 - c. Adjust the company's recruiting operation plan (ROP).

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Prepared to conduct an AAR.	—	—
a. Analyzed reports and data.		
b. Reviewed the station's plan, goals, and milestones.		
2. Conducted an AAR.	—	—
a. Explained the AAR agenda.		
b. Discussed previous phase line goals and mission accomplishments.		
c. Discussed obstacles and lessons learned from the previous phase line:		
(1) Future Soldier Losses		
(2) Possible matches (law violations)		
(3) Positive Drug and Alcohol Test (DAT) results		
(4) Administrative and medical issues		
d. Discussed tactics, techniques and procedures (TTP) and training needs.		

Performance Measures

GO **NO-GO**

- e. Discussed current mission requirements and update plan of action.
- f. Identified resources required.
- g. Summarized and concluded AAR.

- 3. Updated the company operational plan.
 - a. Provided direction to the station commander to conduct station strengths, weaknesses, opportunities, and threats (SWOT).
 - b. Updated the company SWOT.
 - c. Adjusted the company's recruiting operation plan (ROP)

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

Related

- TC 25-20
- USAREC FORM 446
- USAREC MANUAL 3-0
- USAREC MANUAL 3-01
- USAREC MANUAL 3-02
- USAREC REG 1-21
- USAREC REG 350-8
- USAREC REG 360-2
- USAREC REG 37-12
- USAREC REG 56-1
- USAREC REG 600-22
- USAREC REG 600-25
- USAREC REG 601-101
- USAREC REG 601-104
- USAREC REG 601-95
- USAREC REG 601-96
- USAREC REG 690-6
- USAREC/FORSCOM REG 140-1

Develop a Company Recruiting Operational Plan.

805B-79R-7008

Conditions: You are twenty days from the end of the phase line and currently reviewing the upcoming phase line and next quarter's strategy. You have access to Report Management Zone (RMZ) and Leader Zone (LZ) reports, applicable regulations, command guidance, 1SG and station commander input, company calendar and recruiter work station (RWS).

Standards: Establish a company Recruiting Operation Plan (ROP) that consists of the next phase Line and a quarterly strategy, to include:

- o Conduct company level intelligence process
- o Review stations ROP
- o Supervise the company MAP
- o Conduct a SWOT
- o Conduct a recruiting functions analysis
- o Review commander's intent
- o Formulate the ROP
- o Publish the company ROP

Performance Steps

1. Conduct company level intelligence process
 - a. Define the local recruiting environment.
 - (1) Identify key factors.
 - (a) Company/station boundaries
 - (b) Shopping malls
 - (c) Population density
 - (d) Age
 - (e) Economic status
 - (f) Major industries
 - (g) Labor rates
 - (h) Market segments by ethnicity
 - (i) Employment types/rates
 - (j) Local DOD elements
 - (k) Competition
 - (l) Traffic flow
 - (2) Determine elements of the market.
 - (a) Potential market
 - (b) Qualified military available (QMA) market
 - (c) Target market
 - (d) Penetrated market
 - (e) Market segmentation
 - b. Describe the effects of the recruiting environment. USAREC Manual 3-02 3-15
 - (1) Describe the demographics
 - (2) Determine lifestyles
 - (3) Define psychographics
 - c. Evaluate the Market.
 - (1) Identify/analysis characteristics of the market
 - (a) Demographic information
 - (b) Psychographic information
 - (c) Socioeconomic information
 - (d) Sociocultural information

Performance Steps

- (e) Production information
 1. DOD/Army quality categories
 2. Future Soldier Training Program (FSTP) loss trends by categories
 3. Special mission production
 4. Production by component
- (f) Marketing events
- (2) Conduct reverse planning
- d. Synchronize assets to target high payoff zones and events.
- 2. Review stations' ROP.
- 3. Supervise the company Mission Accomplishment plan (MAP).
- 4. Conduct a SWOT analysis
- 5. Formulate the company ROP
 - a. Establish priorities
 - b. Synchronize Recruiting Functions
 - c. Identify, request and allocate resources
 - d. Identify all FSTP events
 - e. Identify all training
- 6. Publish the company ROP

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Conducted company level intelligence process	—	—
a. Defined the local recruiting environment.		
(1) Identified key factors.		
(a) Company/station boundaries		
(b) Shopping malls		
(c) Population density		
(d) Age		
(e) Economic status		
(f) Major industries		
(g) Labor rates		
(h) Market segments by ethnicity		
(i) Employment types/rates		
(j) Local DOD elements		
(k) Competition		
(l) Traffic flow		
(2) Determined elements of the market.		
(a) Potential market		
(b) Qualified military available (QMA) market		
(c) Target market		
(d) Penetrated market		
(e) Market segmentation		
b. Described the effects of the recruiting environment. USAREC Manual 3-02		
3-15		
(1) Described the demographics		
(2) Determined lifestyles		
(3) Defined psychographics		

Performance Measures

GO NO-GO

<ul style="list-style-type: none"> c. Evaluated the Market. <ul style="list-style-type: none"> (1) Identified/analyzed characteristics of the market <ul style="list-style-type: none"> (a) Demographic information (b) Psychographic information (c) Socioeconomic information (d) Sociocultural information (e) Production information <ul style="list-style-type: none"> 1. DOD/Army quality categories 2. Future Soldier Training Program (FSTP) loss trends by categories 3. Special mission production 4. Production by component (f) Marketing events (2) Conducted reverse planning d. Synchronized assets to target high payoff zones and events. 	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
2. Reviewed stations' ROP.	_____	_____
3. Supervised the company Mission Accomplishment plan (MAP).	_____	_____
4. Conducted a SWOT analysis	_____	_____
5. Formulated the company ROP <ul style="list-style-type: none"> a. Established priorities b. Synchronized Recruiting Functions c. Identified, request and allocate resources d. Identified all FSTP events e. Identified all training 	_____	_____
6. Published the company ROP	_____	_____

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required	Related
USAREC FORM 446	
USAREC MANUAL 3-0	
USAREC MANUAL 3-01	
USAREC MANUAL 3-02	
USAREC REG 350-8	
USAREC REG 600-22	
USAREC REG 600-25	
USAREC REG 601-104	
USAREC REG 601-95	

Develop a Company School Recruiting Program
805B-79R-7011

Conditions: There are ninety days before the start of the upcoming school year (SY). You have access to School Zone (SZ), applicable regulations, command guidance, 1SG and station commander input, school calendar and recruiter work station (RWS).

Standards: Develop a company SRP that achieves USAREC standards, attains enlistment goals, penetrates the school market, incorporates SZ and ensures school access by:

- o Evaluating the previous SY recruiting plan.
- o Developing the SRP for the next SY.
- o Implementing the school penetration plan and goals.
- o Supervising and evaluating the SRP.

Performance Steps

1. 1. Evaluate previous SY recruiting plan
 - a. Identify effective and ineffective aspects of the previous SY recruiting plan.
 - b. Identify uncooperative and hard to penetrate schools.
 - c. Evaluate all assigned school information for the previous SY within SZ.
2. Develop the school recruiting program for the next SY.
 - a. Validate achievements and set enlistment goals for new SY.
 - b. Request school lists.
 - c. Identify VIP/COI's and plan targeted recruiting events to increase participation and support.
 - d. Identify key events and time period(s) that requires recruiter involvement or increased prospecting.
 - e. Identify partnerships with JROTC/ROTC units.
 - f. Plan to target hard to penetrate schools.
 - g. Identify areas of opportunities to direct force within available media.
 - h. Identify volunteer positions, within the assigned schools, to allow for recruiter penetration.
 - i. Identify and request local and national assets to support school penetration plan.
3. Implement school penetration plan and goals.
 - a. Promote professional attendance in school activities weekly
 - b. Verify that school list/information are obtained and input to advanced lead refinement list (ALRL) and SZ information.
 - c. Regularly make presentations in class using films or videos.
 - d. Promote college attendance by military personnel (Future Soldiers, recruiters, TPU members, military spouses, etc.).
 - e. Direct activities designed to foster a long-term relationship with administration VIP/COI's.
 - f. Direct activities at career days and fairs that bring students and recruiters together.
 - g. Direct station(s) involvement in faculty member and student organizations that often seek appropriate speakers for their interest areas.
 - h. Institute awareness of the Armed Services Vocational Aptitude Battery (ASVAB) in every high school.
 - i. Promote education tours for VIP/COI's.
4. Supervise and evaluate an SRP
 - a. Validate SRP quarterly, as a minimum.
 - (1) Assess penetration plans based on seasonality and market conditions.
 - (2) Authenticate SZ with station commanders to ensure requirements are being met.
 - (3) Confirm scheduling and conduct of directed recruiting operations.

Performance Steps

- b. Modify plan, as needed, to achieve desired production goals from assigned schools and adjust to unanticipated changes within the recruiting environment.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Evaluated previous SY recruiting plan	—	—
a. Identified effective and ineffective aspects of the previous SY recruiting plan.		
b. Identified uncooperative and hard to penetrate schools.		
c. Evaluated all assigned school information for the previous SY within SZ.		
2. Developed the school recruiting program for the next SY.	—	—
a. Validated achievements and set enlistment goals for new SY.		
b. Requested school lists.		
c. Identified VIP/COI's and plan targeted recruiting events to increase participation and support.		
d. Identified key events and time period(s) that requires recruiter involvement or increased prospecting.		
e. Identified partnerships with JROTC/ROTC units.		
f. Planned to target hard to penetrate schools.		
g. Identified areas of opportunities to direct force within available media.		
h. Identified volunteer positions, within the assigned schools, to allow for recruiter penetration.		
i. Identified and request local and national assets to support school penetration plan.		
3. Implemented school penetration plan and goals.	—	—
a. Promoted professional attendance in school activities weekly		
b. Verified that school list/information are obtained and input to advanced lead refinement list (ALRL) and SZ information.		
c. Regularly made presentations in class using films or videos.		
d. Promoted college attendance by military personnel (Future Soldiers, recruiters, TPU members, military spouses, etc.).		
e. Directed activities designed to foster a long-term relationship with administration VIP/COI's.		
f. Directed activities at career days and fairs that bring students and recruiters together.		
g. Directed station(s) involvement in faculty member and student organizations that often seek appropriate speakers for their interest areas.		
h. Instituted awareness of the Armed Services Vocational Aptitude Battery (ASVAB) in every high school.		
i. Promoted education tours for VIP/COI's.		
4. Supervised and evaluated an SRP	—	—
a. Validated SRP quarterly, as a minimum.		
(1) Assessed penetration plans based on seasonality and market conditions.		
(2) Authenticated SZ with station commanders to ensure requirements are met.		
(3) Confirmed scheduling and conduct of directed recruiting operations.		

Performance Measures

GO **NO-GO**

- b. Modified plan, as needed, to achieve desired production goals from assigned schools and adjusted to unanticipated changes within the recruiting environment.

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-development for soldiers who experience major difficulties in task performance.

References

Required

USAREC PAM 350-13

Related

USAREC REG 601-104

Subject Area 10: XO

**Coordinate the Battalion Organizational Inspection Program
805B-79R-7301**

Conditions: You've been appointed the battalion's Organizational Inspection Program (OIP) coordinator. The commander has directed you to execute a command inspection program (CIP). You have access to all required publications, reports, materials and subject matter experts (SME).

Standards: Coordinate a CIP that will:

- o Provide guidance to the unit being inspected
- o Provide SMEs as inspectors.
- o Provide a detailed out-brief to the commander and unit inspected
- o Provide the commander with an inspection report
- o Establish a post-inspection assessment to ensure corrective action have been taken.

Performance Steps

1. Verify inspected areas are still valid and IAW references
2. Validate inspection checklists.
 - a. Download current IG inspection checklist
 - b. Conduct an in-process review (IPR) with SMEs to ensure inspection items are still current/valid
3. Prepare for inspection
 - a. Validate SMEs
 - (1) Conduct IPR with SMEs
 - (2) Validate checklist
 - b. Develop courses of action (COA) and plan for execution
 - (1) Disseminate checklists to SMEs and the unit to be inspected
 - (2) Provide the unit with the last Inspection's reply by endorsement (RBE)
 - (3) Review the inspection process with SMEs and members of the unit to be inspected
 - (4) Coordinate inspection schedule with SME's and members of the unit to be inspected
4. Supervise inspection to ensure compliance with applicable regulations and commander's guidance
Note: Conduct ICI within 90 days of assumption of command and annually there after
5. Conduct follow-up actions
 - a. Conduct an after action review (AAR) with inspectors/SMEs
 - b. Review follow-up actions for the inspected unit
 - (1) Review RBE from inspected unit
 - (2) Conduct follow-up inspection if needed
 - (3) Conduct spot-checks of companies and stations
6. Report findings to commander and CSM

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Verified inspected areas were still valid and IAW references	—	—

Performance Measures	<u>GO</u>	<u>NO-GO</u>
2. Validated inspection checklists.	—	—
a. Downloaded current IG inspection checklist		
b. Conducted an in-process review (IPR) with SMEs to ensure inspection items are still current/valid		
3. Prepared for inspection	—	—
a. Validated SMEs		
(1) Conducted IPR with SMEs		
(2) Validated checklist		
b. Developed courses of action (COA) and plan for execution		
(1) Disseminated checklists to SMEs and the unit to be inspected		
(2) Provided the unit with the last Inspection's reply by endorsement (RBE)		
(3) Reviewed the inspection process with SMEs and members of the unit to be inspected		
(4) Coordinated inspection schedule with SME's and members of the unit to be inspected		
4. Supervised inspection to ensure compliance with applicable regulations and commander's guidance	—	—
Note: Conducted ICI within 90 days of assumption of command and annually there after		
5. Conducted follow-up actions	—	—
a. Conducted an after action review (AAR) with inspectors/SMEs		
b. Reviewed follow-up actions for the inspected unit		
(1) Reviewed RBE from inspected unit		
(2) Conducted follow-up inspection if needed		
(3) Conducted spot-checks of companies and stations		
6. Reported findings to commander and CSM	—	—

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required	Related
AR 1-201	AR 25-400-2
AR 600-20	
USAREC FORM 446	
USAREC MANUAL 3-0	
USAREC MANUAL 3-01	
USAREC MANUAL 3-02	
USAREC REG 1-21	
USAREC REG 350-8	
USAREC REG 360-2	
USAREC REG 37-12	
USAREC REG 56-1	
USAREC REG 600-22	
USAREC REG 600-25	
USAREC REG 601-101	
USAREC REG 601-104	
USAREC REG 601-95	
USAREC REG 601-96	
USAREC REG 690-6	

STP 12-79R-OCFS

References

Required

USAREC/FORSCOM REG 140-1

Related

**Manage the Battalion Recruiting Standards Program
805B-79R-7303**

Conditions: As the executive officer (XO), you are the primary staff officer responsible for the battalion's Recruiting Standards Program (RSP). You have access to Leader Zone (LZ), Report Management Zone (RMZ), and all applicable regulations.

Standards: Monitor Army applicant processing throughout the battalion to ensure integrity in the recruiting process; discuss negative trends and specific issues with appropriate commanders and provide recommended actions regarding negative trends or potential problem areas and recruiters.

Performance Steps

1. Review the Enlistment Standards Functional Area Analysis Package, Volume II, and quality assurance reports (QARs) to identify negative trends and specific issues
 - a. Navigate LZ to select pertinent applicant data.
 - b. Analyze data
 - c. Disseminate findings to the battalion and company commanders, primary staff, and senior guidance counselor (SGC).
 - d. Communicate identified enlistment trends with affected company commanders.
2. Conduct RSP training for appropriate key personnel.
 - a. Train investigating officers regarding proper investigation techniques.
 - b. Brief new Soldiers on recruiting standards.
3. Oversee all suspected violations of the RSP
 - a. Investigate suspected violations with Suspected Impropriety and Recruiting Impropriety inquiries and investigations.
 - b. Assign investigating officer, as needed.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Reviewed the Enlistment Standards Functional Area Analysis Package, Volume II, and quality assurance reports (QARs) to identify negative trends and specific issues <ol style="list-style-type: none"> a. Navigated LZ to select pertinent applicant data. b. Analyzed data c. Disseminated findings to the battalion and company commanders, primary staff, and senior guidance counselor (SGC). d. Communicated identified enlistment trends with affected company commanders. 	—	—
2. Conducted RSP training for appropriate key personnel. <ol style="list-style-type: none"> a. Trained investigating officers regarding proper investigation techniques. b. Briefed new Soldiers on recruiting standards. 	—	—
3. Oversaw all suspected violations of the RSP <ol style="list-style-type: none"> a. Investigated suspected violations with Suspected Impropriety and Recruiting Impropriety inquiries and investigations. b. Assigned investigating officer, as needed. 	—	—

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

USAREC FORM 446
USAREC MANUAL 3-0
USAREC MANUAL 3-01
USAREC MANUAL 3-02
USAREC REG 1-21
USAREC REG 350-8
USAREC REG 360-2
USAREC REG 37-12
USAREC REG 56-1
USAREC REG 600-22
USAREC REG 600-25
USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95
USAREC REG 601-96
USAREC REG 690-6
USAREC/FORSCOM REG 140-1

Related

AR 15-6
AR 601-210

**Manage Battalion Level Enlistment Waiver Actions
805B-79R-7305**

Conditions: You have received notification that there is a waiver request waiting in your Enlisted Records Management (ERM) inbox. You have access to required references and the commander's guidance.

Standards: Process enlistment waivers to determine eligibility IAW Army and USAREC regulations and messages within 48 hours.

Performance Steps

1. Verify the merit of an applicant's waiver request
 - a. Conduct a waiver interview (if required) to determine the merit of an applicant's request.
 - (1) Validate if an applicant's interview is consistent with their written statement
 - (2) Determine if the applicant has any additional charges not listed
 - (a) If there are no additional charges continue to approve/disapprove
 - (b) If there are additional charges request additional documents and determine if they are still eligible for a waiver

Note: At this time return without action .

- (3) Determine if the applicant told a recruiter about additional charges
- (4) Determine any disqualifying attributes IAW regulatory guidance

2. Recommend approval or disapproval
 - a. Approve
 - b. Disapprove
 - c. Return without action

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

GO NO-GO

1. Verified the merit of an applicant's waiver request
 - a. Conducted a waiver interview (if required) to determine the merit of an applicant's request.
 - (1) Validated if an applicant's interview is consistent with their written statement
 - (2) Determined if the applicant has any additional charges not listed
 - (a) If there were no additional charges, continue to approve/disapprove
 - (b) If there were additional charges, requested additional documents and determined if they were still eligible for a waiver

_____ _____

Note: At this time return without action

- (3) Determined if the applicant told a recruiter about additional charges
- (4) Determined any disqualifying attributes IAW regulatory guidance

2. Recommended approval or disapproval
 - a. Approved
 - b. Disapproved
 - c. Returned without action

_____ _____

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction

should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

AR 40-501
AR 601-210
USAREC FORM 446
USAREC MANUAL 3-0
USAREC MANUAL 3-01
USAREC MANUAL 3-02
USAREC REG 1-21
USAREC REG 350-8
USAREC REG 360-2
USAREC REG 37-12
USAREC REG 56-1
USAREC REG 600-22
USAREC REG 600-25
USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95
USAREC REG 601-96
USAREC REG 690-6
USAREC/FORSCOM REG 140-1

Related

**Supervise the Battalion Staff Sections
805B-79R-7306**

Conditions: As battalion executive officer (XO) you are responsible to supervise the headquarters staff. You have access to all required publications and the commander's guidance.

Standards: Supervise the headquarters staff within regulatory compliance.

Performance Steps

1. Supervise headquarters staff
 - a. Coordinate with the Civilian Personnel Advisory Center (CPAC) for all personnel actions.
 - (1) Contact CPAC and receive guidance on civilian personnel actions
 - (2) Submit Request for Personnel Action (RPA) to CPAC
 - (3) Submit SF-50
 - b. Conduct counseling, performance plans, and evaluations/appraisals of all staff members
 - (1) Conduct initial counseling for military and general schedule (GS) personnel including performance plans. DA 2166-8-1, DA 67-9-1, DA 7222, DA 7222-1, DA 7223, DA 7223-1, and My Biz web site
 - (2) Conduct quarterly counseling (military and GS) or semi-annual reviews
 - (3) Complete evaluation (military or GS) or annual appraisal(NSPS)
 - c. Validate and submit staff's work schedules.
 - (1) Ensure dates/times match what was actually worked
 - (2) Sign and submit request for time off, SF 71 and DA 31
 - (3) Track comp time / over time
 - d. Ensure staff receives required training
 - e. Ensure all staff actions are completed
2. Manage additional duties as appropriate

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

- | | <u>GO</u> | <u>NO-GO</u> |
|---|-----------|--------------|
| 1. Supervised headquarters staff | — | — |
| a. Coordinated with the Civilian Personnel Advisory Center (CPAC) for all personnel actions. <ol style="list-style-type: none"> (1) Contacted CPAC and receive guidance on civilian personnel actions (2) Submitted Request for Personnel Action (RPA) to CPAC (3) Submitted SF-50 | | |
| b. Conducted counseling, performance plans, and evaluations/appraisals of all staff members <ol style="list-style-type: none"> (1) Conducted initial counseling for military and general schedule (GS) personnel including performance plans. (2) Conducted quarterly counseling (military and GS) or semi-annual reviews (3) Completed evaluation (military or GS) or annual appraisal(NSPS) | | |
| c. Validated and submitted staff's work schedules. <ol style="list-style-type: none"> (1) Ensured dates/times match what was actually worked (2) Signed and submitted request for time off, SF 71 and DA 31 (3) Tracked comp time / over time | | |
| d. Ensured staff receives required training | | |
| e. Ensured all staff actions are completed | | |

Performance Measures

GO **NO-GO**

- 2. Managed additional duties as appropriate

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

- USAREC FORM 446
- USAREC MANUAL 3-0
- USAREC MANUAL 3-01
- USAREC MANUAL 3-02
- USAREC REG 1-21
- USAREC REG 350-8
- USAREC REG 360-2
- USAREC REG 601-95
- USAREC REG 601-96
- USAREC REG 690-6
- USAREC/FORSCOM REG 140-1

Related

- AR 600-20
- AR 690-12
- AR 690-400
- FM 5-0 (FM 101-5)

Synchronize the Battalion Staff Operation
805B-79R-7307

Conditions: As battalion executive officer (XO) you are responsible to effectively synchronize headquarters staff activities to support recruiting operations and maintain mission momentum. You have access to all necessary publications, materials and equipment.

Standards: Synchronize the battalion staff's activities in support of the battalion's mission by:

- o Managing the internal support staff to orchestrate daily actions in support of the field force.
- o Functioning as senior coordinator with lateral external commands and higher headquarters.
- o Approving and ensuring proper and efficient use of recruiting assets.
- o Controlling resources and manpower.
- o Providing guidance and assistance to the equal opportunity office.
- o Exercising command in the absence or incapacitation of the commander
- o Synchronizing and integrating staff activities and functions through targeting boards and fusion cells to optimize control of operations and sustainment support.
- o Overseeing the integration of information management.
- o Directing and ensuring staff participation in the positioning analysis and evaluation (PAE) process.

Performance Steps

1. Coordinate mission analysis
 - a. Analyze the brigade's operation order
 - b. Perform initial intelligence preparation of the environment (IPE)
 - c. Determine specified, implied, and essential tasks
 - d. Review available assets
 - e. Determine constraints
 - f. Identify critical facts and assumptions
 - g. Perform risk assessment
 - h. Determine initial Commander's Critical Information Requirement (CCIR) and Essential Elements of Friendly Information (EEFI)
 - i. Determine the initial Intelligence, Surveillance, and Reconnaissance (ISR) plan
 - j. Update operational timelines
 - k. Write the restated mission
 - l. Deliver a mission analysis briefing
 - m. Approve the restated mission
 - n. Develop the initial commander's intent
 - o. Review facts and assumptions
2. Conduct staff operations by prioritizing the staff
 - a. List all mission requirements
 - b. Gather input from staff and subordinate units on how staff will prioritize their efforts
 - c. Compile staff estimates
 - d. Develop courses of action (COA)
 - e. Analyze and compare COAs
 - f. Provide recommended COA for battalion commander approval
3. Synchronize the battalion staff functions.
 - a. Produce synch matrix
 - b. Allocate resources
 - c. Develop decision support matrix
 - d. Orders Production

Evaluation Preparation: SETUP: Ensure that all materials required in the conditions statement are available to the soldier.

BRIEF SOLDIER: Tell the soldier, in preparation for (task) you must

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Coordinated mission analysis	_____	_____
a. Analyzed the brigade's operation order		
b. Performed initial intelligence preparation of the environment (IPE)		
c. Determined specified, implied, and essential tasks		
d. Reviewed available assets		
e. Determined constraints		
f. Identified critical facts and assumptions		
g. Performed risk assessment		
h. Determined initial Commander's Critical Information Requirement (CCIR) and Essential Elements of Friendly Information (EEFI)		
i. Determined the initial Intelligence, Surveillance, and Reconnaissance (ISR) plan		
j. Updated operational timelines		
k. Wrote a restated mission		
l. Delivered a mission analysis briefing		
m. Approved the restated mission		
n. Developed the initial commander's intent		
o. Reviewed facts and assumptions		
2. Conducted staff operations by prioritizing the staff	_____	_____
a. Listed all mission requirements		
b. Gathered input from staff and subordinate units on how staff will prioritize their efforts		
c. Compiled staff estimates		
d. Developed courses of action (COA)		
e. Analyzed and compared COAs		
f. Provided recommended COA for battalion commander approval		
3. Synchronized the battalion staff functions.	_____	_____
a. Produced synch matrix		
b. Allocated resources		
c. Developed decision support matrix		
d. Produced orders		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required	Related
USAREC FORM 446	FM 4-0
USAREC MANUAL 3-0	FM 5-0
USAREC MANUAL 3-01	FM 6-0
USAREC MANUAL 3-02	
USAREC REG 1-21	
USAREC REG 350-8	
USAREC REG 360-2	
USAREC REG 37-12	
USAREC REG 56-1	

References

Required

USAREC REG 600-22
USAREC REG 600-25
USAREC REG 601-101
USAREC REG 601-104
USAREC REG 601-95
USAREC REG 601-96
USAREC REG 690-6
USAREC/FORSCOM REG 140-1

Related

Subject Area 14: A & PA

Develop a Marketing / Advertising Plan
805B-79R-8501

Conditions: You receive a tasking by higher headquarters to prepare the annual and quarterly marketing/advertising plans for the upcoming year. You have access to applicable regulations, higher guidance, field marketing representatives, planning calendar and an RWS.

Standards: Manage a marketing/advertising plan that promotes Army awareness which supports the recruiting environment, generation of leads, and the commander's intent while remaining within budget constraints by:

- o Participating in the battalion's intelligence process.
- o Developing a marketing/advertising plan.
- o Completing the marketing/advertising plan.
- o Executing the marketing/advertising plan.

Performance Steps

1. Participate in the intelligence process.
 - a. Understand the commander's intent and guidance based on mission.
 - b. Gather data from other staff sections.
 - (1) Market share
 - (2) Market trends
 - (3) Historical production
 - (4) AAR
 - (5) Available resources
 - (6) National advertising strategy
 - (7) Area school plans
 - (8) S-2 analysis
 - (9) Vendor proposals/options
 - (10) Mission
2. Develop a marketing/advertising plan.
 - a. Analyze intelligence data gathered in Step 1b above to determine priority targets
 - b. Create a draft copy of the advertising plan
 - (1) Review last year's plan
 - (2) Complete USAREC advertising plan template.
 - (a) Commander's guidance
 - (b) Situation analysis
 - (c) Battalion structure
 - (d) Target market analysis (BN/CO)
 - (e) Ethnic penetration
 - (f) Target audiences
 - (g) Targeted areas (determined by fusion cell)
 - (h) Spending plan
 - (i) Cost/ROI for 5K+ events
 - (j) Issues and concerns
 - (k) College marketing analysis
 - (l) SWOT
 - (3) Participate in a fusion cell.(validate plan)
 - c. Attend the targeting board.
 - (1) Brief marketing/advertising plan.

Performance Steps

- (2) Collect feedback.
- 3. Complete marketing/advertising plan.
 - a. Make necessary changes.
 - b. Get approval from BN Commander.
 - c. Brief plan to BDE.
 - d. Provide a copy to USAREC HQ's.
 - e. Provide guidance to lower echelons.
- 4. Execute the marketing/advertising plan.
 - a. Implement the plan.
 - (1) Enter media request into MAPS.
 - (2) Produce local purchase order.
 - (3) Disseminate information to appropriate levels.
 - (4) Request Source Based Codes (SBC).
 - b. Request resources and asset support.
 - c. Evaluate the plan.
 - (1) Collect proof of performance data.
 - (a) Collect data from the Electronic Leads Mobile Option (ELMO).
 - (b) Send batched leads cards, with SBCs, to the lead center.
 - (2) Collect/review AARs to determine ROI prior to next planning cycle.
 - (a) Unit AAR reports
 - (b) Share Point Action Network (SPAN)

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Participated in the intelligence process.	—	—
a. Understood the commander's intent and guidance based on mission.		
b. Gathered data from other staff sections.		
(1) Market share		
(2) Market trends		
(3) Historical production		
(4) AAR		
(5) Available resources		
(6) National advertising strategy		
(7) Area school plans		
(8) S-2 analysis		
(9) Vendor proposals/options		
(10) Mission		
2. Developed a marketing/advertising plan.	—	—
a. Analyzed intelligence data gathered in Step 1b above to determine priority targets		
b. Created a draft copy of the advertising plan		
(1) Reviewed last year's plan		
(2) Completed USAREC advertising plan template.		
(a) Commander's guidance		
(b) Situation analysis		
(c) Battalion structure		
(d) Target market analysis (BN/CO)		
(e) Ethnic penetration		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
<ul style="list-style-type: none"> (f) Target audiences (g) Targeted areas (determined by fusion cell) (h) Spending plan (i) Cost/ROI for 5K+ events (j) Issues and concerns (k) College marketing analysis (l) SWOT 		
(3) Participated in a fusion cell.(validate plan)		
c. Attended the targeting board.		
<ul style="list-style-type: none"> (1) Briefed marketing/advertising plan. (2) Collected feedback. 		
3. Completed marketing/advertising plan.	—	—
<ul style="list-style-type: none"> a. Made necessary changes. b. Got approval from BN Commander. c. Briefed plan to BDE. d. Provided a copy to USAREC HQ's. e. Provided guidance to lower echelons. 		
4. Executed the marketing/advertising plan.	—	—
<ul style="list-style-type: none"> a. Implemented the plan. <ul style="list-style-type: none"> (1) Entered media request into MAPS. (2) Produced local purchase order. (3) Disseminated information to appropriate levels. (4) Requested Source Based Codes (SBC). b. Requested resources and asset support. c. Evaluated the plan. <ul style="list-style-type: none"> (1) Collected proof of performance data. <ul style="list-style-type: none"> (a) Collected data from the Electronic Leads Mobile Option (ELMO). (b) Sent batched leads cards, with SBCs, to the lead center. (2) Collectws/reviewws AARs to determine ROI prior to next planning cycle. <ul style="list-style-type: none"> (a) Unit AAR reports (b) Share Point Action Network (SPAN) 		

Evaluation Guidance: Score "GO" if Soldier correctly performs all performance measures. Score "NO GO" if Soldier incorrectly performs one or more performance measures. Provide on-the-spot correction, should the Soldier experience minor difficulty. Consider directing self-study or OJT for Soldiers who experience major difficulties in task performance.

References

Required
 USAREC MANUAL 3-03
 USAREC REG 5-3

Related

**Manage Advertising and Public Affairs Budget
805B-79R-8502**

Conditions: You receive the commander's approval and notification of funding for an advertising plan and public affairs program. You have access to applicable regulations, higher guidance, field marketing representative, resource manager (RM), Marketing Advertising Placement System (MAPS), MAPS media log, advertising log, marketing plan, planning calendar and an RWS.

Standards: Develop a budget that supports the commander's intent for the advertising plan and public affairs program while staying within budget constraints by:

- o Receiving command guidance.
- o Reviewing the advertising plan.
- o Reviewing the public affairs program requirements.
- o Obligating funds.
- o Reconciling the budget funds.

Performance Steps

1. Receive command guidance
 - a. Review additional guidance from higher levels
 - b. Coordinate with resource manager on budget Template
2. Review the advertising plan
 - a. Match funding to requirements
 - b. Prioritization of targets
3. Review public affairs program requirements
 - a. Match Funding to requirements
 - b. Prioritization of markets
 - c. Prioritization of media
4. Obligate the funds.
 - a. Execute funding.
 - (1) Advertising plan
 - (2) Public affairs program
 - b. Annotate expenditures.
 - (1) MAPS
 - (2) Appropriate logs
5. Reconcile the budget funds.
 - a. Update budget log
 - (1) TAIR payments
 - (2) COI collection AAR and bill
 - (3) Direct purchase order
 - b. Local advertising media placement (LAMP) log
 - c. Coordinate with resource manager

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Received command guidance	_____	_____

Performance Measures	<u>GO</u>	<u>NO-GO</u>
a. Reviewed additional guidance from higher levels		
b. Coordinated with resource manager on budget Template		
2. Reviewed the advertising plan	—	—
a. Matched funding to requirements		
b. Prioritization of targets		
3. Reviewed public affairs program requirements	—	—
a. Matched Funding to requirements		
b. Prioritization of markets		
c. Prioritization of media		
4. Obligated the funds.	—	—
a. Executed funding.		
(1) Advertising plan		
(2) Public affairs program		
b. Annotated expenditures.		
(1) MAPS		
(2) Appropriate logs		
5. Reconciled the budget funds.	—	—
a. Updated budget log		
(1) TAIR payments		
(2) COI collection AAR and bill		
(3) Directed purchase order		
b. Located advertising media placement (LAMP) log		
c. Coordinated with resource manager		

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
USAREC REG 5-3

Related

Organize a Recruiting Event
805B-79R-8503

Conditions: You receive a request for event support within your area of operations. You have access to applicable regulations, higher guidance, Field Marketing Representatives (FMR), the Recruiter Store (ADC), public relations toolkit, Marketing Advertising Placement System (MAPS), planning calendar and a RWS.

Standards: Organize a recruiting event based on the commander's intent and goals to include:

- o Processing the event request.
- o Coordinating the event with staff and outside organizations.
- o Participating during the event.
- o Properly annotating the event upon completion.

Performance Steps

1. Process the event request.
 - a. Evaluate the event request:
 - (1) Requirement
 - (2) Date/Time
 - (3) Cost
 - (4) Bnattalion assets
 - (5) Historical data
 - (6) Advertising
 - (7) Return on investment
 - (8) Staffing support
 - b. Determine Feasibility
 - (1) Review assets schedule for availability
 - (2) Review Budget for availability
 - (3) Review past performance (ROI) and AAR (best practices)
 - (4) Conduct a fusion cell for major events.
 - (5) Forward to battalion commander or designated representative for approval
2. Coordinate event with staff and outside organizations.
 - a. Delegate responsibilities.
 - b. Coordinate with event manager.
 - c. Determine space.
 - d. Determine media vehicles.
 - (1) Advertising
 - (2) Media
 - (3) Press
 - e. Determine Future Soldier and COI support, as needed.
 - f. Coordinate with event POC's.
 - g. Request medical support.
 - h. Coordinate with event NCOIC.
 - i. Obligate funds
 - j. Coordinate display materials.
 - k. Coordinate with outside agencies.
 - l. Conduct rehearsals as needed.
3. Participate during the Event.
 - a. Conduct media support/facilitation, if present.
 - b. Engage with attending COI's.
 - c. Maintain contact with OIC/NCOIC

Performance Steps

- d. Supervise event execution (adjust as needed).
- e. Provide command information coverage.

- 4. Properly annotate the event (completion)
 - a. Collect and review AAR's.
 - b. Update appropriate logs.
 - (1) Budget
 - (2) COIs
 - (3) ROI
 - c. Forward appropriate AAR's and documentation to higher headquarters.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Processed the event request.	_____	_____
a. Evaluated the event request:		
(1) Requirement		
(2) Date/Time		
(3) Cost		
(4) Bnattalion assets		
(5) Historical data		
(6) Advertising		
(7) Return on investment		
(8) Staffing support		
b. Determined Feasibility		
(1) Reviewed assets schedule for availability		
(2) Reviewed Budget for availability		
(3) Reviewed past performance (ROI) and AAR (best practices)		
(4) Conducted a fusion cell for major events.		
(5) Forwarded to battalion commander or designated representative for approval		
2. Coordinated event with staff and outside organizations.	_____	_____
a. Delegated responsibilities.		
b. Coordinated with event manager.		
c. Determined space.		
d. Determined media vehicles.		
(1) Advertising		
(2) Media		
(3) Press		
e. Determined Future Soldier and COI support, as needed.		
f. Coordinated with event POC's.		
g. Requested medical support.		
h. Coordinated with event NCOIC.		
i. Obligated funds		
j. Coordinated display materials.		
k. Coordinated with outside agencies.		
l. Conducted rehearsals as needed.		
3. Participated during the Event.	_____	_____
a. Conducted media support/facilitation, if present.		
b. Engaged with attending COI's.		

Performance Measures

GO **NO-GO**

- c. Maintained contact with OIC/NCOIC
- d. Supervised event execution (adjust as needed).
- e. Provided command information coverage.

- 4. Properly annotated the event (completion)
 - a. Collected and reviewed AAR's.
 - b. Updated appropriate logs.
 - (1) Budget
 - (2) COIs
 - (3) ROI
 - c. Forwarded appropriate AAR's and documentation to higher headquarters.

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

USAREC REG 601-107

Related

USAREC MESSAGE

Manage Public Affairs Programs

805B-79R-8504

Conditions: You receive notification of a policy and/or local climate change where you need to shape positive awareness and public opinion through targeted communications and the telling of the Army story. You have access to applicable regulations, higher guidance, media vehicles, planning calendar and a RWS.

Standards: Communicate a message designed to elicit a positive response from specific audiences to include:

- o Addressing area of opportunities to support recruiting operations.
- o Producing information campaign products.
- o Delivering the message to a targeted audience.
- o Conducting media relations.
- o Conducting a community relations program.
- o Conducting media awareness training.

Performance Steps

1. Address area of opportunities to support recruiting operations.
 - a. Negative media (response/story)
 - b. Policy Change
 - c. Program Change
 - d. Positive Program
 - (1) Hero's
 - (2) Awards
 - (3) Promotions
 - e. Influence public opinion
2. Produce information campaign products.
 - a. Compose message content.
 - (1) Public affairs guidance
 - (2) Talking points
 - (3) Local themes and messages
 - b. Determine media vehicles.
 - (1) Newsletter
 - (2) E-mail
 - (3) Telephone
 - (4) Website/Intranet
 - (5) Presentations
 - (6) Flyers
 - (7) Training
3. Deliver message to targeted audience.
 - a. Internal/external news release
 - b. Conduct press conference/briefings
 - c. Conduct/facilitate interviews
 - d. Social media outlets
 - e. Intranet postings
 - f. Respond to queries
 - g. Speech
 - h. Presentation
 - i. Distribute flyer

Performance Steps

4. Conduct media relations.
 - a. Receive query
 - (1) Validate and notify chain of command
 - (2) Research
 - (3) Develop course of action
 - (4) Deliver response in an appropriate medium
 - b. Initiate release of information.
 - (1) Validate and notify chain of command
 - (2) Research
 - (3) Develop course of action
 - (4) Deliver response in an appropriate medium
 - c. Maintain media engagement within area of operation.
 - (1) Media contact
 - (2) Climate awareness

5. Conduct community relations program.
 - a. Monitor centers of influence (COI) program.
 - (1) Communicate with COIs
 - (2) Involve COIs with media operations
 - (3) Conduct/fund events
 - (4) COI database
 - b. Assist with partnerships.
 - (1) Communicate with partners
 - (a) Civilian Aide to the Secretary of the Army (CASA)
 - (b) USAR Ambassadors
 - (c) Sporting events
 - (d) Military organizations
 - (e) Local affiliations
 - (2) Coordinate support
 - (3) Develop partners into COIs
 - c. Assist with PaYs program.
 - (1) Communicate with partner
 - (2) Solicit new partners
 - (3) Develop COIs
 - d. Manage Total Army Involvement in Recruiting (TAIR).
 - (1) Gather request for TAIR assets
 - (2) Request external support for TAIR
 - (3) Maintain a TAIR resource guide
 - (4) Coordinate event
 - (5) Assist and fund TAIR event
 - (6) Receive AAR
 - (7) Consolidate AAR's to USAREC Form 551 and forward to brigade
 - e. Manage guest speaker program.
 - (1) Maintain list
 - (2) Communicate with guest speaker
 - (3) Provide supportive materials to include TDY orders
 - f. Promote enlistment incentives and programs.
 - (1) Receive information
 - (2) Notify chain of command
 - (3) Develop COA
 - (4) Deliver information
 - g. Special programs and events.
 - (1) Locally generated community events
 - (2) Planning for life

Performance Steps

- (3) Community covenant
- (4) Grassroots committee

- 6. Conduct media awareness training:
 - a. Classroom
 - (1) Prepare for an interview
 - (2) Conduct an interview
 - (3) Social media
 - (4) Cultural
 - b. Field
 - (1) Guide interview subject on key points
 - (2) COI development

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Addressed area of opportunities to support recruiting operations.	—	—
a. Negative media (response/story)		
b. Policy Change		
c. Program Change		
d. Positive Program		
(1) Hero's		
(2) Awards		
(3) Promotions		
e. Influence public opinion		
2. Produced information campaign products.	—	—
a. Composed message content.		
(1) Public affairs guidance		
(2) Talking points		
(3) Local themes and messages		
b. Determined media vehicles.		
(1) Newsletter		
(2) E-mail		
(3) Telephone		
(4) Website/Intranet		
(5) Presentations		
(6) Flyers		
(7) Training		
3. Delivered message to targeted audience.	—	—
a. Internal/external news release		
b. Conduct press conference/briefings		
c. Conduct/facilitate interviews		
d. Social media outlets		
e. Intranet postings		
f. Respond to queries		
g. Speech		
h. Presentation		
i. Distribute flyer		
4. Conducted media relations.	—	—

Performance Measures**GO** **NO-GO**

- a. Received query
 - (1) Validated and notified chain of command
 - (2) Research
 - (3) Developed course of action
 - (4) Delivered response in an appropriate medium
- b. Initiated release of information.
 - (1) Validated and notified chain of command
 - (2) Research
 - (3) Developed course of action
 - (4) Delivered response in an appropriate medium
- c. Maintained media engagement within area of operation.
 - (1) Media contact
 - (2) Climate awareness

5. Conducted community relations program. _____

- a. Monitored centers of influence (COI) program. _____
 - (1) Communicate with COIs
 - (2) Involve COIs with media operations
 - (3) Conduct/fund events
 - (4) COI database
- b. Assisted with partnerships.
 - (1) Communicated with partners
 - (a) Civilian Aide to the Secretary of the Army (CASA)
 - (b) USAR Ambassadors
 - (c) Sporting events
 - (d) Military organizations
 - (e) Local affiliations
 - (2) Coordinated support
 - (3) Developed partners into COIs
- c. Assisted with PaYs program.
 - (1) Communicated with partner
 - (2) Solicited new partners
 - (3) Developed COIs
- d. Managed Total Army Involvement in Recruiting (TAIR).
 - (1) Gathered request for TAIR assets
 - (2) Requested external support for TAIR
 - (3) Maintained a TAIR resource guide
 - (4) Coordinated event
 - (5) Assisted and funded TAIR event
 - (6) Received AAR
 - (7) Consolidated AAR's to USAREC Form 551 and forward to brigade
- e. Managed guest speaker program.
 - (1) Maintained list
 - (2) Communicated with guest speaker
 - (3) Provided supportive materials to include TDY orders
- f. Promoted enlistment incentives and programs.
 - (1) Received information
 - (2) Notified chain of command
 - (3) Developed COA
 - (4) Delivered information
- g. Special programs and events.
 - (1) Locally generated community events
 - (2) Planning for life
 - (3) Community covenant
 - (4) Grassroots committee

Performance Measures

GO **NO-GO**

- 6. Conducted media awareness training:
 - a. Classroom
 - (1) Prepared for an interview
 - (2) Conducted an interview
 - (3) Social media
 - (4) Cultural
 - b. Field
 - (1) Guided interview subject on key points
 - (2) COI development

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

References

Required

- USAREC MANUAL 3-0
- USAREC MANUAL 3-03

Related

- USAREC REG 601-95

Subject Area 15: Resource Management

Manage Commander's Financial Resources
805B-79R-8700

Conditions: You are the resource management specialist (RMS) and you receive a new budget for the fiscal year and a monthly status of funds from the brigade. You have access to all applicable references.

Standards: Execute fiscal year (FY) budget at 100% (plus or minus 1%) in accordance with Title 31, Anti-Deficiency Act

Performance Steps

1. Receive budget for the fiscal year from brigade
 - a. Compare previous and current year needs and obligations
 - b. Projections of financial needs from each subordinate organization
 - c. Compare mission requirements of last FY to current FY
2. Respond to brigade based on proposed budget received
 - a. Submit proposed changes based on commander's guidance and input from staff sections
 - b. Document proposed changes
 - c. Attach supporting documentation
3. Execute budget plans
 - a. Monitor status of funds
 - (1) Review for incorrect funding
 - (2) Reconcile discrepancies with brigade
 - b. Initiate miscellaneous obligation documents to cross level budget shortfalls
 - c. Adjust spending to improve execution rate
 - d. Submit unfunded requirements (UFR) as directed

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Received budget for the fiscal year from brigade	—	—
a. Compared previous and current year needs and obligations		
b. Projected financial needs from each subordinate organization		
c. Compared mission requirements of last FY to current FY		
2. Responded to brigade based on proposed budget received	—	—
a. Submitted proposed changes based on commander's guidance and input from staff sections		
b. Documented proposed changes		
c. Attached supporting documentation		
3. Executed budget plans	—	—
a. Monitored status of funds		
(1) Reviewed for incorrect funding		
(2) Reconciled discrepancies with brigade		
b. Initiated miscellaneous obligation documents to cross level budget shortfalls		

Performance Measures

GO NO-GO

- c. Adjusted spending to improve execution rate
- d. Submitted unfunded requirements (UFR) as directed

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

DFAS-IN MANUAL 37-100-FY
DFAS-IN REG 37-1

Related

**Manage Civilian Human Resources
805B-79R-8701**

Conditions: You are the resource management specialist (RMS) and have civilian personnel assigned to the unit. You have access to the Internet and all applicable references.

Standards: Complete in-processing, personnel actions, counseling and personnel evaluations for civilian employees IAW regulatory and command guidance. Initiate and maintain civilian personnel files, and resolve all inquiries between civilian personnel and Civilian Personnel Advisory Center (CPAC) / Civilian Personnel Operations Center (CPOC).

Performance Steps

1. Manage civilian personnel counseling and personnel evaluations
 - a. Advise civilian personnel and supervisors of suspense dates for: initial counseling, mid-point counseling, and civilian personnel evaluations.
 - b. Receive initial counseling, mid-point counseling, and civilian personnel evaluations
 - c. Forward initial and mid-point counseling to Brigade Manpower Analyst
 - d. Forward completed civilian personnel evaluations to Brigade Manpower Analyst and CPOC.

2. Maintain individual files for civilian personnel. Produce SF 50, to record civilian personnel actions on DCPDS.

3. Resolve civilian personnel inquiries through CPAC and/or CPOC.

4. Process Requests for Personnel Action (RPA's) for:
 - a. Awards
 - b. Vacancies
 - c. Promotions
 - d. Terminations
 - e. Leave without pay
 - f. Reassignments
 - g. Other actions as required

5. Process new civilian employees.
 - a. Verify each employee has an appropriate common access card (CAC).
 - b. Verify each employee has completed the direct deposit form for net pay.
 - c. Verify CPAC orientation for each new employee
 - d. Notify brigade to give employee access to Headquarters Support System (HSS).
 - e. Verify each employee is processed through the information management officer (IMO) so they have access to appropriate data systems.
 - f. Brief each employee on workplace expectations.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Managed civilian personnel counseling and personnel evaluations	—	—
a. Advised civilian personnel and supervisors of suspense dates for: initial counseling, mid-point counseling, and civilian personnel evaluations.		
b. Received initial counseling, mid-point counseling, and civilian personnel evaluations		
c. Forwarded initial and mid-point counseling to Brigade Manpower Analyst		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
d. Forwarded completed civilian personnel evaluations to Brigade Manpower Analyst and CPOC.		
2. Maintained individual files for civilian personnel. Produced SF 50, to record civilian personnel actions on DCPDS.	—	—
3. Resolved civilian personnel inquiries through CPAC and/or CPOC.	—	—
4. Processed Requests for Personnel Action (RPA's) for:	—	—
a. Awards		
b. Vacancies		
c. Promotions		
d. Terminations		
e. Leave without pay		
f. Reassignments		
g. Other actions as required		
5. Processed new civilian employees.	—	—
a. Verified each employee has an appropriate common access card (CAC).		
b. Verified each employee has completed the direct deposit form for net pay.		
c. Verify CPAC orientation for each new employee		
d. Notified brigade to give employee access to Headquarters Support System (HSS).		
e. Verified each employee is processed through the information management officer (IMO) so they have access to appropriate data systems.		
f. Briefed each employee on workplace expectations.		

Evaluation Guidance: : Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

- AR 690-11
- AR 690-12
- AR 690-400
- AR 690-600

Related

Manage Defense Travel System
805B-79R-8702

Conditions: You are the resource management specialist and receive requests for travel/assistance and have personnel arriving/departing the battalion. You have access to the Internet and all applicable references.

Standards: Train and register all personnel in the Defense Travel System (DTS); approve and submit authorizations/vouchers to meet travel requirements; and remove outgoing personnel from the system.

Performance Steps

1. Register new travelers in DTS.
 - a. Determine if a new arrival has previously registered in DTS.
 - b. For travelers who have never registered in DTS, assist travelers with self-registration.
 - c. For travelers who have registered in DTS,
 - (1) Communicate with an individual's previous unit to "release" them from the system.
 - (2) Communicate with Brigade Defense Travel Administrator (DTA) to "receive" traveler into Battalion.
2. Train end users to use DTS for Recruiter Expense Account (REA) Authorizations, and Vouchers.
 - a. Provide link to web resources including DTS Manual.
 - b. Train new travelers in registration and use of DTS.
 - c. Provide DTS user with local guidance, procedures and policy for submission of local vouchers, vouchers, and authorizations.
3. Troubleshoot DTS issues for travelers.
 - a. Assist travelers in accessing DTS
 - b. Validate traveler information in DTS profile
 - c. Notify brigade to update profile with any changes
 - d. Provide DTS user with points of contact for emergency travel issues
4. Review/approve Authorizations.
 - a. Validate and Submit local request for temporary duty (TDY) as substantiating document for travel approval
 - (1) Purpose and location of travel
 - (2) Mode of travel, including constructive travel worksheet
 - (3) Dates of travel
 - (4) Government Travel Charge Card (GTCC)
 - (5) Accounting label
 - b. Verify required trip description
 - c. If the traveler is flying, confirm that:
 - (1) Traveler is using Government Services Administration (GSA) city pair.
 - (2) Travel reservations are done in DTS.
 - d. If the traveler is authorized a rental car, confirm that:
 - (1) Traveler selected the correct size vehicle
 - (2) Travel reservations are done in DTS.
 - e. Confirm that Actual Expense Authorization (AEA) letter is attached to authorization request when indicated
 - f. For TDY longer than 45 days, establish scheduled partial payments.
 - g. Correct or return authorizations that need adjustments
5. Turn on traveler's GTCC for period of travel as needed.
6. Review/approve vouchers and local vouchers
 - a. Submit exception to policy to exceed recruiter expense allowance (REA) limit (if required)
 - b. Validate traveler input for accuracy and completeness.

Performance Steps

- c. Confirm that all required receipts are attached to the voucher, such as lodging, rental car, air fare, and any other item over \$75.00.
 - d. Validate that expenses claimed are reimbursable.
 - e. Confirm that statement of non-availability (for lodging and/or meals) has been obtained if TDY site was government installation but traveler has claimed commercial lodging/meals.
 - f. Adjust voucher expenses to correlate with receipts.
 - g. Resolve items "flagged" by DTS.
 - h. Correct or return vouchers that need adjustments
7. Process personnel out of the Battalion.
- a. Confirm that all DTS transactions are finalized.
 - b. Submit request to DTA for release of traveler from the battalion.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Registered new travelers in DTS.	—	—
a. Determined if a new arrival has previously registered in DTS.		
b. For travelers who have never registered in DTS, assisted travelers with self-registration.		
c. For travelers who have registered in DTS,		
(1) Communicated with an individual's previous unit to "release" them from the system.		
(2) Communicated with Brigade Defense Travel Administrator (DTA) to "receive" traveler into Battalion.		
2. Trained end users to use DTS for Recruiter Expense Account (REA) Authorizations, and Vouchers.	—	—
a. Provided link to web resources including DTS Manual.		
b. Trained new travelers in registration and use of DTS.		
c. Provided DTS user with local guidance, procedures and policy for submission of local vouchers, vouchers, and authorizations.		
3. Troubleshoot DTS issues for travelers.	—	—
a. Assisted travelers in accessing DTS		
b. Validated traveler information in DTS profile		
c. Notified brigade to update profile with any changes		
d. Provided DTS user with points of contact for emergency travel issues		
4. Reviewed/approved Authorizations.	—	—
a. Validated and submitted local request for temporary duty (TDY) as substantiating document for travel approval		
(1) Purpose and location of travel		
(2) Mode of travel, including constructive travel worksheet		
(3) Dates of travel		
(4) Government Travel Charge Card (GTCC)		
(5) Accounting label		
b. Verified required trip description		
c. If the traveler is flying, confirmed that:		
(1) Traveler is using Government Services Administration (GSA) city pair.		
(2) Travel reservations are done in DTS.		
d. If the traveler is authorized a rental car, confirmed that:		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
(1) Traveler selected the correct size vehicle		
(2) Travel reservations are done in DTS.		
e. Confirmed that Actual Expense Authorization (AEA) letter is attached to authorization request when indicated		
f. For TDY longer than 45 days, established scheduled partial payments.		
g. Corrected or returned authorizations that need adjustments		
5. Turned on traveler's GTCC for period of travel as needed.	—	—
6. Reviewed/approved vouchers and local vouchers	—	—
a. Submitted exception to policy to exceed recruiter expense allowance (REA) limit (if required)		
b. Validated traveler input for accuracy and completeness.		
c. Confirmed that all required receipts are attached to the voucher, such as lodging, rental car, air fare, and any other item over \$75.00.		
d. Validated that expenses claimed are reimbursable.		
e. Confirmed that statement of non-availability (for lodging and/or meals) were obtained if TDY site was government installation but traveler has claimed commercial lodging/meals.		
f. Adjusted voucher expenses to correlate with receipts.		
g. Resolved items "flagged" by DTS.		
h. Corrected or return vouchers that need adjustments		
7. Processed personnel out of the Battalion.	—	—
a. Confirmed that all DTS transactions are finalized.		
b. Submitted request to DTA for release of traveler from the battalion.		

Evaluation Guidance: Score "GO" if soldier correctly performs all performance measures. Score "NO GO" if soldier incorrectly performs one or more performance measure. Provide on-the-spot correction, should the soldier experience minor difficulty. Consider directing self-study or OJT for soldiers who experience major difficulties in task performance.

**References
Required**

Related
JFTR
JFTR VOL 1
JFTR, VOL 2

**Manage Government Purchase Card (GPC)
805B-79R-8703**

Conditions: You are the resource management specialist (RMS) and have Government Purchase Card (GPC) account holders assigned to subordinate units and the headquarters. You have access to US Bank ACCESS On-Line, and all applicable references.

Standards: Audit cardholder transaction logs and detail logs, review purchasing directives, reconcile cardholder receipts and purchase documents monthly, and retain all GPC records in a centralized location.

Performance Steps

1. Complete GPC Agency Coordinator Course
2. Complete required documents for position assignment
 - a. DD Form 577
 - b. Letter of appointment
3. Identify existing GPC accounts (cardholders and check writers)
 - a. Advise cardholders on accounting classifications and regulatory limits, including \$2,500 limit for services and \$3,000 limit for supplies
 - b. Audit cardholder transaction logs and detail logs. Advise cardholder if records are incomplete or inaccurate; review again for correction. Reviews include:
 - (1) Correct fiscal year (FY)
 - (2) Proper allocation between Operations and Maintenance - Regular Army (OMA) and Operations and Maintenance - Army Reserve (OMAR).
 - (3) Split purchases
 - (4) Use a variety of vendors
 - (5) Spending limits for services and supplies
 - (6) Spending limits for single day and monthly total purchases.
4. Review purchasing directives to ensure purchasing procedures are in accordance with applicable directives.
5. Certify monthly statements
 - a. Review cardholder receipts and purchase documents
 - b. Review purchase authorization documents
 - c. Compare purchase authorization documents and receipts with access online transactions file
 - d. Adjust as necessary
 - e. Re-allocate and final approve
 - f. Certify account
 - g. Submit to brigade.
6. Retain all GPC records in a centralized location for 6 years and 3 months per regulation.

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures	<u>GO</u>	<u>NO-GO</u>
1. Completed GPC Agency Coordinator Course	_____	_____
2. Completed required documents for position assignment	_____	_____
a. DD Form 577		
b. Letter of appointment		

Performance Measures	<u>GO</u>	<u>NO-GO</u>
3. Identified existing GPC accounts (cardholders and check writers)	—	—
a. Advised cardholders on accounting classifications and regulatory limits, including \$2,500 limit for services and \$3,000 limit for supplies		
b. Audited cardholder transaction logs and detail logs. Advise cardholder if records are incomplete or inaccurate; review again for correction. Reviews include:		
(1) Correct fiscal year (FY)		
(2) Proper allocation between Operations and Maintenance - Regular Army (OMA) and Operations and Maintenance - Army Reserve (OMAR).		
(3) Split purchases		
(4) Use a variety of vendors		
(5) Spending limits for services and supplies		
(6) Spending limits for single day and monthly total purchases.		
4. Reviewed purchasing directives to ensure purchasing procedures are in accordance with applicable directives.	—	—
5. Certified monthly statements	—	—
a. Reviewed cardholder receipts and purchase documents		
b. Reviewed purchase authorization documents		
c. Compared purchase authorization documents and receipts with access online transactions file		
d. Adjusted as necessary		
e. Re-allocated and approved final		
f. Certified account		
g. Submitted to brigade.		
6. Retained all GPC records in a centralized location for 6 years and 3 months per regulation.	—	—

Evaluation Guidance: Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required

JTR, VOLUME II
 USAREC REG 37-14
 USAREC REG 37-16

Related

AR 715-9
 USAREC REG 715-1

Manage Government Travel Charge Card
805B-79R-8704

Conditions: You are the resource management specialist (RMS) and have military and civilian travelers assigned, arriving, and departing the unit. You have access to the internet and all applicable references.

Standards: Maintain a delinquency rate of two percent or less, transfer Government Travel Charge Card (GTCC) accounts within 10 days of arrival; activate/deactivate cards per command guidance, and terminate GTCC for personnel leaving the Army (retirement or expiration term of service (ETS)).

Performance Steps

1. Process personnel into the battalion
 - a. Provide new Soldier/civilian without a GTCC paper or on-line application.
 - b. Provide a statement of understanding to all card holders.
 - (1) Obtain signature and date on statement of understanding
 - (2) Retain statement of understanding
 - (3) Review command policy
 - (4) Explain failure to file vouchers or not receiving settlement does not relieve cardholder of payment in full
 - c. If a new Soldier/civilian have a GTCC, transfer that account into your "hierarchy" with CITI Bank.
 - d. Determine amount of time account is past due and take action accordingly.
2. Remind card holder to acknowledge card receipt of new GTCC by contacting CITI Bank with the 800 number listed on GTCC
 - a. Ensure cardholder is a member of the organization hierarchy
 - b. Provide updated home address changes to CITI Bank and or battalion
 - c. If cardholder's card has been lost or stolen, provide immediate notification to CITI Bank and battalion
3. Notify brigade of new card number for DTS profile update
4. Maintain battalion reports
 - a. Account listing report
 - b. Account activity report
 - (1) Review for misuse or abuse
 - (2) Notify command of misuse or abuse
 - (3) Require card hold to respond with payment amount, method, and date.
 - (4) Determine if activity was an authorized expense
 - c. Delinquency report
 - (1) Produce delinquency report on the 12th of each month
 - (2) Notify individuals and their command of amounts past due
 - (3) Require each delinquent individual to respond with payment amount, method, and date.
 - (4) Recommend procedures to command staff to eliminate delinquencies.
 - d. Pre-suspension report
 - (1) Select a sampling of 10% of all GTCC transactions
 - (2) Audit for propriety each month as required by USAREC
 - (3) Supply brigade S-8 a copy of audit
5. Activate/deactivate cards, per command policy, when Defense Travel System (DTS) authorizations/vouchers are submitted.
6. Out-process personnel
 - a. Deactivate GTCC
 - b. Require current balance on GTCC
 - c. Notify S1 to initiate flagging action if cardholder does not have current balance
 - d. Inform personnel that GTCC is not available while in transit

Performance Steps

- e. Advise cardholder to inform new unit to transfer hierarchy
- f. Close accounts upon ETS or civilian termination

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test.

Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Processed personnel into the battalion	—	—
a. Provided new Soldier/civilian without a GTCC paper or on-line application.		
b. Provided a statement of understanding to all card holders.		
(1) Obtained signature and date on statement of understanding		
(2) Retained statement of understanding		
(3) Reviewed command policy		
(4) Explained failure to file vouchers or not receiving settlement does not relieve cardholder of payment in full		
c. If a new Soldier/civilian have a GTCC, transferred that account into your "hierarchy" with CITI Bank.		
d. Determined amount of time account is past due and take action accordingly.		
2. Reminded card holder to acknowledge card receipt of new GTCC by contacting CITI Bank with the 800 number listed on GTCC	—	—
a. Ensured cardholder is a member of the organization hierarchy		
b. Provided updated home address changes to CITI Bank and or battalion		
c. If cardholder's card has been lost or stolen, provided immediate notification to CITI Bank and battalion		
3. Notified brigade of new card number for DTS profile update	—	—
4. Maintained battalion reports	—	—
a. Account listing report		
b. Account activity report		
(1) Reviewed for misuse or abuse		
(2) Notified command of misuse or abuse		
(3) Required card hold to respond with payment amount, method, and date.		
(4) Determined if activity was an authorized expense		
c. Delinquency report		
(1) Produced delinquency report on the 12th of each month		
(2) Notified individuals and their command of amounts past due		
(3) Required each delinquent individual to respond with payment amount, method, and date.		
(4) Recommended procedures to command staff to eliminate delinquencies.		
d. Pre-suspension report		
(1) Selected a sampling of 10% of all GTCC transactions		
(2) Audited for propriety each month as required by USAREC		
(3) Supplied brigade S-8 a copy of audit		
5. Activated/deactivated cards, per command policy, when Defense Travel System (DTS) authorizations/vouchers are submitted.	—	—
6. Out-processed personnel	—	—
a. Deactivated GTCC		
b. Required current balance on GTCC		
c. Notified S1 to initiate flagging action if cardholder does not have current balance		

Performance Measures

GO NO-GO

- d. Informed personnel that GTCC is not available while in transit
- e. Advised cardholder to inform new unit to transfer hierarchy
- f. Closed accounts upon ETS or civilian termination

Evaluation Guidance: : Score "GO" if individual correctly performs all performance measures. Score "NO GO" if individual incorrectly performs one or more performance measure. Provide on-the-spot correction, should the individual experience minor difficulty. Consider directing self-study or OJT for individuals who experience major difficulties in task performance.

References

Required
AR 715-9

Related

**Manage Applicant Travel Requests
805B-79R-8705**

Conditions: You are the resource management specialist (RMS) and receive a request for applicant travel. You have access to the internet and all applicable references.

Standards: Verify travel requests and supporting documentation are complete and contain zero errors; process requests in accordance with timelines as prescribed by the standing operating procedures (SOP); and submit vendor payments monthly IAW SOP

Performance Steps

1. Manage air travel using "Carlson Wagonlit Travel"
 - a. Receive travel order request for applicant traveling via aircraft from the recruiter
 - b. Review travel order for completeness.
 - c. Update Excel spreadsheet document with travel information
 - d. Submit/Fax travel order to Carlson Wagonlit Travel.
 - e. Forward flight itinerary to recruiter that requested travel.
 - f. Forward, via email, the Excel spreadsheet to brigade at the end of each week.

2. Manage ground travel using "eTranscor"
 - a. Access eTranscor
 - (1) Select "reports menu"
 - (2) Select "credit card invoice"
 - b. Compare with CITI Bank invoice received from brigade
 - c. Reconcile and annotate differences to balance amounts
 - d. Prepare DD Form 250, to pay CITI Bank
 - e. Submit to brigade
 - f. Monitor transportation usage by station
 - (1) Access eTranscor
 - (2) Select station inventory
 - (3) Review usage and purpose
 - g. Conduct any inquiries through chain of command

3. Manage ground travel using "STARFORCE"
 - a. Receive STARFORCE invoice
 - b. Compare with CITI Bank invoice received from brigade
 - c. Complete DD Form 250, to pay CITI Bank and submit to brigade

Evaluation Preparation: This task may be evaluated by using the evaluation guide and/or administering the performance test. Evaluation Guide. If the task is performed on the job, use the materials listed in the CONDITIONS statement above. This task can be evaluated by using the evaluation guide.

Performance Measures

	<u>GO</u>	<u>NO-GO</u>
1. Managed air travel using "Carlson Wagonlit Travel"	_____	_____
a. Received travel order request for applicant traveling via aircraft from the recruiter		
b. Reviewed travel order for completeness.		
c. Updated Excel spreadsheet document with travel information		
d. Submitted/Faxed travel order to Carlson Wagonlit Travel.		
e. Forwarded flight itinerary to recruiter that requested travel.		
f. Forwarded, via email, the Excel spreadsheet to brigade at the end of each week.		
2. Managed ground travel using "eTranscor"	_____	_____

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Other Product Types

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 USAREC FORM 611 DEP/DTP Tracking Log 1 October 1997
 USAREC FORM 635 Mission Accomplishment Plan (MAP) - RA 1 November 1998
 USAREC FORM 635-A Mission Accomplishment Plan (MAP) - USAR 1 November 0199
 USAREC FORM 636 School Data Sheet (RA and USAR) 1 November 1998

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 AR 25-2 Information Assurance 24 October 2007
 AR 350-1 Army Training and Leader Development 18 December 2009
 AR 37-104-4 Military Pay and Allowance Policy and Procedures-Active Component 8 June 2005
 AR 380-5 Department of the Army Information Security Program 29 September 2000
 AR 40-501 Standards of Medical Fitness 14 December 2007
 AR 600-20 ARMY COMMAND POLICY (*RAR 002, 11/30/2009) 18 March 2008
 AR 600-8-1 Army Casualty Program 30 April 2007
 AR 600-8-10 Leaves and Passes 15 February 2006
 AR 600-8-104 Military Personnel Information Management/Records 22 June 2004
 AR 600-8-19 Enlisted Promotions and Reductions 30 April 2010
 AR 600-8-22 Military Awards 11 December 2006
 AR 600-8-6 Personnel Accounting and Strength Reporting 24 September 1998
 AR 601-1 Assignment of Enlisted Personnel to the U.S. Army Recruiting Command 2 March 1992
 AR 601-210 Army and Army Reserve Enlistment Program 16 May 2005
 AR 614-200 ENLISTED ASSIGNMENTS AND UTILIZATION MANAGEMENT (*RAR 001, 09/03/2009) 26 February 2009
 AR 623-3 Evaluation Reporting System 10 August 2007
 AR 635-200 Active Duty Enlisted Administrative Separations 6 June 2005
 AR 690-11 Use and Management of Civilian Personnel in Support of Military Contingency Operations 14 September 1990
 AR 690-12 Equal Employment Opportunity and Affirmative Action 4 March 1988
 AR 690-400 Total Army Performance Evaluation System (Chapter 4302) 16 August 1998
 AR 690-600 Equal Employment Opportunity Discrimination Complaints 18 September 1989
 AR 710-2 SUPPLY POLICY BELOW THE NATIONAL LEVEL 28 March 2008
 AR 715-9 Contractors Accompanying the Force 20 October 1999
 AR 735-5 Policies and Procedures for Property Accountability 28 February 2005

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SMTC16 ARISS Administrator Guide
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USAREC MANUAL 3-01 The Recruiter Handbook 30 November 2006
USAREC MANUAL 3-02 Recruiting Company and Station Operations 30 November 2006
USAREC MANUAL 3-03 Recruiting Brigade and Recruiting Battalion Operations 16 October 2006
USAREC MESSAGE Current USAREC Incentive Message
USAREC PAM 350-13 School Recruiting Program Handbook 9 April 2002
USAREC REG 1-21 Inspections 31 October 2000
USAREC REG 25-2 Information Resources Management Program 31 December 2000
USAREC REG 350-8 Military and Civilian Personnel Training and Development 31 October 1992
USAREC REG 360-2 Distribution and Replenishment of National Recruiting Publicity Items 31 July 1995
USAREC REG 37-12 Control of Financial Resources 31 October 1997
USAREC REG 37-14 Travel and Conferences 31 December 1997
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USAREC REG 600-25 Prohibited and Regulated Activities 31 July 1991
USAREC REG 601-101 Education Enlistment Credentials 30 November 1998
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USAREC REG 601-107 Operational Management Systems 31 May 2005
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AR 25-400-2 The Army Record Information Management System (ARIMS) 2 October 2007

AR 350-1 Army Training and Leader Development 18 December 2009

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USAREC REG 210-4	Leased Unaccompanied Personnel Quarters 9 August 1985
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By Order of the Secretary of the Army

GEORGE W. CASEY, JR
General, United States Army
Chief of Staff

Official:

JOYCE E. MORROW

A