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**History.** This is an expedited revision to the U.S. Army Training and Doctrine Command Regulation 1-11. The portions affected are listed in the summary of change.

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

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

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

*This regulation supersedes TRADOC Regulation 1-11, dated 24 June 2020.*
senior leader of the requesting activity and forwarded through their higher headquarters to the policy proponent.

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

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

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

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

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**Summary of Change**

TRADOC Regulation 1-11
Staff Procedures

This expedited revision, dated 31 August 2022-

- Updates the Enterprise Task Management Software Solution references that supersedes the Actions Library and Command Action Tracking System (para 1-4).

- Adds the Executive Deputy to the Commanding General throughout where all command group leaders are mentioned.

- Revises TRADOC Form 5, to include the Executive Deputy to the Commanding General in the routing.

- Updates the requirement to use the Fiscal Service Form 7600A (United States Government General Terms & Conditions (GT&C)) for support agreements (memorandums of agreement and memorandums of understanding) (para 2-18).

- Updates Army Heritage Month, decentralized organization day, other recurring events, and nationally recognized commemorative events (paras 6-1 through 6-4).

- Updates Commanding General, U.S. Army Training and Doctrine Command as the spousal representational travel approval authority (formerly delegated to the Deputy Commanding General) (table 7-1).
o Removes Deputy Commanding General U.S. Army Training and Doctrine Command as having delegated authority to approve spouse travel (para 7-2b).

o Updates correspondence figures, links, and instructions throughout.
# TRADOC Regulation 1-11

## Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>7</td>
</tr>
<tr>
<td>7. <strong>Purpose</strong></td>
<td>7</td>
</tr>
<tr>
<td>8. <strong>Staff Policies and Procedures</strong></td>
<td>41</td>
</tr>
<tr>
<td>9. <strong>Correspondence</strong></td>
<td>10</td>
</tr>
<tr>
<td>10. <strong>Commanding General actions</strong></td>
<td>11</td>
</tr>
<tr>
<td>11. <strong>Staff action process</strong></td>
<td>12</td>
</tr>
<tr>
<td>12. <strong>Operational tasking process</strong></td>
<td>19</td>
</tr>
<tr>
<td>13. <strong>Readahead</strong></td>
<td>22</td>
</tr>
<tr>
<td>14. <strong>Command group notification, review, or approval</strong></td>
<td>22</td>
</tr>
<tr>
<td>15. <strong>Signature blocks/complimentary closings</strong></td>
<td>24</td>
</tr>
<tr>
<td>16. <strong>Suspense</strong></td>
<td>26</td>
</tr>
<tr>
<td>17. <strong>Note taking and suspenses for Commanding General forums</strong></td>
<td>28</td>
</tr>
<tr>
<td>18. <strong>Note taking and suspenses for Deputy Commanding General/Chief of Staff, Executive Deputy to the Commanding General, and Deputy Chief of Staff forums</strong></td>
<td>29</td>
</tr>
<tr>
<td>19. <strong>Staff assistance</strong></td>
<td>32</td>
</tr>
<tr>
<td>20. <strong>Coordinating staff actions</strong></td>
<td>32</td>
</tr>
<tr>
<td>21. <strong>Correspondence distribution</strong></td>
<td>35</td>
</tr>
<tr>
<td>22. <strong>Abbreviations and acronyms</strong></td>
<td>36</td>
</tr>
<tr>
<td>23. <strong>Type font and size</strong></td>
<td>36</td>
</tr>
<tr>
<td>24. <strong>Identification of point of contact</strong></td>
<td>36</td>
</tr>
<tr>
<td>25. <strong>Distinguished visitors</strong></td>
<td>37</td>
</tr>
<tr>
<td>26. <strong>Support agreements</strong></td>
<td>38</td>
</tr>
<tr>
<td>27. <strong>Approval of outside continental United States temporary duty or overseas conference travel</strong></td>
<td>40</td>
</tr>
<tr>
<td><strong>U.S. Army Training and Doctrine Command Forms and Correspondence Formats</strong></td>
<td>41</td>
</tr>
<tr>
<td>31. <strong>Guidelines</strong></td>
<td>41</td>
</tr>
<tr>
<td>32. <strong>Assembling a hardcopy staff action</strong></td>
<td>42</td>
</tr>
<tr>
<td>33. <strong>U.S. Army Training and Doctrine Command Form 5</strong></td>
<td>43</td>
</tr>
<tr>
<td>34. <strong>Executive summary</strong></td>
<td>43</td>
</tr>
<tr>
<td>35. <strong>Decision memorandum</strong></td>
<td>46</td>
</tr>
<tr>
<td>36. <strong>Information paper</strong></td>
<td>49</td>
</tr>
<tr>
<td>37. <strong>Point paper</strong></td>
<td>50</td>
</tr>
<tr>
<td>38. <strong>Star note</strong></td>
<td>51</td>
</tr>
<tr>
<td>39. <strong>U.S. Army Training and Doctrine Command policy letters and delegations of authority</strong></td>
<td>52</td>
</tr>
<tr>
<td><strong>Conferences and Briefings</strong></td>
<td>52</td>
</tr>
<tr>
<td>41. <strong>U.S. Army Training and Doctrine Command hosted or sponsored conferences</strong></td>
<td>52</td>
</tr>
</tbody>
</table>
4-2. Headquarters U.S. Army Training and Doctrine Command conference room locations and responsible staff offices ............................................................................................................ 52
4-3. Scheduling conferences/briefings requiring command group participation ............................................................................................................. 53
4-4. Preparing visual aids .................................................................................................................................................................................. 54
4-5. Tracking conference taskings ................................................................................................................................................................. 57
Chapter 5 ............................................................................................................................................... 58
Use of Enterprise Email ............................................................................................................................................................................. 58
5-1. Email ................................................................................................................................................................................................. 58
5-2. Organizational Messaging Service and Automated Message Handling System ............................................................................................................. 59
5-3. Organizational email accounts ............................................................................................................................................................. 60
5-4. Use of calendars within email ......................................................................................................................................................... 60
Chapter 6 ............................................................................................................................................... 61
Headquarters, U.S. Army Training and Doctrine Command Army Heritage Month, Decentralized
Organization Day ............................................................................................................................................................................................................. 61
6-1. Army Heritage Month ........................................................................................................................................................................ 61
6-2. Administrative guidelines for Army Heritage Month ............................................................................................................................................................................................................. 62
Chapter 7 ............................................................................................................................................... 65
U.S. Army Training and Doctrine Command Invitational Travel Authorization (ITA) Procedures ............................................................................................................................................................................................................. 65
7-1. Invitational travel authorization guidelines ............................................................................................................................................................................................................. 65
7-2. Preparation of an invitational travel authorization request ............................................................................................................................................................................................................. 65
7-3. Publication of the invitational travel authorization ............................................................................................................................................................................................................. 71
Chapter 8 ............................................................................................................................................... 72
U.S. Army Training and Doctrine Command Enterprise Calendar ............................................................................................................................................................................................................. 72
8-1. U.S. Army Training and Doctrine Command Enterprise Calendar overview ............................................................................................................................................................................................................. 72
8-2. U.S. Army Training and Doctrine Command Enterprise Calendar management and access ............................................................................................................................................................................................................. 72
Appendix A ............................................................................................................................................... 72
References ............................................................................................................................................................................................................. 72
Appendix B ............................................................................................................................................... 76
Helpful Hints for Preparing Correspondence and Processing Actions ............................................................................................................................................................................................................. 76
Appendix C ............................................................................................................................................... 78
Headquarters, U.S. Army Training and Doctrine Command tasking order format ............................................................................................................................................................................................................. 78
Appendix D ............................................................................................................................................... 83
Procedures and Formats for Readheads ............................................................................................................................................................................................................. 83
Appendix E ............................................................................................................................................... 94
U.S. Army Training and Doctrine Command Form 5 ............................................................................................................................................................................................................. 94
Appendix F ............................................................................................................................................... 98
Zone Improvement Plan (ZIP)+4 Address Format ............................................................................................................................................................................................................. 98
Appendix G ............................................................................................................................................... 99
Public Distribution Lists ............................................................................................................................................................................................................. 99
Glossary ............................................................................................................................................................................................................. 100

Figure List
Figure 2-1. Command group tasking process .........................................................17
Figure 2-2. Deputy Chief of Staff, G-3/5/7 Current Operations tasking process ........21
Figure 2-2.1. Operations orders process .................................................................22
Figure 2-3. Generic Commanding General, Deputy Commanding General/Chief of Staff,
Executive Deputy to the Commanding General, Deputy Chief of Staff, and Command Sergeant
Major signature blocks .......................................................................................25
Figure 2-4. Memorandum format for Commanding General notes and taskings ...........30
Figure 2-5. Distribution list for correspondence ...................................................36
Figure 2-6. Distinguished visitors/major events .....................................................38
Figure 3-1. Assembling a hard copy staff action ....................................................43
Figure 3-2. Executive summary format .................................................................45
Figure 3-3. Decision memorandum format ..........................................................48
Figure 3-4. Sample format for an information paper .............................................49
Figure 3-5. Sample point paper ...........................................................................50
Figure 3-6. Sample commanding general star note .............................................51
Figure 4-1. Diagram of General William W. Hartzog Conference Room ....................56
Figure 4-2. Diagram of Morelli Auditorium .........................................................57
Figure 7-1. Invitational travel authorization request memorandum ....................67
Figure 7-2. Spousal representational travel request memorandum .........................69
Figure C-1. Sample Headquarters, U.S. Army Training and Doctrine Command tasking order ...79
Figure D-1. Readahead guidance .........................................................................86
Figure D-2. Readahead table of contents ..............................................................87
Figure D-3. Readahead executive overview ..........................................................89
Figure D-4. Readahead itinerary ...........................................................................92
Figure D-5. Readahead participants/points of contact ..........................................93
Figure E-1. Sample U.S. Army Training and Doctrine Command Form 5 ................95
Figure F-1. Example of an outgoing (delivery) three-line zone improvement plan+4 address ....98
Figure F-2. Example of an outgoing (delivery) five-line zone improvement plan+4 address ....98
Figure F-3. Example of a return zone improvement plan+4 address .......................99

Table List

Table 2-1. Support agreement threshold matrix ..................................................40
Table 6-1. Army Heritage Month tasking timelines .............................................62
Table 6-2. Headquarters, U.S. Army Training and Doctrine Command Decentralized
Organization Day and other recurring events schedule, calendar year 2022-2025 ..........64
Table 7-1. Invitational travel authorization request approval authority ..................66
Table D-1. Configuration of readaheads ...............................................................84
Chapter 1
Introduction

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

1-2. References
See appendix A.

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

1-4. Responsibilities

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

(1) Serve as the focal point for tracking and tasking actions directed by the Commanding General (CG), Deputy Commanding General (DCG)/Chief of Staff (CoS), Executive Deputy to the Commanding General (EDCG), and Deputy Chief of Staff (DCoS) and identified as command group taskings. Process all external suspense actions generated by proponents. Manage tasking continuity.

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

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

(4) Process documents requiring the review and decision of the CG, DCG/CoS, EDCG, or DCoS.

(5) Ensure responses to the taskers are complete (properly formatted, properly assembled, and appropriately coordinated). Coordination will include the names, positions, phone numbers, and offices with which coordination was made.

(6) Receive and assign taskings from the Commanders Planning Group (CPG) collected from meetings and briefings.

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

(8) Assign staff responsibility for and task TRADOC-led reoccurring events (such as decentralized organization day) and other actions/events as directed by the DCoS.
(9) Maintain the SGS website.

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

(11) Schedule and conduct Staff Officer Orientation Briefing (SOOB) to familiarize newly assigned action officers (AOs) with staff procedures.


(13) Maintain command group internal TRADOC email distribution lists (commanders/commandants, chiefs, staff principals, executive officers (XOs), SGS, senior executive services (SESs), senior commanders, and TRADOC Top 4 meeting).

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

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

(16) Upload staff-generated staff actions addressed to Headquarters, Department of the Army (HQDA) in Enterprise Task Management Software Solution (ETMS2).

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

(1) Serve as primary tasking authority for all internal, external, and operational taskings not generated by the TRADOC command group in accordance with TRADOC Regulation (TR) 10-5.

(2) Receive and process all requests for military aircraft travel (see TR 95-5, for flight operations).

(3) Manage the TRADOC Enterprise Calendar (TEC).

(4) Oversee TRADOC support agreements.

(5) Serve as the ETMS2 in accordance with ETMS2.

c. DCSs and chiefs of special staff will-

(1) Require incoming personnel to review the resources available in the SAORC.

(2) Ensure newly assigned personnel (military and civilian) attend the first available SOOB within 60 days of arrival. Contractor employees may be directed to attend the SOOB if their organization’s commander/director determines that the individual contractor employee’s attendance would support the tasks listed in the Contract Performance Work Statement.
(3) Ensure personnel and contractors manage records in accordance with AR 25-400-2.

(4) Enter events into the TEC.

d. Commanders/commandants/directors will-

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

(2) Ensure personnel and contractor employees manage records in accordance with AR 25-400-2.

e. The Director, Congressional Activities Office (CAO) will monitor and provide assistance on all congressional actions. Additional guidance and information on CAO functions and services are available at https://intranet.tradoc.army.mil/sites/cao.

f. Offices of primary responsibility (OPRs) for actions, taskers, and meetings will:

(1) Be familiar with AR 25-50, TR 10-5 series, TRADOC Enterprise Task Management Software Solution (ETMS2) Business Practices and Rules, and this regulation.

(2) Coordinate directly with all internal and external staff directorates and subordinate units (office of coordinating responsibility (OCR)) to gain concurrence on the final action.

(3) Obtain principal or principal deputy coordination on the Form 5 in ETMS2 on staff actions that require TRADOC Senior Leader (CG, DCG, EDCG, DCoS) approval.

(4) Conduct mission analysis for all aspects of the tasker, organize tasks, and prepare a timeline for completion. Inherent to the lead role is the authority to require products from any assisting staff director or unit supporting the preparation of the final product.

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

(6) Prepare tasker responses in ETMS2 according to the guidelines in the ETMS2 Business Practices and Rules. The staff principal or principal deputy will approve the action for submission to the TRADOC senior leadership. If the principal is out of the office, the XO may approve within ETMS2.

(7) Submit meeting readaheads in accordance with para 2-5.

(8) Organizations disagreeing with the assignment of an action will contact the tasking officer via ETMS2, email, or telephone for reconsideration within 1 workday of assignment. The action officer will explain why the task should be reassigned and provide a recommendation for reassignment (See paras 2-3i and 2-4d).
(9) Submit requests extensions to the SGS or G-33 point of contact (POC) no later than 2 workday from receipt of the tasking (see para 2-3j).

(10) For meetings, will provide a note-taker and publish a post-meeting Executive Summary (EXSUM) (see para 2-3d, 2-9, and 2-10).

g. XOs and SGSs at subordinate organizations (core function leads, special activities and field operating activities (FOAs), direct reporting units, schools and centers), and HQ TRADOC will-

(1) Provide updated changes to TRADOC Senior Leaders Contact List to the TRADOC SGS, Staff Actions Division (SAD) as changes occur.

(2) Ensure records (hardcopy or electronic) created and/or received in the course of doing Army business will be maintained in accordance with AR 25-400-2. The Army Records Information Management System (ARIMS) record numbers and titles are determined by the proponents of the prescribing directives and lead to the category and type of record(s) (keep [short-term less than 6 years] or transfer [long-term retention greater than 6 years up to permanent]) to support the business process of those functional areas. Visit ARIMS (https://www.arims.army.mil/arims/default.aspx) and consult your organization records manager for assistance in determining applicable record numbers. Upload electronic transfer records to the ARIMS Army Electronic Archive.

h. Designated organization POCs will upload documents to ETMS2. Uploading records to ETMS2 does not constitute recordkeeping per ARIMS requirements.

1-5. Records management requirements
As prescribed by AR 25–400–2, the records management (recordkeeping) requirements for all ARIMS record numbers, associated forms, and reports are included in the Army’s Records Retention Schedule-Army (RRS–A). Detailed information for all related record numbers, forms, and reports associated with this regulation are located in RRS–A at https://www.arims.army.mil/arims/default.aspx.

Chapter 2
Staff Policies and Procedures

2-1. Correspondence
AR 25-50 and this regulation prescribe policies, procedures, and standard formats for preparing and processing Army and TRADOC correspondence.


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

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


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

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

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

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

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

h. Use TRADOC Form 5 (TF 5) (Transmittal, Action and Control) for all correspondence (hard copy or electronic) going to the command group.

i. TRADOC organizations will not use multiple-addressee correspondence, memorandums of instruction, policy memorandums, electronic messages (including all Army activities messages), and SOPs as substitutes for issuing, changing, or revising Army TRADOC-wide policy and administrative publications in accordance with AR 25-30.

2-2. Commanding General actions

a. Actions requiring CG approval and/or signature take precedence over other actions. Ensure staff principals handle as a priority.
b. TF 5 will accompany all CG correspondence, whether for information, signature, or approval. Include a suspense date as required.

c. Unless otherwise indicated, taskers for CG approval, information, review, or signature are assigned a 5 workday suspense.

d. CG-generated requests for information or action require feedback within 5 workdays. Complex actions still require initial feedback within 5 workdays. Provide interim response(s) to TRADOC SGS SAD (usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil) who will forward to the CG and courtesy copy (CC) the DCG/CoS, EDCG, and/or DCoS. Follow up with weekly updates until complete.

(1) Coordinating staff and/or their deputies will submit responses to simple questions and interim responses in EXSUM format, or a stand-alone TF 5. Follow EXSUM forwarding instructions.

(2) For detailed actions requiring more than 5 workdays to complete, upload TF 5 (containing the EXSUM and appropriate digital signatures) to ETMS2. Notify TRADOC SGS SAD (usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil) when the TF 5 has been uploaded. Include EXSUM title in the subject line. TRADOC SGS SAD will forward EXSUM to the CG and CC individuals in paragraph 2-3.

e. Returns and rework. OPRs will have 24 hours, unless otherwise specified, to make the necessary adjustments and return the action in ETMS2. At times, the suspense may require turnaround in less than 24 hours due to the CG’s travel schedule. Always use the documents your staff action control officer (SACO) posted in ETMS2 for your rewrite or corrections. These documents contain edits to your original submission. Do not use your original documents.

2-3. Staff action process

a. All staff actions going to the command group will be submitted to SGS in ETMS2 in accordance with TRADOC Enterprise Task Management Software Solution (ETMS2) Business Practices and Rules.

b. The SGS will proofread, edit, ensure required coordination, and forward the correspondence to the command group. Actions received at the command group without prior SGS approval will be returned to the SGS for processing. Ensure you provide the SGS a copy of the action to be presented for CG, DCG/CoS, EDCG, or DCoS signature for review prior to a briefing so SGS can proofread. If bypassing the SGS, provide a copy of signed correspondence and TF 5 to the SGS for official files following the briefing.

c. SGS will date correspondence the command group signs (if not dated at time of signature). A copy of the correspondence will be scanned and filed electronically. Unless directed otherwise, the SGS will email all actions signed by the CG, DCG/CoS, EDCG, or DCoS that are addressed to all subordinate organizations and HQ TRADOC. See figure 2-5 on page 36, for correspondence distribution list. Distribution of actions addressed elsewhere is the responsibility
of the lead organization. Proponents are responsible for maintaining their records in accordance with AR 25-400-2.

d. OPRs will provide meeting EXSUMs and/or tasking updates to SGS on TF 5. SGS will review and forward to the command group. If space allows, type EXSUMs on TF 5 in the discussion section of block 7 (instead of attaching it as a tab). Upload TF 5 (containing the EXSUM and appropriate digital signatures) to ETMS2. Email TRADOC SGS SAD (usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil) when TF 5 has been uploaded; be sure to include EXSUM title in the subject line. When a proponent head chooses to route the EXSUM directly to the CG, DCG/CoS, EDCG, or DCoS, as a minimum, provide a CC to the following individuals:

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

(a) DCG/CoS;
(b) EDCG;
(c) DCoS;
(d) CG XO;
(e) DCG/CoS XO;
(f) EDCG XO;
(g) DCoS XO;
(h) CPG Chief; and
(i) SGS to track response/close tasking.

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

(a) EDCG;
(b) DCoS;
(c) DCG/CoS XO;
(d) EDCG XO;
(e) DCoS XO; and
(f) SGS to track response/close tasking.
e. Coordinating staff and subordinate organizations’ representatives will review respective TRADOC ETMS2 dashboards to monitor suspense dates for their respective taskings and ensure they are met on time.

f. AOs will:

(1) Become familiar with AR 25-50, TR 10-5 series, TRADOC ETMS2 Business Rules, and this regulation. Follow regulatory guidance to determine action required, level of approval, and appropriate signature for the action. Contact the SGS SAD with questions on signature/approval authority or coordination of self-generated actions prior to processing.

(2) All new AOs will attend the SOOB within first 60 days of arrival. Prior to attending the SOOB, review documents on the SAORC at https://intranet.tradoc.army.mil/saorc/SitePages/Home.aspx that provide an introduction to TRADOC.

(3) Conduct a thorough mission analysis of the action being submitted. Before taking action, thoroughly consider the issue and why TRADOC is involved and does the CG/DCG/EDCG/DCoS need to review this action, staff recommendations, implications for accepting or rejecting the staff recommendations and assessment of supporting and background information.

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

(5) If review of the subordinate command request or recommendation results in non-concurrence, discuss the decision with the affected organization before forwarding to the command group for final action/signature. Non-concurrences will require consideration of non-concurrence review be provided to TRADOC senior leaders for internal non-concurrences. This gives the field an opportunity to understand the forthcoming response and ensures consideration of the most critical data points from the centers’/schools’ perspective. Explain action fully and in a positive manner, pointing out alternatives, if available. Non-concurrences/negative responses to subordinate activities and/or other commands outside of TRADOC require CG, DCG/CoS, EDCG, and/or DCoS approval.

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

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

(8) Complete coordination with subordinate organizations, special activities and FOAs, schools and centers, HQ TRADOC organizations, and other Army commands (ACOMs) in accordance with TR 10-5 and paragraph 2-12 of this regulation prior to forwarding to SGS.
Ensure coordinating office is commensurate with level of signature. (For example, if TRADOC CG signs correspondence requiring coordination with U.S. Army Forces Command (FORSCOM), the FORSCOM CG is the coordinating authority.) For subordinate organizations, the chief of staff or higher must provide his/her name for concurrence/non-concurrence on an action. For HQ TRADOC organizations, the XO, DCS, or assistant DCS must provide his/her name for concurrence/non-concurrence on an action. Include date and concur or non-concur on TF5. If they non-concur, include additional tab that explains the objections.

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

(10) Ensure the distribution is appropriate (see para 2-13).

(11) Ensure staff action includes a completed TF 5.

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

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

(14) Prepare and process TRADOC correspondence in compliance with regulatory guidance.

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

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

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

(b) Email critical and/or strategic-level actions to the TRADOC DCSs and chiefs of special staff offices via the TRADOC Staff Principals distribution list. Only staff principals should use this list.
TRADOC Regulation 1-11

(17) Upload a copy of the final response in ETMS2 when a direct reply from an outside agency is received and notify SGS. For example, actions addressed to agency that result in a direct reply to the proponent.

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

(19) Mark records with the classification or designation in accordance with DOD Manual 5200.01, Volume 2; DODI 5200.48; AR 25-55; AR 380-5, and applicable security classification guide(s) as it relates to policy and the protection of information.

(a) Mark unclassified information requiring protection under a law, regulation, or government-wide policy as controlled unclassified information (CUI) per DODI 5200.48. For example, information that can reasonably be expected to qualify for exemption under one or more of FOIA exemptions 2 through 9 would require appropriate CUI marking. Ensure the required designation indicator block is included on the bottom right of the first page.

(b) Mark the classification on classified records.

(20) Work with their appointed record coordinator to upload electronic records to the ARIMS Army Electronic Archive. For example, program briefings and operating program progress reports are permanent records and will be maintained in accordance with ARIMS record numbers 5-10a and 5-10b.

(g) Proponents will upload documents for command group approval/signature. SACOs will make required administrative corrections, but will not change content.

(h) SGS, SAD will:

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

(2) Conduct mission analysis, assign actions to appropriate proponent in accordance with TR 10-5, and monitor suspense dates (see figure 2-1 for a flow chart of the command group tasking process). Assign staff lead/assist(s) and immediately email the CG, DCG/CoS, EDCG, and DCoS taskings/requests for information to respective proponent with a CC to the AO (if known).

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

(4) Review all correspondence sent to the command group for administrative completeness and correctness, appropriate coordination, proper level of signature, and compliance with established policies.
(5) Date all correspondence the command group signs before returning to proponent for dispatch.

(6) Maintain electronic file copies of completed actions and return to originating proponent for dispatch.

(7) Email scanned correspondence signed or lined-through by the command group in response to HQDA taskings to G-33. Copy lead organization, including AO, if known, on email to G-33. Deliver original signed/initialed correspondence to lead organization.

(8) Package and send command group correspondence addressed to SA, USA, CSA, VCSA, DAS, VDAS, or SMA on behalf of lead organizations and upload in to ETMS2.

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Command Group Tasking Process

![Command Group Tasking Process Diagram]

Figure 2-1. Command group tasking process

i. Lead organizations will:

(1) Conduct a thorough mission analysis of the tasking and take responsibility for satisfactory completion of the tasking.

(2) For G-33 taskings, see appendix C, for how to construct the tasking following the current TRADOC tasking order (TASKORD) format.
(3) Accomplish all required communications and coordination, within the proponent organization, external and higher organizations, and across the command (see TR 10-5).

(4) Use the telephone rosters provided at the SAORC to contact all assist organizations within 1 workday and identify primary AO and his/her contact information.

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

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

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

j. Procedures to request transfer of lead:

(1) G-33 taskings. If the assigned lead organization believes a tasking is outside its area of responsibility, within 1 workday of receipt of tasking they will email the XO of the organization they consider the appropriate lead (with a CC to the G-33 Tasking Office at usarmy.jble.tradoc.mbx.eustis-g33-tasking@army.mil). The email will include detailed justification for transfer of lead. The gaining organization has 1 workday to assess the request for lead change and reply to the originating organization (with CC to the G-33 Tasking Office) of their acceptance/rejection. Transfer must occur within 3 workdays of the initial assignment of the tasking.

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

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

(2) SGS SAD: If the assigned lead organization believes a tasking is outside its area of responsibility, within 1 workday of receipt of tasking they will email the XO of the organization they consider the appropriate lead (with a CC to the TRADOC SGS SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil). The email will include detailed justification for transfer of lead. The gaining organization has 1 workday to assess the request for lead change and reply to the originating organization (with CC to the SGS SACO who issued the tasking) of their acceptance/rejection. Transfer must occur within 3 workdays of the initial assignment of the tasking.

(a) If the gaining organization accepts the lead, SGS SAD will retask the action to the new lead and notify all concerned.
(b) If after 3 workdays no agreement is reached, SGS will determine the lead.

k. Requesting extensions:

(1) SGS procedures. TRADOC lead organizations may request a suspense extension for SGS taskings. AOs should request an extension in an email to the lead organization, with justification for extension, which will then forward it to the SGS SAD. Subordinate organization commanders/deputies/XOs and HQ TRADOC staff DCSs/XOs will send request via email to the SGS SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil. Copy the individual SACO who initiated the tasking. Include the TMS control number, a detailed reason for the request, and an estimated date for completion. Only the SGS, in coordination with the command group, may grant extensions for command group taskings.

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

(a) For external taskings originated by HQDA, Joint Staff, or other non-TRADOC agencies, the TRADOC organization assigned as the lead for TRADOC will submit the request for extension of suspense date directly to the external POC and CC: G-33 Tasking Office at usarmy-jble.tradoc.mbx.eustis-g33-tasking@army.mil. For HQDA (ARSTAFF) taskings, refer to HQDA Policy Notice 25-52. For Joint Action Control Office tasking from the Joint Staff, refer to DA Memorandum 1-18. TRADOC assist agencies will coordinate directly with the TRADOC lead organization.

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

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

2-4. Operational tasking process

G-33 Tasking Office is responsible for processing and tracking all TRADOC internal and external taskings assigned to TRADOC until completion. The SGS is responsible for all command group taskings. The SGS-specific instructions for both types of tasks are discussed below.

a. Draft operations orders must be approved by originating organization’s general officer (GO)/SES and submitted to G-3/5/7 for the DCS G-3/5/7’s approval. Once approved, operations orders are placed in ETMS2 for digital distribution (see figure 2-2 on page 21 and figure 2-2.1 on page 22).
b. Internal taskings.

(1) Internal tasks originate from a unit or organization within TRADOC only (not taskings from TRADOC CG, DCG/CoS, EDCG, DCoS, or CPG, these are processed by the SGS). Internal taskings must be tasked to organizations external to the originator's organization and require significant resources, involve changes in policy, generate new policy, or require formal concurrence/comment.

(2) Taskings are not required for routine staffing. Examples of routine staffing are: a TRADOC subordinate organization tasking another; a TRADOC subordinate organization tasking the HQ TRADOC staff; a TRADOC subordinate organization/HQ TRADOC tasking a special activity; or a HQ TRADOC staff office tasking another HQ TRADOC staff office.

(a) TRADOC has adopted the HQDA six (6) paragraph standard for instructions: (1) POC for questions regarding this tasker; (2) Purpose; (3) Deliverable; (4) Background; (5) Short Suspense; and (6) Assignments, when adding TASKORD information into an internal or external task, insert the text into Assignments (Paragraph 6). See Appendix C, for the draft TASKORD format to develop internal taskings. When time permits, the task originator should coordinate the draft TASKORD with all assist elements prior to publishing to prevent unnecessary conflicts and ensure the tasks and timeline are feasible/supportable.

(b) Establishing a suspense. Draft TASKORDs with a suspense within 15 to 30 days requires an O-6/GS-15 approval. Draft TASKORDs with a suspense under 15 days require GO/SES approval.

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

(3) Task Disposition. Assist elements request extensions through the task lead identified in paragraph 5.A on the TASKORD, if more time is required for task completion. The originator will notify TRADOC G-3/5/7 (G-33) via email at usarmy.jble.tradoc.mbx.eustis-g33-tasking@army.mil to extend the suspense date in ETMS2. Thereafter, the task originator will also notify both the requestor and G-33 (via email at usarmy.jble.tradoc.mbx.eustis-g33-tasking@army.mil) when the extension is granted; and further, when the task is complete for closure in ETMS2.

c. External taskings originate from outside TRADOC and usually come through the HQDA ETMS2. HQDA assigns TRADOC as either the office of primary responsibility (OPR) cited as lead or as the office of coordinating responsibility (OCR) cited as an assist.

(1) When TRADOC is the OPR, the assigned TRADOC lead organization’s AO/POC contact information will already be added as a Team member in ETMS2 to enable coordination with all external organizations within 1 workday.

(2) TRADOC lead must identify all the assist organizations (inside and outside of
TRADOC Regulation 1-11

TRADOC) to ensure the response is fully coordinated to provide a complete consolidated response. If the TRADOC lead requests external OCRs (such as FORSCOM) from G-33 Tasking Office, he/she must contact G-33 Tasking Office via email at usarmy.jble.tradoc.mbx.eustis-g33-tasking@army.mil to request the additional OCRs be added to the ETMS2.

(3) Tasking and Individual Augmentation Management. Refer to TR 500-2 for Emergency Employment and other resources. TR 500-2 establishes, assigns, and describes policies, responsibilities and procedures for individual augmentation (IA). The regulation also provides IA support request procedures for TRADOC staff, subordinate elements, centers, schools, and commands.

(a) G-33 Tasking Office will assign OCRs using the HQDA ETMS2 with instructions to coordinate their response directly to the identified TRADOC lead POC.

(b) When possible, G-33 Tasking Office will forward the ETMS2 task information to the potential TRADOC lead for analysis and recommendation of assist organizations. The lead can develop a TRADOC TASKORD to provide amplified information/instructions to the TRADOC assist organizations.

d. Task re-directs. Within 1 workday the assigned lead will notify G-33 Taskings Office that they should not be the task lead; and if possible, recommend a replacement lead. After 2 workdays, it is the responsibility of the assigned lead to coordinate a replacement lead and forward the acceptance email to usarmyjble.tradoc.mbx.eustis-g33-tasking@army.mil.

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Figure 2-2. Deputy Chief of Staff, G-3/5/7 Current Operations tasking process
2-5. Readahead

a. Readahead are a special type of staff action forwarded with the TF 5, tasked on short notice (less than 10 workdays), that require immediate action. Readahead prepare the CG for trips, visits of military/civilian dignitaries, or briefings.

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

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

c. All readahead must contain an executive overview. See appendix D, for how to prepare readahead.

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

Proponents will notify the command group of these specific items of interest that require command group notification, review, approval, and/or signature:
a. Any meetings involving subordinate commanders or commandants that provide less than 30 calendar days notification must have DCoS approval.

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

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

d. Correspondence to and from:

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

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

e. Non-concurrences and disapprovals.

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

   (2) Disapproval of actions proposed by subordinate commands.

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

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

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

i. Reports of significant financial or property irregularities.

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

k. Communications of exceptional information or importance that require prompt command attention or that existing policy does not cover (as the DCS/staff office chiefs determine).
l. Any assignment, reassignment, or relief-for-cause actions involving senior officers or noncommissioned officers.

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

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

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

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

2-7. Signature blocks/complimentary closings

a. See AR 25-50, for guidelines on signature blocks and complimentary closings. Signature blocks begin at the center of the page, on the fifth line below the authority line or last line of text. See figure 2-3 for generic CG, DCG/CoS, EDCG, DCoS, and Command Sergeant Major (CSM) signature blocks.

b. Use "Sincerely" as the complimentary closing on all letters addressed to military and civilian equivalents or subordinates that the CG, DCG/CoS, EDCG, DCoS signs. Use "Very respectfully" when addressing the CSA, VCSA, Members of Congress, or higher authorities, as well as retired 4-star GOs.
c. Current CG, DCG/CoS, EDCG, DCoS, and CSM signature blocks are available at the SAORC.

<table>
<thead>
<tr>
<th>COMMANDING GENERAL</th>
<th>Nonmilitary correspondence, such as, letters to civilians, star notes (Use CG’s letterhead, 4-star note paper.)</th>
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</thead>
<tbody>
<tr>
<td>JOHN A. SMITH, JR.</td>
<td>John A. Smith, Jr.</td>
</tr>
<tr>
<td>General, U.S. Army</td>
<td>General, U.S. Army</td>
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<td>Commanding General</td>
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For Memorandums of Understanding/Agreement

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<tr>
<th>DEPUTY COMMANDING GENERAL/CHIEF OF STAFF</th>
<th>Nonmilitary correspondence, such as, letters to civilians, star notes (Use DCG’s letterhead, 3-star note paper.)</th>
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<tr>
<td>JOHN A. SMITH, JR.</td>
<td>John A. Smith, Jr.</td>
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<td>Deputy Commanding General/Chief of Staff</td>
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<td>U.S. Army Training and Doctrine Command</td>
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<td>____________________________</td>
<td>(Date)</td>
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**Figure 2-3. Generic CG, DCG/CoS, EDCG, DCoS, and CSM signature blocks**
2-8. Suspenses

a. The SGS designates the OPR for all command group taskings. TRADOC G-3/5/7, G-33 Tasking Division Chief, designates the proponent for internal, external, and operational taskings.

b. Time standard. Unless otherwise specified, allow the OPR two-thirds of the time to work the action and TRADOC senior leaders one-third of the time to review.
c. Returns and rework. OPRs will have 24 hours, unless otherwise specified, to make the necessary adjustments and return the action in ETMS2.

d. TRADOC Senior Leaders’ suspense for a request for information is 72 hours.

e. Unless otherwise indicated, actions and taskers for CG, DCG, EDCG, or DCoS approval, information, review, or signature are assigned a 5 workday suspense.

f. When staff offices cannot meet a suspense, the assigned action officer with the approval of the organization principal, deputy, or XO must request an extension within 48 hours of assignment. See paragraph 2-3k for detailed instructions on requesting extensions.

g. Written congressional inquiries normally have a 5 work-day suspense from the date of receipt. Ensure inquiries are processed expeditiously. Send guidance inquiries or questions concerning responding to or processing congressional inquiries to CAO at usarmy.jble.tradoc.mbx.hq-tradoc-cao@army.mil.

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

(2) Task leads will staff and coordinate response with agencies listed as assists when appropriate, as well as the local OSJA for legal review when deemed necessary. Staff all draft replies with CAO AO and CC the TRADOC SGS SAD prior to final signature.

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

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

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

(6) Delegation of signature authority for routine inquiries is typically at the colonel or civilian equivalent level. Signature by position (for example, CoS) is appropriate when the tasked office does not have a colonel or civilian equivalent available for signature. For inquiries that have SA, USA, CSA, or VCSA interest, CAO may recommend a higher signature level (for example, CG, DCOs, Deputy to the CG, etc.).
2-9. Note taking and suspenses for Commanding General forums

CG taskings. It is important to make note of any guidance, taskings, and/or observations the CG or senior leaders provide in various venues (for example, during meetings, video teleconferences (VTCs), visits, conferences, discussions enroute, etc.). Highlight only significant guidance, decisions, and taskings and provide the who, what, when, where, and why of the event. Prior to adjournment, the lead will confirm the list of taskings. See figure 2-4 on page 30 for notes and tasking memorandum format for providing this information to the SGS. The CG notes and taskers are released by your staff principal or deputy.

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

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

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

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

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

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

g. Key points:

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

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

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

   (4) See figure 2-4, for memorandum format to prepare notes and taskings recommending leads and suspenses.

   (5) Upon approval by staff principal or deputy, send final memorandum to SGS for tasking out any official taskers.
2-10. Note taking and suspenses for Deputy Commanding General/Chief of Staff, Executive Deputy to the Commanding General, and Deputy Chief of Staff forums

   a. DCG/CoS taskings. Responsible staff lead will serve as note taker and email SGS a summary of significant issues and taskings directed by the DCG/CoS during any venue (for example, meetings, VTCs, visits, conferences, discussions enroute, etc.) for dissemination within 2 workdays. Prior to adjournment the lead will confirm the list of taskings by the DCG/CoS. See figure 2-4 on page 30 for notes and tasking memorandum format.

   b. EDCG. Responsible staff lead will serve as note taker and email SGS a summary of significant issues and taskings directed by the EDCG during any venue (for example, meetings, VTCs, visits, conferences, discussions enroute, etc.) for dissemination within 2 workdays. Prior to adjournment the lead will confirm the list of taskings by the EDCG. See figure 2-4 for notes and tasking memorandum format.

   c. DCoS taskings. Responsible staff lead will serve as note taker and email SGS a summary of significant issues and taskings directed by the DCoS during any venue (for example, meetings, VTCs, visits, conferences, discussions enroute, etc.). To ensure unity of effort and maintain visibility, responsible staff lead will, within 2 workdays, email a summary of significant issues that arose to SGS for dissemination, with CC to the CG XO, DCG XO, EDCG XO, DCoS XO, and CPG Chief. Prior to adjournment, the lead will confirm the list of taskings by the DCoS. See figure 2-4 for notes and tasking memorandum format.
MEMORANDUM FOR Secretary of the General Staff, 950 Jefferson Avenue, Fort Eustis, VA 23604

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

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

2. Objectives. Clearly state meeting objectives.

3. Tasker Recap. Identify taskers, if any, that come from the meeting to update the CG or DCG/CoS on status, or answer a question, etc. Ensure that the tasker is clear and concise and includes subject, deliverable, recommended lead, assist(s) and suspense date.
   
   a. Provide briefing to the CG outlining plans for the Annual Modernization Guidance Update (LEAD: G-3/5/7; ASSIST: CKO; S: 21 Nov XX).
   
   b. Provide CG an EXSUM listing holistic solutions to the 11B mechanized skillset crisis (LEAD: MCoE; ASSIST: G-3/5/7, FCoE; S: 28 Mar XX).
   
   c. Provide CG an information paper identifying ways to assist or fix the recruiting challenge in the 98th Training Command (LEAD: USAREC; ASSIST: G-3/5/7, ARNG, MCoE; S: 11 Dec XX).
   
   d. Relook recent tax applied to CoEs/Activities and identify OSD fenced programs that were impacted. E-mail feedback to DCG, with potential on return of taxed funds to CoEs (LEAD: G-8; S: 5 Nov XX).

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

Figure 2-4. Memorandum format for CG notes and taskings
Your Directorate’s Office Symbol (ARIMS RN)
SUBJECT: Title of Meeting, Location, and Date(s)

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

FELICIA R. JONES
COL, AG
Respective Title

CF:
XO, CG
XO, DCG
XO, DCoS
Chief, CPG
Lead
Assists
2-11. Staff assistance
All taskings initiated through SGS or G-33 Tasking Office will identify a lead, as well as staff sections and/or subordinate commands or activities that may need to provide assistance to the lead. On occasion, the initial tasking may not identify all assist staff sections. A good staff requires a one team mindset when it comes to assisting others in completing taskers. Even if a DCS or special staff office is not identified on the original tasker, consider the request from the staff lead as a valid requirement. Resolve conflicts at the XO/deputy assistant level before bringing an issue to G-33 Tasking Office/SGS level.

2-12. Coordinating staff actions
Staff actions must be coordinated both within the lead organization (internal coordination) and with other TRADOC organizations that have an interest in the action (external coordination). For subordinate organizations, the chief of staff or higher must provide his/her name for concurrence/non-concurrence on an action. For HQ TRADOC organizations, the deputy chief of staff or assistant deputy chief of staff must provide his/her name for concurrence/non-concurrence on an action. That individual should initial and date the TF 5 in the appropriate space. A note indicating the individual’s name and the date of his/her review is acceptable. See paragraph 2-3 for AO responsibilities in the staff action process.

a. Internal coordination (within the lead organization).

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

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

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

b. External coordination (outside the lead organization). All staff actions going to the command group must be coordinated with TRADOC organizations that have an interest in the action.

   (1) Lead organizations must consider actions from the CG’s, DCG’s/CoS, EDCG, or DCoS’s viewpoint. What organizations will the CG, DCG/CoS, EDCG, or DCoS expect to have reviewed the action? Whose input will they want as they consider their decision?
(2) Any organization directly affected by the action or having expertise in the subject matter must be given the opportunity to review it. Often an action crosses several disciplines and must be reviewed by multiple organizations.

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

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

(5) Coordinate support agreements with TRADOC G-3/5/7, G-8, and TRADOC OSJA before submitting to SGS SAD.

(6) Coordinate actions that involve a regulatory or legal issue with TRADOC OSJA.

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

(8) Coordinate actions that impact strategic communications with the Chief, Communication Directorate (CCD), CPG, CAO, and DCS, G-3/5/7 (G-39).

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

(10) Coordinate all congressional actions with TRADOC CAO and OSJA.

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

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

(13) Coordinate new and changes to existing administrative publications and delegations of authority with the TRADOC OSJA and TRADOC DCS, G-6 Publications Control in accordance with TR 25-35.

(14) Use rosters posted at SAORC to facilitate coordination.

(15) Coordinate actions with initial military training impacts with the Center for Initial Military Training (CIMT), G-3/5/7, U.S. Army Recruiting Command, and U.S. Army Cadet Command, if the staff action involves enlisted or officer accessions.


(18) Coordinate actions involving officer accessions or Senior and Junior Reserve Officer Training Corps with U.S. Army Cadet Command and G-3/5/7.

c. Other coordination requirements.

(1) AOs will list the agency, name and phone number of the POC responding to coordination, check the concur or non-concur block, annotate the date of response and remarks on the TF 5 in block 9, staff coordination. The AO is responsible for keeping all records of coordination on action.

(2) The DCS, deputy, or organization command group must sign non-concurrences and considerations of non-concurrence.

(3) Coordinate scheduling of all conferences/major briefings with G-33 Tasking Office to avoid conflicts on the TEC.

(4) Coordinate major ceremonies with Executive Services Office (ESO) and G-3/5/7.

(5) Keep DCGs and CSMs informed; coordinate actions as appropriate.

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

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

(8) Simultaneous coordination is encouraged. Use email, portals, and other electronic tools to share documents and collect responses.

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

(10) Unless otherwise noted, organizations asked to provide coordination have 2 workdays to give their concurrence/non-concurrence. Unless otherwise noted, the review and “chop” must be from a senior individual of the organization. For subordinate organizations, the chief of staff or higher must provide his/her name for concurrence/non-concurrence on an action. For HQ TRADOC organizations, the deputy chief of staff or assistant DCS must provide his/her name for concurrence/ non-concurrence on an action. That individual should initial and date the TF 5 in the appropriate space. A note indicating the individual’s name and the date of his/her review is acceptable. The standard response time for actions staffed to the TRADOC OSJA for a legal review and/or a formal concurrence/comment on a TF 5 is seven (7) duty days. The TRADOC OSJA will be the last staff section to receive the action prior to its presentation to the principal
action officer or command group. TRADOC OSJA concurrence/non-concurrence and initial/date annotations on the TF 5 may reflect an attorney other than the TRADOC Staff Judge Advocate or Deputy Staff Judge Advocate.

d. Non-concurrences.

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

(2) There is no designated format for conveying non-concurrences. Email comments will suffice. A copy of the email can be placed under a tab in the action.

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

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

2-13. Correspondence distribution

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

b. See figure 2-5 on page 36 for how to type address correspondence to all addressed to TRADOC subordinate activities and deputy chiefs of general staff and chiefs of special staff offices.
c. The TRADOC SGS/G-3 POC and HQ TRADOC POC rosters identify TRADOC subordinate activities and key HQ coordinating staff. They are located at the SAORC under Telephone Directories/Rosters.

d. To determine correct addresses use:

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

2. TRADOC Senior Leaders Contact List. SGS SAD posts TRADOC Senior Leaders Contact List updates at the SAORC under telephone rosters.

2-14. Abbreviations and acronyms
Use acronyms in correspondence except when writing to individuals or organizations not familiar with their use. The first time an abbreviation, brevity code, or acronym (ABCA) is used in text, spell it out and follow it with the abbreviation in parentheses. Thereafter, use the acronym. Use the electronic version of authorized ABCA database for Army-approved ABCAs. See the U.S. Government Publishing Office Style Manual or APD link for examples of acceptable and unacceptable capitalization of meanings of abbreviations, brevity codes, and acronyms.

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

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

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**DISTRIBUTION:**
Commander
U.S. Army Combined Arms Center
U.S. Army Combined Arms Support Command
U.S. Army Center for Initial Military Training
U.S. Army Cadet Command
U.S. Army Recruiting Command
Centers of Excellence
U.S. Army Soldier Support Institute
Commandants, TRADOC Schools
Director, U.S. Army Center of Military History
Deputy Chiefs of General Staff and Chiefs of Special Staff Offices, HQ TRADOC

Figure 2-5. Distribution list for correspondence
2-17. Distinguished visitors
Distinguished visitor (DV) visits to HQ TRADOC. DV visit approval authority is the DCG/CoS. DV visit requests are approved during regularly scheduled visit update briefings with the DCG/CoS. If a visit requires a lead assigned prior to a regularly scheduled meeting with the DCG/CoS, the visit request will be coordinated through the DCoS. The request will include the type of visit/event, the objectives, the visitor’s biography, and the 5Ws. See TRADOC Memorandum 1-16 for additional distinguished visitor information. Along with ESO, the staff lead will attend the regularly scheduled meeting with the DCG/CoS and brief all aspects of the visit or event.

a. Upon DCG/CoS approval:

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

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

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

b. Upon DCG/CoS disapproval, proponent will notify all concerned. See figure 2-6 on page 38 for flow chart of process.

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

d. Member of Congress and professional staffer visits to subordinate command and/or activities. Electronically report initial notification of congressional visitors to the CAO via email at usarmy.jble.tradoc.mbx.hq-cao@army.mil. After the visit, submit an EXSUM via the “Reporting Contacts with Congress” feature on the CAO website.
2-18. Support agreements

a. TRADOC G-3/5/7 has oversight of all TRADOC support agreements (SAs): memorandum of agreement (MOA), Fiscal Service (FS) Form 7600A (United States Government General Terms & Conditions (GT&C)) and memorandum of understanding (MOU).

(1) Follow the U.S. Treasury Department’s Bureau of Fiscal Service guidance at https://www.fiscal.treasury.gov/g-invoice/ and DoDI 4000.19 for required content and formatting in the development of support agreements. See Army policy guidance at https://www.milsuite.mil/book/groups/army-g invoicing.

(2) MOA. An MOA is used to document agreements and execute or deliver support with or without reimbursement between any two or more parties. Unless otherwise noted (see table 2-1 on page 40), all MOAs involving and Office of the Secretary of Defense (OSD) or DoD Component that require payment from one party to another will be recorded on an FS Form 7600A. When an SA involves reimbursement, an MOA can be used in addition to an FS Form 7600A to further detail terms and conditions.
(3) FS Form 7600A. An FS Form 7600A is used to document the General Terms and Conditions of SAs involving an OSD or DoD Component that require payment from one party to another. An FS Form 7600A may also be used to document and record agreements without reimbursement.

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

(5) TRADOC organizations creating SAs will:

(a) Complete SA coordination at their organization-level G-3/5/7, G-8, OSJA, and other staff elements as appropriate followed by coordination with TRADOC G-3/5/7, Priorities Analysis and Requirements Directorate (PARD).

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

(c) See table 2-1 for the SA threshold matrix for approval authorities and final acknowledgement requirements.
2-19. Approval of outside continental United States temporary duty or overseas conference travel

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

    b. Traveler will include detailed itinerary, purpose, and POC for each location/facility to be visited. Requests for travel based on invitations, previously approved clearances, or those initiated by other ACOMs will include copies of such documentation with the request.
c. Coordinating staff will notify CG, TRADOC of the reason and intent for all OCONUS TDY. The CG, DCG/CoS, EDCG, or DCoS may want to meet with coordinating staff prior to their departure.

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

2-20. Rename subject of line and title to scanned documents
When emailing scanned documents as attachments, users will rename the subject line and title to indicate the content of the document. Scanners automatically assign generic subject lines and titles to links (for example, .pdf, .jpg, .tif, and .xps) scanned documents.

Chapter 3
U.S. Army Training and Doctrine Command Forms and Correspondence Formats

3-1. Guidelines
This chapter prescribes specific forms and formats to use within HQ TRADOC. Use HQ TRADOC letterhead stationery for military correspondence, annotated with the proponent’s office symbol. Use personal stationery for letters (for example, CG, DCG/CoS, EDCG, or DCoS letterhead). Templates are available on the TRADOC SAORC website at https://intranet.tradoc.army.mil/saorc/SitePages/Home.aspx. The following general guidelines apply to all staff actions:

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

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

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

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

e. Provide SGS an electronic copy of action by uploading it in ETMS2. SACO will make administrative corrections, but will return staff actions to AOs that require substantive changes or contain inordinate amount of errors for rewrite and/or corrections. Upload the corrected documents in ETMS2 and notify SGS once they are resubmitted. Remove older versions to ensure only one working document is maintained.
3-2. Assembling a hardcopy staff action

a. Assemble all staff actions, except readaheads, as shown in figure 3-1. Ensure tabs are consecutive and explained in order on the TF 5. Refer to table D-1, when assembling readaheads.

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

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

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

e. Assemble any enclosure printed in landscape mode (printed along the long axis of the paper) with the head of the document to the left so that when the entire package is rotated clockwise and the enclosure is right-side up. Most common enclosures are paper copies of briefing slides.
TF 5 (Transmittal, Action and Control) accompanies staff actions processed for command group information, signature, or approval. The current version of this form is posted on the TRADOC Website. Use of TF 5 ensures correct tracking of staff actions within ETMS2 and provides an official record of approvals/disapprovals. CGAC retains a file copy. Pay special attention when preparing TF 5 because it is more than just an administrative tool to track, record, and file. Ensure the information is well thought out and succinct so the CG, DCG/CoS, EDCG, or DCoS can quickly review a summary of the details they need to know at their level before taking the requested action. Obtain the appropriate coordination and approval/release signature(s) within your organization before forwarding to SGS. A well-prepared TF 5 eliminates the need to return the package for corrections and ensures speedy processing through the command group and signature/approval of the action without questions. See appendix E, for instructions on completing TF 5.

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

   a. Procedures. Requests for EXSUMs are tasked in accordance with procedures in paragraph 2-3.
b. See figure 3-2, for the EXSUM format. (The TRADOC EXSUM format matches the HQDA EXSUM format shown in HQDA Policy Notice 25-52).

   (1) Do not exceed 15 lines.

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

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

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

   d. Type APPROVED BY: Rank/Mr./Mrs./Ms. Surname one line below originators name and contact information.

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

1 Mar XX

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

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

APPROVED BY: BG Brian Xxxxxx
3-5. Decision memorandum

Use a decision memorandum to obtain decisions from the command group. Prepare this special purpose action in plain paper memorandum format. Do not exceed two pages, excluding supporting documents.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Deputy Chief of Staff
Deputy Commanding General/Chief of Staff

FOR TRADOC Commanding General

SUBJECT: Decision Memorandum Format

1. FOR DECISION.

2. PURPOSE. To obtain...


APPROVED_______ DISAPPROVED_______ SEE ME_______

4. BACKGROUND.

5. DISCUSSION.
   a. Course of Action (COA) 1: (Advantages/Disadvantages)
   b. COA 2: (Advantages/Disadvantages)
   c. COA 3: (Advantages/Disadvantages)

6. IMPACT.

7. COORDINATION.

TRADOC DCS, G-8_______ CONCUR/NONCONCUR_______ DATE
TRADOC DCS, G-1/4_______ CONCUR/NONCONCUR_______ DATE

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

Encl

MICHAEL M. Xxxxxx
Major General, U.S. Army

Figure 3-3. Decision memorandum format
3-6. Information paper

Use an information paper to provide the reader pertinent facts in a clear and concise format. Figure 3-4 provides format and instructions for preparing an information paper. Note the authority block begins at the center of the page and one line below the last paragraph.

\[\text{INFORMATION PAPER}\]

\[\text{ATCS-XS}\]

\[30\text{ Aug XX}\]

\text{SUBJECT: Information Paper Format}\n
1. Purpose: To provide guidance on the preparation and use of an information paper.

2. Facts:
   a. An information paper provides facts in a clear and concise format.
   b. Include the subject and the purpose. Paragraphs will contain only essential facts concerning the subject. There is one line between the title “INFORMATION PAPER” and the office symbol. There is one line between the date and the subject line. Do not “bold” any text.
   c. Information papers are self-explanatory and will not refer to enclosures, except for tabular data, charts, or photographs.
   d. Information papers should not exceed one page in length. If a continuation page is unavoidable, number pages starting on page 2, bottom center. Do not repeat the subject line, title, or date on the second page.
   e. Information papers do not require signature, but must include the AO’s name and telephone number at the bottom of the page. Type the AO’s information on the second line below the last paragraph. Type an approval line below the AO’s name and number to indicate directorate approval by principal, deputy, or director. Begin typing at the center of the page.
   f. Avoid using acronyms and abbreviations, except those that are familiar outside the Army. Avoid using classified information when it does not contribute to understanding the issue.
   g. Information papers should not include a decision statement, ask for a decision, include recommendations, or courses of action.
   h. An information paper is forwarded under the cover of a TRADOC Form 5.

\[\text{Mr. John Brown}\]
\[\text{(757) 501-1234}\]
\[\text{Approved by: COL Paul C. Swift}\]

\[\text{Figure 3-4. Sample format for an information paper}\]
3-7. **Point paper**
Use a point paper to provide assessment, recommendations, and discussion points in outline form. It features short, to the point, easy to read bullet phrases. Use a point paper when the reader has a thorough knowledge of the subject. See figure 3-5, for instructions on preparing a point paper. Minor variations in the point paper format are acceptable, if needed, to better present the information.

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**POINT PAPER**

**SUBJECT:** Point Paper Preparation

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

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

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

4. **Discussion Points:**
   - Font: Arial 12. Margins: 1 inch for the top, bottom, left, and right.
   - Use bullet statements to outline discussion points supporting paragraphs 2 and 3 above. Short, to the point, easy to read.
   - One page preferred. However, if two or more pages, place page number at bottom center beginning on the second page, 1 inch from edge.

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**Figure 3-5. Sample point paper**
3-8. Star note

a. Only general officers (GOs) use star notes, normally for brief personal replies or to convey congratulations, appreciation, welcome, regrets, etc. Prepare the star note according to the personal preference of the GO signing the note. Include appropriate information in the TF 5; for example, “PURPOSE: To obtain CG’s signature on star note (TAB A) to Mr. Jonathan (John) E. Doe for his selection as TRADOC Employee of the Year.” The preparer may also put first name/nickname on small adhesive notes on each letter within the package. Star notes are normally one page in length. See figure 3-6 for a sample CG star note with formatting instructions.

b. Use Arial 12 with at least 1-inch margins and center text on the page for framing. Do not date the star note prior to signature, but leave space for it when typing. After signature, center the civilian-style date, for example, February 10, 2021, two lines below printed return address. Indent paragraphs five spaces and begin typing at the sixth space.

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

![Figure 3-6. Sample commanding general star note](image-url)
3-9. U.S. Army Training and Doctrine Command policy letters and delegations of authority

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

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

   c. Staff elements will forward policy letters and delegations of authority under cover of a TF 5, through the SGS for CG approval. Policy letters and delegations of authority must be coordinated through the OSJA, TRADOC G-6 Publications Control, and any other staff as required.

   d. Once the CG approves, SGS will consecutively number the policy letters, secure OPSEC approval and CCD approval to post to the TRADOC Publications and Resources website https://adminpubs.tradoc.army.mil. SGS will maintain an index of the policy letters and delegations of authority (those in delegation memorandums and those written into administrative publications).

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

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

Chapter 4
Conferences and Briefings

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

4-2. Headquarters U.S. Army Training and Doctrine Command conference room locations and responsible staff offices
DCSs and chiefs of special staffs are responsible for scheduling conferences and briefings in the General William W. Hartzog Conference Room and Morelli Auditorium via the Conference Room Scheduler.
a. The Office of the Commanding General (OCG) approves requests for the General William W. Hartzog Conference Room.

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

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

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

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

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

d. When arranging conferences and briefings, AOs will:

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

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

   (3) Reserve appropriate conference rooms via the Conference Room Scheduler: https://intranet.tradoc.army.mil/sites/crs.

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

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

      (b) Attendance requirements.

      (c) Name or title of chair.

      (d) Purpose of conference or briefing.

      (e) Security classification.

      (f) Title, order of presentation, and time set aside for each part of the conference or briefing.
(g) Special instructions (for example, prebriefing requirements, attendee allocations, etc.).

(h) Uniform requirements.

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

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

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

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

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

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

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

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

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

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

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

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

4-4. Preparing visual aids

a. A briefing template is available in the SAORC under TRADOC Templates.
b. Do not use background tints and other features that burn memory/bandwidth and make slides hard to read when projected.

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

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

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

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

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

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

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

j. Transmit material via email or on Microsoft TEAMS. Ensure all files are created with approved Army software. Distribute paper copies of slides/conference materials to multiple attendees only as a last resort.
Figure 4-1. Diagram of General William W. Hartzog Conference Room
4-5. Tracking conference taskings

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

5-1. Email

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

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

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

d. AR 25-1 prescribes email digital signature and encryption requirements. Digital signatures on emails provide a means to determine the exact originator of a particular message, a capability commonly referred to as non-repudiation. Encrypted emails can only be opened and read by those with access to a private decryption key associated with the recipient. Currently the Public Key Infrastructure (PKI) to enable digital signing and encrypting of emails is available on non-secure internet protocol router network (NIPRNET).

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

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

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

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

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

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

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

5-2. Organizational Messaging Service and Automated Message Handling System

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

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

c. Messages. TRADOC organizational account users prepare and release OMS messages electronically via the DOD Enterprise OMS/Automated Message Handling System (AMHS) (http://www.amhs.army.pentagon.mil/) on the Pentagon Website. Follow procedures below when preparing AMHS traffic the command group will release:

(1) Organizational messages. Follow guidance outlined in paragraph 3-2 to package staff actions containing AMHS messages for command group approval/release, and process the same as other actions. When forwarding TF 5 for command group release, include administrative
instructions recommending the mode to send message (for example, once approved, recommend sending signed message, but not encrypted).

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

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

(c) Once approved, a designated user with release authority for the FROM organizational account is responsible for dispatching the message using OMS/AMHS software. Once dispatched, a copy of the message is printed from the sent items folder and placed in the package behind tab A. Then, the entire package, with TF 5 showing approval, is uploaded to the lead organization’s folder and notification made to SGS to close action in ETMS2.

5-3. Organizational email accounts

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

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

5-4. Use of calendars within email

AOs should use the calendar function within email to manage their daily schedules. This will allow others to easily plan and coordinate meetings. AOs should set calendar permissions to allow the maximum feasible ability to view individual schedule information by others on the local installation network. AOs should freely share their schedules with other AOs within their organization.
Chapter 6
Headquarters, U.S. Army Training and Doctrine Command Army Heritage Month, Decentralized Organization Day

6-1. Army Heritage Month

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

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

      (1) Promote the Army Values.

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

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

      (4) Promote unit cohesion, teamwork and Esprit de Corps.

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

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

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

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

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

   g. See table 6-1 on page 62 for Army Heritage Month tasking timeline.
Table 6-1
Army Heritage Month tasking timelines

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Responsible proponent office</th>
</tr>
</thead>
<tbody>
<tr>
<td>120 days prior to observance date</td>
<td>Convene AHMC. AHMC determines scope of proposed activities and identifies installation activity lead/s.</td>
</tr>
<tr>
<td>90 days prior to observance date</td>
<td>AHM AOs submit a plan of action/milestones to the AHMC.</td>
</tr>
<tr>
<td>70 days prior to primary event</td>
<td>Brief event concept plan to SAEC for approval.</td>
</tr>
<tr>
<td>60 days prior to primary event</td>
<td>If CG, DCG/CoS, EDCG, or DCoS are involved in the program, AHMC sends the DCoS an information paper. AHMC/AO coordinates concept and funding with appropriate agencies and HQ TRADOC Directorates as required.</td>
</tr>
<tr>
<td>NLT 31 July</td>
<td>AHMC provides a written after action report in memorandum format to the AEC and HQ TRADOC DCoS.</td>
</tr>
</tbody>
</table>

6-2. Administrative guidelines for Army Heritage Month

a. To ensure timely command group awareness of event concepts and use of proper protocol procedures, responsible organization or special staff office will follow timelines in table 6-1.

b. The following HQ TRADOC DCSs Special Staff will designate and provide AHMC board members: CDO (AHMC Co-Chair), G8, ESO, CCD, SJA, and History Office.

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

d. For TRADOC-sponsored events, TRADOC ESO will send electronic invitations of scheduled event(s) to all GOs/SESs and other special guests. The ESO will also send electronic invitations to the XO distribution list for dissemination to the remaining staff.

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

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

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

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

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

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

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


TRADOC was founded on 1 July 1973 under General William E. DePuy. TRADOC celebrates that founding every year with a variety of special activities. There is no centralized program honoring TRADOC’s founding. TRADOC HQ staff organizations, located on Fort Eustis, will honor TRADOC’s founding by conducting individual organization celebratory programs customized to meet their members’ preferences and responsibilities.

a. TRADOC HQ organizations responsible for conducting decentralized organization day activities are:


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

   (3) G-2

   (4) G-3/5/7

   (5) G-6

   (6) G-8
b. Lead organization for the decentralized events will draft a memorandum for DCoS’s signature announcing the date(s) and parameters for the events. Lead organization will also collect after action reports from the participating organizations and prepare a single after action report for the DCoS’s review. The after action report will be submitted under cover of a TF5 through the SGS SAD, no later than 30 days following the final organization day event.

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

d. Organizations will schedule activities no earlier than the last full week of June and no later than the first full week of July. Activities will not be in conjunction with Independence Day, nor the associated training holiday.

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

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

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

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

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

**Table 6-2.**
**Headquarters, U.S. Army Training and Doctrine Command Decentralized Organization Day and other recurring events schedule, calendar year 2022-2025**

<table>
<thead>
<tr>
<th>Event</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Army Emergency Relief</td>
<td>STB</td>
<td>STB</td>
<td>STB</td>
<td>STB</td>
</tr>
<tr>
<td>May</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HQ TRADOC Decentralized Organization Day</td>
<td>G-1/4</td>
<td>G-2</td>
<td>G-6</td>
<td>G-6</td>
</tr>
<tr>
<td>July</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TRADOC Best Warrior Competition</td>
<td>G-3/5/7</td>
<td>G-3/5/7</td>
<td>G-3/5/7</td>
<td>G-3/5/7</td>
</tr>
<tr>
<td>July</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor of the Year</td>
<td>G-3/5/7</td>
<td>G-3/5/7</td>
<td>G-3/5/7</td>
<td>G-3/5/7</td>
</tr>
<tr>
<td>August</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drill Sergeant of the Year</td>
<td>CIMT</td>
<td>CIMT</td>
<td>CIMT</td>
<td>CIMT</td>
</tr>
<tr>
<td>September</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Combined Federal Campaign</td>
<td>733rd MSG</td>
<td>733rd MSG</td>
<td>733rd MSG</td>
<td>733rd MSG</td>
</tr>
<tr>
<td>September-November</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 7
U.S. Army Training and Doctrine Command Invitational Travel Authorization (ITA) Procedures

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

7-2. Preparation of an invitational travel authorization request

a. ITA request memorandums for all official TDY not involving spousal representational travel as described in paragraph 7-2b, will be prepared and submitted in accordance with the Joint Travel Regulations, AR 600-8-105, and current Army policy. (See figure 7-1 on page 67 for an example of an ITA request format.) ITA request memorandums must be signed by the approving official within the requesting organization.

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

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

(a) TF 5 (with TRADOC G-3/5/7 concur/non-concur recorded if military air travel is requested, with TRADOC OSJA review recorded).

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

b. Army spouses may be authorized military aircraft or commercial aircraft transportation where the requirements of Section 5703, Title 5, United States Code (5 USC 5703) are met (i.e., the spouse is acting as a “quasi employee” during a period of service to the government) and the spouse is “legitimately performing a direct service for the Government,” as established in JTR, paragraph 030501-A12. Additionally, spousal travel by Government Aircraft is authorized for spouses accompanying their sponsors on military aircraft transportation when the current requirements listed in DODD 4500.56, Enclosure 3, paragraph 5 are met. Commercial aircraft transportation is not authorized for this latter type of travel. ITA request memorandums for spousal travel will be prepared and submitted in accordance with the JTR and Army Directive 2020-14. (See figure 7-2 on page 69 for spousal travel request.) The ITA request memorandum must clearly explain how spouse travel to activities meets either the “direct service” standard of the JTR or the “nonreimbursable spousal travel” standard of DODD 4500.56. The ITA request memorandum must be signed by the funding budget analyst and spouse’s sponsor. All TRADOC subordinate organizations, FOAs, special activities, and HQ TRADOC organizations will forward the ITA packet through the G-3/5/7 Flight Operations Division (if military air is
requested) to the TRADOC OSJA for review at least 15 calendar days prior to the travel date. After review, the TRADOC OSJA will forward the ITA request package to the SGS SAD for CG approval. The ITA package will contain:

1. Unless per diem is separately authorized by the CG, the spousal travel request memorandum will contain the text: “This travel authorization authorizes the spouse to accompany the sponsor on official travel. It does not authorize per diem or other expense allowances for the spouse. If the spouse does not desire to bear the expenses ordinarily reimbursed through per diem or other expenses allowances, this travel authorization is canceled.” See figure 7-2 on page 69.

2. TF 5 (with TRADOC G-3/5/7 concur/non-concur recorded if military air travel is requested, with TRADOC OSJA review recorded).

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

4. Legal review from the requesting organization’s servicing legal advisor.

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

Table 7-1.
Invitational travel authorization request approval authority

<table>
<thead>
<tr>
<th></th>
<th>Non-spouse travel</th>
<th>Spousal travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>HQ TRADOC</td>
<td>Approval authority is DCG/CoS</td>
<td>Approval authority is TRADOC CG</td>
</tr>
<tr>
<td>Subordinate organizations</td>
<td>Approval authority delegated to senior TRADOC commander/commandant. No further delegation allowed</td>
<td>Approval authority is TRADOC CG</td>
</tr>
<tr>
<td>All TRADOC organizations</td>
<td>Requests are signed by the traveling Soldier or general schedule civilian</td>
<td>Requests are signed by the traveling spouse's sponsor</td>
</tr>
</tbody>
</table>
DEPARTMENT OF THE ARMY
HEADQUARTERS, UNITED STATES ARMY TRAINING AND DOCTRINE COMMAND
950 JEFFERSON AVENUE
FORT EUSTIS, VIRGINIA 23604-5780

Office Symbol (ARIMS RN) 8 Aug XX

MEMORANDUM THRU (Enter organization’s servicing legal office)
FOR (Enter section responsible for issuing the ITA)
SUBJECT: Invitational Travel Authorization

1. Request publishing of invitational travel authorization for the below individual:
   a. Name, title or position:
   b. Mailing address:
   c. Proceed date:
   d. Itinerary: FROM (enter location traveling from) TO (enter location traveling to) and RETURN.
   e. Itinerary attached? Yes
   f. Length of travel:
   g. Point of contact:
   h. Modes of travel for entire visit: (Commercial air, rental car, MILAIR, POV, etc.)
   i. Purpose of travel:
   j. Estimated cost:
      (a) Per diem: $00.00
      (b) Travel: $00.00
      (c) Fund cite: (if applicable. If DTS, annotate DTS line of accounting.)

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

Figure 7-1. Invitational travel authorization request memorandum
Office Symbol (ARIMS RN)
SUBJECT: Invitational Travel Authorization

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

X Encls

Approving official's signature
Approving official's signature block

Figure 7-1. Invitational travel authorization request memorandum, continued
MEMORANDUM THRU TRADOC Staff Judge Advocate, U.S. Army Training and Doctrine Command, 950 Jefferson Avenue, Fort Eustis, VA 23604

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

SUBJECT: Spousal Travel – Spouse’s name, date/place of travel

1. References:
   a. Joint Travel Regulations (JTR) (Uniformed Service Members and DOD Civilian Employees), 1 Jan 21.
   b. Army Directive 2020-14 (Army Spouse Travel), 23 Oct 20

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

3. Request publishing of individual travel authorization (ITA) for individual below:
   a. Name, title or position: Mrs. Mary Smith – Spouse of General Smith
   b. Mailing address:
   c. Proceed date: (Date leaving home station.)
   d. Itinerary. FROM (enter location traveling from) TO (enter location traveling to) and RETURN.
   e. Itinerary attached? Yes
   f. Length of travel:
   g. Point of contact: (Name and phone number.)
   h. Modes of travel for entire visit: (Commercial air, rental car, MILAIR, POV, etc. If by vehicle note they will be a passenger is sponsor’s vehicle)
   i. Purpose of travel:
      (1) To attend the (name of event.)
Office Symbol (ARIMS RN)
SUBJECT: Accompanying Spouse Travel – Spouse’s name, date/place of travel

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

(a) Estimated cost:

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

(c) Travel: $0

j. Fund Cite: DTS Line of Accounting

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

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

5. Justification for Travel:

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

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

[Signature]
Sponsor’s signature
Sponsor’s signature block
(The sponsor MUST sign this request.)
7-3. Publication of the invitational travel authorization

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

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

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

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

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

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

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

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

f. The requesting organization will ensure that entitlements are entered correctly. For example, in most cases of spousal representational travel, the spouse is not entitled to per diem; it is the organization’s responsibility to ensure the lodging and meals are removed from the authorization. G-1/4 and G-8 will also review for accuracy and ensure all required statements are on the authorization.

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

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

i. The organization’s appointed NDEA is responsible to scan and upload all supporting documents (expense receipts, airline receipts, etc.) to the substantiating records section of the voucher, then sign the voucher in DTS as T-entered.
j. After the traveler’s voucher is paid, the organization DTA will detach the individual from their organization; this will ensure the availability of the individual’s profile to other organizations in the event they travel on an ITA at a later date.

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

8-1. U.S. Army Training and Doctrine Command Enterprise Calendar overview
The TEC (https://intranet.tradoc.army.mil/sites/tec2/SitePages/Home.aspx) is a web-based calendar that provides information on key events affecting TRADOC organizations. It is designed to keep the command informed of key events and to provide a tool to help prevent scheduling conflicts. The online version of the TEC is the authoritative version of the TRADOC master activities calendar. The TEC is shown in real time, as all events are immediately reflected on the calendar once approved.

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

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

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

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

Appendix A
References

Section I
Required Publications

AR 25-50
Preparing and Managing Correspondence
Related Publications

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

AR 1-20
Legislative Liaison

AR 1-50
Army Conference Policy

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

AR 20-1
Inspector General Activities and Procedures

AR 25-1
Army Information Technology

AR 25-30
The Army Publishing Program

AR 25-51
Official Mail and Distribution Management

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

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

AR 55-46
Travel Overseas

AR 380-5
Army Information Security Program
JTR
Joint Travel Regulations (https://www.defensetravel.dod.mil/site/travelreg.cfm)

TR 5-14
Acquisition Management and Oversight

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

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

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

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

TR 37-2
Temporary Duty Travel Policies and Procedures

TR 95-5
Flight Operations

TR 500-2
Taskings and Individual Augmentation Management

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


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

Section III
Prescribed Forms

TF 5
Transmittal, Action and Control

TF 712
Request for Official OCONUS Temporary Duty Travel
Section IV
Referenced Forms

DA Form 2028
Recommended Changes to Publications and Blank Forms

DD Form 1351-2
Travel Voucher or Subvoucher

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

Appendix B
Helpful Hints for Preparing Correspondence and Processing Actions

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

B-2. Reference materials
Follow AR 25-50 and this regulation to assist in preparing correspondence.

B-3. Processing staff actions

a. Purpose statement on TF 5 refers to the purpose of the form, not the purpose of the action being transmitted. It tells what you want the form to accomplish. For example: “To obtain CG signature on memo to MG Brown (TAB A) non-concurring with his proposed changes to FM XX-X (TAB B).”

b. Recommendation statement on TF 5 tells the recipient what you want him to do and is usually worded similarly to the PURPOSE statement. For example: “CG sign memo to MG Brown (TAB A) non-concurring with his proposed changes to FM XX-X (TAB B).”

c. Ensure the ETMS2 control number is in block 1 on the TF 5.

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

e. TAB B is the document that generated the action. Additional background information follows, using succeeding tabs in order mentioned in TF 5.
f. Always use editing and proofreading tools available (spelling and grammar check) as an initial step in the proofreading process. Review correspondence to ensure document is error free and ready for signature and dispatch prior to submission to SGS for command group signature.

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

h. AOs will provide the designated organization POC an electronic copy of all documents to upload in ETMS2. The POC will make administrative corrections, but will not change the content of the documents. SACOs will retrieve the documents, make administrative corrections, but will not change the content.

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

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

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

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

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

n. If an action requires presentation to the CG, DCG/CoS, EDCG, or DCoS for signature during a briefing, provide the SGS an advanced copy of the correspondence for proofreading, editing, assignment of ETMS2 control number, and approval prior to the briefing. Following the briefing, return a copy of both the TF 5 and the signed correspondence to SGS.

**B-4. Correspondence**

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

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

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

   (1) Make reference(s) to the first paragraph.
(2) Begin the paper with the most important information.

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

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

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

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Appendix C

Headquarters, U.S. Army Training and Doctrine Command tasking order format

C. TRADOC tasking order format. See figure C-1, for the tasking order format.
UNCLASSIFIED (or) UNCLASSIFIED//FOR OFFICIAL USE ONLY

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

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


3. Execution.
   3.A. Suspense: Instructions for this paragraph: {DDMMYY} such as 05JUNXX. If multiple suspenses, list each with brief description. All suspenses must be referenced within the body of the TASKORD under 3.C TASKS. NOTE: If suspense is less than 30 days, submission must be approved by COL/GS15. Approving official must be listed in paragraph 5D.
   3.B. Concept of operations. Instructions: {Expand on situation and mission paragraphs. Describe how the Lead sees the actions of subordinate units fitting together to accomplish the mission. May be a single paragraph or multiple subparagraphs. Address decisive and shaping operations. Address phases if appropriate. This is not the paragraph for specific tasks only a description of how the overall mission.}
   3.C. Tasks. Instructions for this paragraph: {Identify each in a separate line; the standard first task is always 3.C.1 acknowledge receipt of tasking to primary POC. Use actual name - do not just refer to a following paragraph.}
   3.C.1. Acknowledge. Instructions for this paragraph: Within 2 working days reply via e-mail to Lead point of contact (POC) {Use actual name - do not just refer to a following paragraph.}

{Note1: Delete all instructions from final version.}
{Note2: Enter appropriate protective marking or classification IAW AR 380-5}

UNCLASSIFIED (or) UNCLASSIFIED//FOR OFFICIAL USE ONLY

Version 11 FEB 20. Previous versions are obsolete.
3.C.2. Instructions for this paragraph: [Specify tasks to CFL, CoE, and Staff in separate lines. Be clear what is to be done. Tasks should be to CFL, CoE and not to sub-elements within a major organization.]

3.C.2.(a). Instructions for this paragraph: [Format for multiple subparagraphs.]

3.D. Coordinating Instructions. Instructions for this paragraph: [Always the last subparagraph in paragraph 3. List any CCIRs, specific formats, spreadsheets, etc., that respondents must use to answer the task. Provide web address to any referenced documents.]

4. Admin and Log. Instructions for this paragraph: [List what is required to support the tasking, funding, or administrative instructions. Cite any references or enclosures here. Ensure attachments (i.e., Enclosures, Annexes, Exhibits, etc.) are named the same, as cited in the TASKORD.]

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

5. Command and Signal.

5.A. Lead. Instructions for this paragraph: [Provide a Primary and Secondary POC or subject matter expert (SME) name, phone, and e-mail (NPRNET and SIPRNET).

5.B. Assist. Instructions for this paragraph: [list POC/action officer name(s), if known for tasked organizations.] Note: See DISTRIBUTION below.

5.C. Originator. Instructions for this paragraph: [Initiating office is office of primary responsibility (OPR). Include POC/SME name, phone, and e-mail (NPRNET and SIPRNET (if appropriate)).]

5.D. Approval. Instructions for this paragraph: [NOTE: Suspense less than 30 days requires COL/GS-15 approval. 15 days or less requires G3/5/7 GO/FO approval]

INSERT NAME HERE
Deputy Chief, Taskings Division
HQ TRADOC G-33

Encl instructions for enclosures [List in para 4 above. Ensure any attached references and enclosures are named the same as cited in the TASKORD]

Instructions for Distributions (below): [Customize the below list to reflect the intended audience for your tasking. Do not indicate distribution into sub-elements. Delete any organization not involved in the tasking to minimize tasking spam. For tasking involving all Schools, we may task to AMEDD, USAJFKSWC and JAG School by exception.]

DISTRIBUTION:
Commander
U.S. Army Combined Arms Center

Figure C-1. Sample Headquarters, U.S. Army Training and Doctrine Command tasking order, continued
ATXX-XXX {Office symbol of Originator}

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

U.S. Army Combined Arms Support Command
U.S. Army Center for Initial Military Training
U.S. Army Cadet Command
U.S. Army Recruiting Command
Centers of Excellence
U.S. Army Soldier Support Institute

Commandants, TRADOC Schools

Director, U.S. Army Center of Military History

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

CF: FCC (Army Capabilities Integration Center)
ETC.

Figure C-1. Sample Headquarters, U.S. Army Training and Doctrine Command tasking order, continued
Figure C-1. Sample Headquarters, U.S. Army Training and Doctrine Command tasking order, continued
Appendix D
Procedures and Formats for Readahead

D-1. Procedures for readahead

a. The OCG determines readahead requirements and forwards them to the SGS Saco. When a proponent is not identified, the SGS Saco assigns an office of primary responsibility as the HQ TRADOC staff lead. The Saco assigns ETMS2 control numbers and notifies designated action offices via official tasker. Lead will submit readahead packet electronically in accordance with instructions in paragraphs D-2a(1) through D-2a(4) and table D-1 on page 84.

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

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

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

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

f. Upon submission of the readahead to SGS, the Saco checks for format compliance and uploads the documents to a secure portal so the command group (CG, DCG/CoS, EDCG, DCoS, and CPG) can print and process accordingly.
Table D-1.
Configuration of readaheads

<table>
<thead>
<tr>
<th>Type of readahead</th>
<th>TAB A</th>
<th>TAB B</th>
<th>TAB C</th>
<th>TAB D</th>
<th>TAB E</th>
<th>TAB F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briefings</td>
<td>Executive Overview and top 4 bullets</td>
<td>Briefings</td>
<td>Point and/or Information Papers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CG Office Calls</td>
<td>Executive Overview</td>
<td>Biography (only if CG is not familiar with visitor)</td>
<td>Briefings (as appropriate, and with facing pages, as required)</td>
<td>Point and/or Information Papers</td>
<td>Social Schedule (as appropriate)</td>
<td>Visitor Template</td>
</tr>
<tr>
<td>Conferences</td>
<td>Executive Overview</td>
<td>Agenda</td>
<td>Participants</td>
<td>Briefings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distinguished Foreign Visits</td>
<td>Executive Overview</td>
<td>Itinerary</td>
<td>Biographies</td>
<td>Briefings</td>
<td>Country Information (as appropriate)</td>
<td></td>
</tr>
<tr>
<td>Installation Visits</td>
<td>Executive Overview</td>
<td>Briefings</td>
<td>Point and/or Information Papers</td>
<td>Biography/ Biographies (as appropriate)</td>
<td>Social Schedule (as appropriate)</td>
<td></td>
</tr>
<tr>
<td>Social Events</td>
<td>Executive Overview</td>
<td>Itinerary</td>
<td>Logistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking Engagements</td>
<td>Executive Overview</td>
<td>Speech</td>
<td>Itinerary</td>
<td>Point and/or Information Papers</td>
<td>Logistics</td>
<td></td>
</tr>
</tbody>
</table>

*Include visitor template for all visitors to TRADOC, except foreign visitors.

D-2. Format

a. Composition and transmittal.

(1) CG readaheads. All CG readaheads will be emailed electronically to the TRADOC SGS office. Submit readahead documents NLT 4 days prior to the event, or in accordance with the ETMS2 suspense via email to the TRADOC SGS office. Ensure all document file names for readahead electrons are clearly named (for example, TF 5, TAB A - Executive Overview, TAB B - Briefing Slides, etc.). SGS will upload CG readaheads to a secure portal and provide email notification to the command group. The respective command group offices will print the CG, DCG, EDCG, DCoS, and CPG copies of the readahead. If the readahead document changes, provide updates via email to the TRADOC SGS office. SGS will upload updated documents to the secure portal and notify the command group of the changes.

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

(4) DCoS readaheads. All DCoS readaheads will be sent electronically and directly to the DCoS office. Submit readahead documents no later than 2 days prior to the event via email to the DCoS Executive Assistant and the DCoS NCOIC and CC the DCoS XO.

b. TF 5. Forward all readaheads to the TRADOC SGS SAD at usarmy.jble.tradoc.mbx.hq-tradoc-sad@army.mil with a one-page TF 5, as outlined below. The following paragraphs on the TF 5 will include minimal information. Include expanded details in the executive overview. Subject line on TF 5 should read exactly like the subject of the actual tasking.

(1) PURPOSE. To complete the sentence Prepare the CG for... explain the 5Ws (see figure D-1 on page 86).

(2) DISCUSSION. Include your key discussion points.

(3) COORDINATION. Ensure pertinent coordination across TRADOC in accordance with TR 10-5. Consider early contact with CCD, CPG, OSJA, ESO, and SGS.

c. Table of contents. Place the table of contents as the first page under the TF 5. See figure D-2 on page 87 for a table of contents example.
READAHEAD GUIDANCE

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

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

Figure D-1. Readahead guidance
Visit of General (R) Moring  
3-4 Nov XX  
TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Overview</td>
<td>TAB A</td>
</tr>
<tr>
<td>Briefing</td>
<td>TAB B</td>
</tr>
<tr>
<td>Point Paper on Program Details</td>
<td>TAB C</td>
</tr>
<tr>
<td>Itinerary</td>
<td>TAB D</td>
</tr>
<tr>
<td>Participants/POCs</td>
<td>TAB E</td>
</tr>
<tr>
<td>Other Items of Interest</td>
<td>TAB F</td>
</tr>
<tr>
<td>Social Schedule</td>
<td>TAB G</td>
</tr>
<tr>
<td>Background Material</td>
<td>TAB H</td>
</tr>
<tr>
<td>General (R) Moring Biography</td>
<td>TAB H-1</td>
</tr>
<tr>
<td>AAR from Office Call (General Wilson and General Lewis)</td>
<td>TAB H-2</td>
</tr>
<tr>
<td>Logistical Requirements</td>
<td>TAB I</td>
</tr>
<tr>
<td>Work Plan</td>
<td>TAB J</td>
</tr>
</tbody>
</table>
D-3. Assembling readaheads

Description of readahead tabs.

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

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

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

d. Itinerary. The itinerary provides the when, where, and what in sequential order, and cross-references these events with details found at various tabs in the readahead book (see example at figure D-4 on page 92). Provide full itinerary for very important persons (VIPs) while in the company of the CG. Provide short comments on persons the VIP is scheduled to meet after the CG and why. This information could impact the CGs discussion with the VIP.

e. Participants/POCs. List attendees, including all from TRADOC, in descending order, senior official at top. Include grade, name, title, and organization. At the bottom, list POCs with primary responsibility for actions during the event. Include office telephone numbers to reach individuals during the event (including portable electronic device numbers), see figure D-5 on page 93 for an example. Email the list to appropriate command group office no later than 2 workdays prior to event and provide updates on participants as they occur. If the CG is attending, include a seating chart diagram of the meeting room (see figure 4-1 on page 56 and figure 4-2 on page 57). Do not provide the CG biographies of TRADOC personnel or other GOs that the CG knows or works with routinely.

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

g. Social schedule. Include as required. If there is no social event, omit this tab.
h. Background material. Include other biographies, historical information, and other related
documents (email, articles, white papers, etc.). Also, include any additional papers with a distinct
bearing on the purpose of the event involving the CG, but do not duplicate information contained
in the primary brief.

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

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

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

3. RECOMMENDATIONS. Actions or comments the CG should consider:
   a. Express that France is an extremely important ally and close friend of the U.S.
      Army-to-Army relations, in particular, are excellent, as evidenced by French and
      American Soldiers serving together in Operation Enduring Freedom.
   b. Endorse the utility of maintaining the full-time liaison and exchange personnel
      within the French and U.S. Armies. Highlight the key role that the French Army Senior
      Liaison to TRADOC and the TRADOC Senior Liaison to French Army play in keeping
      TRADOC and CDES synchronized.

4. STRATEGIC ANALYSIS.
   a. The French-U.S. Army liaison and exchange network remains robust and very
      beneficial.
   b. The French/U.S. Army Staff Talks program, in existence since 1979, has
      conducted 27 staff talks to date. Staff talks focus on doctrine, training and education,
      materiel and equipment, and logistics. These areas facilitate an ongoing dialogue on
      transformation-related topics. The theme for the 20XX staff talks is “Future Warfighting
      in Military Operations in Urban Terrain by a Digitized and Reinforced Combined Arms
      Brigade.”

5. MOST SIGNIFICANT ISSUES. Current U.S. objectives toward its relations with
   France:
   a. Encourage a strong French defense; encourage close French-NATO cooperation;
      and to maintain a bilateral defense relationship designed to maximize common interests
      around the globe.
   b. Since 2005, when the French military began its latest round of dramatic
      transformation, the French Army has shrunk by almost half (TAB C).

Figure D-3. Readahead executive overview
6. **ATTENDEES/PARTICIPANTS.** Principal attendees are General (R) Moring (former Chief of Staff of the French Army and creator of French Rapid Reaction Forces), Colonel Millard (Army Attaché at French Embassy in Washington, D.C., and former French Liaison Officer to HQ TRADOC). See TAB E for all participants.

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

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

Figure D-3. Readahead executive overview, continued
i. Logistics. Include transportation details (who, what, where, when, how) and billeting information for the CG. The OCG can provide this information.

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

k. Work plan. This tab contains a list of all AOs contributing to the readahead, the IPR schedule, and the After Action Report, which the AO compiles the week following the event. The AO is the primary user of this information, but it may be helpful when answering questions from the CG during IPRs or pre-briefs.
<table>
<thead>
<tr>
<th>DATE/TIME</th>
<th>WHAT</th>
<th>WHERE</th>
<th>TAB</th>
</tr>
</thead>
<tbody>
<tr>
<td>19 Oct XX 0500-0630</td>
<td>C21 Flight</td>
<td>LAFB to Kennedy Space Center (KSC)</td>
<td>A</td>
</tr>
<tr>
<td>0700-0745</td>
<td>Breakfast</td>
<td>KSC HQ Bldg Dining Facility</td>
<td>B</td>
</tr>
<tr>
<td>0800-0930</td>
<td>NASA Project Status Overview</td>
<td>KSC HQ Bldg, Rm 21</td>
<td>C</td>
</tr>
<tr>
<td>0945-1030</td>
<td>OMB Budget Briefing</td>
<td>KSC HQ Bldg, Rm 21</td>
<td>D</td>
</tr>
<tr>
<td>1045-1145</td>
<td>DOD Overview</td>
<td>KSC HQ Bldg, Rm 21</td>
<td>E</td>
</tr>
<tr>
<td>1200-1300</td>
<td>Working Lunch</td>
<td>KSC HQ Bldg, Rm 46</td>
<td></td>
</tr>
<tr>
<td>1300-1330</td>
<td>USAF Astronaut Selection Status Briefing</td>
<td>KSC HQ Bldg, Rm 35</td>
<td>F</td>
</tr>
<tr>
<td>1330-1430</td>
<td>Army Corps of Engineers Martian Facility Model</td>
<td>KSC Assembly Bldg</td>
<td></td>
</tr>
<tr>
<td>1445-1615</td>
<td>DOTMLPF Model Application Briefing</td>
<td>KSC VTC Facility</td>
<td>G</td>
</tr>
<tr>
<td>1615-1700(T)</td>
<td>Office Call with CINCSPACE</td>
<td>KSC HQ Bldg, Rm 7</td>
<td></td>
</tr>
<tr>
<td>1800-0100</td>
<td>Social/Dinner</td>
<td>KSC Club</td>
<td>H</td>
</tr>
<tr>
<td>20 Oct XX 0130-0300</td>
<td>C21 Flight</td>
<td>KSC to LAFB</td>
<td></td>
</tr>
</tbody>
</table>

Figure D-4. Readahead itinerary
1. **Video teleconference - After Action Review and Lessons Learned (3 Nov, 1600-1800)**

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

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

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

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

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

**POCs/Phone Numbers**

- XO to CG, CAC: LTC Bob Jones, DSN 552-XXXX, 913-XXX-XXXX
- CGSC, Staff Group Leader, LTC Tom Davis, DSN 552-XXXX, 913-XXX-XXXX

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**Figure D-5. Readahead participants/points of contact**
Appendix E
U.S. Army Training and Doctrine Command Form 5

E-1. Completing TF 5
See figure E-1 for a sample and instructions page to complete TF 5 for CG, DCG/CoS, EDCG, and DCoS correspondence.

E-2. Assembling the action
See figure 3-1 on page 43 for assembling the staff action package in the proper order.
Figure E-1. Sample U.S. Army Training and Doctrine Command Form 5
**Figure E-1. Sample TF 5, continued**

<table>
<thead>
<tr>
<th>CONCUR</th>
<th>NON-CONCUR</th>
<th>AGENCY</th>
<th>NAME (TITLE, LAST NAME)</th>
<th>PHONE (XXX-XXX-XXXX)</th>
<th>DATE (YYYY/MM/DD)</th>
<th>REMARKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SJA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CAC</td>
<td>Mr. White</td>
<td>(915) 684-0000</td>
<td>20XX0301</td>
<td>See statement TAB B</td>
</tr>
<tr>
<td></td>
<td></td>
<td>G-3/5/7</td>
<td>Mr. Black</td>
<td>(757) 501-0000</td>
<td>20XX0301</td>
<td>See statement TAB C</td>
</tr>
</tbody>
</table>

10. REMARKS BY SGS:

- RETURNED REQUESTING ADDITIONAL INFORMATION/CLARIFICATION
INSTRUCTIONS

PARENTHESES AT TOP FORM:
Fill in designation/classification (UNCLASSIFIED, CUI, etc.).

Block 1. ETMS2 CONTROL NUMBER:
If the action has been assigned a tasker number by the G-33 Tasking Office or SGS Staff Actions Division, enter that number.

Block 2. TODAY’S DATE:
Enter today’s date. The Army standard date format: YYYYMMDD. Example: 20220408.

Block 3. SUSPENSE DATE:
Use format: YYYYMMDD. If the action is responding to an external suspense, enter the date of the assigned suspense. If the suspense date is established internally, enter that date.

Block 4. OFFICE SYMBOL:
Enter the office symbol of the agency responsible for the action. Example: ATIM-RM.

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

Block 6. ROUTING: (TRADOC SGS use only.)
The TRADOC SGS will complete this block.

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

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

Block 9. STAFF COORDINATION:
When staffing an action for review and comment, include each office and POC’s information that the action is being staffed with, and include instructions for the addresses to indicate their concurrence by checking the corresponding block and returning it to the originator. If concurrence indicates “concur with comments,” include comments at appropriate tab.

Block 10. REMARKS BY TRADOC SGS: (TRADOC SGS use only.)
The TRADOC SGS will complete this block.

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

TRADOC FORM 5-E, APR 2022

Figure E-1. Sample TF 5, continued
Appendix F
Zone Improvement Plan (ZIP)+4 Address Format

F-1. Mandatory lines of address

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

Note. District of Columbia will be abbreviated as DC. See figure F-1 below.

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

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

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

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

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

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

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

Figure F-3. Example of a return ZIP+4 address
F-2. Optional lines of address

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st line</td>
<td>Office name line <em>(OPTIONAL)</em></td>
</tr>
<tr>
<td>2nd line</td>
<td>Attention line (individual’s name, office symbol) <em>(OPTIONAL)</em></td>
</tr>
<tr>
<td>3rd line</td>
<td>DOD activity name line <em>(MANDATORY)</em></td>
</tr>
<tr>
<td>4th line</td>
<td>Delivery address line <em>(MANDATORY)</em></td>
</tr>
<tr>
<td>5th line</td>
<td>City, state, ZIP code + 4 <em>(MANDATORY)</em></td>
</tr>
</tbody>
</table>

*Figure F-4. Optional and mandatory lines of address*

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

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

F-3. HQ TRADOC city designation

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

Appendix G

Public Distribution Lists

G-1. Command group email distribution lists

The command group email distribution lists include frequently used distribution lists such as commanders/commandants-TRADOC, chiefs-TRADOC, XO-TRADOC, SGS-TRADOC and TRADOC staff principals. These distribution lists are located on the global address list.

G-2. Guidance for using command group email distribution lists

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

Section I
Abbreviations and Acronyms

ABCA abbreviation, brevity code, or acronym
ACOM Army command
AHM Army Heritage Month
AHMC Army Heritage Month Committee
AMHS Automated Message Handling System
AO action officer
AR Army Regulation
ARIMS Army Records Information Management System
CAO Congressional Activities Office
CC courtesy copy
CCD Chief, Communication Directorate
CDO Command Diversity Office
CG commanding general
CGAC Command Group Actions Center
CIMT Center for Initial Military Training
CoS chief of staff
CPG commander’s planning group
CSA Chief of Staff, Army
CSM Command Sergeant Major
CUI controlled unclassified information
DA Department of the Army
DCG deputy commanding general
DCoS Deputy Chief of Staff (U.S. Army Training and Doctrine Command)
DCS deputy chief of staff
DCS, G-1/4 Deputy Chief of Staff, Personnel and Logistics
DCS, G-2 Deputy Chief of Staff, Intelligence
DCS, G-3/5/7 Deputy Chief of Staff, Operations, Plans, and Training
DCS, G-6 Deputy Chief of Staff, Command, Control, Communications, and Computers
DCS, G-8 Deputy Chief of Staff, Resource Management
DODD Department of Defense Directive
DODI Department of Defense Instruction
DSN Defense Switch Network
DTA Defense Travel Administrator
DTS Defense Travel System
DV distinguished visitor
EDCG Executive Deputy to the Commanding General
ESO Executive Services Office
ETMS2 Enterprise Task Management Software Solution
EXSUM executive summary
FORSCOM U.S. Army Forces Command
FOA field operating activity
FS Fiscal Service
G-33 Deputy Chief of Staff, G-3/5/7 Current Operations
GO general officer
HQDA Headquarters, Department of the Army
HQ headquarters
IA individual augmentation
IPR in-process review
ITA invitational travel authorization
MOA memorandum of agreement
MOU memorandum of understanding
NDEA non-designated entry agent
NIPRNET non-secure internet protocol router network
OCG Office of the Commanding General
OCONUS outside the continental United States
OCR office of coordinating responsibility
OPR office of primary responsibility
OMS Organizational Messaging Service
OSD Office of the Secretary of Defense
OSJA Office of the Staff Judge Advocate
PARD Priorities Analysis and Requirements Directorate
POC point of contact
PKI Public Key Infrastructure
RC Reserve Component
RRS-A Records Retention Schedule-Army
SA Support Agreement
SACO staff action control officer
SAORC Staff Action Officer Resource Center
SAD Staff Actions Division
SOOB Staff Officer Orientation Briefing
SES senior executive service
SGS Secretary of the General Staff
SJA Staff Judge Advocate
SIPRNET secure internet protocol router network
TASKORD tasking order
TDY temporary duty
TEC U.S. Army Training and Doctrine Command Enterprise Calendar
TF U.S. Army Training and Doctrine Command form
TR U.S. Army Training and Doctrine Command regulation
TRADOC U.S. Army Training and Doctrine Command
VCSA Vice Chief of Staff, Army
VIP very important person
VTC video teleconference
XO executive officer
ZIP zone improvement plan
Section II
Terms

This section contains no entries.

Section III
Special Abbreviations and Terms

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

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

Designated organization points of contact
The designated administrative individual, or team, within subordinate organizations, special activities, FOAs, schools and centers, and HQ TRADOC who interacts with the SGS SAD and G-33 Tasking Office on behalf of their organization.

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

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

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

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

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