

# **STP 12-42A35-SM-TG**

## **SOLDIER'S MANUAL and TRAINER'S GUIDE**

**MOS 42A**

**Human Resources Specialist**

**Skill Levels 3/4/5**

**DECEMBER 2003**

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# SOLDIER'S MANUAL and TRAINER'S GUIDE

## MOS 42A

### Human Resources Specialist

### Skill Levels 3, 4 and 5

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## PREFACE

This publication is for skill levels (SL) 3, 4, and 5 Soldiers holding Military Occupational Specialty (MOS) 42A and their trainers/first-line supervisors. It contains standardized training objectives in the form of task summaries, which can be used to train and evaluate Soldiers on critical tasks that support unit missions during wartime. Soldiers holding the MOS/SL 42A3, 4, and 5 should have access to this publication. It should be made available in the Soldier's work area, unit learning center, and unit library. Trainers and first-line supervisors should actively plan for Soldiers to have access to this publication. However, it is not intended that an individual copy be available for each Soldier holding the MOS/SL.

Users of this publication are encouraged to recommend changes and submit comments for its improvement. Comments should be keyed to a specific page, must be provided for each comment to ensure understanding and complete evaluation. Comments should be prepared using DA Form 2028 (Recommended Changes to Publications and Blank Forms) and forwarded directly to Commander, U.S. Army Soldier Support Institute, Training Development Directorate, ATTN: ATSG-TD, Fort Jackson, SC 29207-7025.

## CHAPTER 1

### Introduction

#### 1-1. GENERAL.

a. This Soldier Training Publication (STP) is the Soldier's Manual (SM) and Trainer's Guide (TG) that identifies the military occupational specialty (MOS) training requirement for individual Soldiers in MOS 42A3/4/5 (formerly 75H), Personnel Services Specialist. It is the primary MOS reference that supports the self-development and training for Soldiers possessing MOS 42A3/4/5. Therefore, commanders, trainers, and Soldiers should use this manual to plan, conduct, and evaluate training within their units.

b. To establish effective training plans and programs that integrate Soldier's, leader's, and collective tasks, use this manual with the following publications:

(1) Soldier's Manual of Common Tasks (SMCT). STP 21-24-SMCT for SL2 and above Soldiers.

(2) Army Training and Evaluation Programs' (ARTEP) Mission Training Plans (MTP).

ARTEP 12-402-MTP, Headquarters and Headquarters Detachment, Command and Group and Staff, Personnel Group

ARTEP 12-413-30-MTP, Postal Company (Direct Support/General Support)

ARTEP 12-417-30-MTP, Personnel Detachment

ARTEP 12-426-MTP, Personnel Service Battalion

ARTEP 12-602-MTP, Personnel Command

ARTEP 12-906-MTP, Headquarters and Headquarters Detachment, Replacement Battalion (CRC)

(3) FM 25-101, Battle Focused Training.

1-2. TASK SUMMARIES. Task summaries outline the wartime performance requirements of each critical task in this SMTG. They give both Soldiers and trainers the information necessary to prepare, conduct, and evaluate critical task training. As a minimum, task summaries include the information Soldiers must know and the skills they must perform/demonstrate to standards. Task summaries contain the format as follows:

a. Task Title. The task title identifies the action that the Soldier must perform/demonstrate.

b. Task Number. Task numbers are 11 alphanumeric characters that identify each task. Include this number and its title in any correspondence that relates to this task.

c. Conditions. The condition statement lists all the necessary equipment, tools, references, job aids and supporting personnel, for the Soldier to perform the task in wartime.

d. Standards. The task standards describe how well and to what level the Soldier must perform a task under wartime conditions. Standards are typically described in terms of accuracy, completeness and speed.

e. Evaluation Preparation. This section shows the necessary modifications to task performance in order to train and evaluate a task that normally cannot be trained to the wartime standard, under wartime conditions. It may also include special training and evaluation preparation instructions to accommodate these modifications, and any instructions to furnish the Soldier before evaluation.

f. Performance Measures. Performance measures are evaluation guides that identify the specific actions the Soldiers are to accomplish, to successfully complete the task. This SMTG lists specific actions in a "GO/NO GO" format.

g. Evaluation Guidance. This section shows the requirements (for example, number of performance measures receiving a "GO" on) for successfully completing the task.

h. References. This section identifies references that provide more detailed and thorough explanations of task performance requirements than that given in the task summary description.

1-3. SOLDIER'S RESPONSIBILITIES. Each Soldier is responsible for performing individual tasks, which the first-line supervisor identifies. The Soldier must perform the task to the standard listed in this STP. The Soldier's first line supervisor can clarify any questions about how to do a task, or which tasks in this STP the Soldier must perform. It is the Soldier's responsibility to ask the first-line supervisor for clarification. In addition, the first line supervisor knows how to perform each task and can direct the Soldier to the appropriate training materials.

1-4. NCO SELF-DEVELOPMENT AND THE SOLDIER'S MANUAL AND DISTANCE LEARNING.

a. Self-development is one of the key components of the leader development program. It is a planned, progressive, and sequential program followed by leaders to enhance and sustain their military competencies. It consists of individual study, research, professional reading, practice, and self-assessment. Under the self-development concept, the NCO, as an Army professional, is responsible for remaining current in all phases of the MOS.

b. The SMTG is the NCO's primary source for maintaining MOS proficiency.

c. Distance Learning (DL). Formal, nonresident training programs for TRADOC service schools and certain DOD/DA schools and agencies are available in several Distance Learning formats. For example, the Army Institute for Professional Development (AIPD) administers the Army Correspondence Course Program (ACCP), another important resource for NCO self-development for professional development DA Pamphlet 350-59, the ACCP Catalog, lists the courses and sub courses available in both the consolidated and the non-consolidated portions of the program. For information about ACCP courses and subcourses, compact disks available in distance learning classrooms, and other distance learning courseware, visit the Army Training Support Center (ATSC) website at: <http://www.atsc.army.mil/helpdesk/TrainingDelivery>.

d. Unit learning centers are valuable resources for planning self-development programs. They can help access enlisted career maps, training support products, and extension training materials.

1-5. TRAINING SUPPORT. This STP includes the following sections that provide additional training support information.

a. Glossary. The glossary is a comprehensive list of acronyms, abbreviations, and terms.

b. References. This section contains the references that support training for all tasks in this SMTG.



## CHAPTER 2

### Training Guide

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

2-2. SUBJECT AREA CODES. The MTP shows the relationship of a MOS skill level between duty position and critical tasks. These critical tasks are grouped by task commonality into subject areas. This section list subject area numbers and titles used through the MTP. These subject areas are used to define the training requirements for each duty position within a MOS.

#### Skill Level 3

- 13 REVIEW CLASSIFICATION
- 14 REVIEW ASSIGNMENTS
- 16 REVIEW EVALUATION REPORTS
- 17 REVIEW RECORDS
- 18 REVIEW SEPARATION PROCESSING
- 19 REVIEW PERSONNEL ACTIONS
- 21 REVIEW CASUALTY OPERATIONS
- 22 REVIEW AUTOMATED REPORTS
- 24 REVIEW OFFICE ADMINISTRATION
- 27 ESSENTIAL PERSONNEL SERVICES
- 28 DEPLOYMENT

#### Skill Level 4

- 26 SUSTAINMENT
- 27 ESSENTIAL PERSONNEL SERVICES
- 28 DEPLOYMENT
- 29 OPERATIONS AND WAR FIGHTING
- 30 REDEPLOYMENT
- 33 REVIEW MANAGEMENT MAINTENANCE AND CONTROL

2-3. CRITICAL TASK LIST. These section lists by general subject areas, the critical tasks to be trained in a MOS and the type of training required (resident, integration, or sustainment). Refer to the MOS Training Plan, Critical Task List.

**Subject Area column.** This column lists the subject area number and title in the same order as listed in paragraph 2-2 above.

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

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

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

|              |                     |
|--------------|---------------------|
| <b>BNCOC</b> | Basic NCO Course    |
| <b>ANCOC</b> | Advanced NCO Course |
| <b>UNIT</b>  | Trained in the Unit |

Figure 2-1. Training Locations

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

|           |                |
|-----------|----------------|
| <b>BA</b> | - Biannually   |
| <b>AN</b> | - Annually     |
| <b>SA</b> | - Semiannually |
| <b>QT</b> | - Quarterly    |
| <b>MO</b> | - Monthly      |
| <b>BW</b> | - Bi-weekly    |
| <b>WK</b> | - Weekly       |

Figure 2-2. Sustainment Training Frequency Codes

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

**Critical Tasks List**

**MOS TRAINING PLAN  
42A35**

**CRITICAL TASKS**

| Subject Area                  | Task Number   | Title  | Training Location | Sust Tng Freq | Sust Tng SL |
|-------------------------------|---------------|--|-------------------|---------------|-------------|
| <b>Skill Level 3</b>          |               |  |                   |               |             |
| 13. REVIEW CLASSIFICATION     | 805C-42A-3400 | Review MOS Classification/Reclassification Actions               | BNCOC             | QT            | 3           |
| 14. REVIEW ASSIGNMENTS        | 805C-42A-3411 | Review Processing of Enlisted Distribution Assignment            | BNCOC             | AN            | 3           |
|                               | 805C-42A-3414 | Review a Request for Reassignment Due to Extreme Family Problems | BNCOC             | QT            | 3           |
| 16. REVIEW EVALUATION REPORTS | 805C-42A-3423 | Review a Completed Noncommissioned Officer Evaluation Report     | BNCOC             | AN            | 3           |
|                               | 805C-42A-3424 | Review a Completed Officer Evaluation Report (OER)               | BNCOC             | QT            | 3           |
| 17. REVIEW RECORDS            | 805C-42A-3431 | Review Maintenance of the Officer Record Brief (ORB)             | BNCOC             | QT            | 3           |
|                               |               |  |                   |               |             |

|                                  |               |  |       |    |     |
|----------------------------------|---------------|--|-------|----|-----|
| 18. REVIEW SEPARATION PROCESSING | 805C-42A-3444 | Review Separation Documents  | BNCOC | QT | 3   |
| 19. REVIEW PERSONNEL ACTIONS     | 805C-42A-3463 | Review the Processing of a Request and Authority for Leave, Pass, or Permissive Temporary Duty | BNCOC | QT | 3   |
| 21. REVIEW CASUALTY OPERATIONS   | 805C-42A-3473 | Review Emergency Notification Data   | BNCOC | QT | 3   |
|                                  | 805C-42A-3474 | Review Casualty Reports  | BNCOC | QT | 3   |
| 22. REVIEW AUTOMATED REPORTS     | 805C-42A-3495 | Review Wartime Strength Accounting/Reporting   | BNCOC | AN | 3   |
|                                  | 805C-42A-3406 | Review the Unit Manning Report (UMR) to Ensure Proper Utilization                              | BNCOC | AN | 3   |
| 24. REVIEW OFFICE ADMINISTRATION | 805C-42L-3002 | Review Correspondence  | BNCOC | AN | 3   |
|                                  | 805C-42L-3044 | Maintain Initial Distribution Subscription   | BNCOC | AN | 3   |
|                                  | 805C-42A-3006 | Prepare Personnel Readiness Data for Unit Status Report  | BNCOC | SA | 3   |
| 27. ESSENTIAL PERSONNEL SERVICES | 805C-42A-3418 | Process Semi-Centralized Enlisted Promotions, SGT Through SSG                                  | BNCOC | QT | 3   |
| 28. DEPLOYMENT                   | 805C-42A-3488 | Review Personnel Asset Inventory (PAI)   | BNCOC | AN | 3   |
| <b>Skill Level 4</b>             |               |  |       |    |     |
| 26. SUSTAINMENT                  | 805C-42A-4012 | Review the Structure of the Army Division  | ANCOC | AN | 4-5 |
|                                  | 805C-42A-4014 | Supervise Reassignment Processing  | ANCOC | SA | 4-5 |
| 27. ESSENTIAL PERSONNEL SERVICES | 805C-42A-4021 | Review Flow of Personnel Actions   | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4022 | Manage Transfers and Discharges  | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4023 | Manage Awards and Decorations  | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4024 | Monitor Finance Actions  | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4025 | Review Personnel Evaluation System   | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4026 | Review Personnel Readiness Data from the Unit Status Report (USR)                              | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4027 | Manage Officer Promotions  | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4028 | Manage Enlisted Promotions and Reductions  | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4029 | Process MOS Medical Retention Board  | ANCOC | SA | 4-5 |
| 28. DEPLOYMENT                   | 805C-42A-4032 | Monitor Manifesting Procedures   | ANCOC | SA | 4-5 |
|                                  | 805C-42A-4031 | Conduct Soldier Readiness Plan   | ANCOC | SA | 4-5 |

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|  |               |   |       |    |     |
|--|---------------|---|-------|----|-----|
| 29. OPERATIONS<br>AND WAR<br>FIGHTING                  | 805C-42A-4033 | Review Mobilization Procedures                      | ANCOC | SA | 4-5 |
|  | 805C-42A-4041 | Prepare Personnel Estimates                         | ANCOC | SA | 4-5 |
|  | 805C-42A-4042 | Manage Casualty System                              | ANCOC | SA | 4-5 |
|  | 805C-42A-4043 | Conduct Replacement Operations                      | ANCOC | SA | 4-5 |
|  | 805C-42A-4044 | Manage Wartime Strength Reporting/Accounting System | ANCOC | SA | 4-5 |
| 30.<br>REDEPLOYMENT                                    | 805C-42A-4051 | Manage Demobilization Procedures                    | ANCOC | SA | 4-5 |
| 33. REVIEW<br>MANAGEMENT<br>MAINTENANCE<br>AND CONTROL | 805C-42A-4011 | Review the Personnel Organization Structure         | ANCOC | AN | 4-5 |

## CHAPTER 3

### MOS/Skill Level Tasks

#### Skill Level 3

#### Subject Area 13: REVIEW CLASSIFICATION

#### Review MOS Classification/Reclassification Actions

#### 805C-42A-3400

**Conditions:** Given a requirement to review MOS classification/reclassification actions, access to:

- a. Completed DA Form 4187/4187E (Request for Personnel Action).
- b. DA Pam 611-21 (Military Occupational Classification and Structure).
- c. AR 614-200 (Enlisted Assignments and Utilization Management).
- d. DA Total Army Human Resources Command (HRC) Reenlistment/Reclassification In-Out Call Message.
- e. AAA-347 Enlisted Record Brief (ERB).
- f. Standard office supplies and equipment.

#### Standards:

1. Verify that the Soldier is qualified for MOS classification.
2. Verify that the Soldier is qualified for MOS reclassification.

#### Performance Steps

1. Determine if the request for classification/reclassification is initiated at the Soldier's request, or is mandated by the Department of the Army (DA) or a medical screening board.
  - a. Read the request for classification/reclassification action documented on a DA Form 4187-E.
    - (1) Verify the Soldier meets the eligibility criteria in Item 4-i.
    - (2) Verify the Soldier's signature and date are written in Item 6.
    - (3) Verify the Soldier's commander has approved the request in Item 7.
    - (4) Verify the commander's signature is written in Item 9.
  - b. Read the Soldier's request for classification/reclassification action and verify one of the following conditions exists:
    - (1) Verify the Soldier's MOS no longer exists on the DA HRC Reenlistment/Reclassification In-Out Call Message.
    - (2) Verify the Soldier is no longer physically capable of working in the MOS based on the qualification data listed on the ERB.
    - (3) Verify there is an erroneous award entry on the Soldier's ERB.
    - (4) Verify if disciplinary action taken under the UCMJ adversely affects the Soldier's qualification in the MOS based on the qualification data listed in of the ERB.
    - (5) Verify the Soldier cannot satisfactorily perform the duties of his or her MOS.
    - (6) Verify the Soldier has been appointed to or reduced to a rank that is not in line with or authorized for the Soldier's PMOS based on the qualification data listed on the ERB.
    - (7) Verify the withdrawal of the PMOS has been directed by the CG HRC.
2. Verify the Soldier is qualified for classification into the MOS.
  - a. Ensure the Soldier's current skill level is correctly assigned.

### Performance Steps

- (1) Verify skill level 0 is reserved for the MOS of a Soldier who has no prior service and is undergoing initial entry training for an award of PMOS based on the qualification criteria in DA PAM 611-21.
  - (2) Verify the skill level for a Soldier undergoing reclassification is correct in rank based on the qualification criteria in DA PAM 611-21.
  - (3) Verify the PMOS and Secondary Military Occupational Specialty (SMOS) skill levels are the same based on the qualification criteria in DA PAM 611-21.
  - (4) Verify the skill levels are not indicated for Career Progression Military Occupational Specialty (CPMOS) based on the qualification criteria in DA PAM 611-21.
- b. Ensure the Soldier's current Skill Qualification Identifier (SQI) is correctly assigned.
- (1) Verify the use of the SQI is not restricted by the qualification criteria in DA PAM 611-21.
  - (2) Verify the commander in custody of the Soldier's MPRJ or the training activity commander has announced the award of the SQI in orders based on the qualification criteria in DA PAM 611-21.
  - (3) Verify the SQI "F" is not awarded to a Soldier in MOS 91A and 91B (unless awarded by the commander/dean, US Army School of Aviation Medicine), and the Soldier has completed the Flight Medical Airman Course based on the qualification criteria in DA PAM 611-21.
  - (4) Verify the SQI shown for the Soldier's PMOS is the SQI with the highest order of precedence based on the qualification criteria in DA PAM 611-21.
  - (5) Verify the SQI is recorded in the fifth position of the PMOS based on the qualification criteria in DA PAM 611-21.
  - (6) Verify that a SQI of "X" or "Q" is not replaced with any other SQI, regardless of precedence while the soldier is assigned to an authorized drill sergeant or equal opportunity advisor position based on the qualification criteria in DA PAM 611-21.
  - (7) Verify the lower precedence SQI removed from the PMOS due to the award of a higher precedence SQI is recorded for the SMOS based on the qualification criteria in DA PAM 611-21.
  - (8) Verify the most recently awarded SQI is recorded first for those SQI with no order of precedence based on the qualification criteria in DA PAM 611-21.
- c. Verify the Additional Skill Identifier (ASI) is correctly assigned.
- (1) Verify the ASI is authorized for use with the assigned PMOS based on the qualification criteria in DA PAM 611-21.
  - (2) Verify the ASI is assigned as part of the PMOS based on the qualification criteria in DA PAM 611-21.
  - (3) Verify the ASI is awarded in both the PMOS and SMOS in which the Soldier is qualified based on the qualification criteria in DA PAM 611-21.
  - (4) Verify the ASI is withdrawn when the related MOS is withdrawn unless the new MOS is also related to that ASI based on the qualification criteria in DA PAM 611-21.
- d. Verify the language identification is correctly assigned.
- (1) Verify the language code is awarded in orders based on the qualification criteria in DA PAM 611-21.
  - (2) Verify the language code assigned to the PMOS is that of the control language in which the Soldier is most proficient based on the qualification criteria in DA PAM 611-21.
  - (3) Verify the correct language code is assigned to a multilingual Soldier.
    - (a) Check the language code for which an enlistment bonus (EB) or selective reenlistment bonus (SRB) has been received is assigned to the Soldier's PMOS.
    - (b) Verify the language code of the position to which the Soldier is currently assigned is shown in the PMOS if no EB or SRB has been received.
    - (c) Verify the language code of the language in which the Soldier most recently trained is listed.

## Performance Steps

3. Verify that the Soldier is qualified for reclassification of his or her MOS.
  - a. Ensure the Soldier is qualified to request a reclassification.
    - (1) Verify the Soldier's current MOS has a Yes-Out Call if the Soldier is requesting reclassification and the desired MOS has a Yes-In Call at the appropriate rank in DA HRC Reenlistment/Reclassification In-Out Call Message.
    - (2) Verify the Soldier has satisfied all service remaining requirements.
      - (a) Check the qualification data on the Soldier's ERB.
      - (b) Check the qualification criteria listed for the MOS in DA PAM 611-21.
    - (3) Verify the Soldier is qualified for reclassification in the desired MOS.
      - (a) Check the qualification data on the Soldier's ERB.
      - (b) Check the qualification criteria listed for the MOS in DA PAM 611-21.
    - (4) Verify the Soldier has successfully completed the appropriate MOS training.
      - (a) Check the qualification data on the Soldier's ERB.
      - (b) Check the qualification criteria listed for the MOS in DA PAM 611-21.
    - (5) Verify the Soldier has successfully completed On-the-Job Training (OJT) of 60 days or more under the direction of a Headquarters, Department of the Army (HQDA) service school or training activity.
      - (a) Check the qualification data on the Soldier's ERB.
      - (b) Check the qualification criteria listed for the MOS in DA PAM 611-21.
    - (6) Verify the Soldier, as a civilian, acquired skills having a direct MOS counterpart based on the qualification data on his or her ERB.
    - (7) Verify the Soldier's PMOS has been withdrawn based on the qualification data on his or her ERB.
    - (8) Verify the findings of the reclassification board authorized the Soldier's reclassification.
  - b. Ensure the Soldier's current assignment renders him or her available for submission of voluntary request for reclassification.
    - (1) Verify the Soldier was not alerted for Permanent Change of Station (PCS) based on the assignment information on the ERB.
    - (2) Verify reclassification would not result in reassignment of the Soldier outside the Cohesion, Operational Readiness and Training (COHORT) unit during the unit's life cycle, period of stabilization, or other than prescribed commander's assignment window based on the assignment information on the ERB.
    - (3) Verify the Soldier is not within eight months of Expiration Term of Service (ETS) based on the assignment information on the ERB.
    - (4) Verify training can be accomplished before the Date the Soldier is Eligible for Return from Overseas (DEROS) based on the assignment information on the ERB.
  - c. Ensure the Soldier's training in a MOS, or the award of a MOS during the current enlistment, does not prohibit MOS reclassification.
    - (1) Verify the Soldier has not received funds for travel.
    - (2) Verify the Soldier was either not selected for training, or did not use a school quota granted by the CG HRC.
    - (3) Verify the Soldier has not received training or an award in compliance with reclassification instructions from CG HRC.
      - (a) Check the Soldier's awards on the ERB.
      - (b) Check the Soldier's military education on the ERB.
    - (4) Verify the Soldier is not a first-term Soldier.
    - (5) Verify the Soldier has not received an Enlistment Bonus (EB) or Selective Reenlistment Bonus (SRB) for this period of service.
  - d. Ensure the first-term Soldier can be reclassified as an exception.
    - (1) Verify the Soldier is serving in an over strength MOS and desires retraining into a shortage MOS.
      - (a) Check the DA HRC In/Out Call Message List.
      - (b) Check the written remarks in Section IV of DA Form 4187.
    - (2) Verify the Soldier has satisfied all service remaining requirements.

### Performance Steps

- (3) Verify reclassification is mandatory, normal career progression, or there are changes in the MOS structure.
    - (a) Check the Soldier's assignment history on the ERB.
    - (b) Check the MOS progression chart in DA PAM 611-21.
  - (4) Verify reassignment was directed by CG HRC based on the written remarks in Section IV of DA Form 4187.
4. Verify the Soldier's MOS is accurate for classification/reclassification.
    - a. Ensure the correct skill level is assigned to the Soldier based on the qualification data on his or her ERB.
    - b. Ensure the ASI is correctly assigned to the Soldier based on the qualification data on his or her ERB.
    - c. Ensure the SQI is correctly assigned to the Soldier based on the qualification data on his or her ERB.
  5. Verify the Soldier is qualified for the award of a MOS for classification/reclassification.
    - a. Verify the Soldier meets the physical profile series (PULHES) for training in the MOS based on requirements specified in DA PAM 611-21 and qualification data on his or her ERB.
    - b. Verify the Soldier meets skills/training requirements for the MOS based on the requirements specified in DA PAM 611-21 and the qualification data on his or her ERB.
    - c. Verify the Soldier meets the security requirements for the MOS based on the requirements specified in DA PAM 611-21 and the qualification data on his or her ERB.
  6. Verify the reclassification board proceedings are attached to the request.
    - a. Verify a statement declaring that all the MOSs with a Yes-In call at the appropriate rank in the DA HRC Reenlistment In-Out Call Message List were considered and documenting the reason the Soldier qualifies for an exception is attached.
    - b. Verify a statement from the Soldier's commander or supervisor about the Soldier's performance in his or her current duty position is attached.
    - c. Verify a commander's evaluation of the Soldier's potential for success and continuation on active duty in the recommended MOS is attached.
  7. Instruct the clerk to forward the required documents to HQDA for reclassification.
    - a. Instruct the clerk to forward reclassification orders and support documents to HQDA.
    - b. Instruct the clerk to forward exceptions and support documents to HQDA.
    - c. Instruct the clerk to forward reclassifications that cannot be accomplished prior to DEROS to HQDA.
    - d. Instruct the clerk to forward reclassifications that require recoupment of bonus to HQDA.
    - e. Instruct the clerk to forward copies of board findings to HQDA.
    - f. Instruct the clerk to forward awards of SQI to HQDA.
    - g. Instruct the clerk to forward notifications of any actions causing MOS disqualification to HQDA.
  8. Instruct the clerk to forward the required documents to HQDA for classification.
    - a. Instruct the clerk to forward classification orders and support documents to HQDA.
    - b. Instruct the clerk to forward exceptions and support documents to HQDA.
    - c. Instruct the clerk to forward classifications that cannot be accomplished prior to DEROS to HQDA.
    - d. Instruct the clerk to forward classifications that require recoupment of bonus to HQDA.
    - e. Instruct the clerk to forward copies of board findings to HQDA.
    - f. Instruct the clerk to forward awards of SQI to HQDA.
    - g. Instruct the clerk to forward notifications of any actions causing MOS disqualification to HQDA.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier handles MOS Classification/Reclassification Actions. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the



Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Determined if the request for classification/reclassification is initiated at the Soldier's request, or is mandated by the Department of the Army (DA) or a medical screening board.
2. Verified the Soldier is qualified for classification into the MOS.
3. Verified the Soldier is qualified for reclassification of his or her PMOS.
4. Verified the Soldier's MOS is accurate for classification/reclassification.
5. Verified the Soldier is qualified for the award of a MOS for classification/reclassification.
6. Verified the reclassification board proceedings are attached to the request.
7. Instructed the clerk to forward the required documents to HQDA for reclassification.
8. Instructed the clerk to forward the required documents to HQDA for classification.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

- AR 614-200
- DA FORM 4187
- DA FORM 4187-E
- DA PAM 611-21

**Related**

Subject Area 14: REVIEW ASSIGNMENTS

**Review Processing of Enlisted Distribution Assignment  
805C-42A-3411**

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

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

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

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

**Performance Steps**

1. Review the screening of the EDAS cycle.
  - a. Review weekly EDAS cycle from Personnel Automation Section (PAS).
  - b. Ensure a reassignment file for each Soldier on the current EDAS cycle is complete.
    - (1) Verify there are copies of all reassignment forms and documents.
      - (a) Verify DA Form 4036-R is included if Soldier is being assigned overseas.
      - (b) Verify DA Form 4787-R is included if Soldier is being assigned overseas.
      - (c) Verify DA Form 5117-R is included to monitor the Soldier through the reassignment process.
      - (d) Verify copies of any reclassification, medical examination board, physical evaluation board, or physical evaluation board actions that relate directly to the reassignment action and documents qualifying the Soldier for permanent change of station (PCS) movement, deletion or deferment are included.
    - (2) Ensure blocks 1 through 15 of DA Form 5118-R are complete.
      - (a) Verify Soldier's name is in Block 1.
      - (b) Verify Soldier's SSN is in Block 2.
      - (c) Verify Soldier's grade is in Block 3.
      - (d) Verify Soldier's Primary Military Occupational Specialty (PMOS) is in Block 4.
      - (e) Verify Soldier's additional skill identifier (ASI) is in Block 5.
      - (f) Verify Soldier's control language is in Block 6.
      - (g) Verify Soldier's current unit is in Block 7.
      - (h) Verify Soldier's current unit processing code (UPC) is in Block 8.

**Performance Steps**

- (i) Verify Soldier's gaining unit is in Block 9.
  - (j) Verify Soldier's EDAS Cycle number is in Block 10.
  - (k) Verify date in Block 11.
  - (l) Verify arrival date is in Block 12.
  - (m) Verify Soldier's AI Military Occupational Specialty (MOS) is in Block 13.
  - (n) Verify AI ASI is in Block 14.
  - (o) Verify AI language is in Block 15.
- c. Review the Special Management Command (SMC) process of each Soldier using DA Form 5118-R.
- (1) Verify the appropriate boxes (yes, no, N/A) in questions 17 through 27 in Section B - General Eligibility Status - are checked.
  - (2) Verify the appropriate boxes (yes, no, N/A) in questions 28 through 34 in Section C - Time in Service Requirements Status are checked.
- d. Ensure ineligible Soldiers have been identified.
- e. Ensure deferment/deletion tasks have been initiated for ineligible Soldiers.
- f. Ensure DA Form 5118-R for eligible Soldiers has been forwarded to their battalion for completion of Part II, III, & IV of the form.
- g. Verify Sections II, III & IV of DA Form 5118-R from HRC are completed by BNS1.
- h. Ensure the eligible Soldiers that require special handling procedures for processing are identified.
- i. Ensure the appropriate tasks for Soldiers that require special handling are initiated.
  - j. Ensure eligible Soldiers who must acquire additional service time for reassignment are identified.
- k. Ensure tasks for additional service remaining requirements are initiated.
- l. Ensure there is a copy of a completed DA Form 5118-R placed in the Soldier's reassignment file.
- m. Ensure there is the appropriate label for the Military Personnel Record Jacket (MPRJ).
- n. Ensure the reassignment MPRJ distinctive label to the Personnel Information Work Center is forwarded.
2. Review reassignment briefing and individual interview.
- a. Ensure there are four completed copies of the Reassignment Notification Memorandum for the Soldier completing DA Form 5118-R, Part III.
  - b. Ensure any special processing requirements are annotated during initial screening of the assignment by Military Personnel Division (MPD) or Personnel Services Battalion (PSB).
  - c. Ensure the interview date is established and this date is on the Reassignment Notification Memorandum.
  - d. Ensure a copy of DA Form 5118-R, Parts IV-VII, is attached to the Reassignment Notification Memorandum.
  - e. Ensure a copy of the "Handout for Personnel Assignment DA Directed Schooling in Conjunction with PCS" to Reassignment Notification Memorandum is attached, if the Soldier requires temporary duty (TDY) schooling.
  - f. Ensure the Reassignment Notification Memorandum original, two copies, and enclosures are forwarded to Battalion (BnS1) for action.
  - g. Ensure an additional copy of the Reassignment Notification Memorandum is forwarded to the Retention and Transition Work Center (if Soldier does not have enough remaining service to meet the requirements for reassignment).
  - h. Ensure a copy of the Reassignment Notification Memorandum is placed in the Soldier's reassignment file.
  - i. Review the Reassignment Notification Memorandum 1st End from Battalion S1 to Commander, Personnel Service Battalion (PSB) and DA Form 5118-R to identify any disqualification when received from BnS1.
  - j. Initiate a deletion or deferment task if Reassignment Notification Memorandum 1st End from Battalion S1 to Commander, PSB and DA Form 5118-R reveal any disqualifications.

### Performance Steps

- k. Ensure any special processing requirements such as Exceptional Family Member Program (EFMP), Homebase Advance Assignment Program (HAAP), and married Army couples are identified.

3. Review Part 1 of a Soldier's DA Form 5118-R to the Soldier's MPRJ and ERB to ensure that all normal and special eligibility requirements for reassignment are met.

- a. Ensure that Part 1 - Military Personnel Division/Personnel Service Company - is accurate.
  - (1) Verify Soldier's name is entered in Block 1.
  - (2) Verify Soldier' SSN is entered in Block 2.
  - (3) Verify Soldier's grade is entered in Block 3.
  - (4) Verify Soldier's PMOS is entered in Block 4.
  - (5) Verify Soldier's ASI is entered in Block 5.
  - (6) Verify Soldier's control language is entered in Block 6.
  - (7) Verify Soldier's current unit is entered in Block 7.
  - (8) Verify Soldier's current UPC is entered in Block 8.
  - (9) Verify name of the Soldier's gaining unit is entered in Block 9.
  - (10) Verify Soldier's EDAS Cycle number is entered in Block 10.
  - (11) Verify current date is entered in Block 11.
  - (12) Verify Soldier's arrival date is entered in Block 12.
  - (13) Verify Soldier's A1 MOS is entered in Block 13.
  - (14) Verify Soldier's A1 ASI is entered in Block 14.
  - (15) Verify Soldier's A1 language is entered in Block 15.
- b. Ensure Section A - Special Management Command Status - is completed. Compare the check mark in the "yes," "no," or "N/A" box in Block 16 to the Reassignment Eligibility rules.
- c. Ensure that Section B - General Eligibility Status - is completed.
  - (1) Compare the check mark in the "yes," "no," or "N/A" box in Block 17 to the Reassignment Eligibility rules.
  - (2) Compare the check mark in the "yes," "no," or "N/A" box in Block 18 to the Reassignment Eligibility rules.
  - (3) Compare the check mark in the "yes," "no," or "N/A" box in Block 19 to the Reassignment Eligibility rules.
  - (4) Compare the check mark in the "yes," "no," or "N/A" box in Block 20 to the Reassignment Eligibility rules.
  - (5) Compare the check mark in the "yes," "no," or "N/A" box in Block 21 to the Reassignment Eligibility rules.
  - (6) Compare the check mark in the "yes," "no," or "N/A" box in Block 22 to the Reassignment Eligibility rules.
  - (7) Compare the check mark in the "yes," "no," or "N/A" box in Block 23 to the Reassignment Eligibility rules.
  - (8) Compare the check mark in the "yes," "no," or "N/A" box in Block 24 to the Reassignment Eligibility rules.
  - (9) Compare the check mark in the "yes," "no," or "N/A" box in Block 25 to the Reassignment Eligibility rules.
  - (10) Compare the check mark in the "yes," "no," or "N/A" box in Block 26 to the Reassignment Eligibility rules.
  - (11) Compare the check mark in the "yes," "no," or "N/A" box in Block 27 to the Reassignment Eligibility rules.
- d. Ensure Section C - Time in Service Requirements Status - is completed.
  - (1) Compare the check mark in the "yes," "no," or "N/A" box in Block 28 to the Reassignment Eligibility rules.
  - (2) Compare the check mark in the "yes," "no," or "N/A" box in Block 29 to the Reassignment Eligibility rules.
  - (3) Compare the check mark in the "yes," "no," or "N/A" box in Block 30 to the Reassignment Eligibility rules.

**Performance Steps**

- (4) Compare the check mark in the "yes," "no," or "N/A" box in Block 31 to the Reassignment Eligibility rules.
  - (5) Compare the check mark in the "yes," "no," or "N/A" box in Block 32 to the Reassignment Eligibility rules.
  - (6) Compare the check mark in the "yes," "no," or "N/A" box in Block 33 to the Reassignment Eligibility rules.
  - (7) Compare the check mark in the "yes," "no," or "N/A" box in Block 34 to the Reassignment Eligibility rules.
4. Review deletions/deferments request.
- a. Ensure DA Form 5118-R is complete.
    - (1) Ensure Part 1 - Military Personnel Division/Personnel Service Company - is accurate.
      - ( a ) Verify Soldier's name is entered in Block 1.
      - ( b ) Verify Soldier's SSN is entered in Block 2.
      - ( c ) Verify Soldier's grade is entered in Block 3.
      - ( d ) Verify Soldier's PMOS is entered in Block 4.
      - ( e ) Verify Soldier's ASI is entered in Block 5.
      - ( f ) Verify Soldier's control language is entered in Block 6.
      - ( g ) Verify Soldier's current unit is entered in Block 7.
      - ( h ) Verify Soldier's current UPC is entered in Block 8.
      - ( i ) Verify name of the Soldier's gaining unit is entered in Block 9.
      - ( j ) Verify Soldier's EDAS Cycle number is entered in Block 10.
      - ( k ) Verify current date is entered in Block 11.
      - ( l ) Verify Soldier's arrival date is entered in Block 12.
      - ( m ) Verify Soldier's A1 MOS is entered in Block 13.
      - ( n ) Verify Soldier's A1 ASI is entered in Block 14.
      - ( o ) Verify Soldier's A1 language is entered in Block 15.
    - (2) Ensure Section A - Special Management Command Status - is completed.
    - (3) Compare the check mark in the "yes," "no," or "N/A" box in Block 16 to Table 2-1, Reassignment Eligibility rules, to determine if the Soldier requires a deletion or deferment.
    - (4) Ensure Section B - General Eligibility Status - is completed.
      - ( a ) Compare the check mark in the "yes," "no," or "N/A" box in Block 16 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( b ) Compare the check mark in the "yes," "no," or "N/A" box in Block 17 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( c ) Compare the check mark in the "yes," "no," or "N/A" box in Block 18 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( d ) Compare the check mark in the "yes," "no," or "N/A" box in Block 19 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( e ) Compare the check mark in the "yes," "no," or "N/A" box in Block 20 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( f ) Compare the check mark in the "yes," "no," or "N/A" box in Block 21 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( g ) Compare the check mark in the "yes," "no," or "N/A" box in Block 22 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
      - ( h ) Compare the check mark in the "yes," "no," or "N/A" box in Block 23 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.

**Performance Steps**

- ( i ) Compare the check mark in the "yes," "no," or "N/A" box in Block 24 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- ( j ) Compare the check mark in the "yes," "no," or "N/A" box in Block 25 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- ( k ) Compare the check mark in the "yes," "no," or "N/A" box in Block 27 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- (5) Ensure Section C - Time in Service Requirements Status - is complete.
  - ( a ) Compare the check mark in the "yes," "no," or "N/A" box in Block 28 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( b ) Compare the check mark in the "yes," "no," or "N/A" box in Block 29 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( c ) Compare the check mark in the "yes," "no," or "N/A" box in Block 30 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( d ) Compare the check mark in the "yes," "no," or "N/A" box in Block 31 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( e ) Compare the check mark in the "yes," "no," or "N/A" box in Block 32 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( f ) Compare the check mark in the "yes," "no," or "N/A" box in Block 33 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( g ) Compare the check mark in the "yes," "no," or "N/A" box in Block 34 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( h ) Review Block 35 for remarks to determine if Soldier requires a deletion or deferment.
  - ( i ) Review Block 36a for the reassignment clerk's signature.
  - ( j ) Review Block 36b for the date.
- (6) Ensure Section D - Duty Status - is complete.
  - ( a ) Compare the check mark in the "yes," "no," or "N/A" box in Block 37 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( b ) Compare the check mark in the "yes," "no," or "N/A" box in Block 38 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( c ) Compare the check mark in the "yes," "no," or "N/A" box in Block 39 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( d ) Compare the check mark in the "yes," "no," or "N/A" box in Block 40 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( e ) Compare the check mark in the "yes," "no," or "N/A" box in Block 41 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( f ) Compare the check mark in the "yes," "no," or "N/A" box in Block 42 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.

**Performance Steps**

- (g) Compare the check mark in the "yes," "no," or "N/A" box in Block 43 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- (h) Compare the check mark in the "yes," "no," or "N/A" box in Block 44 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- (7) Ensure Section E - Pending Action Status - is complete.
  - (a) Compare the check mark in the "yes," "no," or "N/A" box in Block 45 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (b) Compare the check mark in the "yes," "no," or "N/A" box in Block 46 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (c) Compare the check mark in the "yes," "no," or "N/A" box in Block 47 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (d) Compare the check mark in the "yes," "no," or "N/A" box in Block 48 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (e) Compare the check mark in the "yes," "no," or "N/A" box in Block 49 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (f) Compare the check mark in the "yes," "no," or "N/A" box in Block 50 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (g) Compare the check mark in the "yes," "no," or "N/A" box in Block 51 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (h) Compare the check mark in the "yes," "no," or "N/A" box in Block 52 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (i) Compare the check mark in the "yes," "no," or "N/A" box in Block 53 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (j) Review Block 54 - Remarks - to determine if Soldier requires a deletion or deferment.
  - (k) Review Block 55a to ensure there is a signature from Battalion S1.
  - (l) Review Block 55b to ensure there is a date.
- (8) Ensure Section F - Personal Status - is complete.
  - (a) Compare the check mark in the "yes," "no," or "N/A" box in Block 56 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (b) Compare the check mark in the "yes," "no," or "N/A" box in Block 57 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (c) Compare the check mark in the "yes," "no," or "N/A" box in Block 58 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (d) Compare the check mark in the "yes," "no," or "N/A" box in Block 59 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - (e) Compare the check mark in the "yes," "no," or "N/A" box in Block 60 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.

### Performance Steps

- ( f) Compare the check mark in the "yes," "no," or "N/A" box in Block 61 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- ( g) Compare the check mark in the "yes," "no," or "N/A" box in Block 62 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- ( h) Compare the check mark in the "yes," "no," or "N/A" box in Block 63 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- (9) Ensure Section G - To and From OCONUS Status - is complete.
  - ( a) Compare the check mark in the "yes," "no," or "N/A" box in Block 64 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( b) Compare the check mark in the "yes," "no," or "N/A" box in Block 65 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( c) Compare the check mark in the "yes," "no," or "N/A" box in Block 66 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( d) Compare the check mark in the "yes," "no," or "N/A" box in Block 67 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( e) Compare the check mark in the "yes," "no," or "N/A" box in Block 68 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( f) Compare the check mark in the "yes," "no," or "N/A" box in Block 69 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( g) Compare the check mark in the "yes," "no," or "N/A" box in Block 70 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
  - ( h) Compare the check mark in the "yes," "no," or "N/A" box in Block 71 to Table 2-1, Reassignment Eligibility rules, to determine if Soldier requires a deletion or deferment.
- b. Ensure all supporting documentation accompanies DA Form 5118-R.
  - (1) Verify there is the appropriate Reassignment Notification Memorandum.
  - (2) Verify there is a DA Form 3739, if applicable.
  - (3) Verify there is a DA Form 4187, if applicable.
  - (4) Verify there is a DA Form 268, if applicable.
  - (5) Verify there is a DA Form 3349, if applicable.
  - (6) Verify there is a DA Form 2339, if applicable.
  - (7) Verify there is a DA Form 3340-R, if applicable.
- 5. Ensure all departure documents are prepared and processed.
  - a. Verify Permanent Change Station (PCS) orders are attached.
  - b. Verify a completed DD Form 1610 is attached, if applicable.
  - c. Verify there is a Memorandum for authorization for travel at government expense, if applicable.
  - d. Verify there is a nonconcurrent family travel authorization, if applicable.
  - e. Verify there is a passport, if applicable.
- 6. Ensure a date of loss (DLOS) transaction has been prepared.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes Enlisted Distribution Assignments. Allow the Soldier to practice until the Soldier feels qualified and prepared for



the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Reviewed the screening of the EDAS cycle.
2. Reviewed the reassignment briefing and individual interview.
3. Reviewed Part 1 of a Soldier's DA Form 5118-R to the Soldier's MPRJ and ERB to ensure that all normal and special eligibility requirements for reassignment are met.
4. Reviewed deletions/deferments request.
5. Ensured all departure documents are prepared and processed.
6. Ensured a date of loss (DLOS) transaction has been prepared.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 600-8-105  
 AR 600-8-11  
 AR 614-30  
 DA FORM 4036-R  
 DA FORM 4787-R  
 DA FORM 5117-R  
 DA FORM 5118-R

**Related**

**Review a Request for Reassignment Due to Extreme Family Problems**  
**805C-42A-3414**

**Conditions:** Given a Request for Reassignment Due to Extreme Family Problems, a completed DA Form 3739 (Application for Assignment/Deletion/Deferment for Extreme Family Problems), Enlisted Records Brief (ERB), access to Personnel Records, AR 614-200, and standard office supplies and equipment.

**Standards:**

1. Verify that the Soldier's personal data on application is accurate.
2. Verify the applicant's DA Form 3739 is complete.
3. Verify the applicant meets the basic eligibility criteria.
4. Verify a request from a Soldier that meets the basic eligibility criteria.
5. Verify that documents attached to DA Form 3739, as necessary, to substantiate the request for reassignment.
6. Verify that in a case involving legal or medical problems, the application has been referred to a staff judge advocate (SJA) or the local surgeon for evaluation and recommendations.
7. Confirm application package prepared by subordinate is accurate and complete.

**Performance Steps**

1. Verify Soldier's personal data on application is accurate.
  - a. Compare the personal data on the DA Form 4187 to the data in the Soldier's personnel records for accuracy.
  - b. Verify Soldier's name, SSN and personal data on the application against the Soldier's personnel records.
2. Verify applicant's DA Form 3739 is complete.
  - a. Verify there is an "x" entered in the first block in the "required section" and the name of the installation/activity is entered after "reassignment to" block.
  - b. Verify Soldier's last and first name and middle initial are entered in Item 2.
  - c. Verify Soldier's social security number is entered in Item 3.
  - d. Verify Soldier's rank is entered in Item 4.
  - e. Verify the Soldier's enlistment/reenlistment bonus indicator has a zero in it and is entered in Item 5.
  - f. Verify Soldier's enlistment obligation is entered in Item 6.
  - g. Verify Soldier's five-character Primary Military Occupational Specialty (PMOS) is entered in Item 7.
  - h. Verify Soldier's five-character Secondary Military Occupational Specialty (SMOS) is entered in Item 8.
  - i. Verify Soldier's last permanent change of station (PCS) date is entered in Item 9.
  - j. Verify Soldier's current status is entered with an "x" next to the appropriate block in Item 10.
  - k. Verify Soldier's assigned/attached unit is entered in item 11a.
  - l. Verify Soldier's Defense Switched Network (DSN) number is entered in Item 11b.
  - m. Verify Soldier's date eligible to return from overseas (DEROS) or an N/A is entered in Item 12.
  - n. Verify Soldier's date returned from overseas (DROS) or N/A is entered in Item 13.
  - o. Verify Soldier's marital status is entered in Item 14.
  - p. Verify Soldier's date of marriage or an N/A is entered in Item 15.

### Performance Steps

- q. Verify name, age, and current address of spouse or an N/A is entered in Item 16a-c.
  - r. Verify Soldier's basic active service date (BASD) is entered in Item 17.
  - s. Verify Soldier's pay entry basic date (PEBD) is entered in Item 18.
  - t. Verify Soldier's expiration term of service (ETS) is entered in Item 19.
  - u. Verify Soldier's phone number and area code or "none" is entered in Item 20.
  - v. Verify Soldier's authorized dependent information is entered in Item 21.
  - w. Verify Soldier's parents information or "deceased" is entered in Item 22a.
  - x. Verify Soldier's information on loco parentis if it's applicable in item 22b.
  - y. Verify Soldier's sibling information is entered in Item 23.
  - z. Verify Soldier has indicated whether he/she has submitted any previous requests for reassignment/deletion in Item 24.
  - aa. Verify Soldier has written an explanation for requesting reassignment/deferment in Item 25
  - ab. Verify Soldier has indicated he or she has attempted to remedy the situation in Item 26.
  - ac. Verify there are remarks in Item 27 if DA Form 3739 submitted by a Soldier on leave.
  - ad. Instruct Soldier to read the statement, sign, and date in Items 28a-c.
  - ae. Verify Soldier has signed and dated the form in the signature block.
3. Verify applicant meets the basic eligibility criteria.
    - a. Interpret the explanation in Item 24 of DA Form 3937 to verify that the Soldier's problem neither existed nor was it foreseen at the time of the latest entry in active duty.
    - b. Interpret the explanation in Item 24 of Form 3739 to verify that if the problem involves a family member, that he or she is qualified for the Soldier's aid.
    - c. Interpret the explanation in Item 25 DA of Form 3739 to verify the family problem is temporary and is expected to be resolved within a year.
    - d. Interpret the explanation in Item 25 of DA Form 3937 to verify the Soldier's problem cannot be resolved through the use of leave, correspondence, help of family members or other parties, or power of attorney.
    - e. Interpret the explanation in Item 25 of DA Form 3739 to verify the Soldier is the only member of the family who is available to help with the family problem.
  4. Verify request from a Soldier that meets the basic eligibility criteria, but normally does not warrant approval, is signed by the Soldier's immediate commander.
    - a. Read and interpret Item 25 of DA Form 3739.
    - b. Insure the request is signed by the commander.
  5. Verify that one of the following documents is attached to DA Form 3739, as necessary, to substantiate the request for reassignment.
    - a. Ensure a signed statement from the attending physician giving the specific medical diagnosis and prognosis of illness for the medical problem is attached.
    - b. Ensure a signed statement, such as a court order, divorce decree, or other legal document from a licensed attorney stating the problem, is attached.
    - c. Ensure support documents from responsible persons such as clergymen, social workers, or court clerks who have personal knowledge of the problem is attached.
    - d. Ensure a statement advising the Soldier that moving and traveling expenses for his or her family members are not authorized government expenses has been witnessed by an officer and is attached.
  6. Verify in a case involving legal or medical problems, that the application has been referred to a staff judge advocate (SJA) or the local surgeon for evaluation and recommendations.
  7. Confirm application package prepared by subordinate is accurate and complete.
    - a. Verify DA Form 4187 and previous comments to application.
    - b. Retain copy for correspondence.
    - c. Set up suspense for receipt of comeback copy and reply.
    - d. Submit outgoing correspondence with individual records to supervisor.

**Evaluation Preparation:** This task can be evaluated by using the performance measures. This method of evaluation is appropriate if the NCO supervises SL 1/2 Soldiers who process applications for reassignment. Use the evaluation guide to grade performance after the NCO has verified applications processed by SL 1/2 Soldiers.

**Performance Measures**

**GO   NO GO**

1. Verified the Soldier's personal data on application is accurate.
2. Verified the applicant's DA Form 3739 is complete.
3. Verified the applicant meets the basic eligibility criteria.
4. Verified request from a Soldier that meets the basic eligibility criteria, but normally does not warrant approval, is signed by the Soldier's immediate commander.
5. Verified at least one of the following documents is attached to DA Form 3739 as necessary to substantiate the request for reassignment.
6. Verified in a case involving legal or medical problems, the application has been referred to a staff judge advocate (SJA) or the local surgeon for evaluation and recommendations.
7. Confirmed application package prepared by subordinate is accurate and complete.

**Evaluation Guidance:**

Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 614-200  
DA FORM 3739  
DA PAM 600-8

**Related**

## Subject Area 16: REVIEW EVALUATION REPORTS

**Review a Completed Noncommissioned Officer Evaluation Report**  
**805C-42A-3423**

**Conditions:** Given the requirement to review the completed Noncommissioned Officer Evaluation Report (NCOER) (DA Form 2166-8) and access to AR 623-205, AR 600-9, Military Personnel Message (MILPER MSG) 02-114, MILPER MSG 02-122.

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

**Performance Steps**

1. Verify the data entered in blocks a through k and blocks n and o of Part I (ADMINISTRATIVE DATA) are correct.
  - a. Verify the NCO's name, social security number (SSN), rank, date of rank, and primary MOS Code (PMOSC) are entered correctly in blocks a through e.
  - b. Verify NCO's unit, organization, station, zip code or Army Post Office (APO), and major command (MACOM) are entered correctly in block f.
  - c. Verify block g (REASON FOR SUBMISSION) contains the correct report code and report title.
  - d. Verify the year and month of the beginning date and the year and month of the thru date of the evaluation period covered by this NCOER are entered correctly in block h.
  - e. Verify the actual number of rated months covered by this NCOER has been computed correctly and entered in block i.
  - f. Verify the correct non-rated codes, if any, have been recorded in block j.
  - g. Verify the number of authorized enclosures, if any, included with the NCOER has been correctly entered in block k.
    - (1) Verify any enclosures do not exceed one page per enclosure and have been prepared on 8 1/2 X 11-inch bond paper.
    - (2) Verify each enclosure, if any, contains the rated NCO's full name, SSN, and grade.
    - (3) Verify each enclosure, if any, specifies the period covered by the NCOER.
    - (4) Verify the originator of any enclosure has stated a reason for its inclusion with the NCOER and has signed it.
  - h. Verify the correct two-place Major Command (MACOM) assignment code for the rated NCO is entered in block n.
  - i. Verify the correct four position alphanumeric Personnel Service Center (PSC) Code is entered in block o.
2. Verify that Parts II, III, IV, and V of the NCOER are administratively correct.
  - a. Verify all administrative and bullet portions of these parts have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face.
  - b. Verify all box marks and signatures have been typed or handwritten in black ink.
3. Verify the information contained in Part II (AUTHENTICATION) of the NCOER is complete and accurate.
  - a. Verify the name, SSN, rank, PMOS/Branch, organization, and duty assignment for the rater, senior rater, and reviewer are entered correctly in their respective blocks (a, b, and d) by referring to the ERB.
  - b. Verify the senior rater obtained the rated NCO's signature or entered the appropriate "NCO refuses to sign" or "NCO unavailable for signature" and entered the date in block c.
  - c. Verify the rater, senior rater, and reviewer signed and dated the report in their respective blocks (a, b, and d).
  - d. Verify the reviewer placed an X in the CONCUR WITH RATER AND SENIOR RATER EVALUATIONS box, or in the NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL box in block e.

### Performance Steps

- e. Verify the reviewer included an enclosure with the NCOER to explain his or her placing an X in the NONCONCUR box.
4. Verify the information provided by the rater in Part III (DUTY DESCRIPTION) of the NCOER is complete and accurate.
    - a. Verify the rated NCO's principal duty title and duty MOSC are recorded correctly in blocks a and b by referring to his or her ERB and Military Personnel Record Jacket (MPRJ).
    - b. Verify the rated NCO's daily duties and the scope of those duties are recorded in block c in short, concise phrases which begin with action verbs and are separated by semi-colons.
    - c. Verify the rated NCO's areas of special emphasis, rater, senior rater and reviewers AKO E-mail address his recorded in block d and his or her appointed duties listed in block e consist of a list of tasks and duties which are separated by semi-colons.
    - d. Verify the rated NCO's counseling dates are recorded in six-digit year, month, and day sequence in the appropriate boxes in block f.
    - e. Verify that, in the absence of any counseling dates in block f, the senior rater entered a comment in Part V, block e that explains why counseling of the rated NCO was not accomplished.
  5. Verify the information provided by the rater in Part IV (VALUES/NCO RESPONSIBILITIES) of the NCOER is complete and accurate.
    - a. Verify the rater entered a typed or handwritten X in black ink in either the YES or NO box of each of the seven values/NCO responsibilities in block a.
    - b. Verify the rater entered mandatory bullet comments in the space provided at the bottom of the page for each X he or she placed in a NO box of block a.
    - c. Verify each bullet comment by the rater is short and concise, begins with an action verb or the possessive pronoun his or her.
    - d. Verify the rater avoided using the rated NCO's name or the personal pronouns he or she in any of the comment sections of Part IV.
    - e. Verify that no comments refer to prior or subsequent NCOERs of the rated NCO, to performance or incidents which occurred before or after this particular rating period, or to any punitive or administrative action being taken or planned against the rated NCO.
    - f. Verify no comments in the NCOER refer to unverified derogatory information concerning the rated NCO or contain inappropriate or arbitrary remarks related to race, color, religion, gender, or national origin.
    - g. Verify the rated NCO's full NAME, SSN, THRU DATE, and AKO E-mail address have been entered correctly at the top of page 2 of the NCOER..
    - h. Verify the rater placed an X in the appropriate box in each block, b through f.
    - i. Verify the rater explained all EXCELLENCE or NEEDS IMPROVEMENT ratings in blocks b through f with specific bullet comments in the space provided on the right side of each block.
    - j. Verify that the rater entered PASS, FAIL, or PROFILE in the APFT box of block c and the year and month of the APFT results or the year and month the profile was given.
    - k. Verify the rater entered a bullet comment in block c to explain why he or she rated the NCO as FAIL or PROFILE or left the APFT box blank.
    - l. Verify the rater completed the HEIGHT/WEIGHT box of block "c" by recording the rated NCO's verified height and weight as of the rater's signature date and denoting the rated NCO's compliance or noncompliance (YES or NO) with the provisions of AR 600-9.
      - (1) Verify the rater entered a bullet comment in block c to explain a noncompliance rating or to explain why he or she left the HEIGHT/WEIGHT box blank.
      - (2) Verify the rater entered a bullet comment in block c to explain a profile entry.
    - m. Verify these parts of the NCOER contain no acronyms.
    - n. Verify each comment is preceded by a lower case o (bullet), there is no more than one bullet comment per line, and all comments are double-spaced between bullets.
    - o. Verify these parts of the NCOER do not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
    - p. Verify the NCOER is intact and has not been taped or stapled.

## Performance Steps

6. Verify the information provided by the rater and senior rater in Part V (OVERALL PERFORMANCE AND POTENTIAL) of the NCOER is complete and accurate.
  - a. Verify the rater entered an X in the appropriate box in block a.
  - b. Verify a NCO who is rated as being AMONG THE BEST in block a has not been rated as NEEDS IMPROVEMENT in blocks b through f in Part IV.
  - c. Verify the rater listed in block b at least two and no more than three future duty positions (job titles) in which the rated NCO could best serve the Army at his or her current or next higher grade.
  - d. Verify the senior rater evaluated the NCO's overall performance and potential for promotion and/or service in positions of greater responsibility by placing Xs in the appropriate boxes in blocks c and d.
    - (1) Verify the senior rater included bullet comments in block e to expand upon his or her overall performance/potential ratings in blocks c and d.
    - (2) Verify the senior rater addressed a MARGINAL rating by the rater in block a and Fair or Poor ratings by himself or herself (blocks c and d) with specific bullet comments in block e.
    - (3) Verify the senior rater included a bullet comment in block e which states, "Senior rater does not meet minimum qualifications," to explain why he or she left blocks c and d blank.
7. Verify Part I of the NCOER is completed, and the form is distributed correctly and expeditiously.
  - a. Verify block L of Part I is completed correctly.
    - (1) Verify a typed or handwritten X in black ink is recorded in box 1 of block L when a copy of the completed NCOER, along with copies of any authorized enclosures, is to be given directly to the rated NCO.
    - (2) Verify a typed or handwritten X in black ink is recorded in box 2 of block L when a copy of the NCOER and any authorized enclosures are to be forwarded to the rated NCO.
    - (3) Verify the six-digit year, month, and day on which the completed NCOER is to be given to the rated NCO or forwarded to him or her is recorded in black ink in block L.
  - b. Verify no changes need to be made to the completed NCOER.
  - c. Verify the Personnel Services Battalion (PSB) representative initials block m in black ink.
  - d. Verify a copy of the completed NCOER and copies of any authorized enclosures are handed to the rated NCO or forwarded to him or her.
    - (1) Verify a copy of the completed NCOER, along with copies of any authorized enclosures, is forwarded in a sealed envelope to the rated NCO via the distribution center or first-class mail when it could not be hand delivered to him or her.
    - (2) Verify a copy of the completed NCOER, along with copies of any authorized enclosures, is forwarded via certified mail to a rated NCO who refused to sign the report and the report could not be hand delivered to him or her.
  - e. Verify the original of the completed NCOER and any authorized enclosures are forwarded intact to the U.S. Army Enlisted Records and Evaluation Center (USAEREC).
    - (1) Verify the NCOER is placed in a large envelope with cardboard backing to ensure safe mailing.
    - (2) Verify the envelope is sealed and addressed to the Commander, USAEREC (HRC Indianapolis), ATTN: PCRE-RE, 8899 East 56th Street, Indianapolis, IN 46249-5301.
    - (3) Verify the envelope is forwarded to USAEREC via first-class mail in time to reach its destination not later than 60 days after the ending month of the NCOER.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes Noncommissioned Officer Evaluation Reports. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

**Performance Measures**

**GO**    **NO GO**

1. Verified the data entered in blocks a through k and blocks n and o of Part I (Administrative Data) are correct.
2. Verified Parts II, III, IV, and V of the NCOER were administratively correct.
3. Verified the information contained in Part II (AUTHENTICATION) of the NCOER was complete and accurate.
4. Verified the information provided by the rater in Part III (DUTY DESCRIPTION) of the NCOER was complete and accurate.
5. Verified the information provided by the rater in Part IV (VALUES/NCO RESPONSIBILITIES) of the NCOER was complete and accurate.
6. Verified the information provided by the rater and senior rater in Part V (OVERALL PERFORMANCE AND POTENTIAL) of the NCOER was complete and accurate .
7. Verified Part I of the NCOER was completed correctly, and that the form was distributed correctly and expeditiously.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 600-9  
AR 623-205  
AR 680-29  
DA FORM 2166-8  
DA FORM 2166-8-1  
MILPER MESSAGE 02-114  
MILPER MESSAGE 02-122

**Related**



**Review a Completed Officer Evaluation Report (OER)**  
**805C-42A-3424**

**Conditions:** Given a requirement to review a completed OER and access to AR 623-105, AR 600-9 and AR 40-501.

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

**Performance Steps**

1. Verify the data entered in Blocks a through p of Part I are correct.
  - a. Ensure the appropriate information is entered.
    - (1) Verify the officer's name is entered in all capital letters in Block a.
    - (2) Verify the officer's social security number (SSN) is entered in Block b.
    - (3) Verify the officer's rank is entered in Block c.
    - (4) Verify the officer's date of rank is entered using the 4-digit year format in Block d.
    - (5) Verify the officer's branch (BR) is entered in Block e.
    - (6) Verify the officer's designated specialties are entered in Block f.
    - (7) Verify officer's unit, organization, station, zip code or APO, and major command (MACOM) are entered in Block g.
    - (8) Verify Block h contains the correct report code and report title.
    - (9) Verify the year and month of the beginning date and the year and month of the through date of the evaluation period covered by this OER are entered in Block i using the 4-digit year format.
    - (10) Verify the actual number of rated months covered by this OER has been computed and entered in Block j.
    - (11) Verify the appropriate non-rated codes are entered in Block k, if applicable.
    - (12) Verify the total number of enclosures or 0 is entered in Block l.
    - (13) Verify the box indicating the disposition of the rated officer's copy of the report is marked in Block m.
    - (14) Verify the initials of the senior raters military personnel officer is entered in Block n.
    - (15) Verify the code for the raters MACOM is entered in Block o.
    - (16) Verify the four-character alphanumeric personnel service battalion (PSB) code is entered in Block p.
  - b. Ensure the information is entered correctly.
    - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or 12 point for computers.
    - (2) Verify all check marks and signatures have been handwritten in black ink.
2. Verify the information contained in Part II of the OER is complete.
  - a. Ensure the appropriate information is entered.
    - (1) Verify the name, SSN, rank, and position of the rater are entered in Block a by referring to the rating scheme.
    - (2) Verify the name, SSN, rank, and position of the intermediate rater, if applicable, are entered in Block b by referring to the rating scheme.
    - (3) Verify the name, SSN, rank, position, organization, branch, telephone number, and email address of the senior rater are entered in Block c by referring to the rating scheme.
    - (4) Verify the senior rater obtained the rated officer's signature or entered the appropriate "Officer refuses to sign" or "Officer unavailable for signature" and entered the date in Block e.
    - (5) Verify the rater signed and dated the report in Block a.
    - (6) Verify the intermediate rater, if appropriate, signed and dated the report in Block b.
    - (7) Verify the senior rater signed and dated the report in Block c.
    - (8) Verify the referred report box is checked, if applicable per paragraph 3-32.

### Performance Steps

- b. Ensure the information is entered correctly.
  - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or 12 point for computers.
  - (2) Verify all check marks have been entered and signatures have been handwritten in black ink.
3. Verify the information provided by the rater in Part III of the OER is complete.
  - a. Ensure the appropriate information is entered.
    - (1) Verify the rated officer's principal duty title and duty Area of Concentration (AOC)/Military Occupational Specialty (MOS) are recorded in Blocks a and b by referring to his or her ORB.
    - (2) Verify the rated officer's daily duties and the scope of those duties are recorded in Block c in a succinct narrative, written in prose (not bullet) format.
    - (3) Verify specific functions required of the rated officer are written in Block c.
    - (4) Verify if the rated officer is serving under dual supervision, the statement "Officer serving under dual supervision" is entered as the first line of Block c.
  - b. Ensure the information is entered correctly.
    - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or 12 point for computers.
    - (2) Verify this part of the OER contains no acronyms.
    - (3) Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
4. Verify the information provided by the rater in Part IV of the OER is complete and accurate.
  - a. Ensure the appropriate information is entered.
    - (1) Verify the rater placed an "x" in either the "yes" or "no" block of each of 7 values in Part IVa.
    - (2) Verify the rater placed an "x" in either the "yes" or "no" block for each attributes/skills/actions in part IVb.
    - (3) Verify the rater entered the officer's physical fitness test results, height, weight, and date in part IVc.
    - (4) Determine if rater is rating a LT or WO1.
      - (a) Verify the rater placed an "x", when rating a LT or WO1, either in the "yes" or "no" block in Part IVd to indicate compliance with the requirements of the Junior Officer Developmental Support Form.
      - (b) Verify the rater placed an "x", when not rating a LT or WO1, in the "na" block in Part IVd.
  - b. Ensure the information is entered.
    - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or 12 point for computers.
    - (2) Verify all check marks have been entered.
5. Verify the information provided by the rater in Part V of the OER is complete.
  - a. Ensure the appropriate information is entered.
    - (1) Verify name, SSN, and dates covered by this report are entered at the top of page 2 of the OER.
    - (2) Verify rater placed an "x" in the appropriate box in Part Va.
    - (3) Verify rater entered comments on specific aspects of performance and potential in Part Vb.
      - (a) Verify a comment is entered if rated officer received a "no" rating in Part IVa or IVb.
      - (b) Verify "Exempt from APFT requirement" is entered if rated officer has not taken the APFT within the last twelve months.
      - (c) Verify "Exempt from weight control standards of AR 600-9" is entered if rated officer is pregnant.
      - (d) Verify a comment is made if rated officer received a "FAIL" in the APFT entry or a "no" in height/weight entry.

**Performance Steps**

- (4) Verify the rater entered narrative comments in Part Vc.
    - (a) Verify rater entered comments indicating any unique skills/expertise which rated officer possesses.
    - (b) Verify rater entered an explanation for "other" rating in Part Va.
  - b. Ensure the information is entered correctly.
    - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or 12 point for computers.
    - (2) Verify this part of the OER contains no acronyms.
    - (3) Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
    - (4) Verify this part of the OER does not contain any references to unproven derogatory information, marital status, or spouse.
    - (5) Verify this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin.
6. Verify the information provided by the intermediate rater, if applicable, in Part VI of the OER is complete.
- a. Ensure the appropriate information is entered.
    - (1) Verify the intermediate rater included specific comments which address the rated officer's performance and potential.
    - (2) Verify the intermediate rater has entered the statement, "I am unable to evaluate the rated officer because I have not been (his or her) rater for the required number of days," when it is appropriate.
    - (3) Verify for an intermediate rater who assumes the role of the rater he or she cites the authority and reasons for doing so in Part VI.
  - b. Ensure the information is entered.
    - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or 12 point for computers.
    - (2) Verify this part of the OER contains no acronyms.
    - (3) Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
    - (4) Verify this part of the OER does not contain any references to unproven derogatory information, marital status, or spouse.
    - (5) Verify this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin.
7. Verify the information provided by the senior rater in Part VII of the OER is complete.
- a. Ensure the appropriate information is entered.
    - (1) Verify the senior rater placed an "x" in the appropriate box of Part VIIa and entered the total number of officers of the same grade that he/she senior rates.
    - (2) Determine if rated officer is a General Officer.
      - (a) Verify the senior rater did not complete Part VIIb if rated officer is a General Officer.
      - (b) Verify the senior rater placed an "x" in the appropriate box in Part VIIb identifying the potential of the rated officer compared with officers senior rated in the same grade, if rated officer is not a General Officer.
    - (3) Verify the senior rater entered narrative comments in Part VIIc.
      - (a) Verify comments were made focusing on rated officer's potential and future assignments.
      - (b) Verify comments were made referencing anything unusual about the report.
      - (c) Verify the following statement was entered if the minimum number of days of supervision is not met: "I am unable to evaluate the rated officer because I have not been (his or her) intermediate rater for the required number of days."
    - (4) Verify the senior rater completed Part VIIc.

### Performance Steps

- ( a ) Verify senior rater entered three future assignments for which the officer is best suited.
- ( b ) Verify the senior rater entered a recommended career field if rated officer is a CPT through LTC.
- b. Ensure the information is entered.
  - (1) Verify all administrative portions of this part have been prepared by typing or printing machine in either pica (10 pitch) or elite (12 pitch) type face or (12 point) for computers.
  - (2) Verify these parts of the OER contain no acronyms.
  - (3) Verify this part of the OER does not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
  - (4) Verify this part of the OER does not contain any references to unproven derogatory information, marital status, or spouse.
  - (5) Verify this part of the OER does not contain any inappropriate or arbitrary remarks or comments drawing attention to differences relating to race, color, religion, gender, age, or national origin.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures. This method of evaluation is appropriate if the NCO supervises SL 1/2 Soldiers who process the OER. Use the performance measures to grade performance after the NCO has verified the OER processed by SL 1/2 Soldiers.

### Performance Measures

**GO    NO GO**

1. Verified the data entered in Blocks a through p of Part I are correct.
2. Verified the information contained in Part II of the OER is complete.
3. Verified the information provided by the rater in Part III of the OER is complete.
4. Verified the information provided by the rater in Part IV of the OER is complete and accurate.
5. Verified the information provided by the rater in Part V of the OER is complete.
6. Verified the information provided by the intermediate rater, if applicable, in Part VI of the OER is complete.
7. Verified the information provided by the senior rater in Part VII of the OER is complete.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

### References

#### Required

AR 40-501  
AR 600-9  
AR 623-105  
DA FORM 67-9

#### Related

## Subject Area 17: REVIEW RECORDS

**Review Maintenance of the Officer Record Brief (ORB)****805C-42A-3431**

**Conditions:** Given a requirement to review maintenance of the ORB and to identify the correct documents that must be forwarded for placement in the Official Military Personnel File (OMPF)/Career Management Individual File (CMIF), access to an ORB printout with pen changes, a newly printed ORB with the changes entered into eMILPO, and access to:

- a. DA Form 873 (Certificate of Clearance and/or Security Determination)
- b. SF Form 88 (Report of Medical Examination)
- c. DA Form 3349 (Physical Profile)
- d. DD Form 1343 (Notification of Change in Service Member's Official Records)

**Standards:**

1. Ensure that the ORB is processed only for an officer who is eligible to receive one.
2. Verify the reason why HRC generated an ORB for the officer by locating the officer's supporting source documents.
3. Verify that the officer's ORB is properly audited during his or her birth month.
4. Verify the OFRC followed the proper ORB correction procedures by submitting a correction of ORB memorandum to the appropriate authority.
5. Review the officer's feedback ORB when it is received from HRC to ensure that the audit changes have been made.
6. Verify the proper disposition procedures are followed in filing, distributing, and disposing of the officer's ORB, and his or her source documents.

**Performance Steps**

1. Ensure the ORB is processed only for an officer who is eligible to receive one.
  - a. Verify HRC issued the ORB as required.
  - b. Verify HRC issued the ORB to a gaining command or organization when a request for orders was issued concerning the officer under the Total Army Officer Management Information System (TOPMIS).
  - c. Verify HRC issued the ORB to replace an officer's missing or lost ORB.
  - d. Verify HRC issued the ORB at the request of the officer.
    - (1) Verify the officer established that he or she is having difficulty in correcting a significant or excessive amount of errors on his or her current ORB by submitting a request memorandum to his or her Military Personnel Division (MPD)/Personnel Service Center (PSC).
    - (2) Verify the MPD/PSC submitted a memorandum, along with documentation substantiating the needed change(s) and/or correction(s), requesting that the corrections be made to the officer's ORB to Commander, HRC, ATTN: TAPC-OPZ-IS, Alexandria, VA 22332-0410.
      - (a) Verify the memorandum included the officer's name (last, first, middle initial), grade, social security number (SSN), branch, and date of birth.

### Performance Steps

- (b) Verify the memorandum specified the data element(s) on the ORB where the correction needs to be made, cited the incorrect data which needs to be replaced exactly as it is shown on the ORB, and specified the correct data to be recorded on the document.
  - (c) Ensure the request was submitted only after the corrections were attempted on eMILPO and were unsuccessful or were not permitted.
  - e. Verify HRC issued the ORB as one of three which it issues annually in connection with the officer's birth month.
    - (1) Verify the ORB was issued so it could be audited during the officer's birth month.
      - (a) Verify this ORB is annotated in the top margin with "/ Audit."
      - (b) Verify that the ORB was issued by HRC in the month prior to the officer's birth month.
      - (c) Verify when the officer did not receive a birth month ORB, OFRC requested HRC to issue one.
      - (d) Verify the request was not submitted earlier than 30 days after receipt of shipment of ORBs for officers with the same birth month.
      - (e) Verify the request was sent to Commander, PERSINSCOM, ATTN: ASQNI-DOI, Alexandria, VA 22332-0400.
    - (2) Verify the ORB was issued to verify any necessary changes and/or corrections to the audit ORB were made.
      - (a) Verify this ORB is annotated in the top margin with the word "FEEDBACK."
      - (b) Verify the ORB is either the first or second feedback ORB issued for the officer by determining if it was issued four months after the officer's birth month or eight months after it.
    - (3) Verify HRC issued an audit ORB for an officer who is within the zone of consideration for promotion.
      - (a) Verify the officer was informed he or she is responsible for maintaining and submitting current information to the promotion selection board.
      - (b) Verify the officer's most accurate, available ORB was submitted to the promotion selection board after he or she reviewed it or after it was reviewed by the personnel officer when the officer was not available.
2. Verify the reason why HRC generated an ORB for the officer by locating the officer's supporting source documents.
- NOTE: These documents are military orders, DD Form 1343 (Notification of Change in Service Member's Official Records), Career Management Individual File (CMIF), DA Form 873 (Certificate of Clearance and/or Security Determination), SF 88 (Report of Medical Examination), DA Form 3349 (Physical Profile), social security card, official birth certificate, official court documents, and official documents from educational institutions.
- a. Verify the ORB received from HRC is for an Active Army commissioned or warrant officer.
  - b. Verify an ORB received from HRC for an officer who is not serviced by the MPD/PSB is destroyed.
  - c. Verify the ORB is destroyed when the officer has been reassigned and his or her new duty assignment is not known.
  - d. Verify the ORB is destroyed when the officer has been separated from active duty (AD).
  - e. Verify a request for an ORB is suspended for an officer who is scheduled for transition from AD within 90 days of his or her audit month until his or her transition.
  - f. Verify that after an ORB has served its purpose is destroyed.
3. Verify the officer's ORB is properly audited during his or her birth month.
- a. Verify OFRC notified BnS1 that the officer is due for an audit of his or her ORB.
  - b. Verify BnS1 notified the officer's unit of the date, time, and location of the audit.
  - c. Verify the officer's unit sent him or her to OFRC for the scheduled audit.
  - d. Verify OFRC obtained the officer's source documents prior to the audit.
    - (1) Verify OFRC reviewed each item on the audit ORB with the officer.
    - (2) Verify any necessary changes and/or corrections are entered on the ORB in pen or pencil.

**Performance Steps**

- (3) Verify OFRC obtained the necessary documents to substantiate the changes and/or corrections which are made to the officer's ORB.
  - (4) Verify the officer and the personnel officer or auditor signed and dated the ORB in SECTION X (REMARKS) to indicate that the changes entered on the document are complete and accurate.
  - (5) Verify when attempts to have the officer personally review and sign the ORB failed, the personnel officer wrote in SECTION X, "Attempts have failed in having (rank, name) personally review (his or her) ORB," and signed the statement.
  - (6) Verify the officer's previous ORB is destroyed.
4. Verify OFRC followed the proper ORB correction procedures by submitting a Correction of ORB Memorandum to the appropriate authority at HQDA or making the appropriate corrections on eMILPO.
- a. Verify when the transaction source is identified as HQDA in Table 4-1, Column 2, of AR 600-8-104, OFRC prepared a Correction of ORB Memorandum.
    - (1) Verify the memorandum listed the officer's name (last, first, middle initial), grade, SSN, and the date the ORB was issued by HRC.
    - (2) Verify the memorandum specified the data element(s) on the ORB where the correction needs to be made, cites the incorrect data which needs to be replaced exactly as it is shown on the ORB, and specifies the correct data to be recorded on the document.
  - b. Verify OFRC forwarded the correction memorandum, along with supporting documentation, to the proper authority at HQDA.
    - (1) Verify for an Army Medical Department (AMEDD) officer, the memorandum was sent to Commander, HRC (TAPC-OPH-((AN, DC, MC, MS, SP, or VC))), Alexandria, VA 22332-0400.
    - (2) Verify for an Army Chaplain, the memorandum was sent to HQDA (DACH-PER), Washington, D.C. 20310-2700.
    - (3) Verify for a Judge Advocate General Command (JAGC) officer, the memorandum was sent to HQDA, (DAJA-PT), Washington, D.C. 20310-2206.
    - (4) Verify for correction of aviation qualification data, including an AMEDD aviator, the memorandum was sent to Commander, HRC, ATTN: TAPC-OPD-D, Alexandria, VA 22332-0413.
    - (5) Verify for correction of regular Army (RA) basic date of appointment, grade, and date of rank specified (Chief Warrant Officer ((CW)) 3 and above) temporary grades, and date or rank, the memorandum was sent to Commander, HRC, ATTN: TAPC-MSP-D, Alexandria, VA 22332-0400.
    - (6) Verify for recomputation of an officer's service, the memorandum was sent to Commander, HRC, ATTN: TAPC-PDT-C, Alexandria, VA 22332-0400.
    - (7) Verify for making a change to the officer's RA component (to or from), the memorandum was sent to Commander, HRC, ATTN: TAPC-OPP-P, Alexandria, VA 22332-0400.
    - (8) Verify for an officer in the zone of consideration for promotion, the correction memorandum was sent to Commander, HRC, ATTN: TAPC-MSP-O, Alexandria, VA 22332-0443.
    - (9) Verify for making a change for an officer or a reason not specified in b (1) through b (8), the memorandum was sent to Commander, HRC, (TAPC-OP-appropriate Career Management Division), Alexandria, VA 22332-0400.
  - c. Verify when the transaction source is identified, OFRC performed the appropriate transaction supporting task(s) to effect the proper changes and/or corrections to the appropriate data element(s) of the officer's ORB.
    - (1) Verify OFRC performed the appropriate transaction task(s) to update SECTION I (ASSIGNMENT INFORMATION - OVERSEAS SERVICE, CAREER FIELD INFORMATION, and AVIATOR QUALIFICATIONS) of the ORB, as necessary.
    - (2) Verify OFRC performed the appropriate transaction task(s) to update SECTION II (SECURITY DATA), as necessary.

### Performance Steps

- (3) Verify OFRC performed the appropriate transaction task(s) to update SECTION III (SERVICE DATA), as necessary.
  - (4) Verify OFRC performed the appropriate transaction task(s) to update SECTION IV (PERSONAL/FAMILY DATA), as necessary.
  - (5) Verify OFRC performed the appropriate transaction task(s) to update SECTION V (FOREIGN LANGUAGE), as necessary.
  - (6) Verify OFRC performed the appropriate transaction task(s) to update SECTION VI (MILITARY EDUCATION), as necessary.
  - (7) Verify OFRC performed the appropriate transaction task(s) to update SECTION VII (CIVILIAN EDUCATION), as necessary.
  - (8) Verify OFRC performed the appropriate transaction task(s) to update SECTION VIII (AWARDS AND DECORATIONS), as necessary.
  - (9) Verify OFRC performed the appropriate transaction task(s) to update SECTION IX (ASSIGNMENT HISTORY), as necessary.
  - (10) Verify OFRC performed the appropriate transaction task(s) to update SECTION X (REMARKS), as necessary.
5. Review the officer's feedback ORB when it is received from HRC.
    - a. Ensure the audit changes have been made as they were submitted on the Correction of ORB Memorandum or input in eMILPO.
    - b. Ensure ORB correction procedures are reinitiated when discrepancies still exist on the officer's ORB.
  6. Verify proper disposition procedures are followed in filing, distributing, and disposing of the officer's ORB, and his or her source documents.
    - a. Verify the officer's audit ORB is destroyed once the feedback ORB was found to be complete and accurate.
    - b. Verify a copy of the corrected ORB is provided to the officer.
    - c. Verify OFRC filed and forwarded the corrected ORB as required.
    - d. Ensure any of the officer's source documents which are authorized to be filed in his or her Official Military Personnel File (OMPF) are forwarded to Commander, HRC, ATTN: TAPC-MSR-S, Alexandria, VA 22332-0400.
    - e. Ensure any of the officer's source documents which are authorized to be filed in his or her Career Management Individual File (CMIF) are forwarded.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures. This method of evaluation is appropriate if the NCO supervises SL 1/2 Soldiers who process the OER. Use the performance measures to grade performance after the NCO has verified the OER processed by SL 1/2 Soldiers.

### Performance Measures

**GO    NO GO**

1. Verified the reason why HRC generated an ORB for the officer by locating the officer's supporting source documents, including such documents as military orders, DD Form 1343, CMIF, DA Form 873, SF 88, DA Form 3349, social security card, official birth certificate, official court documents, and official documents from educational institutions.
2. Ensured the ORB was processed only for an officer who was eligible to receive one.
3. Verified the officer's ORB was properly audited during his or her birth month.
4. Verified OFRC followed the proper ORB correction procedures by submitting a Correction of ORB Memorandum to the appropriate authority at HQDA or making the appropriate corrections in eMILPO.



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

5. Verified proper disposition procedures were followed in filing, distributing, and disposing of the officer's ORB, the P85s, and his or her source documents.
6. Reviewed the officer's feedback ORB when it was received from HRC to ensure that the audit changes had been made as they were submitted on the Correction of ORB Memorandum or input in eMILPO.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References****Required**

AR 600-8-104  
 DA FORM 3349  
 DA FORM 4037  
 DA FORM 873  
 SF 88

**Related**

Subject Area 18: REVIEW SEPARATION PROCESSING

**Review Separation Documents**

**805C-42A-3444**

**Conditions:** Given a requirement to review enlisted separation/discharge from the Active Army and review separation documents and access to AR 635-5 (Personnel Separations: Separation Documents), AR 635-200 (Enlisted Personnel), a completed DD Form 214 (Certificate of Release or Discharge from Active Duty), and standard office supplies and equipment and access to:

- a. VA Form SGLV 8285 (Request for Insurance)
- b. VA Form SGLV 8286 (Servicemembers' Group Life Insurance Election and Certificate)
- c. DD Form 214 (Certificate of Release or Discharge from Active Duty)
- d. DD Form 220 (Active Duty Report)

**Standards:**

1. Review the separation/discharge actions for unsatisfactory performance or misconduct.
2. Verify the accuracy of a Soldier's completed DD Form 214.
3. Review other separation documents, as appropriate, for completeness and accuracy.
4. Ensure the separation documents are distributed to the Soldier and proper agencies.

**Performance Steps**

1. Review the separation/discharge actions for unsatisfactory performance or misconduct.
  - a. Review the separation actions for unsatisfactory performance.
    - (1) Verify Soldier meets the following criteria for separation for unsatisfactory performance and is not in the entry level status:
      - (a) Verify the Soldier, in the commander's judgement, will not develop sufficiently to participate in the further training and/or become a satisfactory Soldier.
      - (b) Verify the circumstances are so serious that the retention would have adverse effects on the military discipline, good order, and morale.
      - (c) Verify the Soldier is likely to be a disruptive influence in present or future duty assignments.
      - (d) Verify the circumstances forming the basis for initiation of separation proceedings will probably continue or recur.
      - (e) Verify the ability of the Soldier to perform duties effectively in the future, including potential for advancement or leadership, is unlikely.
      - (f) Verify if the Soldier is pregnant, the substandard duty performance is not caused solely by the pregnancy.
    - (2) Verify the unit commander takes appropriate actions.
      - (a) Verify the unit commander notifies the Soldier in writing of the recommendation for the Soldier's separation.
      - (b) Verify the commander forwards the case recommending separation for unsatisfactory performance.
      - (c) Verify the medical examination and mental status evaluations are obtained.
      - (d) Verify the case is processed through medical channels if the Soldier's incapacitating physical or mental illness was the direct or contributing cause of the misconduct for which the action is being considered.

**Performance Steps**

- (e) Verify the commander submits a report when it is determined that separation is in the best interest of the service. Ensure report is forwarded through the intermediate commander to the separation authority.
- (3) Verify the intermediate commander takes appropriate actions.
  - (a) Determine if the intermediate commander disapproves the recommendation and reassigns Soldier to another organization or directs disposition to other means. Ensure, if reassigned, the commanding officer's report is forwarded to the gaining commander.
  - (b) Determine if the intermediate commander recommends approval. Ensure the intermediate commander provides a recommendation for the character of service and forwards the report.
- (4) Verify the separation authority takes appropriate actions.
  - (a) Determine if the separation authority disapproves the direct reassignment of the Soldier to another organization. Ensure the commander's report is forwarded to gaining commander.
  - (b) Determine if the separation authority disapproves and returns the recommendation for disposition by other means. Ensure the commanders report is returned to originator and an endorsement is included stating the reason for considering separation for unsatisfactory performance inappropriate.
  - (c) Determine if the Soldier has waived his or her right to consideration by a board or has less than six years of total active and/or reserve military service. Ensure the separation authority then approves separation for unsatisfactory performance or approves separation for unsatisfactory performance and suspends execution of the separation.
  - (d) Determine if the separation authority will convene a board of officers to decide whether the Soldier should be separated for unsatisfactory performance if the Soldier has six or more years of total active and or reserve military service and has not executed a waiver to consideration by a board.
  - (e) Verify the Soldier is either given an honorable or under honorable conditions characterization of service for unsatisfactory performance.
- b. Review the separation actions for misconduct.
  - (1) Verify the following is established for a Soldier to be processed for the separation.
    - (a) Ensure further attempts to rehabilitate an individual as a satisfactory Soldier are unlikely to succeed.
    - (b) Ensure the Soldier is not willing to be rehabilitated or rehabilitation is not capable of being achieved.
    - (c) Ensure an unfit medical condition is not the direct substantial contributing cause of the Soldier's misconduct.
  - (2) Determine character of service.
    - (a) Determine if the separation authority directs a general discharge.
    - (b) Ensure an honorable characterization is not issued for Soldiers who have completed entry level status unless records are otherwise so meritorious. Ensure only commander exercising general court-martial jurisdiction approves an honorable characterization unless otherwise delegated.
    - (c) Ensure entry-level separation with uncharacterized services is initiated while a Soldier is in an entry-level status unless the characterizations under other than honorable conditions are warranted.
    - (d) Ensure honorable discharge is clearly warranted by the presence of unusual circumstances involving personal conduct and performance of duty.
  - (3) Determine authority for discharge or retention.
    - (a) Determine General Court-Martial Convening Authority (GCMCA) is the approval authority for to receive a discharge under other than honorable conditions.
    - (b) Determine if the authority for other types of discharge has been delegated to Special Court Martial Convening Authority (SPCMA).

### Performance Steps

- (c) Ensure the Soldier is reduced to the lowest rank when separated under other than honorable conditions discharge.
- (d) Determine if the separation authority suspends execution of an approved administrative discharge to afford highly deserving Soldiers a probationary period up to 6 months to allow rehabilitation time.
- (4) Verify processing procedures.
  - (a) Ensure immediate commander will submit a commanding officer's report to the separation authority.
  - (b) Ensure intermediate commander either disapproves the recommendation and directs reassignment, approves the recommendation and sends to separation authority - with recommendation for characterization of service, or recommends separation for unsatisfactory performance if the reason for separation is determined to be a pattern of misconduct and unsatisfactory performance was stated as a basis for separation in the initial letter of notification.
  - (c) Ensure the separation authority either disapproves the recommendation and directs reassignment, disapproves the recommendation and returns for other disposition, disapproves recommendation and takes action himself or herself, convenes a board of officers to determine if the Soldier should be separated for misconduct, direct separation of the Soldier for misconduct when board hearing is properly waived, approve separation and suspend execution of the separation when the board hearing has been waived, or if appropriate, direct the case to be processed through medical channels when Soldier does not meet retention medical standards.

### 2. Verify the accuracy of a Soldier's completed DD Form 214.

- a. Obtain the Soldier's completed DD Form 214 and Army source documents from the Human Resources Specialist in order to thoroughly and accurately review the completed form.
- b. Verify the Soldier's Army source documents contain his or her ORB or ERB, MPRJ, separation orders, retirement order, when applicable, DD Form 4/4, any DD Forms 214 from prior service, and DA Form 3444-1.
- c. Determine the Soldier meets one of the following criteria to be issued a DD Form 214.
  - (1) Verify the Soldier is an active army Soldier on termination of active duty by reason of administrative separation (including separation by reason of retirement or expiration of term of service (ETS)), physical disability separation, or punitive discharge under the Uniform Code of Military Justice.
  - (2) Verify the Soldier is a reserve component Soldier completing 90 days or more of continuous active duty for training (ADT), Full-Time National Guard Duty (FTNGD), Active Duty for Special Work (ADSW), Temporary Tours of Active Duty (TTAD), or Active Guard Reserve (AGR) service, except as follows:
    - (a) Verify the Soldier is a reserve component Soldiers who are being separated from the Active Army for physical disability, regardless of the period of time he or she served on active duty. Exceptions to this apply to Soldiers separated under AR 635-200, paragraph 5-11.
    - (b) Verify the Soldier is ARNGUS and USAR Soldiers mobilized under sections 12301(a), 12302, or 12304, Title 10, U.S. Code and ARNG Soldiers called into Federal service under chapter 15, or section 12406, title 10, U.S. Code, regardless of length of mobilization, when transitioned from active duty. Soldiers who report to the mobilization station and are found unqualified for active duty will be excluded from this provision - he/she will receive a DD Form 220.
    - (c) Verify the Soldier completed initial ADT, which resulted in the award of a Military Occupational Specialty (MOS) even though the AD was less than 90 days.
  - (3) Verify the Soldier is an enlisted Soldier released from active duty by reason of a void enlistment under AR 635-200, chapter 7.

**Performance Steps**

- (4) Verify the Soldier is changing their status or component while serving on active duty such as Enlisted discharged to continue as Commissioned or Warrant Officers or Warrant officers terminating status to continue as Commissioned Officers. Also, Officers who revert to Enlisted.
  - (5) Verify the Soldier is an ARNGUS Soldier separated from title 32, U.S. Code AGR status to enter title 10 U.S. Code AGR or other active duty status, or the reverse.
  - (6) Verify the Soldier is being released from a status that is determined to be void.
  - (7) Verify the Soldier is an active duty Soldier entering the USMA. USMA cadets who fail to graduate.
- d. Review the Soldier's completed DD Form 214 for administrative accuracy.
- (1) Verify all eight copies of the DD Form 214 have been typed or printed legibly.
  - (2) Determine no corrections such as erasures and overtypes have been made to the shaded areas of DD Form 214.
  - (3) Verify all corrections made to the document have been initialed by the signing official on all eight copies.
  - (4) Determine any corrections which have been made to the unshaded areas of DD Form 214 are neat and legible.
  - (5) Verify each of the thirty blocks of DD Form 214 contains an entry.
  - (6) Verify each entry on the document is typed or printed in all capital letters.
  - (7) Verify NA or NONE, whichever is appropriate, has been entered in blocks where an entry is not appropriate or none exists.
  - (8) Determine the use of abbreviations on the DD Form 214 has been kept to a minimum.
  - (9) Verify the entries in blocks 11, 13, 14, and 18 begin directly under the block number, flush with the left border of the block.
  - (10) Verify the entries in blocks 11, 13, 14, and 18 are continuous from the left border of the block to the right border.
  - (11) Verify two slash marks (//) separate each entry when there are multiple entries in blocks 11, 13, 14, and 18.
  - (12) Verify the final entries in blocks 11, 13, 14, and 18 are correct.
    - (a) Verify the last entry in each of these blocks is followed by two slash marks and the phrase "NOTHING FOLLOWS."
    - (b) Verify when there is not enough space to complete the entries in blocks 11, 13, or 14, the last entry in the block is followed by two slash marks and the phrase "CONT IN BLOCK 18."
  - (13) Verify entries in other blocks which are too long for their allotted space are followed by two slash marks and the phrase "SEE BLOCK 18."
  - (14) Verify any entries in block 18 which are statements continued from other blocks begin by citing their original block number.
  - (15) Verify when there is not enough space in block 18 to complete the entries a continuation sheet has been attached to the DD Form 214 and the phrase "SEE CONTINUATION SHEET" has been entered as the last entry in block 18.
    - (a) Verify there are eight copies of the continuation sheet, that each is typed or printed on bond paper, and that a copy of the continuation sheet is attached to each of the eight copies of the DD Form 214.
    - (b) Verify the continuation sheet begins by referring to the original DD Form 214 which is being continued and includes the information contained in blocks 1 through 4b of the original document.
    - (c) Verify all eight copies of the continuation sheet have been signed and dated by the Soldier and by the signing official.
    - (d) Verify the entries on the continuation sheet begin by citing block 18 and adhere to the format which was previously detailed in items d(11), and d(12).
- e. Review the contents of the DD Form 214 for accuracy and completeness.
- (1) Verify the Soldier's name, including JR., SR., or II when appropriate, is recorded correctly in all capital letters in block 1.
  - (2) Verify block 2, DEPARTMENT, COMPONENT, and BRANCH, is completed correctly.

**Performance Steps**

- (3) Verify the Soldier's social security number (SSN) entered in block 3 matches the SSN listed in the Soldier's Army source documents.
- (4) Verify the Soldier's grade, rate or rank, and pay grade listed in blocks 4a and 4b match those contained in his or her Army source documents.
- (5) Verify the Soldier's date of birth recorded in block 5 matches the date of birth listed in his or her Army source documents.
- (6) Verify the Soldier's reserve obligation termination date has been computed correctly and entered in block 6.
  - (a) Determine the Soldier is in his or her initial enlistment or appointment into the Armed Forces.
  - (b) Determine the Soldier's MSO is 8 years by verifying that he or she enlisted or was appointed into the Army on or after 1 June 1984.
  - (c) Determine the Soldier's date of initial enlistment or appointment into the Regular Army (RA), ARNGUS, or USAR, including Delayed Entry Program (DEP) time.
  - (d) Determine the time the Soldier has served during this enlistment/appointment period by subtracting the Soldier's initial date of enlistment or appointment from the Soldier's date of separation from duty for this period.
  - (e) Determine the Soldier's reserve obligation termination date by subtracting the time the Soldier has served during this enlistment/appointment period from 8 years.
  - (f) Verify "00 00 00" is entered in block 6 for a Soldier who is within 90 days of his or her MSO termination date at the time of separation from active duty.
  - (g) Verify "00 00 00" is entered in block 6 for a Soldier whose MSO has expired or who is being discharged, dismissed, or dropped from the Army rolls.
- (7) Verify the city and state (APO/FPO for overseas enlistments) from which the Soldier last entered the Army or was ordered to active duty are entered correctly in block 7a, Place of Entry Into Active Duty, by referring to the Soldier's Army source documents.
- (8) Verify the Soldier's Home of Record at the time he or she was commissioned, appointed, enlisted, inducted, or ordered to active duty corresponds to that which is listed in his or her Army source documents and is recorded correctly in block 7b.
- (9) Verify the Soldier's last duty assignment and major command are entered correctly in block 8a.
- (10) Verify the station (with zip code) from which the Soldier is being separated is recorded in block 8b.
- (11) Verify the command to which the Soldier is being transferred is recorded correctly.
  - (a) Verify the Soldier's type of separation and future status have been correctly determined by referring to the Soldier's Army source documents and Table 2-1.
  - (b) Verify NA has been recorded in block 9 for a Soldier who is being released from custody and control of the Army because of a void or voided enlistment.
- (12) Verify the correct amount of the Soldier's Servicemembers' Group Life Insurance (SGLI) coverage is entered in block 10 or an X is entered in the None box if the Soldier declined coverage.
- (13) Verify the Soldier's primary MOS or Area of Concentration (AOC) and any additional MOSs/AOCs in which the Soldier served for one or more continuous years of active duty, along with their titles and the number of years and months the Soldier served in each of them, by referring to the Soldier's Army source documents.
  - (a) Verify for an enlisted Soldier the first five characters of each of his or her MOSs are correctly entered in block 11 to include the three characters of the MOS, the skill and grade level in the MOS in the fourth character, and the special qualification identifier (SQI) in the fifth character, if applicable, or a 0 (zero) in the fifth character if not applicable.
  - (b) Verify separate entries have been entered correctly for the highest skill level in each MOS below skill level 5 when MOSs merge at that skill level.
  - (c) Verify for a warrant officer the first four characters of each of his or her MOSs and the SQI for the fifth character, if applicable, or 0, if not applicable, are entered in this block.

**Performance Steps**

- (d) Verify for a commissioned officer the two digits and one letter of each of his or her AOCs are entered correctly in this block.
- (e) Verify the titles of each MOS/AOC and the number of years and months the Soldier served in each of them are recorded in block 11.
- (14) Verify the beginning date of the Soldier's enlistment period or tour of active duty for which a DD Form 214 was not issued is entered correctly in block 12a.
- (15) Verify the Soldier's separation date is correctly entered in block 12b.
- (16) Determine if the Soldier had any time lost under 10 U.S.C. 972 during this period or time lost after expiration of his or her term of service by referring to the Soldier's Army source documents.
- (17) Compute the Soldier's amount of active service time during this period by subtracting his or her beginning date (block 12a) from his or her separation date (block 12b) and deducting any time he or she lost under 10 U.S.C. 972 or time lost after expiration of his or her term of service.
- (18) Verify the Soldier's net amount of active service time during this period is entered correctly in block 12c.
- (19) Compute the net active service for an Army cadet in the same way as in item (17).
  - (a) Verify the cadet's net amount of active service time is entered correctly in block 12c.
  - (b) Verify for a cadet an entry has been made in block 18 which states, "BLOCK 12C INCLUDES SERVICE AS A USMA CADET FROM (date of entrance into the USMA) TO (date of separation). SERVICE NOT CREDITABLE FOR ANY PURPOSE IN COMMISSIONED OFFICER STATUS."
- (20) Determine a Soldier has been released from custody and control of the Army because of a void or voided enlistment by referring to his or her Army source documents.
  - (a) Verify for a Soldier who has been released from custody and control of the Army because of a void or voided enlistment "00 00 00" has been entered in block 12c.
  - (b) Verify for a Soldier who has been released from custody and control of the Army because of a void or voided enlistment an entry has been made in block 18 which reads, "TIME SERVED IS NOT CREDITABLE FOR PROMOTION OR LONGEVITY."
- (21) Compute the Soldier's total amount of prior active military service by referring to his or her Army source documents and deducting any time he or she lost under 10 U.S.C. 972 and time lost after expiration of his or her term of service.
  - (a) Verify the correct total amount of prior active military service for the Soldier has been recorded in block 12d.
  - (b) Verify the entry in block 12d is "00 00 00" for a Soldier who has no prior military service.
- (22) Compute the Soldier's total amount of prior inactive service, less lost time, in the same way as item (21).
  - (a) Ensure any time the Soldier spent in the DEP prior to 1 January 1985 is included with his or her prior inactive service time.
  - (b) Ensure any time the Soldier spent in the DEP after 1 January 1985 is not included with his or her prior inactive service time.
  - (c) Verify the correct total amount of prior inactive service for the Soldier has been recorded in block 12e.
- (23) Verify the Soldier's amount of foreign service during this period has been correctly recorded in block 12f by referring to his or her Army source documents.
- (24) Verify the Soldier's amount of sea service during this period has been correctly recorded in block 12g by referring to his or her Army source documents.
- (25) Verify the Soldier's effective date of promotion to pay grade is entered correctly in block 12h.
- (26) Verify the decorations, medals, badges, citations, and campaign ribbons awarded or authorized to the Soldier for all periods of service are correctly entered in block 13.
- (27) Verify the formal in-service (full time attendance) training courses completed by the Soldier during this period of service are correctly listed in block 14 by title, length of the course in weeks, and month and year completed.

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- (28) Verify an X has been placed in the correct box (Yes or No) in block 15a to indicate whether the Soldier contributed to the Post-Vietnam Era Veterans' Educational Assistance Program or not.
- (29) Verify an X has been placed in the correct box (Yes or No) in block 15b to indicate the Soldier's high school graduation status (or its equivalent).
- (30) Verify block 16, Days Accrued Leave Paid, has been completed correctly.
  - (a) Verify the number of days of accrued leave to be paid to the Soldier has been entered correctly in this block.
  - (b) Verify the word NONE has been entered in this block for a Soldier who has no days of accrued leave.
  - (c) Verify NA for "not applicable" has been entered in this block for a Soldier who is being discharged under other than honorable conditions.
  - (d) Verify NONE or the days provided by the local finance office has been entered in this block.
- (31) Verify block 17 has been completed correctly by referring to the Soldier's Army source documents.
  - (a) Determine the Soldier has completed 180 days or more of continuous active military service in the case of an X being placed in the Yes or No box.
  - (b) Determine the Soldier has not completed 180 days of continuous active military service in the case of NA being placed in this block.
  - (c) Determine the validity of the Soldier's dental exam and appropriate treatment by checking the Soldier's SF 603 when an X is placed in the Yes box.
- (32) Verify the entries in block 18 are either required by HQDA and there is no separate block designated for them on DD Form 214 or are completions of entries which are too long for their original blocks.
  - (a) Verify the entry "SOLDIER (HAS) (HAS NOT) COMPLETED FIRST FULL TERM OF SERVICE" is entered in block 18.
  - (b) Determine if Soldier was previously issued a DD Form 214. If not previously issued verify the entry "IMMEDIATE REENLISTMENTS THIS PERIOD \_\_\_\_\_(specify dates)" is entered in block 18 for enlisted Soldiers separating with a character of service of Honorable. If not previously issued a DD Form 214 and characterization of service is anything except honorable, verify that "Continuous Honorable Active Service From (first day of service which DD Form 214 was not issued) Until (date before commencement of current enlistment). Verify that the specific periods of reenlistments are then entered as stated above.
  - (c) Determine whether the Soldier is retiring from active duty for length of service or is being transferred to the individual ready Reserve (IRR) by referring to his or her Army source documents.
    - Verify that for a Soldier who is retiring from active duty for length of service block 18 contains the following entry: "SUBJECT TO ACTIVE DUTY RECALL BY THE SECRETARY OF THE ARMY."
    - Verify that for a Soldier who is being transferred to the IRR block 18 contains the following entry: "SUBJECT TO ACTIVE DUTY RECALL AND/OR ANNUAL SCREENING."
  - (d) Determine if Soldier was ordered to active duty and deployed to a foreign country. Verify the following three statements: "ORDERED TO ACTIVE DUTY IN SUPPORT OF (OPERATION NAME) PER 10 USC (APPLICABLE SECTION)", "SERVICE IN (NAME OF COUNTRY DEPLOYED) FROM (INCLUSIVE DATES FOR EXAMPLE YYYYMMDD - YYYYMMDD)", and "SOLDIER COMPLETED PERIOD FOR WHICH ORDERED TO ACTIVE DUTY FOR PURPOSE OF POST BENEFITS AND ENTITLEMENTS" are entered in block 18. Determine if active duty Soldier deployed with his or her unit during continuous service, then verify only the second statement above is entered.
  - (e) Verify block 18 contains the entry "BLOCK 6 INCLUDES PERIOD OF DEP: (inclusive periods of DEP)".



## Performance Steps

- (f) Verify a Soldier had an extension of service by locating a new service agreement in the Soldier's ORB/ERB and that block 18 contains the following entry: "EXTENSION OF SERVICE WAS AT THE REQUEST OF AND FOR THE CONVENIENCE OF THE GOVERNMENT."
- (g) Verify for a Soldier who was retained in service beyond his or her contractual expiration of term of service (ETS) block 18 contains the following entry: "RETAINED IN SERVICE \_\_\_\_\_ DAYS FOR CONVENIENCE OF THE GOVERNMENT PER (AUTHORITY FOR RETENTION, cite Army regulation without identifying the paragraph or chapter)."
- (h) Verify an enlisted Soldier of the RA or an Army warrant officer is retiring after completing thirty years or more of active military service by locating the grade to which he or she is advanced on the retired list on the Soldier's retirement order and that block 18 contains the following entry: "RETIRED LIST GRADE: (Grade listed)."
- (i) Verify an enlisted Soldier is retired for disability in a commissioned or warrant officer grade by referring to the Soldier's retirement order and that block 18 contains the following entry: "USAR RETIREMENT GRADE: (Rank listed), (Pay grade listed)."
- (j) Verify an enlisted Soldier is being discharged to retire as a commissioned or warrant officer by referring to the Soldier's retirement order and that block 18 contains the following entry: "DISCHARGED FROM ENLISTED STATUS IN THE RETIRED GRADE \_\_\_\_\_, AND PLACED ON THE RETIRED LIST AS INDICATED IN THE RETIREMENT ORDER."
- (k) Verify the type and amount of severance, readjustment, and/or nondisability severance pay the Soldier is to receive have been correctly recorded in block 18 as indicated by the finance office.
- (l) Verify for a Soldier who took excessive leave an entry has been made in block 18 which states, "EXCESS LEAVE (CREDITABLE FOR ALL PURPOSES EXCEPT PAY AND ALLOWANCES) -- (the number of excessive leave days correctly listed): (the inclusive dates of excessive leave status correctly listed)."
- (m) Verify the type of the last enlistment/reenlistment bonus the Soldier was paid, the amount he or she received, and the date (when available) on which he or she received the bonus have been recorded correctly in block 18 indicating "TYPE OF BONUS, AMOUNT, AND WHEN ISSUED).
- (n) Verify the Soldier's place of birth is entered in block 18 for a Soldier who is discharged for being an alien deserter.
- (o) Determine if a Soldier has CADET STATUS. Verify the following statement is included in block 18: "BLOCK 12C INCLUDES SERVICE AS A USMA CADET FROM (date) TO (date). SERVICE NOT CREDITABLE FOR ANY PURPOSE IN COMMISSIONED OFFICER STATUS".
- (p) Verify when a temporary MPRJ is used to prepare a Soldier's DD Form 214 block 18 contains the following entry: "SEPARATED FROM SERVICE ON TEMPORARY RECORDS AND SOLDIER'S AFFIDAVIT. A DD FORM 215 WILL BE ISSUED TO PROVIDE MISSING INFORMATION OR TO CORRECT ANY INFORMATION."
- (q) Verify when a DD Form 214 is administratively issued or reissued, unless directed otherwise by appellate authority, Executive Order, or Secretarial Instruction, block 18 contains the following entry: "DD FORM 214 ADMINISTRATIVELY ISSUED/REISSUED ON (date)."
- (r) Verify when a reissued DD Form 214 shows an upgraded characterization of service block 18 of copies 2 through 8 contains the entry: "SERVICE CHARACTERIZATION UPGRADED ON (date) FOLLOWING APPLICATION DATED \_\_\_\_\_."
- (s) Verify when a Soldier has been a prisoner of war (POW) his or her unit of assignment/country and the dates of capture and release are entered in block 18.
- (t) Verify the entry "DATA HEREIN SUBJECT TO COMPUTER MATCHING WITHIN DOD OR WITH OTHER AGENCIES FOR VERIFICATION PURPOSES AND DETERMINING ELIGIBILITY OR COMPLIANCE FOR FEDERAL BENEFITS" is entered in block 18.

### Performance Steps

- (33) Verify the Soldier's mailing address after separation from the Army is entered in block 19a.
- (34) Verify block 19b contains the name and address of the Soldier's nearest relative or friend who will know the Soldier's location and address at all times or an entry which lists the relative's or friend's name and the statement, "ADDRESS SAME AS BLOCK 19a."
- (35) Verify the entries in block 20.
  - (a) Verify the appropriate Yes or No box of block 20 has been marked with an X to indicate that the Soldier does or does not want copy 6 of DD Form 214 forwarded to a State Director of Veterans' Affairs.
  - (b) Verify the abbreviation of the state to which copy 6 will be sent has been recorded in the space provided when the Yes box has been marked.
- (36) Verify the Soldier signed the DD Form 214 in block 21 or that the appropriate entry of "SOLDIER NOT AVAILABLE TO SIGN" or "SOLDIER REFUSES TO SIGN" has been entered.
- (37) Verify block 22 is signed by an authorized commissioned or warrant officer or by a SSG, GS-07 or higher or authorized contractor employee when he or she is the acting chief of the Transition Point (TP).
- (38) Verify the signatures in blocks 21 and 22 are legible on all eight copies of DD Form 214.
- (39) Verify the type of separation the Soldier is receiving by referring to his or her Army source documents.
- (40) Verify the characterization or description of the Soldier's term of service is correctly entered in block 24.
- (41) Verify NA is entered in block 24 for a Soldier who is released from custody and control of the Army because of a void or voided enlistment.
- (42) Verify the correct separation authority has been entered in block 25 by referring to the regulatory or other authority cited in the directives authorizing the Soldier's separation.
- (43) Verify the correct Separation Program Designator (SPD) code is entered in block 26.
  - (a) Verify the separation order number, source, and date is entered in this block for an Army cadet.
  - (b) Verify NA is entered in this block for a Soldier who was ordered to active duty on self-terminating orders.
- (44) Verify the correct reentry code for the enlisted Soldier by reviewing the Soldier's ERB and referring to AR 601-210.
  - (a) Verify the correct reentry code for the Soldier has been entered in block 27.
  - (b) Verify NA has been entered in block 27 for an officer or for a Reserve component (RC) Soldier who is being separated for other than cause.
  - (c) Verify the correct reentry code for a RC Soldier who is being separated for cause has been entered in block 27.
- (45) Verify a narrative reason for separation has been entered in block 28.
  - (a) Verify the narrative reason for separation corresponds to the appropriate SPD code and regulatory or other authority IAW AR 635-5-1, Chapter 2 and Appendices B and C.
  - (b) Verify for a Soldier ordered to ADT, AGR, TTAD, FTNGD, or ADSW on self-terminating orders the following statement is entered in block 28: "COMPLETION OF PERIOD OF (select ADT, AGR, TTAD, FTNGD, or ADSW as appropriate)."
- (46) Verify the dates of time lost during this period of service are entered correctly in block 29.
  - (a) Verify for an enlisted Soldier the inclusive periods of time lost, which are to be made good under 10 U.S.C. 972, and periods of nonchargeable time after ETS are both correctly entered in this block.
  - (b) Verify for an officer the inclusive dates of absent without leave (AWOL) are correctly entered in this block.
- (47) Verify "YES" has been entered in this block and Soldier has been given a copy prior to permissive temporary duty and/or transition leave.

3. Review other separation documents, as appropriate, for completeness and accuracy.

**Performance Steps**

- a. Verify two copies of the DD Form 220 has been completed for a Soldier who completed basic training under the USAR Split Training Program or the ARNGUS Alternate Training Program.
  - b. Verify one copy of the DD Form 220 has been completed for a Soldier enlisted under the Civilian Acquired Skills Program when a DD Form 214 is not authorized.
  - c. Verify a DD Form 363A has been prepared for a Soldier who is retiring from the Army not to include those on the TDRL, AUS, or ARNG if on FTNGD.
    - (1) Verify the space under "this is to certify that" has the Soldier's name correctly typed in capital letters in signature order followed by his or her SSN, grade, and career branch (officer) or component (enlisted).
      - (a) Verify the component is spelled out for a Soldier who is Regular Army.
      - (b) Verify other components are entered as ARNGUS or USAR.
      - (c) Verify the correct date of retirement is entered in the space provided.
      - (d) Verify the certificate has been signed by the officer authorizing the certificate.
  - d. Verify the applicable discharge certificate has been prepared for a Soldier who is being discharged from the Army.
    - (1) Verify the space under "this is to certify that" has the Soldier's name correctly typed in capital letters in signature order followed by his or her SSN, grade, and career branch (officer) or Component (enlisted).
      - (a) Verify when the Soldier's component is the Regular Army it is spelled out on the certificate.
      - (b) Verify other components are listed on the certificate as ARNGUS or USAR.
    - (2) Verify the signing officer's name is typed in capital letters in signature order between the lines in the lower right corner of the certificate, his or her grade and branch are centered below his or her typewritten name, and he or she signed the certificate.
  - e. Determine DA Form 3891 or DA Form 3891-1 has been completed correctly, if warranted.
    - (1) Verify the spouse's name is entered correctly on the certificate in all capital letters.
    - (2) Verify the unit commander signed the certificate.
  - f. Return the separation documents to the Human Resources Specialist for correction as warranted.
    - (1) Verify all corrections are made.
    - (2) Verify all corrections are initialed by the signing official.
    - (3) Instruct the Human Resources Specialist to distribute the separation documents.
4. Ensure the separation documents are distributed to the Soldier and proper agencies.
- a. Ensure copies 3,5,6, and 7 are distributed on the first workday after the Soldier's separation date.
  - b. Ensure copies copy 1 is presented or mailed to a Soldier on the transition date.
    - (1) Ensure a reproduced copy of copy 1 for discharge alien deserters are mailed to U.S. DEPARTMENT OF STATE, ANNEX #2, WASHINGTON DC 20520 and place of birth is entered in block 18.
  - c. Ensure copy 2 is filed in Soldiers record.
  - d. Ensure copy 3 is mailed to DEPARTMENT OF VETERANS AFFAIRS, DATA PROCESSING CENTER (214),1614 E. WOODWARD ST., AUSTIN, TX 78772.
  - e. Ensure reproduced copies accompany medical records.
  - f. Ensure copy 4 is presented to the Soldier when he or she departs the TC on permissive temporary duty and/or transition leave.
  - g. Ensure copy 5 is mailed to U.S. DEPARTMENT OF LABOR, UCX/UCFE CLAIMS CONTROL CENTER (LCCC), PO BOX 94246, BATON ROUGE, LA 70804-9246.
  - h. Ensure copy 6 is mailed to State Director of Veterans Affairs, if the Soldier requested by having "yes" in block 20. Ensure Soldier stated which state.
  - i. Ensure copy 7 is forwarded to the Installation Finance Office.
  - j. Ensure file copy 8 is maintained at the Transition Center along with a copy of ORB/ERB, DD Form 93 (Record of Emergency Data), and VA Form SGLV 8285 and VA Form 8286. Ensure these records are retained in the CFA as a 6-month file.
  - k. Ensure distribution of DD Form 215 is done identical to distribution of DD Form 214.

**Evaluation Preparation:** Allow the Soldier to practice until he feels qualified and prepared for the evaluation. Have the Soldier perform the task, using the materials listed in the CONDITIONS statement. Encourage or consider directing self-study or Self On the Job Training (SOJT) for Soldiers requiring re-evaluation.

**Performance Measures**

**GO    NO GO**

1. Reviewed the separation/discharge actions for unsatisfactory performance or misconduct.
2. Verified the accuracy of a Soldier's completed DD Form 214.
3. Reviewed other separation documents, as appropriate, for completeness and accuracy.
4. Ensured the separation documents are distributed to the Soldier and proper agencies.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 635-200  
AR 635-5  
DD FORM 214  
SGLV FORM 8286

**Related**

## Subject Area 19: REVIEW PERSONNEL ACTIONS

**Review the Processing of a Request and Authority for Leave, Pass, or Permissive Temporary Duty  
805C-42A-3463**

**Conditions:** Given a requirement to review the processing of a Request and Authority for Leave, Pass, or Permissive Temporary Duty (PTDY), access to DA Form 31 (Request and Authority for Leave), Military Personnel Message 97-170, AR 600-8-10, DA Form 647/647-1, standard office supplies, and equipment.

**Standards:**

1. Review DA Form 31 for accuracy and completeness.
2. Ensure the number of days of chargeable and non-chargeable leave was determined.
3. Ensure the Leave Control Log is updated by checking a hard copy printout.
4. Ensure Soldier's leave is voided when leave has been canceled.
5. Ensure Soldier's leave is extended when applicable.
6. Ensure the Leave Control Log is cross-checked daily with DA Form 647 or DA Form 647-1 for current departures.
7. Ensure DA Form 31 is routed properly after a Soldier has departed on leave.
8. Ensure Soldier's return from leave is processed.
9. Ensure errors on chargeable leave are corrected.

**Performance Steps**

1. Review DA Form 31 for accuracy and completeness.
  - a. Check the form is legible and all blocks are filled out for the appropriate type of leave.
  - b. Verify the Soldier has sufficient leave on his or her Leave and Earning Statement to cover the dates listed in Block 10 of DA Form 31.
  - c. Determine the type of leave being processed.
    - (1) Verify Block 7 is checked for the type of leave requested.
      - (a) Verify the type of leave requested is compared to the guidelines for leave.
      - (b) Verify the type of leave identified in Block 7 best matches the leave guidelines.
    - (2) Verify the Soldier has noted his or her leave address and phone number in Block 6.
    - (3) Verify the Soldier signed the form in Block 11.
  - d. Determine the leave was properly approved.
    - (1) Confirm DA Form 31 was signed by the proper authorities.
    - (2) Confirm the recommending and approval authorities signed DA Form 31 in the appropriate blocks.
  - e. Verify the Leave Control Log.
    - (1) Ensure the Leave Control Log control number in Block 1 of DA Form 31 is entered correctly.
      - (a) Verify "PCS" is annotated over the control number if this is an approved ordinary Permanent Change of Station (PCS) Leave.
      - (b) Verify "INTRAPOST" is annotated over the control number if this is an approved Intrapost Leave.

### Performance Steps

- (c) Verify "TRANS" is annotated over the control number if this is an approved Transition Leave.
  - (2) Verify data to indicate involuntary separation with authorized leave is entered correctly, if appropriate.
    - (a) Verify DA Form 31 has been annotated with "See Item 17."
    - (b) Verify Block 9 is completed.
    - (c) Verify the Leave Balance is entered correctly in Item 9a.
      - Verify the number of Excess and Transition Leave days is entered correctly in Item 9b.
      - Verify "See Item 17" is posted in Item 9c.
      - Verify the number of days of Excess Leave being taken is posted in Item 9d.
  - (3) Verify Block 17 is annotated with the following statements if the Soldier is authorized for Excess and/or Transition Leaves.
    - (a) Verify "Soldier is authorized Excess Leave non-chargeable leave dates from (date) to (date)" is entered.
    - (b) Verify "Soldier is authorized Transition Leave chargeable leave dates from (date) to (date)" is entered.
  - (4) Verify Block 17 is annotated with the telephone numbers of the Soldier's parent organization, the Personnel Services Battalion (PSB), the American Red Cross Field Office at the installation where the Soldier's unit is located, and the Military Airlift Command (MAC) passenger reservation center if this is an approved Emergency Leave.
  - (5) Verify all copies of DA Form 31 are filed in a suspense file to be retrieved at the Soldier's departure date.
2. Ensure the number of days of chargeable and non-chargeable leave was determined.
- a. Verify the Soldier requesting leave was queried regarding his or her travel days and duty days relative to the start and end dates of requested leave.
  - b. Verify the departure day was charged as Start of Leave if the departure date is a leave or travel day.
  - c. Verify the date chargeable as the End of Leave was determined.
    - (1) Verify the return date was charged as End of Leave if the Soldier does not work on that date.
    - (2) Verify the day prior to return was charged as End of Leave if the Soldier works for more than half of a normal scheduled workday on the return date.
    - (3) Verify the day prior to return was charged as End of Leave if the Soldier returns on a scheduled non-duty day.
  - d. Verify the days that qualify as non-chargeable leave were determined.
    - (1) Verify the dates of leave that do not match the guidelines for chargeable leave are identified.
    - (2) Verify these leave conditions were compared to the guidelines for non-chargeable leave.
    - (3) Verify the leave matches the guidelines for non-chargeable leave.
  - e. Verify the number of days from the chargeable Start of Leave date and chargeable End of Leave date were counted as chargeable leave.
  - f. Verify the period of non-chargeable absence was subtracted from chargeable leave.
  - g. Verify the resulting chargeable leave dates are entered in Block 17.
  - h. Verify Block 17 is left blank if leave is never charged, such as convalescent leave.
3. Ensure the Leave Control Log is updated by checking a hard copy printout.
- a. Ensure the Soldier's name and social security number (SSN) were correctly entered.
  - b. Ensure the type of leave requested was correctly entered.
  - c. Ensure the departure date was correctly entered.
  - d. Ensure the return date was correctly entered.
4. Ensure a Soldier's leave is voided when leave has been canceled.
- a. Verify the leave is voided on DA Form 31.
    - (1) Verify a line is drawn through DA Form 31.

**Performance Steps**

- (2) Verify "VOID" is written on the form.
    - (3) Verify an authenticating Battalion S1's (BnS1) Adjutant or Commander's signature was obtained in Block 17.
    - (4) Verify the voided DA Form 31 is filed for a period of 6 months.
  - b. Verify the leave was voided on the Leave Control Log.
5. Ensure a Soldier's leave is extended when applicable.
    - a. Verify Block 21 of DA Form 31 is checked for approval of the leave extension.
    - b. Verify the leave extension dates are entered in Block 15 on the copy of DA Form 31 being maintained in the suspense file.
    - c. Verify the extension dates are posted to the Leave Control Log.
    - d. Verify the original DA Form 31 is forwarded to the Finance Office.
  6. Ensure the Leave Control Log is cross-checked daily with DA Form 647 or DA Form 647-1 for current departures.
    - a. Verify a Leave Departure Report was produced.
    - b. Verify the report was cross-checked with DA Form 647 or DA Form 647-1 for Soldiers departing on the date of the report.
    - c. Verify DA Form 31 is retrieved from the suspense file for a departing Soldier.
    - d. Verify the Departure Date, Time and Authority are entered in Block 1.
    - e. Verify one copy of DA Form 31 was given to the departing Soldier prior to his or her departure.
    - f. Verify the suspense copy of DA Form 31 is retained until the day before the last day of authorized absence or until the Soldier's duty status changes.
    - g. Ensure staff duty personnel can process departures during the supervisor's non-duty hours.
      - (1) Verify staff duty personnel are provided with DA Forms 31 for departing personnel during the supervisor's non-duty hours.
      - (2) Verify staff duty personnel are provided with Leave Departure Reports during the supervisor's non-duty hours.
  7. Ensure DA Form 31 is routed properly after a Soldier has departed on leave.
    - a. Ensure the type of leave noted on DA Form 31, Block 7 was verified.
    - b. Verify DA Form 31 was routed or filed as appropriate.
      - (1) Verify the suspense copy of DA Form 31 was routed to the Finance Office within 3 workdays of the Soldier starting Ordinary Leave.
      - (2) Verify the original and suspense copies of DA Form 31 were routed to the gaining unit upon the Soldier's departure if this is an Intrapost Leave.
      - (3) Verify the original copy of DA Form 31 on the UTM was hand-carried to the Finance Office within 2 workdays of the Soldier starting leave if this is an approved Transition Leave and the Soldier's assigned unit is at the same location with a separation transfer point.
      - (4) Verify the original copy of DA Form 31 was routed to the Finance Office on the Soldier's departure day if this is an approved Transition Leave and the Soldier is not assigned where there is a separation transfer point.
      - (5) Verify the original copy of DA Form 31 was routed to the PSB for completion of Parts II, III and IV if this is an approved Emergency Leave involving travel.
      - (6) Verify the original copy of DA Form 31 and DD Form 1351-2 were routed to the Finance Office within 3 workdays of the Soldier completing an approved Emergency Leave.
      - (7) Verify the original copy of DA Form 31 was routed with an attached TDY voucher to the Finance Office within 10 workdays if TDY is involved.
      - (8) Verify the original copy of DA Form 31 was given to the Soldier if this is an ordinary PCS Leave.
      - (9) Verify the organizational copy of DA Form 31 was filed in the functional files for 6 months.
  8. Ensure a Soldier's return from leave is processed.
    - a. Verify the Leave Control Log is checked daily for current returns.
    - b. Verify a Leave Returning Report was produced.

### Performance Steps

- c. Verify the Leave Returning Report is cross-checked with DA Form 647 or DA Form 647-1 for Soldiers returning on the date of the report.
  - d. Verify DA Form 31 was retrieved from the suspense file for returning Soldiers.
  - e. Verify the Returning Date, Time and Authority is entered in Block 16.
  - f. Verify the Leave Control Log is updated to reflect the Soldier's return from leave.
  - g. Verify the Leave Completion data is entered.
  - h. Ensure staff duty personnel can process returns during the supervisor's non-duty hours.
    - (1) Verify staff duty personnel are provided with DA Forms 31 for returning personnel during the supervisor's non-duty hours.
    - (2) Verify staff duty personnel are provided with the Leave Control Log and the Leave returning Reports during the supervisor's non-duty hours.
    - (3) Verify the original copy of DA Form 31 was routed to the finance office within 3 working days after completion of ordinary leave.
9. Ensure errors on chargeable leave are corrected.
- a. Verify the Chargeable Leave Reconciliation Report from the Finance Office was reviewed for discrepancies in chargeable leave.
  - b. Verify a revised Leave Control Log entry was created.
    - (1) Verify the original log entry containing the erroneous dates was voided.
    - (2) Verify a new Leave Control Log entry for the revised dates was created.
    - (3) Verify a reconciliation memo stating the reason for the change and the new control number were created.
  - c. Verify the date changes to the affected DA Form 31 are posted.
    - (1) Verify the changes are recorded in Block 17.
      - (a) Verify DA Form 31 was annotated with the message "Corrected Leave Charges."
      - (b) Verify the revised chargeable dates are listed and the reason for the correction is indicated.
    - (2) Verify Block 1 is annotated with the corrected Leave Control Log number.
  - d. Verify the revised DA Form 31 and the reconciliation memo were routed to the Finance Office within 3 workdays after completing the corrections.
  - e. Verify the organizational copy of DA Form 31 was filed in the functional files for 6 months.

**Evaluation Preparation:** This task can be evaluated by using the performance measures. This method of evaluation is appropriate if the NCO supervises SL 1/2 Soldiers who prepare requests for emergency leave. Use the performance measures to grade performance after the NCO has processed a request for emergency leave.

### Performance Measures

GO    NO GO

1. Reviewed DA Form 31 for accuracy and completeness.
2. Ensured the number of days of chargeable and non-chargeable leave was determined.
3. Ensured the Leave Control Log is updated by checking a hard copy printout.
4. Ensured Soldier's leave is voided when leave has been canceled.
5. Ensured Soldier's leave is extended when applicable.
6. Ensured the Leave Control Log is cross checked daily with DA Form 647 or DA Form 647-1 for current departures.
7. Ensured DA Form 31 is routed properly after a Soldier has departed on leave.
8. Ensured Soldier's return from leave is processed.
9. Ensured errors on chargeable leave are corrected.



**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 600-8-10  
AR 600-8-105  
DA FORM 31  
DA FORM 4179-R  
DA FORM 647  
DA FORM 647-1  
DD FORM 1351  
DD FORM 1351-2

**Related**

Subject Area 21: REVIEW CASUALTY OPERATIONS

**Review Emergency Notification Data**

**805C-42A-3473**

**Conditions:** Given a requirement to review a Soldier's emergency documents, access to the Soldier, a completed DD Form 93 (Record of Emergency Data), a completed SGLV Form 8286 (Servicemembers' Group Life Insurance Election and Certificate), a completed SGLV Form 8285 (Request for Insurance), AR 600-8-1 and a Officer Records Brief (ORB)/Enlisted Records Brief (ERB).

**Standards:**

1. Verify the items 1-16 of the DD form 93 are properly completed.
2. Verify the personal data on the SGLV Form 8286 is filled out completely and accurately.
3. Verify the personal data on the SGLV Form 8285 is filled out completely and accurately.
4. Ensure the completed DD Form 93, SGLV Form 8286, and SGLV Form 8285 are properly distributed.

**Performance Steps**

1. Verify items 1-16 of the DD Form 93 are properly completed.
  - a. Verify the member's full last name, first name, and middle name are entered in item 1.
  - b. Verify the member's social security number (SSN) is entered in item 2a.
  - c. Verify item 2b is left blank.
  - d. Verify the member's appropriate one-letter service code is entered in item 3a.
  - e. Verify item 3b is left blank.
  - f. Verify the first name, middle initial, maiden name, if applicable, and address of spouse is entered in item 4.
    - (1) Verify "single" is entered, if applicable.
    - (2) Verify "divorced" is entered, if applicable.
    - (3) Verify "widowed" is entered, if applicable.
  - g. Verify the first name, middle initial, last name, if different from the member's, relationship to the member, and the date of birth of all children is entered in item 5.
    - (1) Verify paternity for illegitimate children is acknowledged by a judicial decree.
    - (2) Verify the address is entered for children not living with the member.
  - h. Verify the first name, middle initial, last name, and address of father is entered in item 6.
    - (1) Verify "unknown" is entered, if applicable.
    - (2) Verify "deceased" is entered, if applicable.
    - (3) Verify the father's civilian title is entered, if applicable.
    - (4) Verify the father's military grade is entered, if applicable.
    - (5) Verify the relationship is indicated if other than natural father is listed, if applicable.
  - i. Verify the first name, middle initial, last name, and address of mother is entered in item 7.
    - (1) Verify "unknown" is entered, if applicable.
    - (2) Verify "deceased" is entered, if applicable.
    - (3) Verify the mother's civilian title is entered, if applicable.
    - (4) Verify the mother's military grade is entered, if applicable.
    - (5) Verify the relationship is indicated if other than natural mother is listed, if applicable.
  - j. Verify the relationship of the person(s) listed in items 4, 5, 6, or 7 who are not to be notified of a casualty are entered in item 8a.
  - k. Verify the relationship, name and or address of person(s) to be notified are entered in item 8b.
  - l. Verify the first name, last name, address, and relationship of person(s) to receive six months gratuity pay, if there is no surviving spouse or child at the time of death, is entered in item 9.

**Performance Steps**

- (1) Verify the person listed in item 9 is a parent, a parent in loco parentis status, brother, and /or sister.
  - (2) Verify the date of birth is indicated for brothers or sisters.
  - (3) Verify the percentage to be paid to each person is entered if two or more beneficiaries are indicated.
  - (4) Verify the sum shares to be paid to the beneficiaries equals 100 percent.
  - (5) Verify "none" is entered if the member has no eligible beneficiary.
  - m. Verify the first name, middle initial, last name, address, and relationship of person(s) to receive unpaid pay and allowances at the time of death is entered in item 10.
    - (1) Verify the percentage to be paid to each person is entered if two or more beneficiaries are indicated.
    - (2) Verify the sum shares to be paid to the beneficiaries equals 100 percent.
    - (3) Verify "none" is entered if the member does not designate a beneficiary.
  - n. Verify the first name, middle initial, last name, address, and relationship of dependent(s) the member designates to receive an allotment of pay if missing, captured , or interned is entered in item 11.
    - (1) Verify item 11 is left blank, if applicable.
    - (2) Verify the percentage to be paid to each person is entered if two or more beneficiaries are indicated.
    - (3) Verify the sum shares to be paid to the beneficiaries does not exceed 100 percent.
  - o. Verify the full name of all commercial life insurance companies, including the policy number (if the member desires) to be notified in case of death, is entered in block 12.
  - p. Verify any continuations and/or remarks regarding items 1-12 are entered in item 13, if applicable.
  - q. Verify the member's signature consisting of first name, middle initial, last name, including rank, rate, or grade is entered in item 14 on all copies.
  - r. Verify the witness' signature consisting of first name, middle initial, last name, including rank, rate, or grade is entered in item 15 on all copies.
  - s. Verify the date the member signed the form is entered in item 16 on all copies.
2. Verify the personal data on the SGLV Form 8286 is filled out completely and accurately.
    - a. Verify the Soldier's full name has been properly entered.
    - b. Verify the Soldier's rank, title or grade have been properly entered.
    - c. Verify the SSN has been properly entered.
    - d. Verify the reason for completing this form was checked as appropriate.
    - e. Verify the amount of insurance has been properly entered.
    - f. Verify beneficiaries are correct.
      - (1) Verify for unusual beneficiaries, the Soldier is counseled on the original purpose of SGLI.
      - (2) Verify for unusual beneficiaries, an unusual beneficiary designation notation is on the form.
      - (3) Verify for unusual beneficiaries, the individual who counsels the Soldier, signs and dates the notation.
    - g. Verify the SGLV Form 8286 is appropriately signed.
      - (1) Confirm the Soldier has signed the form, in the correct location, including grade and date, in ink.
      - (2) Confirm a disinterested witness has signed the form, in the correct location, including grade, in ink.
    - h. Scan the report for errors.
      - (1) Route inaccurate or incomplete SGLV 8286 back to the Human Resources Specialist for corrective action.
      - (2) Continue processing if the document is accurate and complete.
  3. Verify the personal data on the SGLV Form 8285 is filled out completely and accurately.
    - a. Verify the Soldier's full name has been properly entered.
    - b. Verify the SSN has been properly entered.

**Performance Steps**

- c. Verify the SGLV Form 8285 is appropriately signed.
    - (1) Confirm the Soldier has signed the form, in the correct location, including grade and date, in ink.
    - (2) Confirm the Soldier's commanding officer has signed the form, in the correct location, including grade, in ink.
  - d. Scan the report for errors.
    - (1) Route inaccurate or incomplete SGLV 8285 back to the Human Resources Specialist for corrective action.
    - (2) Forward the SGLV 8285 to the Office of Servicemembers' Life Insurance (OSGLI) if the document is accurate and complete.
4. Ensure the completed DD Form 93, SGLV Form 8286, and SGLV Form 8285 are properly distributed.
- a. Verify the Soldier received one copy of each form.
  - b. Verify one copy was filed in the Soldier's MPRJ.
  - c. Verify the remaining copy was mailed to CDR, HRC.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes Emergency Notification Data. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

NOTE TO EVALUATOR: Prior to the Soldier performing the task obtain a completed DD Form 93, SGLV FORM 8285 and SGLV 8286 from the local Personnel Office.

**Performance Measures**

**GO    NO GO**

- 1. Verified Items 1-16 of the DD Form 93 were properly completed.
- 2. Verified the personal data on the SGLV Form 8286 is filled out completely and accurately.
- 3. Verified the personal data on the SGLV Form 8285 is filled out completely and accurately.
- 4. Ensured the completed DD Form 93, SGLV Form 8286, and SGLV Form 8285 were properly distributed.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 600-8-1  
DD FORM 93  
SGLV FORM 8285  
SGLV FORM 8286

**Related**

**Review Casualty Reports**  
**805C-42A-3474**

**Conditions:** Given a requirement to review casualty printed casualty report(s) and access to AR 600-8-1; Enlisted Record Brief (ERB); Officer Record Brief (ORB); DD Form 93 (Record of Emergency Data), a completed SGLV Form 8286 (Servicemembers' Group Life Insurance Election and Certificate), and standard office supplies and equipment.

**Standards:**

1. Verify the Casualty Report is properly classified and prioritized.
2. Verify the casualty report is properly addressed.
3. Verify the report is addressed to the reporting Casualty Area Commander (CAC) and the appropriate Major Army Command (MACOM).
4. Correctly route the Casualty Report.

**Performance Steps**

1. Verify the casualty report is properly classified and prioritized.
  - a. Obtain a printout of the Casualty Report for review.
  - b. Check that the report has been marked FOR OFFICIAL USE ONLY, unless otherwise indicated.
  - c. Check that the report has been assigned correct precedence.
    - (1) Check that the report is assigned PRIORITY precedence unless immediate precedence is required.
    - (2) Check that the report is assigned IMMEDIATE precedence if Total Army Human Resources Command is required to make notification.
2. Verify the casualty report is properly addressed (Tables 3-2 and 3-3).
  - a. Verify the category of the casualty.
    - (1) Verify if the casualty was wounded, injured, or ill.
    - (2) Verify if the casualty was wounded, injured, or ill and not separated or discharged.
    - (3) Verify if the casualty was Absence Without Leave (AWOL).
    - (4) Verify if the casualty was a deceased retired general officer or a retired enlisted person who held the position of Sergeant Major of the Army.
    - (5) Verify if the casualty was retired, separated, or discharged or died within 120 days or one year for those with 100% disability.
    - (6) Verify if the casualty was retired.
    - (7) Verify if the casualty was retired and died in a medical treatment facility within the United States.
  - b. Verify the report is addressed correctly for all wounded, injured, or ill reportable persons.
    - (1) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA/TAPC-PEC//TAPC-PED-D for hostile action casualties.
    - (2) Verify the report is addressed to the reporting CAC and the appropriate MACOM for hostile action casualties.
    - (3) Verify the report is addressed to other information addressees required by reporting CMD (IDENTIFICATION OF THIS TERM NOT FOUND IN AR OR OTHER RESOURCES).
  - c. Verify the report is addressed correctly for all wounded, injured, or ill reportable persons, except U.S. Army retired, separated, or discharged.
    - (1) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA/TAPC-PEC//TAPC-PED-D for hostile action casualties.

**Performance Steps**

- (2) Verify the report is addressed to CDRARPERCEN ST LOUIS MO//ARPC-ARES//.
- (3) Verify the report is addressed to Commander of casualty area in which next-of-kin (NOK) resides.
- (4) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-RFC//.
- (5) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-FJEC-B//.
- (6) Verify the report is addressed to DA WASHINGTON DC//DAMI-ZA// for Missing in Action.
- (7) Verify the report is addressed to DIA WASH DC//DAMI-ZA// for Missing in Action.
- (8) Verify the report is addressed to DA WASHINGTON DC//SGPS-PSA// on initial reports for corporals and above.
- (9) Verify the report is addressed to DA WASHINGTON DC//DAPE// for general officers.
- (10) Verify the report is addressed to DIR AFIP WASHINGTON DC//AFIP-CME//.
- (11) Verify the report is addressed to CDR USASC FT RUCKER AL//CSSC-A//.
- (12) Verify the report is addressed to State Adjutant General for the Army National Guard (ARNG).
- (13) Verify the report is addressed to supporting Criminal Investigation Division (CID) for the ARNG.
- (14) Verify the report is addressed to the reporting CAC and the appropriate MACOM.
- d. Verify the report is addressed correctly for all AWOL and Deserters (Table 3-1).
  - (1) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA//TAPC-PEC//.
  - (2) Verify the report is addressed to CDR PERSCOM ALEXANDRIA VA//TAPC-PED-D//.
  - (3) Verify the report is addressed to CDR USAEREC INDIANAPOLIS IN//PCRE-RD//.
  - (4) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-RFC//.
  - (5) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-FJEC-B//.
  - (6) Verify the report is addressed to other information addressees required by reporting CMD.
- e. Verify the report is addressed correctly for a deceased retired general officer or a retired enlisted person who held the position of Sergeant Major of the Army (Table 3-1).
  - (1) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA//TAPC-PEC//.
  - (2) Verify the report is addressed to CDRARPERCEN ST LOUIS MO//ARPC-VAS-C//.
  - (3) Verify the report is addressed to Commander of casualty area in which NOK resides for casualties in CONUS.
  - (4) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-RFC//.
  - (5) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-FJEC-B//.
  - (6) Verify the report is addressed to DA WASHINGTON DC//SGPS-PSA//.
  - (7) Verify the report is addressed to DA WASHINGTON DC//DACS//.
  - (8) Verify the report is addressed to the reporting CAC and the appropriate MACOM.
- f. Verify the report is addressed correctly for a retired, separated, or discharged person who died within 120 days or one year for those with 100% disability (Table 3-1).
  - (1) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA//TAPC-PEC//.
  - (2) Verify the report is addressed to Commander of casualty area in which NOK resides for casualties in Continental US (CONUS).
  - (3) Verify the report is addressed to CDRHRC ALEXANDRIA VA//TAPC-PED-D//.
  - (4) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-RFC//.
  - (5) Verify the report is addressed to CDRARPERCEN ST LOUIS MO//ARPC-VAS-C//.
  - (6) Verify the report is addressed to the reporting CAC and the appropriate MACOM.
  - (7) Verify the report is addressed to other information addressees required by reporting CMD.
  - (8) Verify the report is addressed to State Adjutant General for ARNG only.
- g. Verify the report is addressed correctly for all other retired persons (Table 3-1).
  - (1) Verify the report is addressed to CDRARPERCEN ST LOUIS MO//ARPC-VAS-C//.
  - (2) Verify the report is addressed to Commander of casualty area in which NOK resides for casualties in CONUS.
  - (3) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA//TAPC-PEC//TAPC-PED-D//.

**Performance Steps**

- (4) Verify the report is addressed to DFAS-IN INDIANAPOLIS IN//DFAS-IN-RFC//.
- (5) Verify the report is addressed to State Adjutant General for ARNG only.
- (6) Verify the report is addressed to the reporting CAC and the appropriate MACOM.
- h. Verify the report is addressed correctly for dependents of retired persons who die in a medical treatment facility within the United States (Table 3-1).
  - (1) Verify the report is addressed to DA CASUALTY MEMORIAL AFFAIRS ALEXANDRIA VA//TAPC-PEC//TAPC-PED-D//.
  - (2) Verify the report is addressed to the reporting CAC and the appropriate MACOM.
- 3. Verify the report is addressed to the reporting CAC and the appropriate MACOM (Table 3-1).
  - a. Identify which type of report was prepared.
  - b. Verify the category of casualty.
    - (1) Verify if the casualty is military.
    - (2) Verify if the casualty is civilian.
    - (3) Verify if the casualty is a family member.
  - c. Verify type of casualty.
    - (1) Verify if the casualty is deceased.
    - (2) Verify if the casualty is missing.
    - (3) Verify if the casualty is wounded.
  - d. Verify the casualty report message items that must be completed based on the type of report, the category of person, and the type of casualty.
  - e. Verify the Soldier's data is entered correctly for Initial Report.
    - (1) Verify INIT is entered for Casualty Report Type (item 1).
    - (2) Verify Type of Casualty is correctly entered (item 2).
    - (3) Verify Casualty Status is correctly entered (item 3).
    - (4) Verify Report Number is correctly entered (item 4).
    - (5) Verify Category of Individual is correctly entered (item 7).
    - (6) Verify dashes are correctly included in the correct SSN (item 8).
    - (7) Verify Name is correctly entered as last name/first name/middle name (item 9).
    - (8) Verify correct race is entered (item 10).
    - (9) Verify correct Date and Place of Birth is entered correctly as YYYYMMDD/Birth City/Birth State/Birth Country (item 11).
    - (10) Verify the correct Rank is entered (item 12).
    - (11) Verify Component is correctly entered (item 13).
    - (12) Verify Organization/Station of Assignment is correctly entered (item 14).
    - (13) Verify Duty MOS is correctly entered (item 15).
    - (14) Verify Rank of Sponsor is correctly entered (item 16).
    - (15) Verify Sponsor Name is correctly entered as last name/first name/middle name (item 17).
    - (16) Verify Relation to Sponsor is correctly entered (item 18).
    - (17) Verify dashes are correctly included in the correct Sponsor SSN (item 19).
    - (18) Verify Sponsor Organization is correctly entered (item 20).
    - (19) Verify Retirement/Separation Date is entered correctly as YYYYMMDD (item 21).
    - (20) Verify TDRL or PDRL/percentage is correctly entered (item 22).
    - (21) Verify Date the Soldier was placed on TDRL or PDRL is correctly entered (item 23).
    - (22) Verify YES or NO as to whether the Soldier died while a patient in a Medical Treatment Facility is correctly entered (item 24).
    - (23) Verify Home of Record is correctly entered as Home City/Home State/Country (item 25).
    - (24) Verify Source of Pay Code for civilians is correctly entered (item 26).
    - (25) Verify Employer Name and Address for civilians is correctly entered (item 27).
    - (26) Verify complete NOK information is correctly entered (item 28).
      - (a) Verify NOK's information is entered correctly to include full name, relationship, complete address, and telephone number (item 28).
      - (b) Verify NOK's SSN is correctly included for service members (item 28).
      - (c) Verify parents' information is entered correctly (item 28).

### Performance Steps

- (d) Verify parents' full name, relationship, complete address and telephone number are correctly entered (item 28).
- (e) Verify DECEASED is entered if parent(s) is/are deceased (item 28).
- (f) Verify NOK is not notified if there is a comment as such (item 28).
- (27) Information for NOK if already notified is correctly entered (item 29).
- (28) Verify DD Form 93 Preparation and Review Dates are correctly entered (item 30).
- (29) Verify Vehicular Involvement (item 31).
- (30) Verify Type of Vehicle is correctly entered (item 32).
- (31) Verify Vehicle Ownership is correctly entered (item 33).
- (32) Verify Position Aboard Vehicle is correctly entered (item 34).
- (33) Verify Duty Status at time of incident/from date/to date is correctly entered (item 35).
- (34) Verify Date/Time of Incident is correctly entered as YYYYMMDD/HHMM (item 36).
- (35) Verify slashes are correctly entered for City/State/Country for Place of Incident (item 37).
- (36) Verify Activity at time of incident is correctly entered (item 38).
- (37) Verify Circumstances, including facts from Casualty Feeder/Witness Report is correctly entered (item 39).
- (38) Verify Inflicting Force is correctly entered (item 40).
- (39) Verify Diagnosis is correctly entered (item 41).
- (40) Verify Place Hospitalized is entered as hospital name/city/state/country/zip code (item 42).
- (41) Verify complete Mailing Address is entered if different than Place Hospitalized (item 43).
- (42) Verify Prognosis is correctly entered (item 44).
- (43) Verify Casualty Assistance is correctly entered (item 45).
- (44) Verify pay entry basic date (PEBD) and basic active service data (BASD) is correctly entered as YYYYMMDD/YYYYMMDD (item 46).
- (45) Verify Religious Preference is correctly entered (item 47).
- (46) Verify Receive Ministrations is correctly entered (item 48).
- (47) Verify Decorations and Awards are correctly entered (item 49).
- (48) Verify Training Related is correctly entered (item 50).
- (49) Verify Date Recommended for Promotion is correctly entered (item 51).
- (50) Verify Rank Recommended is correctly entered (item 52).
- (51) Verify Held Higher Rank is correctly entered (item 53).
- (52) Verify Servicemembers' Group Life Insurance (SGLI) Date is correctly entered as YYYYMMDD (item 54).
- (53) Verify Death Gratuity is correctly entered (item 55).
- (54) Verify Line of Duty Status is correctly entered (item 56).
- (55) Verify Date/Time of Death is correctly entered as YYYYMMDD/HHMM (item 57).
- (56) Verify Place of Death is correctly entered (item 58).
- (57) Verify Cause of Death is correctly entered (item 59).
- (58) Verify Status of Remains is correctly entered (item 60).
- (59) Verify Remarks are correctly entered (item 61).
- f. Verify the Soldier's data is entered correctly for Status Change Report.
  - (1) Verify the status change (STACH) is entered for Casualty Report Type (item 1).
  - (2) Verify Type of Casualty is correctly entered (item 2).
  - (3) Verify Casualty Status is correctly entered (item 3).
  - (4) Verify Report Number is correctly entered (item 4).
  - (5) Verify Category of Individual is correctly entered (item 7).
  - (6) Verify dashes are correctly included in the correct SSN (item 8).
  - (7) Verify the correct name is entered correctly as last name/first name/middle name (item 9).
  - (8) Verify dashes are correctly included in the correct Sponsor SSN (item 19).
  - (9) Verify complete NOK information is correctly entered (item 28).
    - (a) Verify NOK's information is entered correctly to include full name, relationship, complete address, and telephone number (item 28).
    - (b) Verify NOK's correct SSN is entered for service members (item 28).



**Performance Steps**

- (c) Verify parents' information is entered correctly (item 28).
  - Verify parents' full name, complete address and telephone number are entered.
  - Verify DECEASED is entered if parent(s) is/are deceased.
- (d) Verify NOK is not notified if there is a comment as such (item 28).
- (10) Verify the information for NOK already notified is correctly entered (item 29).
- (11) Verify Circumstances, including facts from Casualty Feeder/Witness Report is correctly entered (item 39).
- (12) Verify Inflicting Force is correctly entered (item 40).
- (13) Verify Diagnosis is correctly entered (item 41).
- (14) Verify Place Hospitalized is correctly entered as hospital name/city/state/country/zip code (item 42).
- (15) Verify complete Mailing Address is correctly entered if different than Place Hospitalized (item 43).
- (16) Verify Prognosis is correctly entered (item 44).
- (17) Verify Casualty Assistance is correctly entered (item 45).
- (18) Verify Religious Preference is correctly entered (item 47).
- (19) Verify Receive Ministrations is correctly entered (item 48).
- (20) Verify Decorations and Awards are correctly entered (item 49).
- (21) Verify Training Related is correctly entered (item 50).
- (22) Verify Date Recommended for Promotion is correctly entered (item 51).
- (23) Verify Rank Recommended is correctly entered (item 52).
- (24) Verify Held Higher Rank is correctly entered (item 53).
- (25) Verify SGLI Date is correctly entered (item 54).
- (26) Verify Death Gratuity is correctly entered (item 55).
- (27) Verify Line of Duty Status is correctly entered (item 56).
- (28) Verify Date/Time of Death is correctly entered as YYYYMMDD/HHMM (item 57).
- (29) Verify Place of Death is correctly entered (item 58).
- (30) Verify Cause of Death is correctly entered (item 59).
- (31) Verify Status of Remains is correctly entered (item 60).
- (32) Verify Remarks are correctly entered (item 61).
- g. Verify Soldier's data is entered correctly for Progress Report.
  - (1) Verify PROG for Casualty Report Type is correctly entered (item 1).
  - (2) Verify Type of Casualty is correctly entered (item 2).
  - (3) Verify Casualty Status is correctly entered (item 3).
  - (4) Verify Report Number is correctly entered (item 4).
  - (5) Verify Category of Individual is correctly entered (item 7).
  - (6) Verify dashes are correctly included in the correct SSN (item 8).
  - (7) Verify the correct name is correctly entered as last name/first name/middle name (item 9).
  - (8) Verify dashes are correctly included in the correct Sponsor SSN (item 19).
  - (9) Verify complete NOK information is correctly entered (item 28).
    - (a) Verify NOK's information is entered correctly to include full name, relationship, complete address, and telephone number (item 28).
    - (b) Verify NOK's correct SSN is entered for service members (item 28).
    - (c) Verify parents' information is entered correctly (item 28).
      - Verify parents' full name, complete address and telephone number are entered.
      - Verify DECEASED is entered if parent(s) is/are deceased.
    - (d) Verify NOK is not notified if there is a comment as such.
  - (10) Verify the information for NOK already notified is correctly entered (item 29).
  - (11) Verify Diagnosis is correctly entered (item 41).
  - (12) Verify Place Hospitalized is correctly entered as hospital name/city/state/country/zip code (item 42).
  - (13) Verify complete Mailing Address is correctly entered if different than Place Hospitalized (item 43).
  - (14) Verify Prognosis is correctly entered (item 44).
  - (15) Verify Remarks are correctly entered (item 61).

### Performance Steps

- h. Verify the Soldier's data is entered correctly for Supplemental Report.
  - (1) Verify supplemental (SUPP) is correctly entered for Report Type (item 1).
  - (2) Verify Type of Casualty is correctly entered (item 2).
  - (3) Verify Casualty Status is correctly entered (item 3).
  - (4) Verify Report Number is correctly entered (item 4).
  - (5) Verify Category of Individual is correctly entered (item 7).
  - (6) Verify dashes are correctly included in the correct SSN (item 8).
  - (7) Verify the correct name is correctly entered as last name/first name/middle name (item 9).
  - (8) Verify dashes are correctly included in the correct Sponsor SSN (item 19).
  - (9) Verify complete NOK information is correctly entered (item 28).
    - (a) Verify NOK's information is entered correctly to include full name, relationship, complete address, and telephone number (item 28).
    - (b) Verify NOK's correct SSN is entered for service members (item 28).
    - (c) Verify parents' information is entered correctly (item 28).
    - (d) Verify parents' full name, complete address and telephone number are entered (item 28).
    - (e) Verify DECEASED is entered if parent(s) is/are deceased (item 28).
    - (f) Verify NOK is not notified if there is a comment as such (item 28).
  - (10) Verify the information for NOK already notified is correctly entered (item 29).
  - (11) Verify remarks are correctly entered (item 61).
- 4. Correctly route the Casualty Report.
  - a. Obtain authenticating official's signature.
  - b. Dispatch IAW local procedures.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes Casualty Reports. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

### Performance Measures

**GO**    **NO GO**

- 1. Verified the casualty report was properly classified and prioritized.
- 2. Verified the casualty report was properly addressed.
- 3. Cross-checked the personal data on the casualty report with the data contained in the ERB/ORB and DD Form 93 for accuracy.
- 4. Correctly routed the Casualty Report.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

### References

| Required                  | Related |
|---------------------------|---------|
| AR 600-8-1                |         |
| DCIPS FORWARD USER MANUAL |         |
| DD FORM 93                |         |
| SGLV FORM 8286            |         |

Subject Area 22: REVIEW AUTOMATED REPORTS  
**Review the Unit Manning Report (UMR) to Ensure Proper Utilization**  
**805C-42A-3406**

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

- a. AAA-161, Unit Manning Report (UMR).
- b. DA Pam 611-21
- c. AR 614-200.
- d. DA PAM 600-8.
- e. AR 600-8-6.
- f. Standard office supplies and equipment.

**Standards:**

1. Verify that personnel are properly assigned.
2. Verify that mismatches that are not assigned according to the commander's priorities are an exception.
3. Verify that designated personnel are properly utilized.
4. Ensure the processing of upcoming Expiration Terms of Service (ETS) or known losses and that all new vacancies are filled with qualified Soldiers.
5. Ensure all new vacancies are filled with qualified Soldiers.

**Performance Steps**

1. Verify that personnel are properly assigned.
  - a. Locate the Military Occupational Specialty Code (MOSC) lines for the authorization and incumbent assignments on the UMR.
  - b. Identify discrepancies between the incumbent lines and the authorization lines.
  - c. Verify that assigned MOSCs, which do not match the authorized MOSCs, are assigned IAW the commander's priorities.
    - (1) Verify that Soldiers are assigned according to their Primary MOS (PMOS), or Career Progression MOS (CPMOS), up to one grade higher.
    - (2) Verify that Soldiers, for whom no PMOS nor CPMOS slot is available, are assigned in their Secondary MOS (SMOS) for no more than 12 months.
    - (3) Verify that Soldiers, for whom no SMOS slot is available, are assigned to their Additional MOS (AMOS) for no more than 12 months.
    - (4) Verify that Soldiers, for whom no AMOS slot is available, are assigned a MOS substitute for no more than 12 months.
      - (a) Check for substitutability per DA Pam 611-21.
        - Locate applicable MOS flowchart.
        - Check flowchart for acceptable substitutions.
      - (b) Assign Soldiers to positions that provide the most potential for their career advancement.
    - (5) Assign a Soldier in a shortage or balanced MOS in which he or she is being trained.
2. Verify that mismatches that are not assigned according to the commander's priorities are an exception.
  - a. Verify that the assignment is to meet an urgent military requirement to satisfy an exceptional special duty.

### Performance Steps

- (1) Verify that Borrowed Military Manpower assignments last no more than 90 days.
    - (2) Verify that Troop Diversion assignments last no more than 90 days.
  - b. Verify that the assignment is to qualify the Soldier for a shortage MOS.
  - c. Verify that the assignment is made to support Reserve summer training.
  - d. Verify that the assignment is made under special instruction from Headquarters, Department of the Army (HQDA).
  - e. Verify that corporals are utilized in a specialist position at the same rank when no Noncommissioned Officer (NCO) vacancies are available in the current rank and same or higher skill level.
  - f. Verify that Soldiers assigned in a one-grade lower position meet the required conditions.
    - (1) Verify that Soldiers assigned in a one-grade lower position are surplus.
    - (2) Verify that the Soldier knows the specific reason for the assignment.
    - (3) Verify that the Soldier is not penalized through the Enlisted Evaluation Reporting System.
3. Verify that designated personnel are properly utilized.
  - a. Identify personnel who are Conscientious Objectors; Inducted physicians, dentists, and veterinarians; Defense Language Institute (DLI) graduates; Non-Bonus First-Term Soldiers; Bonus Recipients; First Sergeants; and NCOs.
  - b. Verify that Conscientious Objectors are properly utilized.
  - c. Verify that inducted physicians, dentists, and veterinarians are properly utilized.
  - d. Verify that DLI graduates are properly utilized.
    - (1) Verify that DLI graduates are utilized in authorized positions which require foreign language ability.
    - (2) Verify that the Commanding General (CG), HRC approves any exception.
  - e. Verify that Non-bonus, First Term Soldiers serve in their PMOS during their first 12 months after completion of advanced individual training (AIT).
  - f. Verify that Bonus Recipients are utilized in the MOS in which they are receiving the bonus.
  - g. Verify that First Sergeant positions are utilized in their PMOS.
    - (1) Verify that exceptions are in the rank of Master Sergeant (MSG).
    - (2) Verify that exceptions have the Skill Qualification Identifier (SQI) of "M."
    - (3) Verify that no qualified and available personnel with the proper PMOS/CPMOS and rank are available to fill the vacancy.
  - h. Verify that NCO ranks of Sergeant (SGT) through Sergeant Major (SGM)/Command Sergeant Major (CSM) fill MOS and grade authorization in Modification Table of Organization and Equipment (MTOE) and the Table of Distribution and Allowances (TDA) troop units.
4. Verify upcoming ETS or known losses.
  - a. Locate the ETS column on the UMR.
  - b. Verify that the ETS is within the next 30 to 180 days.
  - c. Direct clerk to ensure pending losses are entered in eMILPO.
5. Ensure all new vacancies are filled with qualified Soldiers.
  - a. Locate Soldiers qualified in position number (POS NUM) 9990 or 9991 or 9992 to fill the vacancy.
  - b. Direct clerk to enter the change in position numbers in eMILPO.
  - c. Report any surplus or excess personnel monthly.
    - (1) Check that the Soldier's current MOS is over-strength per HRC in/out call messages.
    - (2) Declare Soldiers who cannot be assigned as surplus or over-strength.
    - (3) Direct clerk to prepare a memo to Personnel Services Battalion (PSB) identifying over-strength Soldiers for reassignment.
  - d. Verify that UMR is kept in the active file.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes the Unit Manning Report. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

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

1. Verified that personnel are properly assigned.
2. Verified that mismatches that are not assigned according to the commander's priorities are an exception.
3. Verified that designated personnel are properly utilized.
4. Verified upcoming ETS or known losses.
5. Ensured all new vacancies are filled with qualified Soldiers.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References****Required**

AAA-161  
 AR 614-200  
 DA PAM 600-8  
 DA PAM 611-21

**Related**

AAA-161  
 AR 614-200  
 DA PAM 600-8  
 DA PAM 611-21

**Review Wartime Strength Accounting/Reporting**  
**805C-42A-3495**

**Conditions:** Given a requirement to review wartime strength accounting reporting, access to a Battle Roster (BR), Personnel Summary Report (PS), Personnel Requirements Report (PRR), Personnel Status Report (PSR) (DA Form 5367-R), Task Force Personnel Summary (TFPS), AR 600-8-6, FM 12-6.

**Standards:** Review wartime strength accounting reporting to include:

1. Review the Battle Roster (BR).
2. Review the Personnel Summary Report (PS).
3. Review the Personnel Requirements Report (PRR).
4. Review the Personnel Status Report (PSR) (DA Form 5367-R).
5. Review Task Force Personnel Summary (TFPS).

**Performance Steps**

1. Review the Battle Roster.
  - a. Review the position data.
    - (1) Identify the Unit Processing Code (UPC) on the roster.
    - (2) Identify a Soldier's sequence number (SEQ NUM) on the roster.
    - (3) Identify a Soldier's duty title (TITLE) on the roster.
    - (4) Identify a Soldier's three-character rank letters on the roster (AUTH GR).
    - (5) Identify a Soldier's five-character alpha numeric MOS code on the roster (DMOS).
  - b. Review personnel data.
    - (1) Identify a Soldier's six-character alpha number code on the roster (BR NUM).
    - (2) Identify a Soldier's name on the roster.
    - (3) Identify a Soldier's social security number (SSN) on the roster.
    - (4) Identify a Soldier's three-character letter code showing rank on the roster (GR).
    - (5) Identify a five-character alpha numeric code showing primary MOS (PMOS) on the roster.
    - (6) Identify the three-character letter code showing duty status (DYST) on the roster.
    - (7) Identify the two-character numeric code showing deployability on the roster (DC).
    - (8) Identify the Task Force UPC alpha-numerical characters on the roster (TF-UPC).
2. Review the Personnel Summary Report.
  - a. Review Part I - "Detailed Portion" of the report.
    - (1) Identify the name of the report.
    - (2) Identify the page number of the report.
    - (3) Identify the parent unit with the date and time the report was printed (REPORTING UNIT/DATE/TIME OF REPORT).
    - (4) Identify the name of the unit (UNIT NAME) submitting the report.
    - (5) Identify the Military Personnel Class (MPC).
    - (6) Identify the authorized strength of the unit by MPC (AUTH).
    - (7) Identify the unit's total personnel assigned for the previous day's ending strength (ASG).
    - (8) Identify the unit's ending strength of personnel on-hand who could do the unit's mission (OPSTR) for the previous day.
    - (9) Identify the number of replacements the unit has received since the last report (REPL).
    - (10) Identify the number of Soldiers attached to the unit since the last report (ATCH).
    - (11) Identify the number of Soldiers reassigned to another unit since the last report (RSG).
    - (12) Identify the number of Soldiers killed in action or who have died of non-battle injuries since the last report (KIA/DED).

**Performance Steps**

- (13) Identify the unit's number of Soldiers who have returned to duty either from the hospital or from missing in action since the last report (RTD).
  - (14) Identify the unit's number of Soldiers classified as missing in action (MIA) since the last report.
  - (15) Identify the unit's number of Soldiers wounded in action and hospitalized because of battle injury since the last report (WIA/HOW).
  - (16) Identify the unit's number of Soldiers hospitalized because of a non-battle injury since the last report (NBL/HOS).
  - (17) Identify the unit's number of Soldiers detached from the unit or performing a temporary duty outside the unit since last report (DTC/TDY).
  - (18) Identify the unit's number of Soldiers in any other type of duty status (OTH).
  - (19) Identify the unit's current assigned strength after gains and losses are computed into the previous numbers (PREVIOUS ASG).
  - (20) Identify the unit's personnel strength of Soldiers on-hand to do the unit's mission after duty status changes have been calculated (OPSTR).
  - (21) Identify the unit's operating strength percentage (OPSTR%).
- b. Review Part II - "Duty Status Summarized Portion" of the report.
    - (1) Identify the name of the report.
    - (2) Identify the page number on the report.
    - (3) Identify the unit's name submitting the report.
    - (4) Identify the unit's Military Personnel Class (MPC).
    - (5) Identify the unit's personnel who are present for duty (PDY).
    - (6) Identify the unit's personnel who are present for duty but are not deployable (PDY/ND).
    - (7) Identify the unit's number of attached personnel (ATCH).
    - (8) Identify the unit's personnel who are performing temporary duty outside the unit (TDY).
    - (9) Identify the unit's number of unauthorized absences of personnel or who are absent without leave ((UA)AWOL).
    - (10) Identify the unit's number of hospitalized Soldiers (HOS/HOW).
    - (11) Identify the unit's number of missing Soldiers (MIS/MIA).
    - (12) Identify the unit's number of Soldiers captured (CAP).
    - (13) Identify the unit's number of Soldiers on leave (LEAVE).
    - (14) Identify the unit's number of Soldiers who are in another duty status not specified under the previous column (OTHER).
  - c. Review Part III, "Narrative Portion" of the report.
3. Review the Personnel Requirements Report.
    - a. Review Part I - "Officer Requirements" of the report.
      - (1) Identify the name of the report.
      - (2) Identify the current unit data (CURRENT UNIT).
      - (3) Identify the area specifying the unit reporting personnel requirements, with the date and time the report was printed (REPORTING UNIT).
      - (4) Identify the UPC.
      - (5) Identify the column header for grade (GRADE).
      - (6) Identify the two-character numeric code for Specialty MOS (SSI).
      - (7) Identify the authorized strength specialty and grade (AUTH).
      - (8) Identify the current assigned strength specialty and grade (ASG).
      - (9) Identify the number of required replacements needed (REQUIRED).
      - (10) Identify the total number of Soldiers authorized and assigned in a specialty (TOTALS).
      - (11) Identify the percentage of fill for a specialty (FILL).
    - b. Identify the number of Soldiers in the RQMT column for each SSI/PMOS, ASI, and grade.
    - c. Review Part II- "Warrant Officer Requirements" of the report.
      - (1) Identify the name of the report.
      - (2) Identify the current unit data (CURRENT UNIT).
      - (3) Identify the area specifying the unit reporting personnel requirements, with the date and time the report was printed (REPORTING UNIT).

### Performance Steps

- (4) Identify the UPC.
  - (5) Identify the four-character alpha number code for MOS.
  - (6) Identify the authorized strength specialty and grade (AUTH).
  - (7) Identify the current assigned strength specialty and grade (ASG).
  - (8) Identify the number of required replacements (REQUIRED).
  - (9) Identify the totals of authorized and assigned numbers in the specialty (TOTALS).
  - (10) Identify the percentage of fill for a specialty (FILL).
  - d. Review Part III "Enlisted Requirements" of the report.
    - (1) Identify the name of the report.
    - (2) Identify the current unit data (CURRENT UNIT).
    - (3) Identify the area specifying the unit reporting personnel requirements, with the date and the time the report was printed (REPORTING UNIT).
    - (4) Identify the UPC.
    - (5) Identify the four-character alpha-numeric code for MOS.
    - (6) Identify the column header for skill level (SL).
    - (7) Identify the authorized strength specialty and grade (AUTH).
    - (8) Identify the current assigned strength specialty and grade (ASG).
    - (9) Identify the number of required replacements (REQUIRED).
    - (10) Identify the totals of authorized and assigned numbers in the specialty (TOTALS).
    - (11) Identify the percentage of fill for a specialty (FILL).
  - e. Review Part IV - Narrative Portion.
4. Review the Personnel Status Report.
- a. Identify the Report Number.
  - b. Identify the time the report was prepared.
  - c. Identify the Unit.
  - d. Review the Personnel Daily Summary.
    - (1) Identify the number of Authorized personnel that are commissioned, warrant and enlisted.
    - (2) Identify the number of Assigned personnel that are commissioned, warrant and enlisted.
    - (3) Identify the number of PDY that are commissioned, warrant and enlisted.
    - (4) Identify the number of KIA that are commissioned, warrant and enlisted.
    - (5) Identify the number WIA that are commissioned, warrant and enlisted.
    - (6) Identify the number MIA that are commissioned, warrant and enlisted.
    - (7) Identify the number of NONBAT LOSSES that are commissioned, warrant and enlisted.
    - (8) Identify the number of total LOSSES that are commissioned, warrant and enlisted.
    - (9) Identify the GAINS that are commissioned, warrant and enlisted.
    - (10) Identify written comments in the Remarks Section.
  - e. Interpret the written comments in Part III - Remarks Section.
5. Review the Task Force Personnel Summary.
- a. Review Part I - C2 Task Force Report - Organic.
  - b. Review Part II - C2 Task Force Report - Attached Direct Support/General Support (DS/GS).
  - c. Review Part III - C2 Task Force Report - Summary.
  - d. Review Non US Army Personnel.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier handles Wartime Strength Accounting/Reporting. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance measure.



**Performance Measures**

**GO   NO GO**

1. Reviewed the Battle Roster.
2. Reviewed the Personnel Summary Report.
3. Reviewed the Personnel Requirements Report.
4. Reviewed the Personnel Status Report.
5. Reviewed the Task Force Personnel Summary.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

AR 600-8-6  
DA FORM 5367-R  
FM 12-6

**Related**

Subject Area 24: REVIEW OFFICE ADMINISTRATION

**Prepare Personnel Readiness Data for Unit Status Report  
805C-42A-3006**

**Conditions:** Given a requirement to prepare personnel readiness data for the USR (DA Form 2715-R) and access to:

- a. Personnel Readiness Data Worksheet
- b. AR 220-1
- c. AR 600-8-6
- d. Standard office supplies and equipment

**Standards:**

1. Determine the Assigned Strength Percentage (ASPER).
2. Determine the number of assigned Soldiers who are not deployable.
3. Determine the Available Strength Percentage (AVPER) and the P-level.
4. Determine the Military Occupational Specialty Qualified Percentage (MSPER) and the P-level.
5. Determine the Senior Grade Percentage (SGPER) and the P-level.
6. Determine the personnel turnover percentage (APERT).
7. Complete information required for DA Form 2715-R, Section A, Set 4.
8. Complete information required for DA Form 2715-R, Section B, Sets 11, 12, 13, and 14.
9. Complete information required DA Form 2715-R, Section C.
10. Complete information required for DA Form 2715-R, Section D, as appropriate.
11. Complete DA Form 2715-R, Section B, Block 13.
12. Complete DA Form 2715-R, Section B, Block 14.
13. Complete DA Form 2715-R, Section C.
14. Complete DA Form 2715-R, Section D (USR pages 4-22).

**Performance Steps**

1. Determine the ASPER using the MTOE and the UPAR.
  - a. Determine the required strength of the unit from the MTOE.
    - (1) Locate the REQ column on the second page of the MTOE.
    - (2) Locate the total at the bottom of the REQ column.
    - (3) Annotate the total required strength on scratch paper.
  - b. Determine the assigned strength of the unit from the UPAR.
    - (1) Access eMILPO in order to generate report(s).
      - ( a) Confirm that the user have Accepted the standard Department of Defense Security Statement.

**Performance Steps**

- (b) Confirm that the user have entered his or her AKO credentials to enter eMILPO.
  - (c) Enter a valid User Name and Password in the provided text entry fields.
  - (d) Click "OK" to proceed.
  - (2) The user will select an UIC to begin this session.
    - (a) The user will click "OK" to proceed to the Main Menu.
    - (b) Press the functional category of Readiness to access the USR.
    - (c) Press the Personnel Asset Visibility Report (PAVR).
    - (d) Press select an UIC and a Document Effective Date, then click "OK" to proceed.
    - (e) Press the PAVR Calculations functional category to proceed.
  - (3) Adjust the PCN to the current status.
    - (a) Add the personnel gains which have occurred since the date of the report.
    - (b) Subtract the personnel losses which have occurred since the date of the report.
  - (4) Annotate the assigned strength on scratch paper for future reference.
  - c. Compute the ASPER.
    - (1) Identify the number of assigned personnel who are not designated to report to another unit under alert, deployment, or combat conditions.
    - (2) Identify the number of PROFIS personnel from a copy of the current PROFIS roster, if applicable.
    - (3) Divide the assigned strength by the required strength.
    - (4) Multiply the quotient by 100 to obtain the ASPER.
    - (5) Annotate the ASPER on scratch paper for future reference.
2. Identify the number of assigned Soldiers who are not deployable.
- a. Determine the number of Soldiers who are non-deployable based on the UPAR.
    - (1) Locate the Duty Status Code in AR 600-8-6, Table 2-1.
    - (2) Locate the Decision Matrix in AR 220-1, Table D-1.
    - (3) Cross-check the Duty Status Code with the UPAR to determine if the Soldier is not deployable.
    - (4) Annotate the number of non-deployable Soldiers for future reference.
  - b. Identify the number of Soldiers who are non-deployable based on the Unit Readiness Deficiency Summary Report.
    - (1) Generate a Non-Deployable list from the "PAVR Calculations
      - (a) To modify the availability status of a Soldier, click on the corresponding checkbox in the "Override" Column.
      - (b) Click "Submit" to proceed. The system will recalculate the Available Strength Percentage accordingly.
      - (c) To exit the page without altering any status, click "Close."
    - (2) Add the number of non-deployable Soldiers extracted from the UPAR and the Unit Non-Deployable list.
  - c. Identify the number of Soldiers who are non-deployable due to Expiration Term of Service (ETS) in less than seven days using an ETS Roster.
    - (1) Compare the date of each Soldier's ETS with the current date.
    - (2) Count all Soldiers with less than seven days to ETS as non-deployable.
  - d. Identify the number of Soldiers who are non-deployable due to not fulfilling the minimum training requirements by reviewing the Local Unit Training Report or the Soldier's training records.
  - e. Add the total number of Soldiers who have been identified as non-deployable.
  - f. Subtract the number of non-deployable Soldiers from the number of total assigned Soldiers to obtain the available strength.
  - g. Annotate the number of Soldiers who are non-deployable due to pregnancy for future reasons. Skills.
3. Determine the AVPER and the P-level.
- a. Generate the Personnel Summary Report.
    - (1) Generate the Personnel Summary Report.

### Performance Steps

- (a) The user will select an UIC to begin the session.
    - (b) The user will click "ok" to proceed to the main menu.
    - (c) Press the functional category of Readiness to access the USR.
    - (d) Press the Personnel Asset Visibility Report (PAVR).
    - (e) Press select an UIC and a document effective date, then click "ok" to proceed.
    - (f) Press the "PAVR" calculations to proceed.
  - b. Divide the available strength from the Personnel Summary Report by the required strength as previously annotated.
  - c. Multiply the quotient by 100.
  - d. Annotate the AVPER on scratch paper for future reference.
  - e. Determine the P-level.
    - (1) Round off the AVPER to the nearest whole percentage.
    - (2) Locate Table 4-1 in AR 220-1.
    - (3) Locate the percentage in the table equal to the total available strength.
    - (4) Identify the P-level, based on the percentage range.
    - (5) Annotate the P-level on scratch paper for future reference.
4. Determine the MSPER and the P-level.
  - a. Determine the required MOS qualified personnel strength of the unit.
    - (1) Determine the number of qualified available personnel by generating a Personnel Requirements Report (PRR).
      - (a) The user will select an UIC to begin this session
      - (b) The user will click "ok" to proceed to the main menu.
      - (c) Press the functional category of Readiness to access the USR.
      - (d) Press the Personnel Asset Visibility Report (PAVR).
      - (e) Press select an UIC and document effective date, then click "ok" to proceed.
      - (f) Press the "PAVR" calculations to proceed.
    - (2) Determine the number of personnel spaces required by rank and by military occupational specialty code (MOSC) from the MTOE.
      - (a) Locate the REQ and AUTH columns on the MTOE and PRR.
      - (b) Match the qualified available personnel against the requirements by using a MOS Inventory by Grade Report.
    - (3) Match the qualified available personnel against the requirements.
      - (a) Match officer to officer spaces on a one-for-one basis.
      - (b) Avoid shuffling slots if it is solely to accommodate the USR.  
Ensure that NCOs are not placed out of their senior grade strength.
      - (c) Include enlisted Soldiers as qualified when they can be used in their primary MOSC (PMOSC), secondary MOSC (SMOSC), or their additional MOSC (AMOSC).
      - (d) Place over-strength personnel in an SMOSC or AMOSC vacancy for which they qualify.
      - (e) Include PROFIS fillers as qualified.
  - b. Verify that MOS qualified strength does not exceed available strength.
  - c. Divide the available MOS qualified strength by the required qualified MOS strength.
  - d. Multiply the quotient by 100 to obtain the MSPER.
  - e. Annotate the MSPER on scratch paper for future reference.
  - f. Determine the P-level.
    - (1) Round off MSPER to the nearest whole percentage.
    - (2) Locate Table 4-1 in AR 220-1.
    - (3) Locate the percentage for the total available strength from the table.
    - (4) Identify the P-level, based on percentage range.
    - (5) Annotate the P-level on scratch paper for future reference.
5. Determine the SGPER and the P-level.
  - a. Identify the number of senior grade personnel assigned or attached to the unit by performing an Ad Hoc query on eMILPO.

**Performance Steps**

- (1) Build a query for senior grade personnel.
    - (a) The user will select an UIC to begin this session.
    - (b) The user will click "ok" to proceed to the main menu.
    - (c) Press the functional category of Readiness to access the USR.
    - (d) Press the Personnel Asset Visibility Report (PAVR).
    - (e) Press select an UIC and a document effective date, then click "ok" to proceed.
    - (f) Press the "PAVR" calculations to proceed.
  - b. Determine the required senior grade strength.
    - (1) Determine the number of senior grade spaces required from the MTOE.
      - (a) Locate the REQ and AUTH columns on the last page of the MTOE.
      - (b) Locate the GR column on the last page of the MTOE.
    - (2) Match the qualified available personnel against the requirements.
  - c. Determine the available senior grade strength by using a MOS Inventory by Grade Report.
    - (1) Add the number of available commissioned officers, warrant officers, and noncommissioned officers in grades E5 through E9.
    - (2) Include PROFIS fillers as qualified.
  - d. Divide the available senior grade strength by the required senior grade strength.
  - e. Multiply the quotient by 100 to obtain the SGPER.
  - f. Annotate the SGPER on scratch paper for future reference.
  - g. Determine the P-level.
    - (1) Round off the SGPER to nearest whole percentage.
    - (2) Locate Table 4-1 in AR 220-1.
    - (3) Locate the percentage for the total available strength in the table.
    - (4) Identify the P-level, based on percentage range.
    - (5) Annotate the P-level on scratch paper for future reference.
6. Determine the APERT.
- a. Identify the number of personnel reassigned or separated from the unit during the preceding three months by creating a loss roster on eMILPO.
    - (1) Generate a Loss Roster.
      - (a) The user will select an UIC to begin the session.
      - (b) The user will click "ok" to proceed to the main menu.
      - (c) Press the functional category of Readiness to access the USR.
      - (d) Press the Personnel Asset Visibility Report (PAVR).
      - (e) Press select an UIC and a document effective date, then click "ok" to proceed.
      - (f) Press the "PAVR" calculations to proceed.
  - b. Divide the number of personnel who have departed by the assigned strength.
  - c. Multiply the quotient by 100 to obtain the APERT.
  - d. Annotate the APERT on scratch paper for future reference.
7. Complete DA Form 2715-R, Section A, Block 4.
- a. Enter the overall P-level rating in PRRAT box.
    - (1) Identify the lowest P-level.
    - (2) Select the lowest P-level to obtain the overall P-level.
  - b. Enter reason code and why the P-level is below P-1, if applicable.
    - (1) Locate Table E-2 in AR 220-1.
    - (2) Locate the reason code for the corresponding reason.
    - (3) Enter the appropriate code in the PRRES box.
8. Complete DA Form 2715-R, Section B, Block 10.
- a. Enter "C" for security classification, unless otherwise indicated.
  - b. Determine the report type.
    - (1) Enter KA1 for regular report.
    - (2) Enter KA2 for change report.
    - (3) Enter KA3 for NATO contingency report.
  - c. Enter the authorized level of organization (ALO).

### Performance Steps

- (1) Locate the first page of the MTOE.
    - (2) Locate the ALO level at the end of the first paragraph.
  - d. Enter RICDA.
    - (1) Determine the report date.
    - (2) Enter the report date as YYMMDD.
9. Complete DA Form 2715-R, Section B, Block 11.
  - a. Enter the correct letter in the transaction type box.
    - (1) Enter "A" for initial report.
    - (2) Enter "C" for change report.
    - (3) Enter "D" for delete report.
  - b. Enter the ASPER in FLD 2.
  - c. Enter the AVPER in FLD 3.
  - d. Enter the MSPER in FLD 4.
  - e. Enter the SGPER in FLD 5.
  - f. Enter the APERT in FLD 6.
10. Complete DA Form 2715-R, Section B, Block 12.
  - a. Compute the assigned percentage of PROFIS personnel who are designated by name, for assignment to the reporting unit under alert, deployment, or combat conditions, using the current PROFIS roster.
  - b. Ensure the PROFIS roster is dated within 30 days of the USR.
  - c. Enter the PROFREQ in FLD 1.
  - d. Enter the PROAVAL, if they meet the regulatory requirements in FLD 2.
11. Complete DA Form 2715-R, Section B, Block 13.
  - a. Determine the number of female Soldiers by performing an Ad Hoc query on eMILPO.
    - (1) Build query for female Soldiers.
      - (a) The user will select an UIC to begin this session.
      - (b) The user will click "ok" to proceed to the main menu.
      - (c) Press the functional category of Readiness to access the USR.
      - (d) Press the Personnel Asset Visibility Report (PAVR).
      - (e) Press select an UIC and a document effective date, then click "ok" to proceed.
      - (f) Press the "PAVR" calculations to proceed.
  - b. Enter the number of female Soldiers, including officers and enlisted members, in the FEMASGD box.
  - c. Enter the number of female Soldiers who are pregnant in the FEMPREG box.
12. Complete DA Form 2715-R, Section B, Block 14.
  - a. Enter the AGRASGD in FLD 1.
  - b. Enter "0" for Army war reserve prepositioned sets.
13. Complete DA Form 2715-R, Section C.
  - a. Enter the UIC.
  - b. Enter "C" for classification, unless otherwise indicated.
  - c. Enter the transaction type.
    - (1) Enter "A" for normal reporting.
    - (2) Enter "D" only to delete previously submitted remarks that are no longer valid.
  - d. Complete the Label box.
    - (1) Enter READY if ready remarks are being submitted.
    - (2) Enter REASN if reason remarks are being submitted.
  - e. Enter READY remarks in the GENTEXT SET area.
14. Complete DA Form 2715-R, Section D (USR pages 4-22), as appropriate.
  - a. Determine which pages apply to the particular unit and unit's status.
    - (1) Identify MOS shortage for P-level of P-4.

**Performance Steps**

- (2) Identify the number and reason for non-deployable Soldiers as previously annotated in Performance Step 2.
  - (3) Determine if there is an ASI or SQI shortage.
    - (a) Locate REQ column on MTOE.
    - (b) Compare with assigned ASI and SQI skills from the UMR.
  - (4) Determine if there is a Language Skills shortage.
    - (a) Generate a Unit Manning Report (UMR).
      - Select an UIC to begin this session.
      - The user will click "ok" to proceed to the main menu.
      - Press to e functional category of Readiness to access the USR.
      - Press the Human Resource Authorizations Report (HRAR).
      - Press select an UIC and a document effective date, then click "ok" to proceed.
      - Press the "HRAR" function key to proceed.
    - (b) Locate REQ column on MTOE.
    - (c) Compare with assigned LIC skills from the Unit Manning Report.
- b. Complete the Personnel Grade Strength Of A Unit Report.
    - (1) Enter the required strength that corresponds to each grade.
    - (2) Enter the authorized strength that corresponds to each grade.
    - (3) Enter the assigned strength that corresponds to each grade.
    - (4) Enter the available strength that corresponds to each grade.
  - c. Complete the Military Occupational Specialty Shortage Report for P-4 levels.
    - (1) Enter the UIC.
    - (2) Enter the Date of Report as YYMMDD.
    - (3) Identify the personnel resources that would be required to achieve a P-3 level.
      - (a) Enter the MOS code that would be required to achieve P-level 3.
      - (b) Enter the grade that would be required to achieve P-level 3.
      - (c) Enter the number that would be required to achieve P-level 3.
  - d. Complete the PSPER Non-Deployables Report for non-deployables.
    - (1) Enter the UIC.
    - (2) Enter the Date of Report as YYMMDD.
    - (3) Enter "U" for the security classification code, unless otherwise indicated.
    - (4) Select the transaction type.
      - (a) Enter "A" for initial report.
      - (b) Enter "D" for delete report.
    - (5) Enter the number of non-deployables with the corresponding reason.
      - (a) Identify the number of non-deployables, using the decision matrix in AR 220-1, Table D-1, as noted in Step 12a(2).
      - (b) Complete the COUNT and REASON columns.
  - e. Complete ASI/SQI Shortage Report for ASI and SQI shortages.
    - (1) Enter the UIC.
    - (2) Enter the Date of Report as YYMMDD.
    - (3) Enter the ASIs.
      - (a) Enter the required number in the REQ column.
      - (b) Enter the authorized number in the AUTH column.
      - (c) Enter the assigned number in the ASGD column.
    - (4) Enter the SQIs, using the letter "S" and the appropriate SQI code.
      - (a) Enter the required number in the REQ column.
      - (b) Enter the authorized number in the AUTH column.
      - (c) Enter the assigned number in the ASGD column.
  - f. Complete the Language Skills Shortage Report for language skills shortages.
    - (1) Enter the UIC.
    - (2) Enter the Date of Report as YYMMDD.
    - (3) Enter the authorized LIC from the MTOE in the AUTHLIC column.
    - (4) Enter the MOS for which this LIC is used in the LICMOS column.
      - (a) Enter the number of personnel required in the unit in the LICREQ column.

**Performance Steps**

- ( b) Enter the number of personnel with this LIC assigned to the unit in the LICASGD column.
- ( c) Enter the number of personnel assigned to the unit and currently qualified in the language in the LICQUAL column.

15. Route the USR to the Personnel Services Supervisor for approval.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes Personnel Readiness Data for Unit Status Report. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance measure.

**Performance Measures**

**GO    NO GO**

1. Correctly determined the ASPER using the MTOE and the UPAR.
2. Correctly identified the number of assigned Soldiers who are not deployable.
3. Correctly determined the AVPER and the P-level.
4. Correctly determined the MSPER and the P-level.
5. Correctly determined the SGPER and the P-level.
6. Correctly determined the APERT level.
7. Accurately completed DA Form 2715-R, Section A, Block 4.
8. Accurately completed DA Form 2715-R, Section B, Block 10.
9. Accurately completed DA Form 2715-R, Section B, Block 11.
10. Accurately completed DA Form 2715-R, Section B, Block 12
11. Accurately completed DA Form 2715-R, Section B, Block 13.
12. Accurately completed DA Form 2715-R, Section B, Block 14.
13. Accurately completed DA Form 2715-R, Section C.
14. Accurately completed DA Form 2715-R, Section D (USR pages 4-22), as appropriate.
15. Properly routed the USR to the Personnel Services Supervisor for approval.

**Evaluation Guidance:** Score the Soldier GO if Soldier passes (P) all applicable performance measures. Score NO GO if the Soldier fails (F) any performance measure. Provide on-the-spot correction, should the Soldier experience minor difficulty, show what was done wrong and how to do it correctly. Direct self-study or SOJT should the Soldier experience major problems with task performance.

**References**

**Required**

- AR 220-1
- AR 600-8-6
- DA FORM 2715-R

**Related**



**Review Correspondence**  
**805C-42L-3002**

**Conditions:** Given final-typed correspondence (classified or unclassified) prior to signature, the required enclosures/attachments, the draft from which the correspondence was prepared, and access to AR 25-50 and AR 310-50.

**Standards:** Ensure that all correspondence is properly prepared and is acceptable for signature and dispatch.

**Performance Steps**

1. Identify the various types of memorandum.
  - a. Identify formal memorandums.
  - b. Identify multiple page memorandums.
  - c. Identify informal memorandums.
  - d. Identify memorandums of understanding/agreement.
  - e. Identify memorandums for record.
  - f. Identify classified memorandums.
2. Identify letters.
  - a. Identify the use for letters.
  - b. Identify appropriate responses and replies.
  - c. Identify general rules.
  - d. Identify format.
3. Identify the types of errors to look for when reviewing correspondence.
  - a. Identify format errors.
  - b. Identify capitalization errors.
  - c. Identify spelling errors.
  - d. Identify punctuation errors.

**Evaluation Preparation:** You can evaluate this task by using the performance measures. This method of evaluation is appropriate if the NCO supervises SL 1/2 Soldiers who prepare correspondence. Use the performance measures to grade performance after the NCO reviews the correspondence prepared by SL 1/2 Soldiers.

**Performance Measures**

**GO    NO GO**

1. Identified the various types of memorandums.
2. Identified letters.
3. Identified the types of errors to look for when reviewing correspondence.

**Evaluation Guidance:** Score a GO if the NCO passes (P) all applicable performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong on any failed performance measure and how to do it correctly.

**References**

**Required**  
AR 25-50  
AR 310-50

**Related**

## Maintain Initial Distribution Subscription

805C-42L-3044

**Conditions:** Given a requirement to maintain Initial Distribution Subscriptions, access to a computer, DA Form 12-R, DA Pam 25-33, and DA Pam 25-30 (Extract and CD ROM).

**Standards:** Establish an Initial Distribution Subscriptions Account using a computer with DA Pam 25-30 (CD ROM).

### Performance Steps

1. Review electronic subscriptions and forms general information.
  - a. Determine major management roles.
  - b. Determine publications accounts authorization.
    - (1) Active Army table of organization and equipment (TOE) units that are battalion size with a personnel administrative center (PAC).
    - (2) Active Army TOE units that are detachment size and larger, and not organized under a PAC.
    - (3) Army table of distribution and allowances (TDA) activities may have accounts established at the commander, director, or chief level.
    - (4) Army schools may establish separate accounts for the reference library, the staff, and student texts.
    - (5) Army Civilian Personnel Offices.
    - (6) US Army Reserve (USAR) units that are company size or larger, and staff sections at division level.
    - (7) The Army National Guard (ARNG) units that are company size or larger, designated by the state adjutant general.
    - (8) Reserve Officers' Training Corps (ROTC), including Senior and Junior ROTC units.
    - (9) Recruiting activities.
    - (10) Test control activities.
    - (11) Other US military services and Department of Defense (DOD) agencies and activities.
2. Establish a publications account.
  - a. Prepare a DA Form 12-R.
    - (1) Leave block 1 blank for an initial request. Enter account number in block 1 if updating account information.
    - (2) Enter the date you are preparing the form in block 2.
    - (3) Enter the type of submission in block 3.
      - (a) Mark block a for an initial account.
      - (b) Mark block b for changes to an existing account.
      - (c) Mark block c to close an account.
    - (4) Enter complete military address in block 4.
    - (5) Enter complete thru address, if applicable, in block 5.
    - (6) Enter complete to address in block 6.
    - (7) Indicate the type of publications service needed in block 7a.
      - (a) Submit a separate DA Form 12-R to receive test control material.
      - (b) Enter a justification to receive blank forms in block 7b if your organization does not meet the criteria in para 2-4, DA PAM 25-33.
    - (8) Enter required unit description information in blocks 8a through 8g.
    - (9) Enter publications officer information in blocks 9a through 9c.
    - (10) Check appropriate item in block 10 to indicate classification level.
    - (11) Complete blocks 11a through 11c if classified service is required.
    - (12) Complete blocks 12a and 12b if change of address is needed.
      - (a) Submit a change of address at least 30 days prior to the effective date of the change.

**Performance Steps**

- (b) Complete blocks 1, 3, 9, and 12 if the form is being submitted only to change an address.
    - (13) Complete blocks 13a through 13c with the commander's information.
    - (14) Complete blocks 14a through 14c with the Installation Publications Control Officer (PCO) information.
  - b. Determine if the account identification information you provide on the DA Form 12-R is accurate.
  - c. Establish your publications account by submitting DA Form 12-R to the Account Processing Team, United States Army Publications Agency (USAPA). If you would like to include your email address in order to be notified when your DA Form 12-R has been received or of your new account number when assigned, write your valid email address in the top margin of the DA Form 12-R.
3. Establish a classified service publications account.
    - a. Complete Section II of DA Form 12-R.
    - b. Submit a DA Form 12-R requesting your account classification level be upgraded.
  4. Establish a blank forms account. (Normally, only the following activities are authorized a blank forms account.)
    - a. Installation publications stockrooms.
    - b. Overseas publications centers.
    - c. Medical department activities.
    - d. Active Army service schools.
    - e. ARNG state adjutant general.
  5. Establish a test material account.
    - a. Submit a completed DA Form 12-R through the Commander, US Total Army Human Resources Command.
    - b. Include a copy of the test control officer's (TCO) duty appointment orders with the DA Form 12-R.
    - c. Include a memorandum of justification, including a list of units or organizations to be supported by the TCO.
    - d. Ensure the TCO Program Manager forwards the approved DA Form 12-R to the United States Army Publications Agency (USAPA) for the establishment of a publication account or change to a test material account.
    - e. Manage test material accounts separately from other types of accounts.
    - f. Use test material accounts only for test material service.
    - g. Obtain test material through the resupply system.
  6. Close a publications account.
    - a. Enter the account number on DA Form 12-R.
    - b. Check "C" (Close) in Block 3 (Reason for Submission) of the DA Form 12-R.
    - c. Submit the form to the US Army Publications Distribution Center at least 90 days prior to the effective date of closure.
  7. Set up the Initial Distribution System using the World Wide Web.
    - a. Go to the United States Army Publications Agency (USAPA) home page.
    - b. Click on the Publications Orders/Subscriptions/Reports system link.
    - c. Click on the Publications Ordering System link.
      - (1) Submit an order using a Publications Identification Number (PIN).
        - (a) Click on the Resupply by PIN link.
        - (b) Complete the subscription form by entering the account number and zip code; entering the sub-account number, if applicable; entering the PIN; entering changes to the publication, if applicable; entering the quantity required; and clicking the "Submit Order" button.
      - (2) Submit an order using a Publications Nomenclature (NOMEN).

### Performance Steps

- (a) Click on the Resupply by NOMEN link.
  - (b) Complete the subscription form by entering the account number and zip code; entering the sub-account number, if applicable; entering the NOMEN; entering changes to the publication, if applicable; entering the quantity required; entering the unit of issue (UI); and clicking the "Submit Order" button.
  - (3) Update an existing initial distribution account.
    - (a) Click on the Subscription Add/Change/Delete link.
    - (b) Complete the subscription change sheet by entering the account number and zip code; entering the first two digits of the Initial Distribution Number (IDN) in the first box and the last four digits of the IDN in the second box; entering the quantity required; deleting a subscription by entering the IDN only and clicking on the "Delete this Subscription" block; and clicking the "Submit Order" button.
8. Search and identify publication subscriptions using the Army Electronic CD-ROM (DA Pam 25-30).
- a. Install DA Pam 25-30 CD-ROM software to the hard drive.
  - b. Click the DA Pam icon on the desktop.
  - c. Choose DA Pam 25-30 (Index) from the main menu screen options.
  - d. Press enter.
  - e. Place the cursor in the desired search field and press F5.
  - f. Type search information in the GO TO field.
  - g. Place the cursor on the desired entry and press Enter.
  - h. Enter search parameters in the appropriate fields.
  - i. Press Enter.
  - j. Press F7 to view information.
  - k. Exit the application.
    - (1) Press F10.
    - (2) Choose Exit Application.
    - (3) Choose Quit.

**Evaluation Preparation:** You can evaluate this task by using the performance measures. This method of evaluation is appropriate if the NCO performs the task on the job. Grade NCO a GO or NO GO.

### Performance Measures

**GO**    **NO GO**

1. Reviewed electronic subscriptions and forms general information.
2. Established a publications account.
3. Established a classified service publications account.
4. Established a blank forms account.
5. Established a test material account.
6. Closed a publications account.
7. Set up the Initial Distribution System using the World Wide Web.
8. Searched and identified publication subscriptions using the Army Electronic CD-ROM (DA Pam 25-30).

**Evaluation Guidance:** Score a GO if the NCO passes (P) all performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong on any failed performance measure and how to do it correctly.

### References

**Required**  
AR 25-30

**Related**

**References**

**Required**

AR 25-55

AR 380-5

DA PAM 25-33

**Related**

Subject Area 27: ESSENTIAL PERSONNEL SERVICES

**Process Semi-Centralized Enlisted Promotions, SGT Through SSG  
805C-42A-3418**

**Conditions:** Given a request to process a Semi-Centralized Enlisted Promotion and access to DA Form 3355/3355E (Promotion Point Worksheet/Promotion Point Worksheet-Electronic), DA Form 3356 (Board Member Appraisal Worksheet), DA Form 3357 (Board Recommendation), Enlisted Records Brief (ERB), an approved promotion recommendation, approved waivers, Military Personnel Records Jacket (MPRJ), SGT/SSG Standing List, Enlisted Distribution Assignment System (EDAS) List, Total Army Personnel Data Base (TAPDB) Promotion Selection List, AR 600-8-19, and Local Standard Operating Procedures (SOP).

**Standards:**

1. Verify recommendations for promotion to SGT/SSG are in the appropriate format.
2. Review promotion board proceedings for accuracy and completeness.
3. Review maintenance of the SGT/SSG Promotion List.

**Performance Steps**

1. Verify recommendations for promotion to SGT/SSG are in the appropriate format.
  - a. Verify all personnel data on DA Form 3355 or DA Form 3355E against the Soldier's Enlisted Record Brief (ERB).
    - (1) Verify the type of promotion evaluation is checked in Block 1.
    - (2) Verify the date is entered in Block 2.
    - (3) Verify the Soldier's name is entered in Block 3.
    - (4) Verify the Soldier's social security number (SSN) is entered in Block 4.
    - (5) Verify the Soldier's recommended grade is entered in Block 5.
    - (6) Verify the Soldier's current organization is entered in Block 6.
    - (7) Verify that the Soldier's PMOS is entered in Block 7.
  - b. Verify all of the required information is contained in the recommendation.
    - (1) Verify Section A - Recommendation of DA Form 3355 is complete.
      - (a) Verify Army Physical Fitness Test (APFT) date is entered in 1a.
      - (b) Verify the APFT Scores are entered in blocks 1b.
        - Verify Push-ups score is entered.
        - Verify Sit-ups score is entered.
        - Verify Run score is entered.
        - Verify Total score is entered.
      - (c) Verify the total points awarded are entered in block 1c.
      - (d) Verify the Latest Weapons Qualification Date is entered in block 1d.
      - (e) Verify the DA Form used for Weapons Qualification data is entered in block 1e.
      - (f) Verify the Total Hits is entered in block 1f.
      - (g) Verify the Points Awarded for Weapons Qualification is entered in block 1g.
      - (h) Verify Duty Performance Evaluation scores are entered in blocks 2a-f.
      - (i) Verify Signature of Commander is entered in block 3.
      - (j) Verify Typed or Printed Name and Grade are entered in block 4.
      - (k) Verify Date is entered in block 5.
    - (2) Verify Section B - Hard copy original documents are required to verify the award of all promotion points unless otherwise indicated. All items in this section must be authenticated by a Personnel Service Battalion (PSB) official (SSG/GS6 or above) prior to initial board appearance or total reevaluation.

**Performance Steps**

- (a) Verify the entries in item 1, Awards and Decorations, are correct.
  - (b) Verify the entries in item 2, Military Education, are correct.
  - (c) Verify the entries in item 3, Civilian Education, are correct.
  - (d) Verify the entries in Items 4-7 (self-explanatory).
  - (3) Verify Section C Totals.
    - (a) Verify item 1a. Total performance evaluation and military training points. Add points from Items 1h and 2f in Section A and enter total points awarded.
    - (b) Verify item 1b. Total administrative points. Add allowable points from Items 1, 2, and 3 in Section B. Enter total.
    - (c) Verify item 1c. Total board points. Enter total board points from DA Form 3357, Item 7.
    - (d) Verify item 1d. Total promotion points. Add points from Items 1a, 1b, and 1c and enter score.
    - (e) Verify item 2. Certification. Initials of responsible PSB official who must be a SSG/GS6 or above.
  - (4) Verify Section D Certification.
    - (a) Verify that blocks 1-11 are completed as required.
  - c. Verify Soldier meets eligibility criteria for recommendation.
    - (1) Verify that the Soldier meets MOS criteria.
    - (2) Verify that the Soldier meets Education criteria.
    - (3) Verify that the Soldier meets Time in Service/Time in Grade (TIS/TIMIG) requirements.
    - (4) Verify that the Soldier meets Reenlistment criteria.
    - (5) Verify that the Soldier meets Physical qualification criteria.
    - (6) Verify that the Soldier meets APFT criteria.
    - (7) Verify that the Soldier meets Weight Control criteria.
    - (8) Verify that the Soldier is not enrolled in Army Drug and Alcohol Prevention Course Program ( ADAPCP).
    - (9) Verify that the Soldier meets points criteria.
    - (10) Verify that the Soldier is not flagged.
  - d. Verify all Soldiers eligible for the first time primary zone.
    - (1) Verify Bn/S1 provided Unit Commander a completed DA Form 3355 for all eligible SPC/CPL and SGTs.
    - (2) Verify unit commander recommends approval and returns the completed DA 3355 to the BnS1 or recommends disapproval and provides the DA 3355 along with counseling documents to the to the promotion authority for a final decision.
    - (3) Ensure quarterly counselings are provided to the promotion authority until the Soldier is recommended for promotion or is no longer eligible.
2. Review promotion board proceedings for accuracy and completeness.
- a. Verify promotion board held not later than the 15th of each month.
  - b. Verify promotion board is properly appointed.
    - (1) Verify President is the senior member and a CSM or SGM if no CSM available.
    - (2) Verify members are at least one grade senior than those being considered.
    - (3) Verify at least one voting member is the same sex as Soldiers being considered. Verify that the reason is included in board proceedings if this is not possible.
    - (4) Verify at least one minority is a voting member of board, however, not comprised solely of minority members.
    - (5) Verify a non-voting recorder from the BnS1 is appointed.
  - c. Verify conduct of promotion selection board.
    - (1) Verify BnS1 schedules monthly selection board with board members appointed in writing by promotion authority.
    - (2) Verify all DA Forms 3355, with sections A and B completed for each Soldier scheduled to appear before the promotion board.
    - (3) Ensure unit commander notified of board schedule.
    - (4) Ensure unit notifies Soldier(s).

### Performance Steps

- (5) Ensure Promotion authority briefs the President of the Board on responsibilities.
  - (6) Verify conduct of promotion board.
  - (7) Verify recorder collects all DA Forms 3356 and prepares DA Forms 3357 after each Soldier's appearance and obtains president's signature.
  - (8) Verify Section D is completed by Bn/S1.
  - (9) Ensure board proceedings memorandum is prepared.
  - d. Verify Processing results of promotion selection board.
    - (1) Verify memorandum of board proceedings prepared within one duty-day of boards adjournment.
    - (2) Ensure president reviews memorandum for accuracy signs and forwards to promotion authority.
    - (3) Ensure promotion authority approves or disapproves the board and forwards completed results to the promotion workcenter within 3 days of board adjournment.
    - (4) Ensure Soldiers attained either 450 points for promotion to SSG or 350 points for promotion to SGT before integrating onto the recommended list.
    - (5) Ensure completed board actions reach the PSB by the 20th day of the board month.
    - (6) Ensure promotion point data is entered into the appropriate database as soon as possible but not later than the 27th of the promotion board month.
    - (7) Ensure Soldiers not recommended or who have not attained the minimum points, are counseled by the promotion authority and/or board president. Ensure Soldier and counselor sign block D of DA Form 3355. Ensure "Soldier refuses to sign" is entered if Soldier will not sign block D of DA Form 3355.
    - (8) Ensure administrative points are determined as of and up until the date the board is approved.
3. Review maintenance of the SGT/SSG Promotion List.
- a. Verify type of reevaluation - Administrative and Total Reevaluations.
    - (1) Verify Administrative Reevaluation rules are met if appropriate.
      - (a) Verify administrative reevaluation is requested using a memorandum for reevaluation.
      - (b) Verify promotion score increased by 20 points or more through self-achievement or awards.
      - (c) Verify commander authenticates and checks appropriate block on DA Form 4187 either recommending approval or disapproval.
      - (d) Verify if commander made a change to performance points - may increase, decrease, or not change.
      - (e) Verify promotions clerk does a total reevaluation prior to administrative reevaluation to increase or decrease the duty performance points and erroneous points.
      - (f) Verify the Soldiers score is adjusted, if the points are increased by 20 or more, on the current DA Form 3355 and appropriate database and annotated with the reevaluation date.
    - (2) Verify Total Reevaluation rules are met if appropriate.
      - (a) Ensure that the total reevaluation covers the entire process: the commander's recommendation, promotion board appearance, and administrative points.
      - (b) Verify it has been six months from the latest board appearance or last administrative reevaluation.
      - (c) Ensure that the Soldiers application for a total reevaluation contains the following statement: " I understand that I may lose points and that the results of this reevaluation will take precedence over my current promotion list standing. Additionally, I understand that if the board does not recommend me for promotion or if I do not obtain the minimum required promotion points to maintain promotion list status, I will be immediately removed form the recommended list." Document must be signed by the Soldier and attached as a continuation page to the DA Form 3355.
      - (d) Ensure the reevaluation date for a total reevaluation is the date the promotion authority approves the promotion board proceedings.



**Performance Steps**

- (3) Verify the promotion scores achieved through the reevaluation process are effective for promotion on the first day of the second month following the date the new score is entered into the database.
  - (4) Ensure gaining commanders of transit Soldiers elect either to award duty performance points or use the previous commander's evaluation.
  - (5) Ensure PSB provides the Soldier with a copy of the completed (DA Form 3355) and computer generated report reflecting the new score and data.
- b. Verify promotion point adjustments.
- (1) Verify adjustment is for correction of mathematical error or adding of or subtracting of administrative points.
  - (2) Ensure mathematical errors on the DA Form 3355 are corrected as soon as detected.
  - (3) Verify points were effective prior to the date of the last board or administrative reevaluation but were left off of the DA Form 3355 or were not supported with official documentation.
    - (a) Adjustment will not result in retroactive promotion.
    - (b) Ensure adjustment action is limited to specific points in question.
    - (c) Verify adjustment is supported by official documentation.
    - (d) Verify request for adjustment submitted using a memorandum with all supporting documents listed. Memorandum should be included as a portion of the promotion packet.
  - (4) Verify point adjustment is approved by MPD Chief/PD Commander and approval document is included with promotion packet and DA Form 3355 annotated in red to show adjustment points and date.
  - (5) Ensure the Soldier is notified in writing by PSB through chain of command of the adjusted promotion points including the reason for change, new points, effective date of new points, a copy of completed action, and a computer generated report reflecting the new information.
- c. Review withdrawal of promotion points and maintenance of list status.
- (1) Verify points suspended from the promotion point worksheet (DA Form 3355) for being outdated until verified with Soldier or commander.
    - (a) Verify Soldier is notified in writing within five days of discovery of outdated documents.
    - (b) Verify 60 days are allowed for verification of suspended points beginning on the day the Soldier is notified in writing by PSB.
    - (c) Verify official documentation verifying suspended points is dated/effective prior to the promotion month.
    - (d) Verify suspended points are withdrawn on the 61st if not verified and Soldier is notified in writing.
    - (e) Verify new points are effective immediately.
    - (f) Ensure that the promotion of an otherwise promotable Soldier on the current recommended list is suspended when promotion authority concludes that he or she was considered in error or was granted more administrative points than entitled.
    - (g) Ensure promotion is suspended when a promotion packet, or portion of, has been lost and must be reconstructed.
    - (h) Verify Soldier whose name appears on the by-name list announced by CDR, HRC (TAPC-MSP-E) is promoted even if a portion of points are suspended as long as the unchallenged point total meets or exceeds the promotion cut-off score.
    - (i) Ensure erroneous or outdated points are removed immediately if not updated by Soldier.
  - (2) Validate recommended list status.
    - (a) Ensure Soldiers whose point score is 699 or less validate their points either through the total or administrative reevaluation process within a 24-month period based on the date of their last approved promotion action with the exception of Soldiers whose name appears on the by-name listing.

**Performance Steps**

- ( b) Ensure Soldiers who fail to validate within the 24-month period are administratively removed from the recommended list on the 1st day of the 25th month following their last approved promotion action by the promotions workcenter.
  - Ensure written notification is provided through the chain of command to the Soldier in regards to the removal action.
  - Ensure Soldiers who are under Suspension of Favorable Personnel Actions (FLAG) during the 24 month period request written authorization from their promotion authority in order to remain on the recommended list pending removal of FLAG. Written authorization is required to reach the promotions workcenter by the last day of the 24th month to allow the Soldier 60 calendar days from the date of the FLAG removal.
  - Ensure Soldiers who fail to maintain list status are not removed as long as reason for failing to maintain status is solely resulting from a commander's decrease in Soldier's performance points.

**Evaluation Preparation:** This method of evaluation is appropriate if the Soldier processes Semi-Centralized Enlisted Promotions, SGT through SSG. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the Conditions statement. Score the Soldier "Pass" or "Fail" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Verified recommendations for promotions to SGT/SSG.
2. Reviewed promotion board proceedings.
3. Reviewed maintenance of the SGT/SSG Promotion List.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References**

**Required**

- AR 600-8-19
- DA FORM 3355
- DA FORM 3355-E
- DA FORM 3356
- DA FORM 3357
- DA PAM 611-21

**Related**

## Subject Area 28: DEPLOYMENT

**Review Personnel Asset Inventory (PAI)****805C-42A-3488**

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

**Standards:**

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

**Performance Steps**

1. Review the Unit Personnel Accountability Report (UPAR).
  - a. Check the cycle date of the report.
  - b. Check the report title.
  - c. Check the date of the report.
  - d. Check that the unit identification code (UIC) is for the unit conducting the PAI.
  - e. Check the date the Soldier was assigned to the unit (gain date).
  - f. Check the date the Soldier was attached to the unit (atch date).
  - g. Check the duty status of the Soldiers appearing on the report.
  - h. Check the date of the duty status of Soldiers appearing on the report.
  - i. Check the sum on the report.
2. Review the Unit Personnel Accountability Notice (UPAN).
  - a. Check the cycle date of the report.
  - b. Check the report title.
  - c. Check the date of the report.
  - d. Check that the report is for the unit conducting the PAI.
  - e. Check that the UIC is for the unit conducting the PAI.
  - f. Check the names, ranks and social security numbers (SSNs) of the Soldiers appearing on the report.
  - g. Check the type of notice for each Soldier listed on the report.
  - h. Check the number of notices for the UIC.
    - i. Check the total number of personnel notices for failure to gain.
    - j. Check the total number of personnel notices for failure to lose.
    - k. Check the total number of personnel notices for absence without leave (AWOL) for over 25 days.
      - l. Check the total number of personnel notices for expired date of return from overseas (DEROS).
      - m. Check the total number of personnel notices for assigned not joined over 10 days.

### Performance Steps

- n. Check the total number of personnel notices for expired expiration term of service/expiration of service agreement (ETS/ESA).
- o. Check the total number of personnel notices for Soldiers discharged by HRC.

3. Verify that the correct information is entered in the appropriate blocks of DA Form 3986-R for the unit conducting the PAI by comparing it to the UPAR and UPAN.
  - a. Verify the date the PAI was conducted is entered in block 1.
  - b. Verify the name of the unit conducting the PAI is entered in block 2.
  - c. Verify the name of the next higher unit in the chain of command is entered in block 3.
  - d. Verify the appropriate major command of the unit conducting the PAI is entered in block 4.
  - e. Verify the complete unit address is entered in block 5.
  - f. Verify the unit processing code (UPC) from the UPAR is entered in block 6.
  - g. Verify the correct data is entered in blocks 7a, c, d, e, and f.
    - (1) Verify the correct "as of date" is entered in block 7a.
    - (2) Verify the correct number of officers currently assigned is entered in block 7c (assigned).
    - (3) Verify the correct number of warrant officers currently assigned is entered in block 7d (assigned).
    - (4) Verify the correct number of warrant officers currently assigned is entered in block 7e (assigned).
    - (5) Verify the total number of officers, warrant officers, and enlisted Soldiers entered in blocks 7c, d, and e (assigned) is entered in block 7f (assigned).
    - (6) Verify the correct number of officers currently attached is entered in block 7c (attached).
    - (7) Verify the correct number of warrant officers currently attached is entered in block 7d (attached).
    - (8) Verify the correct number of warrant officers currently attached is entered in block 7e (attached).
    - (9) Verify the total number of officers, warrant officers, and enlisted Soldiers entered in blocks 7c, d, and e (attached) is entered in block 7f (attached).
  - h. Verify the correct data is entered in blocks 8c, d, e, and f.
    - (1) Verify orders are enclosed for newly assigned officers and the number of new officers assigned is entered in block 8c (assigned).
    - (2) Verify orders are enclosed for newly assigned warrant officers and the number of new warrant officers assigned is entered in block 8d (assigned).
    - (3) Verify orders are enclosed for newly assigned enlisted Soldiers and the number of new enlisted Soldiers assigned is entered in block 8e (assigned).
    - (4) Verify the total number of new officers, warrant officers, and enlisted Soldiers entered in blocks 8c, d, and e (assigned) is entered block 8f (assigned).
    - (5) Verify orders are enclosed for newly attached officers and the number of new officers assigned is entered in block 8c (attached).
    - (6) Verify orders are enclosed for newly attached warrant officers and the number of new warrant officers assigned is entered in block 8d (attached).
    - (7) Verify orders are enclosed for newly attached enlisted Soldiers and the number of new enlisted Soldiers assigned is entered in block 8e (attached).
    - (8) Verify the total number of new officers, warrant officers, and enlisted Soldiers entered in blocks 8c, d, and e (attached) is entered in block 7f (attached).
  - i. Verify the correct data is entered in blocks 9c, d, e, and f.
    - (1) Verify orders are enclosed for departing officers assigned and the number is entered in block 9c (assigned).
    - (2) Verify orders are enclosed for departing warrant officers and the number of departing warrant officers assigned is entered in block 9d (assigned).
    - (3) Verify orders are enclosed for departing enlisted Soldiers and the number of departing enlisted Soldiers assigned is entered in block 9e (assigned).
    - (4) Verify the total number of departing officers, warrant officers, and enlisted Soldiers entered in blocks 9c, d, and e (assigned) is entered in block 9f (assigned).

**Performance Steps**

- (5) Verify orders are enclosed for departing officers attached and the number is entered in block 9c (attached).
  - (6) Verify orders are enclosed for departing warrant officers and the number of departing warrant officers attached is entered in block 9d (attached).
  - (7) Verify orders are enclosed for departing enlisted Soldiers and the number of departing enlisted Soldiers attached is entered in block 9e (attached).
  - (8) Verify the total number of departing officers, warrant officers, and enlisted Soldiers entered in blocks 9c, d, and e (attached) is entered in block 9f (attached).
- j. Verify the correct data is entered in blocks 10 a, c, d, e, and f.
- (1) Verify the correct "as of date" from block 1 of DA Form 3986-R is entered in block 10a.
  - (2) Verify the correct adjusted assigned strengths are entered in blocks 10 c, d, e, and f (assigned) by adding blocks 7, 8, and 9 (assigned).
  - (3) Verify the correct adjusted attached strengths are entered in blocks 10 c, d, e, and f (attached) by adding blocks 7, 8, and 9 (attached).
- k. Verify the correct data is entered in blocks 11 a, c, d, e, and f.
- (1) Verify the date the muster formation was physically held is entered in block 11a.
  - (2) Verify written documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (assigned).
  - (3) Verify written documentation is enclosed for the number of warrant officers not physically at the formation and the number is entered in block 11d (assigned).
  - (4) Verify written documentation is enclosed for the number of enlisted Soldiers not physically at the formation and the number is entered in block 11e (assigned).
  - (5) Verify written documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (attached).
  - (6) Verify written documentation is enclosed for the number of officers not physically at the formation and the number is entered in block 11c (attached).
  - (7) Verify written documentation is enclosed for the number of warrant officers not physically at the formation and the number is entered in block 11d (attached).
  - (8) Verify written documentation is enclosed for the number of enlisted Soldiers not physically at the formation and the number is entered in block 11e (attached).
  - (9) Verify the total number of officers, warrant officers, and enlisted Soldiers physically present at the muster formation entered in blocks 11c, d, and e (attached) is entered in block 11f (attached).
- l. Verify the type of PAI is annotated in block 12.
- m. Verify the correct data is entered in block 13.
- (1) Verify the grade, name, social security number (SSN), and status of Soldiers assigned (gains) to the unit, but do not appear on the UPAR, are listed in block 13.
  - (2) Verify the grade, name, SSN, and status of Soldiers departing (losses) the unit are listed in block 13.
  - (3) Verify the grade, name, SSN, and status of Soldiers who appear on the UPAR but are not present at the muster formation are listed in block 13.
  - (4) Verify the grades, names, SSN, and status of Soldiers who are listed in block 13 are continued on a separate sheet of paper if needed.
- n. Verify the correct data is entered in block 14 a, b, and c.
- (1) Verify the name, grade, branch, and title of the commander of the unit conducting the PAI is entered in block 14a.
  - (2) Verify the signature of the commander of the unit conducting the PAI is entered in block 14b.
  - (3) Verify the commander of the unit conducting the PAI entered the date of his or her signature in block 14c.
- o. Verify the correct data is entered in block 15 if the PAI was conducted as a result of a change of command.
- (1) Verify the appropriate block is checked, "concur" or "nonconcur."
  - (2) Verify an explanation is entered in block 15 if "nonconcur" is checked.
  - (3) Verify the explanation is continued on a separate sheet of paper if needed.

### Performance Steps

- p. Verify the correct data is entered in block 16 a, b, and c if the PAI was conducted as a result of a change of command.
    - (1) Verify the name, grade, branch, and title of the new commander of the unit conducting the PAI is entered in block 16a.
    - (2) Verify the signature of the new commander of the unit conducting the PAI is entered in block 16b.
    - (3) Verify the new commander of the unit conducting the PAI entered the date of his or her signature in block 16c.
  - q. Enter the correct data in item 17.
    - (1) Annotate the appropriate block, "concur" or "nonconcur."
    - (2) Enter an explanation if "nonconcur" is checked.
    - (3) Continue the explanation on a separate sheet of paper if needed.
  - r. Enter the correct data in block 18 a, b, and c.
    - (1) Enter the name, grade, branch, and title of the personnel automation section supervisor in block 18a.
    - (2) Obtain the signature of the personnel automation section supervisor in block 18b.
    - (3) Ensure the personnel automation section supervisor entered the date of his or her signature in block 18c.
  - s. Verify the commander authentication data is completed.
    - (1) Verify PAI was forwarded through command channels.
    - (2) Verify blocks 19-33b are completed by the chain of command and all necessary signatures are present according to local policy.
  - t. Verify the Military Personnel Strength Monitor (MPSM) certification is completed.
    - (1) Verify the TO address entered in block 34 is the address of the commander of the unit conducting the PAI.
    - (2) Verify the date the MPSM approved the PAI is entered in block 36.
    - (3) Verify the unit personnel strength is reconciled and deviations are corrected and the appropriate box is checked in block 37.
    - (4) Verify remarks by the MPSM are entered in blocks 38, if applicable.
    - (5) Verify the MPSM name, grade, branch, and title are entered in block 39a.
    - (6) Verify the signature of the MPSM is entered in block 39b.
- 4. Ensure discrepancies are resolved.
    - a. Return PAI to the battalion S1 to correct any discrepancies.
    - b. Forward PAI to the MPSM to resolve any discrepancies.
  - 5. Route the PAI to the appropriate agencies.
    - a. Forward the original document through the Personnel Automation Section (PAS) to the MPSM within 5 working days of the PAI.
    - b. Ensure the original document is returned to the BnS1 after processing through command channels according to the local SOP.
    - c. Ensure one copy is retained for the unit files.
    - d. Ensure one copy is retained for the PAS analyst.
    - e. Ensure one copy is retained for the MPSM.
    - f. Ensure one copy is provided to the departing commander, if it is a change-of-command PAI.
  - 6. Verify PAI documents are correctly filed.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures. This method of evaluation is appropriate if the NCO supervises SL 1/2 Soldiers who prepare the PAI. Grade the performance after the NCO has reviewed the PAI prepared by SL1/2 Soldiers.

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

1. Accurately reviewed the UPAR.
2. Accurately reviewed the UPAN.
3. Correctly verified the correct information is entered in the appropriate blocks of DA Form 3986-R, for the unit conducting the PAI by comparing it to the UPAR and UPAN.
4. Ensured discrepancies are resolved.
5. Routed the PAI to the appropriate agencies.
6. Verified PAI documents are correctly filed.

**Evaluation Guidance:** Score the Soldier GO if all applicable performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to do it correctly.

**References****Required**

AR 600-8-6  
DA FORM 3986-R

**Related**

AR 600-8-6

Skill Level 4

Subject Area 26: SUSTAINMENT

**Review the Structure of the Army Division**

**805C-42A-4012**

**Conditions:** Given the requirement to identify the organization, capabilities, limitations, personnel, and equipment requirements of an Army division and access to FM 71-100, Division Operations and FM 101-5-1, Operational Terms and Graphics.

**Standards:**

1. Define the unit and map symbology used in a division.
2. Define how a division fights the Army AirLand Battle Doctrine.
3. Define the types of divisions in the Army.
3. Define the units in a division's organization.
4. Define a heavy division's capabilities, limitations, and organization.
5. Define a light division's capabilities, limitations, and organization.

**Performance Steps**

1. Define the unit and map symbology used in a division.
  - a. Identify parts of a map symbol.
    - (1) Frame.
    - (2) Fill.
    - (3) Icons.
  - b. Identify unit symbol building.
    - (1) Familiarize self with seven rules governing building of unit symbols.
    - (2) Know five steps for building a unit symbol.
  - c. Identify unit symbol locations.
  - d. Identify map symbology.
  - e. Identify unit symbol modifiers.
2. Define how a division fights using the division Army AirLand Battle Doctrine.
  - a. Identify how a division uses initiative.
  - b. Identify how a division uses agility.
  - c. Identify how a division uses depth.
  - d. Identify how a division uses synchronization.
3. Define the types of divisions in the Army.
  - a. Identify the types of heavy divisions.
    - (1) Identify armored divisions.
    - (2) Identify mechanized infantry divisions.
  - b. Identify the types of light divisions.
    - (1) Identify infantry divisions.
    - (2) Identify medium divisions.
    - (3) Identify light infantry divisions.
    - (4) Identify airborne divisions.
    - (5) Identify air assault divisions.



## Performance Steps

4. Define the units in a division's organization.
  - a. Identify the basic division design.
    - (1) Headquarters Company.
    - (2) Division Headquarters.
    - (3) Staff Sections.
  - b. Identify the types of units in a division.
    - (1) Ground Maneuver Brigades.
    - (2) Aviation Brigade.
    - (3) Division Artillery.
    - (4) Engineering Brigade.
    - (5) Division Support Command.
    - (6) Division Cavalry Squadron.
    - (7) Air Defense Battalion.
    - (8) Military Intelligence Battalion.
    - (9) Signal Battalion.
    - (10) Military Police Company.
    - (11) Division Chemical Company.
    - (12) Division Band.
  
5. Define a heavy division's capabilities, organization, and function.
  - a. Identify the capabilities of a heavy division.
  - b. Identify the limitations of a heavy division.
  - c. Identify the division tasks.
    - (1) Provide command, control and communications.
    - (2) Conduct surveillance, reconnaissance, and target acquisition.
    - (3) Fight the close-in battle against enemy forces.
    - (4) Fight enemy forces entering the division battle area.
    - (5) Fight enemy forces operating in the division rear area.
    - (6) Conduct counterfire operations to destroy the enemy's indirect fire weapons.
    - (7) Provide air defense against enemy aircraft and attack helicopter threats.
    - (8) Reinforce the terrain for counter mobility and survivability.
    - (9) Provide mobility.
    - (10) Reconstitute depleted division units.
    - (11) Sustain the division by providing necessary combat service support.
  
6. Define the organization and function of various light divisions.
  - a. Identify the structure of a light infantry division.
    - (1) Identify the capabilities of a light infantry division.
    - (2) Identify the limitations of a light infantry division.
    - (3) Identify employment considerations of a light infantry division.
  - b. Identify the structure of an airborne division.
    - (1) Identify the capabilities of an airborne division.
    - (2) Identify the limitations of an airborne division.
  - c. Identify the structure of an air assault division.
    - (1) Identify the capabilities of an air assault division.
    - (2) Identify the limitations of an air assault division.
  
7. Determine the division's structure utilizing the Modified Table of Organization (MTOE) and Table of Distribution Allowances (TDA).
  - a. Identify how to use a MTOE to determine a division's structure.
  - b. Identify how to use a TDA to determine a division's structure.
  - c. Identify how to use MTOE/TDA to coordinate the personnel and equipment requirements of an Army division.
  - d. Identify the structure of a medium division.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier 'PASS" or "FAIL" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Defined the unit and map symbology used in a division.
2. Defined how a division fights using the division Army AirLand Battle Doctrine.
3. Defined the types of divisions in the Army.
4. Defined the units in a division's organization.
5. Defined a heavy division's capabilities, organization, and function.
6. Defined the organization and function of various light divisions.
7. Determined the division's structure utilizing the MTOE and TDA.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**

FM 101-5-1  
FM 71-100

**Related**

**Supervise Reassignment Processing**  
**805C-42A-4014**

**Conditions:** Given a requirement to supervise the reassignment process and access to:

- a. EDAS Cycle.
- b. Reassignment orders.
- c. Reassignment file.
- d. DA Form 4036-R, Medical and Dental Preparation for Oversea Movement.
- e. DA Form 4187 Personnel Action.
- f. DA Form 4787-R, Reassignment Processing.
- g. DA Form 4991-R, Declination of Continued Service Statement.
- h. DA Form 5117-R, Reassignment Control Sheet.
- i. Copies of reclassification, medical examination board, physical evaluation board action documents.
- j. DA Form 5118-R, Reassignment Status and Election Statement.
- k. Soldier's Military Personnel Records Jacket (MPRJ) label.
- l. DLOS Ad Hoc Query Report.
- m. Reassignment Notification Memorandums.
- n. Tracers.
- o. MILPER Memorandum 95-1.
- p. AR 600-8-11.
- q. Standard office supplies and equipment.

**Standards:**

1. Manage the process of weekly Enlisted Distribution Assignment System (EDAS) Cycle.
2. Manage deletion and deferments.
3. Manage the process of additional service-remaining requirements.
4. Manage the open deletion and deferment cases.

**Performance Steps**

1. Manage the process of weekly EDAS cycle.
  - a. Establish a timeline for processing the weekly EDAS cycle.
    - (1) Ensure the Soldier's initial screening occurs within three days of receiving the weekly EDAS cycle.
    - (2) Ensure eligible Soldiers are notified within seven days of the cycle date.
    - (3) Ensure eligible Soldiers are scheduled for an interview within fifteen days of the weekly EDAS cycle date.
    - (4) Ensure the following required actions for reassignment are completed within 30 days from the weekly EDAS cycle date.
      - (a) Initial screening.
      - (b) Reassignment interview.
      - (c) All known deletion or deferment actions.
      - (d) Anticipated date of loss (DLOS) transactions are entered for all the Soldiers.
    - (5) Report any changes in Soldiers' status occurring after the 30 days time frame and within 72 hours of their occurrence.
    - (6) Publish reassignment orders within 90-120 days prior to Soldiers' departure.
  - b. Ensure a reassignment file containing the following is prepared for each Soldier during the current weekly EDAS cycle.
    - (1) DA Form 4036-R, if the Soldier was going overseas.
    - (2) DA Form 4787-R, if the Soldier was going overseas and has family members.

**Performance Steps**

- (3) DA Form 5117-R.
  - (4) Copies of any reclassification, medical examination board, or physical evaluations board actions that relate directly to the reassignment action are included in the file.
  - c. Ensure the following steps for processing the weekly EDAS cycle are performed.
    - (1) The appropriate authority is notified when the weekly EDAS cycle is received.
    - (2) A Special Management Command (SMC) screening takes place using DA Form 5118-R.
    - (3) The General Eligibility Review for Soldiers who require special handling, takes place.
    - (4) Time in Service Requirement Review is conducted for Soldiers who must acquire additional service.
    - (5) All applicable pen entries are made on DA Form 5118-R and a copy of the report is placed in the Soldiers' reassignment file.
  - d. Ensure the reassignment briefing/interview includes the required topics.
    - (1) Tour election and travel entitlements.
    - (2) Remaining service obligation.
    - (3) Temporary duty options.
    - (4) Exceptional Family Member Program.
    - (5) Accompanying family members screened.
    - (6) Married Army Couples Program.
    - (7) Home base or Advance Assignment Program.
    - (8) Family travel application requirements.
    - (9) Passport requirements.
    - (10) HIV test within six months prior to permanent change of station.
    - (11) Deletion or deferment application requirements.
    - (12) Preparation oversea replacement clearing requirements, if necessary.
    - (13) Schedule an overseas orientation briefing with the Army Community Services, if necessary.
  - e. Verify DLOS dates and travel requirements.
    - (1) Anticipated date of loss for Continental United States (CONUS) to Outside Continental United States (OCONUS).
    - (2) Reporting date for CONUS or OCONUS.
  - f. Verify reassignment file is filed according to Standard Operating Procedures for the Army installation.
  - g. Ensure MPRJ labels are forwarded to the Personnel Information Work Center.
2. Manage deletions/deferments.
- a. Ensure the correct codes for deletion/deferments are assigned.
    - (1) Locally approved deletion/deferment codes.
    - (2) HRC approved deletion/deferment codes.
    - (3) HQDA initiated deletion/deferment codes.
    - (4) DLOS rejection codes are corrected and resubmitted.
  - b. Supervise locally-approved regulatory deletion/deferment processing.
    - (1) Ensure that the deletion/deferment requests are complete.
      - (a) Ensure the request is adequate and submitted in a timely manner.
      - (b) Ensure there is a justification from the MPD or PSB attached to the request.
      - (c) Ensure the Data to Support Deletion or Deferment-Local Approved Memorandum from Chief, Reassignment to Commander/Chief PSB is prepared.
      - (d) Ensure the Data to Support Deletion or Deferment-Local Approval Memorandum 1st End from Commander/Chief, PSB to Chief, Reassignments Memorandum if request for deletion, deferment is not delegated to Chief, Personnel Reassignments is prepared.
      - (e) Ensure the request is forwarded to the Personnel Reassignments Work Center.
    - (2) Ensure Bn or S1 is informed of the deletion/deferment decision.
    - (3) Ensure the request is forwarded to HRC.
    - (4) Ensure the anticipated DLOS transaction is submitted.
    - (5) Ensure a copy of approved or disapproved action is placed in Soldier's reassignment file.

**Performance Steps**

- (6) Ensure the transaction was processed locally.
- (7) Ensure all existing port of calls are adjusted.
- (8) Ensure the Soldier is notified if the request is disapproved, and he or she continues the reassignment process.
- (9) Ensure orders are amended, if needed.
- (10) Ensure the Soldier is notified to stop processing for reassignment if deletion was approved.
- (11) Ensure the orders are amended if necessary.
- (12) Ensure the local training office is notified if the Soldier was scheduled for training enroute.
- (13) Ensure all orders are revoked.
- (14) Ensure Soldier's assignment eligibility or availability code is changed.
- c. Supervise HQDA approved regulatory deletions and deferments processing.
  - (1) Ensure the deletions/deferments requests are complete.
    - (a) The request is adequate and submitted in a timely manner, if the request is initiated by the Soldier or his or her unit.
    - (b) DA Form 4187 is prepared and the justification is attached, if the request is initiated by the MPD or the PSB.
    - (c) The Data to Support Deletion or Deferment Request-HQDA Approval Memorandum is prepared from Chief, Reassignment to HRC.
    - (d) The request is forwarded to HRC.
    - (e) A transaction is submitted to report that a deletion or deferment request is being processed.
  - (2) Ensure action is suspended.
  - (3) Ensure open deletion or deferment cases are monitored.
  - (4) Ensure response codes are researched.
  - (5) Ensure a request with additional data is resubmitted, if needed.
  - (6) Ensure BnS1 is informed when the request is approved or disapproved.
  - (7) Ensure transaction is resubmitted.
  - (8) Ensure a copy of approval or disapproval of the request is placed in the Soldier's reassignment file.
  - (9) Ensure reassignment process is continued if the request was disapproved.
  - (10) Ensure the new arrival date is determined if the deferment was approved.
  - (11) Ensure any existing port calls are adjusted.
  - (12) Amend any previously published orders.
  - (13) Ensure the reassignment process is continued.
  - (14) Ensure the reassignment process is stopped if deletion was approved.
  - (15) Ensure any existing port calls are canceled.
  - (16) Ensure any previously published orders are revoked.
- d. Supervise operational deletion/deferments processing.
  - (1) Ensure operational deletion/deferment requests are complete.
  - (2) Ensure a request to HRC is forwarded if General Officer (GO) recommend the approval.
  - (3) Ensure the BnS1 is informed if GO disapproved request.
  - (4) Ensure a copy of the decision is provided to the strength management (SGMT) work center.
  - (5) Ensure a copy of the decision is placed in Soldier's reassignment file.
  - (6) Ensure the status of operational deletion or deferment HRC approved actions is monitored.
  - (7) Ensure the request is resubmitted with additional information if required.
  - (8) Ensure the unit is informed of decision when request is approved or disapproved.
  - (9) Ensure a copy of approval or disapproval of request is provided to the SGMT work center.
  - (10) Ensure a copy of approved or disapproved request is placed in Soldier's reassignment file.
  - (11) Ensure the reassignment process is continued if the request was disapproved.
  - (12) Ensure a new report date is determined if the deferment was approved.
  - (13) Ensure a DLOS transaction is submitted.
  - (14) Ensure the port call is adjusted.

### Performance Steps

- (15) Ensure the local training office is notified if Soldier was scheduled for training enroute.
  - (16) Ensure orders are amended.
  - (17) Ensure the reassignment process continues using adjusted report month.
  - (18) Ensure the reassignment process stops if operational deletion was approved.
  - (19) Ensure port calls are canceled.
  - (20) Ensure the local training office is notified, if Soldier was scheduled for training enroute.
  - (21) Ensure orders are revoked.
  - (22) Ensure the Soldier's AEA code is changed.
  - e. Supervise compassionate deletions/deferments processing.
    - (1) Ensure the request is complete.
      - (a) Request is reviewed for completeness and accuracy.
      - (b) Data to Support Deletion or Deferment.
      - (c) Request is forwarded to approving authority.
      - (d) A copy of approval/disapproval is placed in Soldier's reassignment file.
    - (2) Ensure an action is suspended if request requires HRC approval.
    - (3) Ensure the status of open deletion and deferment cases is monitored.
    - (4) Ensure a request is submitted if response code for additional information or justification is indicated.
    - (5) Ensure unit is informed of approval or disapproval.
    - (6) Ensure a copy of approval/disapproval is placed in Soldier's reassignment file.
    - (7) Ensure the reassignment processing continues if request was disapproved.
    - (8) Ensure a new report date is determined if deferment was approved.
    - (9) Ensure a DLOS transaction is submitted necessary.
    - (10) Ensure any existing port calls are adjusted if deferment was approved.
    - (11) Ensure the local training office is notified if Soldier was scheduled for training enroute.
    - (12) Ensure orders are amended.
    - (13) Ensure the reassignment process continues.
    - (14) Ensure the reassignment process stops if deletion was approved.
    - (15) Ensure any existing port calls are canceled if deletion was approved.
    - (16) Ensure any previously published reassignment or TDY orders are revoked if deleted.
    - (17) Ensure the local training office is notified, if Soldier was scheduled for training enroute.
    - (18) Ensure the Soldier's AEA code is changed, if appropriate.
  - f. Ensure open deferment/deletion cases are processed properly.
    - (1) Ensure all deletion/deferment requests are monitored regardless of their origin and approval authority.
    - (2) Ensure a query of the local database is performed on a regular basis.
    - (3) Ensure the reassignment section follows the SOPs for using EDAS.
3. Manage the process of additional service-remaining requirements.
    - a. Ensure the Soldiers who must acquire additional service to complete a prescribed tour are identified.
    - b. Ensure reassignment notifications are forwarded to unit concerned.
    - c. Ensure the reassignment notification is placed in Soldier's reassignment file.
    - d. Ensure the reassignment process continues if Soldier intends to extend or reenlist in Army.
    - e. Ensure a deletion is processed if Soldier declines to extend or reenlist.
  4. Manage open deletion or deferment cases.
    - a. Ensure an Ad hoc query is generated.
      - (1) Ensure the Ad hoc query is reviewed.
      - (2) Ensure the assignment files of each Soldier named in the Ad hoc query Report are reviewed to determine reason Soldier is listed in the report.
      - (3) Ensure transactions are submitted, if necessary.
    - b. Ensure that the Data to Support Deletion or Deferment Request and all the supporting documents are completed.
    - c. Ensure all tracers are forwarded to HRC.

## Performance Steps

**Evaluation Preparation:** You can evaluate this task by using the performance measures and the materials that appear in the CONDITIONS statement. When the NCO completes the task, the supervisor will score the NCO PASS (P) or FAIL (F) on each performance measure.

### Performance Measures

**GO**    **NO GO**

1. Managed the process of weekly EDAS cycle.
2. Managed deletions/deferments.
3. Managed the process of additional service-remaining requirements.
4. Managed open deletion or deferment cases.

**Evaluation Guidance:** Score a GO if the NCO passes (P) all applicable performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong on any failed performance measure and how to do it correctly.

### References

#### Required

AAA-002  
 AAA-105  
 AAA-132  
 AAA-133  
 AR 600-8-11  
 DA FORM 4036-R  
 DA FORM 4187  
 DA FORM 4787-R  
 DA FORM 4991-R  
 DA FORM 5117-R  
 DA FORM 5118-R  
 MILPER MEMO 95-1

#### Related

Subject Area 27: ESSENTIAL PERSONNEL SERVICES

**Review Flow of Personnel Actions**

**805C-42A-4021**

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

**Standards:**

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

**Performance Steps**

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



**Performance Steps**

- (1) Verify the action request box is checked-off.
- (2) Verify Procedure 3-15 is in the procedure column.
- (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- e. Verify a request for re-assignment due to Extreme Family Problems is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-16 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- f. Verify a request for Exchange re-assignment (enlisted personnel only) is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-18 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- g. Verify a request to apply for Airborne Training is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-19 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- h. Verify a request to apply for Special Forces Training/Assignment is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-22 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- i. Verify a request to apply for On-the-job-training (OJT) (enlisted personnel only) is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-23 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- j. Verify a request for re-testing of Army Personnel Tests is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-25 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- k. Verify a request for reassignment of Married Army Couples is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-32 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- l. Verify a request to apply for Reclassification is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 3-46 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- m. Verify a request to apply for Officer Candidate School is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 4-10 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- n. Verify a request to apply for assignment of Persons with Exceptional Family Members action is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- o. Verify a request to issue an Identification Card is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 6-8 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- p. Verify a request to issue Identification Tags is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 6-9 is in the procedure column.
  - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
- q. Verify a request to receive Separate Rations is complete.
  - (1) Verify the action request box is checked-off.
  - (2) Verify Procedure 9-1 is in the procedure column.

### Performance Steps

- (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
  - r. Verify a request to apply for Leave is complete.
    - (1) Verify the action request box is checked-off.
    - (2) Verify Procedure 9-4 is in the procedure column.
    - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
  - s. Verify a request for a change of Name, SSN, or Date of Birth (DOB) is complete.
    - (1) Verify the action request box is checked-off.
    - (2) Verify Procedure 9-5 is in the procedure column.
      - (a) Circle "Name" if the action is a change in Name.
      - (b) Circle "SSN" if the action is a change in Social Security Number.
      - (c) Circle "DOB" if the action is a change in Date of Birth.
    - (3) Verify the appropriate AHRs procedure(s) is/are complete, if necessary.
  - t. Verify a request for other types of personnel action is complete.
    - (1) Verify the action request box is checked-off.
    - (2) Verify Procedure(s) appropriate for the requested action is/are listed.
    - (3) Verify the appropriate AHRs procedure(s) is/are complete.
  - u. Verify the Soldier signs at the bottom of Section 3, when necessary.
  - v. Verify the current date appears at the bottom of Section 3.
4. Review the contents of DA Form 4187, Section 4 (Remarks) for completeness and accuracy.
- a. Review any comments written in Section 4 for appropriateness to the requested action.
  - b. Verify the attachment of any additional comment sheets to DA Form 4187.
5. Review the contents of DA Form 4187, Section 5 (Certification/Approval/Disapproval) for completeness and accuracy.
- a. Review the information and requested action(s) contained in Section 2 and Section 3.
  - b. Verify the "verified" section is checked-off.
  - c. Verify either "recommended approval" or "recommended disapproval" has been checked-off for the requested action(s).
6. Verify the routing and submission information for DA Form 4187 is complete and accurate.
- a. Verify the "Thru:" designation or address is correct.
  - b. Verify the "To:" designation or address is correct.
  - c. Verify the "From:" designation or address is correct.
  - d. Verify the submission of DA Form 4187 for approval/disapproval as stated in Local SOP.
7. Verify the signature(s) and action item(s) on DA Form 4187 are complete and accurate.
- a. Verify "is approved" or "is disapproved" is checked-off in DA Form 4187 Section 5.
  - b. Verify DA Form 4187 contains the appropriate command authority signature(s).
  - c. Assign and complete all action item(s) indicated by the appropriate signing authority as stated in appropriate regulation or Local SOPs.
  - d. Verify a copy of the Soldier's action is maintained in the local suspense files as stated in appropriate regulation or Local SOPs.
8. Verify the Soldier is notified of the results of the DA Form 4187.
- a. Verify the Soldier's action was returned from higher headquarters approved or disapproved.
  - b. Verify the DA Form 4187 and supporting documentation is properly routed to the Soldier.
  - c. Verify orders are published, if necessary.
9. Verify DA Form 4187 and supporting documents or attachments are properly filed.
- a. File the appropriate content in the Soldier's MPRJ.
  - b. Update the Official Military Personnel File (OMPF), if necessary.
  - c. Update the Career Management Individual File (CMIF), if necessary.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Reviewed the contents of DA Form 4187 for completeness and accuracy.
2. Verified the routing, submission, signature, and action items for DA Form 4187 are complete and accurate.
3. Verified the proper filing of DA Form 4187 and supporting documents or attachments.
4. Verified the Soldier was notified of the results of the DA Form 4187.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**

AR 600-8-104  
 DA FORM 4187  
 DA FORM 4187-E  
 DA PAM 600-8

**Related**

## Manage Transfers and Discharges

### 805C-42A-4022

**Conditions:** Given a requirement to manage the transfers, discharges, and separation actions from the active Army and access to AR 635-200, DA Form 2166-8-1, DA Form 2339, DA Form 4187, DA Form 4856, DA Form 4941-R, DA Form 4991-R, DA Form 5138-R, DA Pam 600-8-11, DD Form 458, SF 88, SF 93, SF 520, and SF 600.

**Standards:**

1. Verify the actions required for separation/discharge.
2. Verify the proper separation/discharge authorities.
3. Verify the proper routing channels for separation/discharge.
4. Verify the proper separation/discharge and reduction orders.
5. Verify the proper distribution of transfer/separation and discharge proceedings.

**Performance Steps**

1. Verify the actions required for separation/discharge.
  - a. Verify the specific type of separation/discharge action being reviewed is correct.
  - b. Ensure the characterization of the Soldier's service or description of his or her separation is correct for the Soldier's type of separation or discharge.
  - c. Ensure the initiating commanding officer who is recommending separation/discharge of the Soldier, if applicable, submitted a report to the separation authority in proper format and that it contains all the data and documentation required for the specific type of separation/discharge being recommended.
    - (1) Ensure the commander cited the specific chapter and paragraph upon which he or she is basing his or her recommendation.
    - (2) Ensure the commander recommended a specific separation/discharge action and characterization of service.
    - (3) Ensure the commander listed a specific, factual reason(s) for his or her recommended action.
    - (4) Ensure the commander listed any counseling records.
    - (5) Ensure the commander noted any trial(s) by court-martial the Soldier had or any other disciplinary action(s) and other derogatory data regarding the Soldier.
    - (6) Ensure the commander attached a copy of SF 600 or psychiatric report to the report to show that the Soldier received a mental status evaluation, if applicable.
    - (7) Ensure the commander attached a copy of SF 88 to the report to show that the Soldier received a medical examination, if applicable.
    - (8) Ensure the commander explained why he or she believes it is not feasible or appropriate to dispose of the Soldier's case by other means.
    - (9) Ensure the commander recorded any promotions and/or reductions the Soldier received and the dates of those actions.
    - (10) Ensure the commander recorded any time the Soldier lost and whether the loss was due to his or her being absent without leave (AWOL), in confinement, or other reasons.
    - (11) Ensure the commander noted any favorable communications, recommendations, citations, or awards regarding the Soldier.
    - (12) Ensure the commander noted any evidence of rehabilitation made by the Soldier when there is derogatory data.
    - (13) Ensure the commander noted any medical or other data.

**Performance Steps**

- (14) Ensure the commander included a statement that he or she, in consultation with the rehabilitation team, has determined that further rehabilitative efforts are not practical, when recommending a Soldier for separation because of alcohol or other drug abuse rehabilitation failure.
  - (a) Ensure the commander included a chronological history of the Soldier's alcohol or drug abuse.
  - (b) Ensure the commander listed the circumstances concerning the Soldier's referral to rehabilitation, initial screening interview, medical evaluation, and enrollment in the Alcohol and Drug Abuse Prevention and Control Program (ADAPCP), along with the dates these events took place.
  - (c) Ensure the commander summarized the rehabilitation efforts which were made before and after the Soldier was enrolled in the ADAPCP. If applicable, the Soldier's dates of detoxification, the extent of counseling and other rehabilitation efforts made by the ADAPCP facility, and the extent of counseling and other rehabilitation efforts made by the Soldier's unit chain of command, including the dates of these efforts.
  - (d) Ensure the commander explained how the criteria for separating the Soldier because of alcohol or other drug abuse rehabilitation failure have been met.
  - (e) Ensure the commander included a statement which says that the Soldier has no potential for useful service under conditions of full mobilization as stated in the Army's Mobilization Asset Transfer Program, if applicable.
- d. Ensure the appropriate notification of separation memorandum was forwarded to the Soldier when the type of separation/discharge requires it and is attached to the initiating commander's recommendation report.
  - (1) Ensure the commander followed the proper format when the recommended separation/discharge action requires use of the Notification Procedure.
  - (2) Ensure the commander followed the proper format when the recommended separation/discharge action requires use of the Administrative Separation Board Procedure.
  - (3) Ensure the commander advised the Soldier of the type of discharge and character of service he or she is recommending.
    - (a) Ensure the commander cited specific allegations on which the proposed discharge/separation action is based.
    - (b) Ensure the commander cited the specific chapter, section, and paragraph in which he or she is basing his or her recommendation.
    - (c) Ensure the commander advised the Soldier whether the recommended separation could result in discharge, release from active duty to a Reserve Component (RC), or release from custody and control of the Army.
  - (4) Ensure the commander informed the Soldier of the least favorable characterization of service or description of separation he or she could receive.
    - (a) Ensure the commander advised the Soldier that the intermediate commander(s) may recommend a less favorable discharge or characterization of service than that recommended by himself or herself.
    - (b) Ensure the commander advised the Soldier that the separation authority is not bound by the recommendations of the initiating commander or intermediate commander(s) and he or she has complete authorization to direct any type of discharge and characterization of service.
  - (5) Ensure the commander advised the Soldier of his or her rights when the recommended separation/discharge action requires adherence to the Notification Procedure.
    - (a) Ensure the commander informed the Soldier that he or she may submit statements on his or her own behalf.
    - (b) Ensure the commander advised the Soldier that he or she can obtain copies of documents supporting the recommendation.
    - (c) Ensure the commander advised the Soldier that he or she has the right to consult with a consulting consul or with a civilian counsel at no expense to the government within a reasonable amount of time.

**Performance Steps**

- (d) Ensure the commander advised the Soldier that he or she has the right to a hearing before an administrative separation board if he or she has 6 or more years of total active and reserve service on the date of initiation of the recommendation
  - (e) Ensure the commander advised the Soldier that he or she can waive these rights by submitting a written request in the proper format.
  - (f) Ensure the commander advised the Soldier that his or her failure to respond to the commander's notification of separation memorandum within 7 duty days will constitute a waiver of his or her rights.
- (6) Ensure the commander advised the Soldier of his or her rights when the recommended separation/discharge action requires adherence to the Administrative Separation Board Procedure.
- (a) Ensure the commander advised the Soldier of his or her rights listed in points (3)(a) and (3)(b).
  - (b) Ensure the commander advised the Soldier that he or she has the right to request a hearing in person before an administrative board or present written statements to the board.
  - (c) Ensure the commander advised the Soldier that he or she has the right to request appointment of military counsel for representation, military representation of his or her own choosing, if reasonably available, or retain civilian counsel at no expense to the government.
- (7) Ensure the commander advised the Soldier regarding his or her rights.
- (a) Ensure the commander advised the Soldier that he or she can submit a written request for a conditional waiver of his or her right to a hearing before an administrative separation board.
  - (b) Ensure the commander advised a Soldier with 18 or more years of active Federal service that he or she cannot waive his or her rights to a board hearing and representation by counsel.
  - (c) Ensure a request for conditional waiver was submitted in the proper format, if applicable.  
Verify that the Soldier signed the waiver.  
Verify that the Soldier's consulting counsel signed the waiver as witness, indicating that he or she is a commissioned officer of the Judge Advocate General's Corps.  
Ensure that an appropriate notation has been made on the waiver for a Soldier who declined to sign it.  
Ensure that an appropriate notation has been made on the waiver as to which rights the Soldier elected to exercise when he or she refused to sign it.
  - (d) Ensure the commander advised the Soldier that failure to respond to the commander's notification of separation within 7 duty days will constitute a waiver of his or her rights.
  - (e) Ensure the commander advised the Soldier that he or she can, based on good cause, request and be granted an extension beyond the 7 duty days.
- (8) Ensure the commander, when required by the type of separation/discharge action, arranged for the Soldier to have a medical examination and/or mental status evaluation and informed him or her as to when and where he or she is to report for the examination and/or evaluation.
- (9) Verify the Soldier acknowledged receipt of the notification by signing and dating it.
- (10) Verify an appropriate notation was recorded on the retained copy when the Soldier failed to acknowledge receipt of the notification.
- (11) Verify the commander's notification of separation and the Soldier's acknowledgment of receipt of the notification are attached as enclosures to the commanding officer's report to the separation authority recommending separation/discharge of the Soldier.
- e. Ensure a Soldier who will have 20 or more years of active Federal service at his or her expiration of term of service (ETS) was counseled by his or her personnel officer during the sixth month prior to his or her ETS.

### Performance Steps

- f. Verify a Soldier who has 20 or more years of active Federal service has signed a statement which indicates that he or she has been counseled regarding his or her options and fully understands the consequences of any career decisions he or she makes.
- g. Ensure the necessary documents have been correctly completed and submitted for a Soldier who is requesting a separation/discharge from the Army.
  - (1) Ensure the originals of DA Form 2339, SF 93, SF 88, and SF 520 are attached to the separation/discharge documents for a Soldier who is applying for retirement after completing 20 or more years of active Federal service.
  - (2) Ensure a Soldier who entered the Army to attend the Warrant Officer Flight Training (WOFT) and failed to qualify medically for flight training correctly submitted his or her request for discharge in proper format.
    - (a) Verify the Soldier's disqualification from flight training was determined by the Commander, US Army Aeromedical Center, Fort Rucker, AL 36362.
    - (b) Verify the Soldier submitted his or her request within 30 days of his or her being disqualified for flying.
  - (3) Ensure a Soldier who is seeking separation from the Army as a surviving son or daughter has submitted a request which includes the name, grade, serial number or social security number (SSN), branch of service, relationship, date of death or disablement of the family member upon whom the request is based, and a Department of Veterans' Affairs (DVA) claim number, if appropriate.
  - (4) Ensure a Soldier who is requesting a discharge in lieu of trial by court-martial has submitted his or her request in the proper format.
    - (a) Ensure in the request the Soldier certified that he or she waived his or her right to counseling or received counseling from a consulting counsel of the Judge Advocate General's Corps or a civilian counsel, understands his or her rights, understands he or she may receive a discharge under other than honorable conditions, and understands the adverse nature of such a discharge and its possible consequences.
    - (b) Ensure the consulting counsel is a commissioned officer of the Judge Advocate General's Corps or a civilian counsel.  
Ensure the consulting counsel signed the application as a witness.  
Ensure when the Soldier waives his right to counsel the consulting counsel prepared a statement to that effect and included it with the separation documents.
    - (c) Ensure in the request the Soldier acknowledges that he or she understands the elements of the offense(s) with which he or she is charged and is guilty of the charge or is guilty of a lesser offense(s) which also authorizes a punitive discharge.
    - (d) Verify court-martial charges have been preferred against the Soldier or that he or she is under a suspended sentence of a punitive discharge.
    - (e) Verify with the staff judge advocate (SJA), when court-martial charges have been preferred against the Soldier, that the offense(s) he or she committed includes punishment by either a bad conduct discharge (BCD) or a dishonorable discharge.
    - (f) Ensure a copy of DD Form 458, a copy of the court-martial order, and a summary of facts which relate to the Soldier's conduct are included with the request, as warranted.
    - (g) Ensure a complete copy of all reports of investigation and any statement(s), documents, or other matter(s) considered by the commanding officer in making his or her recommendation, including any information presented for consideration by the Soldier or consulting consul, are included with the request.
  - (5) Ensure a Soldier who is requesting separation because of dependency or hardship has submitted a formal request and all necessary documentation.
    - (a) Ensure the Soldier's request explains the nature of his or her hardship condition and what the Soldier intends to do to alleviate the hardship.
    - (b) Ensure the Soldier's request contains an affidavit or statement by or on behalf of the Soldier's dependents substantiating the dependency or hardship claim.

### Performance Steps

- (c) Ensure the Soldier's request contains affidavits by at least two agencies or individuals, other than members of the Soldier's family, substantiating the dependency or hardship claim.
  - (d) Ensure when the Soldier's claim of hardship is financially based the request contains a statement establishing the monthly income and expenses of the family.
  - (e) Ensure the request contains any other documents which substantiate the basis of the Soldier's claim of hardship or dependency.
- (6) Ensure the separation documents of a female Soldier who is requesting separation because of pregnancy contain the necessary supporting documents.
- (a) Ensure the Soldier's pregnancy has been verified and documented on SF 88 and SF 93.
  - (b) Ensure the Soldier acknowledged she received counseling from her unit commander as stated in the Pregnancy Counseling Checklist and indicated that she elects separation from active duty by locating a signed Statement of Counseling in her separation documents.
  - (c) Ensure the Pregnancy Counseling Checklist and Statement of Counseling are filed in the Soldier's MPRJ as an action pending document.
- (7) Ensure the separation documents contain the appropriate documents for a Soldier who is requesting separation because he or she has been denied reenlistment and has declined continued service.
- (a) Ensure the separation documents contain a completed DA Form 4941-R for a Soldier who requests separation prior to his or her ETS because he or she has been denied reenlistment by Headquarters Department of the Army (HQDA).
  - (b) Ensure the separation documents contain a completed DA Form 4187 for a Soldier who has requested separation prior to his or her ETS because he or she is under a locally imposed bar to reenlistment.
  - (c) Ensure the separation documents contain a completed DA Form 4187 and DA Form 4991-R for a Soldier who declines to meet his or her remaining service requirements.
- (8) Ensure the separation documents contain the appropriate documents for a Soldier who is requesting early separation or discharge from active duty to attend a specific term at a college, university, or vocational school.
- (a) Ensure the Soldier is not a member of the Army National Guard (ARNGUS), US Army Reserve (USAR) serving on active duty for training (ADT), or a former senior ROTC cadet who was ordered to active duty because of breaches of contract.
  - (b) Ensure the Soldier has served more than three years on active duty and has no more than 90 days left on his or her ETS.
  - (c) Ensure the Soldier's separation documents contain a statement from an appropriate school official, such as a registrar or director of admissions, indicating that the Soldier has been accepted by the school for enrollment in a full time resident course of instruction and that the latest acceptable registration date for the school term falls within the 3-month period preceding the Soldier's ETS.  
Ensure when the Soldier is going to enroll in a college or university the institution offers courses leading to an associate, baccalaureate, or higher degree and is approved by the DVA.  
Ensure when the Soldier is going to enroll in a vocational or technical school the institution offers a course of instruction which is not less than 3 months in duration and is approved by the DVA.
  - (d) Ensure the separation documents contain an application for early release by the Soldier which documents that he or she is able to pay or has already paid any school entrance fees and establishes that for him or her to delay school enrollment until his or her normal ETS would cause undue personal hardship
- h. Ensure a Soldier who qualifies for the Army's Mobilization Asset Transfer Program is transferred to the Individual Ready Reserve (IRR) upon separation from active duty.



**Performance Steps**

- i. Ensure a Soldier who is being separated for alcohol or drug abuse rehabilitation failure, misconduct, homosexuality, or with a characterization of service of under other than honorable conditions is not transferred to the IRR.
- j. Ensure the appropriate items on DA Form 5138-R were completed to ensure that processing goals are met in a timely fashion.
  - (1) Ensure under normal circumstances the separation/discharge process did not exceed 15 working days from the date the Soldier acknowledged receipt of the notification of his or her proposed separation when the Notification Procedure is used.
  - (2) Ensure under normal circumstances the separation/discharge process did not exceed 50 working days from the date the Soldier acknowledged receipt of the notification of his or her proposed separation when the Administrative Separation Board Procedure is used.

## 2. Verify the proper separation/discharge authorities.

- a. Ensure each intermediate commander in the chain of command has recommended approval or disapproval of the recommended separation/discharge action.
  - (1) Ensure each commander has given reasons for his or her recommendation.
  - (2) Ensure each commander who recommended approval specified the type of separation/discharge that he or she recommends for the Soldier.
  - (3) Ensure each commander who recommended approval specified a characterization of the Soldier's service.
  - (4) Ensure an intermediate commander who considered additional unfavorable information about the Soldier, aside from that contained in the initiating commander's recommended action, provided specific facts and incidents in the Soldier's record in writing to warrant the type of discharge and characterization he or she is recommending.
  - (5) Ensure the Soldier was given an opportunity to rebut any additional unfavorable information prior to the proposed separation/discharge action being forwarded by that particular intermediate commander.
- b. Ensure the administrative separation board, if applicable, is composed properly.
  - (1) Ensure the board consists of at least three experienced, unbiased commissioned, warrant, or noncommissioned officers (NCOs) who are fully aware of applicable regulations and policies pertaining to cases for which the board is being convened.
  - (2) Ensure enlisted Soldiers who are appointed to the board are in grade sergeant first class (SFC) or above and are senior in grade to the respondent.
  - (3) Ensure at least one member of the board is serving in the grade of major or above.
  - (4) Ensure in the case of a RC Soldier the board includes at least one RC member.
    - (a) Ensure the RC representative on the board is senior to the RC Soldier's Reserve grade.
    - (b) Ensure in the case of a RC Soldier the board consists of no enlisted Soldiers when a discharge of under other than honorable conditions may be the final action.
  - (5) Ensure the senior member of the board acts as its president.
  - (6) Ensure the convening authority appoints a nonvoting recorder of the board's proceedings and, if he or she chooses, appoints a nonvoting legal advisor to the board.
  - (7) Ensure in the case of a female Soldier, the board will, upon written request of the Soldier, include a female voting member, if reasonably available.
  - (8) Ensure when a female Soldier was not available to serve on the board, this is noted in the record of the board's proceedings.
  - (9) Ensure in the case of a Soldier of the Army who holds a Reserve commission or warrant, the board is composed of an uneven number of officers.
    - (a) Ensure the officers on the board are senior in permanent grade to the Reserve grade held by the Soldier.
    - (b) Ensure one member of the board is a Regular Army (RA) officer and the remaining members are RC officers who are serving on active duty.
  - (10) Ensure in the case of a Soldier who is a member of a minority group the board will, upon written request of the Soldier, include a voting member who is also a minority group member, if reasonably available.

### Performance Steps

- (a) Ensure, when requested, the board member will be of the same minority group as the respondent, if reasonably available.
- (b) Ensure when a request of this nature cannot be met due to unavailability, this fact is noted in the board's proceedings.
- (11) Ensure the board has a competent stenographer or clerk.
- (12) Ensure the initiating officer of the discharge/separation action or any intervening officer who has direct knowledge of the case is not a member of the board
- (13) Ensure no members of the board served on a previous board which was convened to consider any of the same matters against the Soldier.
- c. Ensure the administrative separation board's proceedings are conducted properly.
  - (1) Ensure a Soldier under military control is notified in writing of the board's convening date at least 15 days prior to the hearing.
    - (a) Ensure the president of the board fully explains in writing in the board's proceedings the overriding reasons for not being able to give the minimum of 15 days notice to the Soldier.
    - (b) Ensure the written notice states that if the Soldier fails to appear before the board when scheduled by willfully absenting himself or herself without good cause, he or she could be discharged from or retained in the service without his or her personal appearance.
    - (c) Ensure the Soldier is notified of the names and addresses of witnesses who are expected to be called at the board hearing.
      - Ensure the Soldier is notified that the recorder of the board will, upon his or her request, try to arrange for the presence of any available witness that he or she desires to call.
      - Ensure the ETS date or transfer status of each expected witness is checked to ensure that essential military witnesses are available at the board hearing.
      - Ensure the appropriate commander is notified of any witnesses which are under his or her command so they are not transferred or separated before the beginning of the board hearing except when an enlistment or period of service fixed by law expires.
      - Ensure an attempt is made to obtain a Soldier's consent to retention beyond his or her ETS date for the purpose of testifying at the hearing.
      - Ensure when a Soldier refuses retention a deposition or affidavit is obtained from the Soldier prior to his or her separation.
    - (d) Ensure a copy of the case file, including all affidavits and depositions of witnesses unavailable to appear in person at the board hearing, is delivered to the Soldier or his or her counsel as soon as possible after it is determined that a board will hear the case.
  - (2) Ensure when a Soldier chooses to appear before the board without counsel that the record shows that the president of the board counseled the Soldier.
    - (a) Ensure the record reflects that the Soldier was counseled as to the type of discharge he or she may receive as a result of the board's action and the effects of such a discharge later in his or her life.
    - (b) Ensure the record reflects that the Soldier was informed that he or she may request counsel and how he or she responded.
    - (c) Ensure the record reflects that the Soldier was informed that he or she can, at anytime before the board convenes or during the proceedings, submit any answer, deposition, sworn or not sworn statement, affidavit, certificate, or stipulation, including depositions or affidavits of witnesses who are not reasonably available or unwilling to testify in person.
  - (3) Ensure the record reflects that the Soldier was advised of his rights during the board proceedings.
    - (a) Ensure the Soldier understands that he or she has the right to submit or not to submit to examination by the board.
    - (b) Ensure the Soldier understands that he or she and his or her counsel can question any witness who appears before the board.

**Performance Steps**

- (c) Ensure the Soldier understands that he or she can challenge any voting member of the board for cause only.
  - (d) Ensure the Soldier understands that he or she or his or her counsel can present argument before the board closes the case for deliberation on its findings and recommendations.
  - (e) Ensure the Soldier understands that his or her failure to invoke any of these rights will not have an effect upon the validity of the separation proceedings.
  - (4) Ensure when a Soldier holds RC status as a commissioned or warrant officer the board notifies him or her that the separation/discharge action also involves his or her RC status and could result in the termination of such status.
  - (5) Ensure when the board meets in closed session only voting members are present.
  - (6) Ensure the board's proceedings are summarized as fairly and accurately as possible and contain a verbatim record of its findings and recommendations.
  - d. Ensure the servicing Judge Advocate was consulted by the separation authority, if appropriate.
    - (1) Ensure an officer of the Judge Advocate General's Corps reviewed the discharge/separation action when limited use evidence is involved.
    - (2) Ensure an officer of the Judge Advocate General's Corps reviewed the discharge/separation action when an administrative separation board recommended a discharge under other than honorable conditions.
    - (3) Ensure an officer of the Judge Advocate General's Corps reviewed the discharge/separation action when the Soldier identified specific legal issues for consideration by the separation authority.
  - e. Ensure the separation authority who signed the separation/discharge documents has approval authority for this type of separation/discharge.
  - f. Ensure the appropriate items on DA Form 5138-R were completed to ensure that processing goals are met in a timely fashion.
3. Verify the proper routing channels for the separation/discharge.
- a. Ensure the specialist prepared an endorsement to forward a separation/discharge recommendation to the appropriate separation authority when the report is found to be complete and free of errors.
    - (1) Ensure the specialist's endorsement was reviewed for correctness, completeness, and neatness.
    - (2) Ensure the authenticating official signed the endorsement.
    - (3) Ensure the specialist routed the endorsement, the report, and supporting documents to the appropriate separation authority.
      - (a) Ensure in the case of a Soldier with 18 or more years of service, the completed report of the board's proceedings, along with complete documentation and the recommendation of the convening authority, are forwarded to HQDA (TAPC-PDT-SS), Alexandria, VA 22331-0479, for final action when the convening authority recommends discharge of the Soldier.
      - (b) Ensure in the case of a Soldier with 18 or more years of service and a recommendation for separation under Chapter 3, or in the case of a Soldier with less than 18 years of service, that the completed report of the administrative separation board's proceedings, along with complete documentation, is forwarded to the separation authority in the proper format.
  - b. Ensure improperly authorized separation/discharge documents are returned to the separation authority for correction.
  - c. Ensure the appropriate items on DA Form 5138-R were completed to ensure that processing goals are met in a timely fashion.
4. Verify the proper separation/discharge and reduction orders.
- a. Ensure the Soldier's separation orders are prepared correctly when his or her separation is approved by the appropriate separation authority.

### Performance Steps

- b. Ensure the separation orders correctly identify the type of separation/discharge the Soldier is to receive.
  - c. Verify the type of separation/discharge action is honorable or other than honorable.
    - (1) Ensure reduction orders have been prepared for a Soldier who is being discharged under other than honorable conditions.
    - (2) Ensure the reduction orders establish that the Soldier has been reduced to the lowest rank, Private/E-1.
  - d. Ensure the appropriate items on DA Form 5138-R were completed to ensure that processing goals are met in a timely fashion.
5. Verify the proper distribution of transfer/separation and discharge proceedings.
- a. Ensure the proper procedures are followed when the separation authority directs that the Soldier be retained on active duty.
    - (1) Ensure the suspense of favorable personnel actions (Flags) against the Soldier is removed if the separation authority directs that the Soldier be retained on active duty.
    - (2) Ensure the original copy of the proceedings is filed at the headquarters of the separation authority when the separation authority directs that the Soldier be retained on active duty.
    - (3) Ensure the Soldier's commanding officer is notified that the separation authority has directed the Soldier's retention on active duty.
  - b. Ensure the proper procedures are followed when the separation authority directs that the Soldier be separated from the active Army.
    - (1) Ensure the endorsement and a copy of the proceedings are forwarded to the commander who has the Soldier's records so that the Soldier can be separated as ordered.
    - (2) Ensure the original copy of the proceedings is filed in the permanent section of the Soldier's MPRJ when his or her separation/discharge is approved.
    - (3) Ensure for a naturalized Soldier, who is being separated under conditions other than honorable, the Soldier's commanding officer notified the Immigration and Naturalization Service (INS) by letter.
      - (a) Ensure the letter contains the Soldier's proposed address of residence after discharge, date and place of birth, date and place of naturalization, and certificate of naturalization number, if available.
      - (b) Verify the commander sent the letter to INS, ATTN: Assistant Commissioner (Naturalization), 425 Eye Street, NW, Washington, D.C. 20536.
  - c. Ensure the appropriate items on DA Form 5138-R were completed to ensure that processing goals are met in a timely fashion.
  - d. Ensure the Soldier receives a copy of the proceedings regardless if he or she is approved or disapproved for separation/discharge.
    - (1) Verify the Soldier's copy is marked, "Copy for (name and SSN of the Soldier)."
    - (2) Ensure the Soldier's copy of the proceedings does not include any written medical testimony and reports that would prove injurious to his or her physical or mental health.
    - (3) Verify the proceedings contain a receipt signed by the Soldier or his or her counsel indicating receipt of a copy of the proceedings or a statement indicating that the Soldier was unwilling to sign the receipt.
    - (4) Verify the Soldier's copy contains a notation, if appropriate, that neither the Soldier nor his counsel wanted a copy of the proceedings and that the copy is attached to the original.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Verified the actions required for separation/discharge.
2. Verified the proper separation/discharge authorities.
3. Verified the proper routing channels for the separation/discharge.
4. Verified the proper separation/discharge and reduction orders.
5. Verified the proper distribution of transfer/separation and discharge proceedings.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AR 635-200  
 DA FORM 2166-8-1  
 DA FORM 2339  
 DA FORM 4187  
 DA FORM 4856  
 DA FORM 4941-R  
 DA FORM 4991-R  
 DA FORM 5138-R  
 DA PAM 600-8-11  
 DD FORM 458  
 SF 520  
 SF 600  
 SF 88  
 SF 93

**Related**

**Manage Awards and Decorations**  
**805C-42A-4023**

**Conditions:** Given a completed DA Form 638 (Recommendation for Award) and access to:

- a. AR 600-8-22
- b. DA PAM 600-8.
- c. Standard office supplies and equipment.

**Standards:**

1. Identify guidelines for processing awards.
2. Identify purpose of Army Awards, DOD Service Medals and Ribbons, and Foreign Medals and their required forms.
3. Verify that DA Form 638 contains the correct data and is properly formatted.
4. Advise personnel on mobilization procedures for awards.

**Performance Steps**

1. Identify guidelines for processing awards.
  - a. Check to ensure awarded is within proper time limitations.
  - b. Interim awards are given promptly to award a suitable lesser decoration pending the final approval of a higher award. Upon approval of the higher award, the interim award is revoked. Advise personnel on the qualifying periods of service for awards.
  - c. Only one award is given for the same act, achievement, or period of meritorious service.
  - d. Succeeding awards and decorations will be awarded as an oak leaf cluster or numerical device.
  - e. The approval authority makes the decision on whether to award an individual with a decoration and which one is given.
2. Identify purpose of Army awards, DOD service medals, ribbons, and Foreign medals and their required forms.
  - a. Advise personnel on eligibility requirements for the potential recipients and on correct approval authority for Army individual awards.
  - b. Advise personnel on eligibility requirements for the potential recipients and on correct approval authority for DOD individual awards.
  - c. Advise personnel on eligibility requirements for the potential recipients and on correct approval authority for DOD service medals and ribbons.
  - d. Advise personnel on eligibility requirements for the potential recipients and on correct approval authority for Individual service medals and ribbons.
  - e. Advise personnel on authority for Foreign Medals and what medals are authorized for wear.
3. Verify the DA Form 638 contains the correct data and is properly formatted.
4. Advise personnel on mobilization procedures for awards.
  - a. Advise personnel on the four combat scenarios and procedures.
    - (1) Advise personnel on the procedures for small contingencies.
    - (2) Advise personnel on the procedures for large contingencies.
    - (3) Advise personnel on the procedures for partial mobilization.
    - (4) Advise personnel on the procedures for full mobilization.
  - b. Advise personnel on the award of decorations, service medals, and badges to Soldiers.
  - c. Advise personnel on the award of decorations, service medals, and badges to DA civilians.
  - d. Advise personnel on the appropriate awards approval authority.

**Performance Steps**

- e. Advise personnel on the proper planning procedures during the transition phases.
- f. Ensure areas of heightened importance during combat are processed IAW with regulatory guidelines.
  - (1) Ensure posthumous awards and interaction with the next of kin are processed correctly.
  - (2) Ensure Medal of Honor recommendations and procedures are processed correctly.
  - (3) Ensure reviewed and adjudicated award claims and appeals are processed correctly.
  - (4) Ensure the implementing and disseminating of awards policies.
  - (5) Ensure the management of awards at all echelons is consistent with the commanders directives.
  - (6) Ensure unit awards are processed correctly.
  - (7) Ensure the award of US decorations to foreign personnel and foreign awards to US members awards are processed correctly.
  - (8) Ensure award and decoration abuse and false claim inquiries are monitored properly.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Identified guidelines for processing awards.
2. Identified purpose of Army Awards, DOD Service Medals and Ribbons, and Foreign Medals and their required forms.
3. Verified the DA Form 638 contains the correct data and is properly formatted.
4. Advised personnel on mobilization procedures for awards.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AR 600-8-105  
 AR 600-8-22  
 DA PAM 600-8

**Related**

**Monitor Finance Actions**  
**805C-42A-4024**

**Conditions:** Given a requirement to monitor finance actions and access to AR 27-10 (Military Justice), AR 37-104-4 (Military Pay and Allowances Policy and Procedures-Active Component), DA Form 2627 (Record of Proceedings under Article 15 UCMJ), DD Form 2558 (Authorization to Start, Stop or Change an Allotment), DD Form 2559 (Savings Bond Allotment Authorization/Active Duty or Retired Pay), TRICARE Dental Plan Enrollment/Change form, and DOD Financial Management Regulation 7000.14-R, Volume 7A.

**Standards:**

1. Ensure the Soldier meets the requirements for special pay for enlistment and reenlistment bonuses.
2. Ensure the Soldier is entitled to receive special pay for duty subject to hostile fire or imminent danger.
3. Ensure the Soldier meets the requirements for special pay for foreign language proficiency.
4. Ensure the Soldier meets the requirements for incentive pay for hazardous duties.
5. Ensure the Soldier receives the correct allowances and that any changes are properly documented.
6. Ensure requested allotments of pay meet the requirements.
7. Ensure the guidelines for nonjudicial punishment are met.
8. Ensure the eligibility requirements are met for the TRICARE Dental Plan.
9. Ensure all pay transactions were transmitted and any questions in payment are properly documented.

**Performance Steps**

1. Ensure the Soldier meets the requirements for special pay for enlistment, selective reenlistment, and regular reenlistment bonuses.
  - a. Ensure the Soldier meets special pay requirements for an enlistment bonus.
    - (1) Ensure the bonus amount does not exceed \$20,000 and is an amount prescribed by the Secretary of the Army.
    - (2) Ensure the time of payment requested meets the requirements according to the appropriate DoD regulation.
    - (3) Ensure the enlistment bonus is fixed on the date of enlistment in the Delayed Enlistment Program (DEP), rather than on the date of entry on active duty, when a member enlists in a Reserve component for a period of at least 4 years.
  - b. Ensure the Soldier meets general eligibility requirements for a selective reenlistment bonus.
    - (1) Ensure the Soldier meets the conditions of Zone A, B, or C eligibility.
    - (2) Ensure the Soldier meets the requirements for special conditions, if necessary.
    - (3) Ensure the amount of payment meets the requirements according to the appropriate DoD regulation.
    - (4) Ensure the Soldier meets the requirements for additional obligated service, if necessary.
  - c. Ensure the Soldier meets the special pay requirements for a regular reenlistment bonus.
    - (1) Ensure the Soldier meets the basic conditions of entitlement for a regular reenlistment bonus.
    - (2) Ensure the time of payment requested meets the requirements according to the appropriate DoD regulation.
    - (3) Ensure a regular reenlistment bonus is not given to a Soldier who meets any of the prescribed restrictions.
  - d. Ensure enlistment and reenlistment bonuses are recouped, if necessary.



## Performance Steps

2. Ensure the Soldier is entitled to receive special pay for duty subject to hostile fire or imminent danger.
  - a. Ensure the Soldier meets one of the following entitlement provisions.
    - (1) Verify the Soldier is on official duty in a hostile fire /imminent danger post area.
    - (2) Verify the Soldier is subject to hostile fire or explosion of hostile mines.
  - b. Ensure special situations are addressed, when necessary.
    - (1) Ensure a Soldier who qualifies for special pay, and is missing, is credited with special pay while in the missing status.
    - (2) Ensure a Soldier who is hospitalized as a result of hostile action is credited with hostile fire/imminent danger pay for each month of hospitalization.
  
3. Ensure the Soldier meets the requirements for special pay for the foreign language proficiency.
  - a. Ensure the Soldier meets one of the following entitlement provisions.
    - (1) Verify the Soldier is qualified in a military specialty requiring a foreign language.
    - (2) Verify the Soldier has received training under regulations prescribed by the Secretary of the Army.
    - (3) Verify the Soldier is assigned to military duties requiring such proficiency.
    - (4) Verify the Soldier is proficient in a foreign language for which the DoD may have critical need, as determined by the Secretary of Defense.
  - b. Ensure the correct dollar amount is given to a Soldier with a foreign language proficiency.
    - (1) Ensure a Soldier with a foreign language proficiency rating of 1 is given a monthly rate of \$25.
    - (2) Ensure a Soldier with a foreign language proficiency rating of 2 is given a monthly rate of \$50.
    - (3) Ensure a Soldier with a foreign language proficiency rating of 3 is given a monthly rate of \$75.
    - (4) Ensure a Soldier with a foreign language proficiency rating of 4 is given a monthly rate of \$100.
  
4. Ensure the Soldier meets the requirements for incentive pay for hazardous duties.
  - a. Ensure the Soldier meets the general provisions for incentive pay.
    - (1) Ensure the Soldier performs one of the following hazardous duties.
      - (a) Verify the Soldier performs duty involving parachute jumping as an essential part of military duty.
      - (b) Verify the Soldier performs duty involving frequent and regular participation in flight operation.
      - (c) Verify the Soldier performs duty inside a high- or low-pressure chamber.
      - (d) Verify the Soldier performs duty as a human test subject in thermal stress experiments.
      - (e) Verify the Soldier performs duty involving the servicing of aircraft missiles with highly toxic fuels.
      - (f) Verify the Soldier performs duty involving fumigation tasks utilizing highly toxic pesticides.
      - (g) Verify the Soldier performs duty involving laboratory work utilizing live, dangerous viruses or bacteria.
      - (h) Verify the Soldier performs duty involving the handling of chemical munitions.
      - (i) Verify the Soldier performs duty involving demolition.
    - (2) Ensure the Soldier receives the correct dollar amount for hazardous duty incentive pay.
      - (a) Verify the Soldier, except for a high altitude-low opening (HALO) parachutist, receives \$165 per month in hazardous duty incentive pay.
      - (b) Verify the Soldier, if a HALO parachutist, receives the correct dollar amount as stated in current approved data.
  - (c) Verify that the Soldier is assigned to pararescue units, required to perform parachute jumps, in connection with explosive ordinance demolition duties, if applicable.
  - b. Ensure the Soldier meets the requirements for incentive pay, parachute duty.

### Performance Steps

- (1) Verify the Soldier meets the general entitlement requirements.
  - (2) Verify the Soldier meets the military free fall or HALO requirements.
  - (3) Verify the Soldier meets the parachute jumps-leave, permanent change of station (PCS), temporary duty/temporary additional duty (TDY/TAD), or active duty for training (ADT) requirements.
  - c. Ensure the Soldier meets the requirements for incentive pay, flight deck duty.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify the Soldier meets the quotas and billets requirement.
    - (3) Verify the Soldier meets the members on TDY/TAD requirement.
  - d. Ensure the Soldier meets the requirements for incentive pay, demolition duty.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify the Soldier meets the duty involving demolition of explosives requirement.
    - (3) Verify the Soldier meets the performance requirements.
  - e. Ensure the Soldier meets the requirements for incentive pay, experimental stress duty.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify the Soldier meets the duty involving experimental stress requirement.
      - (a) Verify the Soldier meets the human acceleration or deceleration experimental subject requirement.
      - (b) Verify the Soldier meets the thermal stress duty requirement.
      - (c) Verify the Soldier meets the high- or low-pressure chamber duty requirement.
    - (3) Verify the restrictions do not apply to the Soldier.
  - f. Ensure the Soldier meets the requirement for incentive pay, toxic fuels (or propellants) duty.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify restrictions do not apply to the Soldier.
  - g. Ensure the Soldier meets the requirements incentive pay, toxic pesticides duty.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify restrictions do not apply to the Soldier.
  - h. Ensure the Soldier meets the requirements for incentive pay, dangerous viruses or bacteria lab duty.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify restrictions do not apply to the Soldier.
  - i. Ensure the Soldier meets the requirements for incentive pay, chemical munitions.
    - (1) Verify the Soldier meets the condition of entitlement.
    - (2) Verify restrictions do not apply to the Soldier.
5. Ensure the Soldier receives the correct allowances and that any changes are properly documented.
    - a. Ensure the Soldier receives the basic allowance for subsistence (BAS).
    - b. Ensure the Soldier receives the basic allowance for housing (BAH).
    - c. Ensure the Soldier receives the family separation allowance (BSA).
  6. Ensure requested allotments of pay meets the requirements.
    - a. Ensure requested discretionary allotments of pay meet the requirements.
      - (1) Ensure the discretionary allotment requested is authorized.
      - (2) Ensure the Soldier is eligible to request an allotment.
      - (3) Ensure the pay and allowances the Soldier requests is documented on DD Form 2558.
      - (4) Ensure the period of allotment is definite, when applicable.
      - (5) Ensure allotment overpayment responsibilities are met.
    - b. Ensure requested non-discretionary allotments of pay meet the requirements.
      - (1) Verify the non-discretionary allotment is for the purchase for saving bonds (DD Form 2559).
      - (2) Verify the non-discretionary allotment is for charitable contributions.
      - (3) Verify the non-discretionary allotment is for post-Vietnam era veterans educational assistance program.
      - (4) Verify the non-discretionary allotment is for child and/or spousal support.

**Performance Steps**

- (5) Verify the non-discretionary allotment is for payment of delinquent local, state or federal income taxes.
  - (6) Verify the non-discretionary allotment is for repayment of loans to a government agency.
7. Ensure the guidelines for nonjudicial punishment are met.
    - a. Ensure the punishment affecting pay is authorized (DA Form 2627).
    - b. Ensure the limitations on nonjudicial punishment are not exceeded.
    - c. Ensure the effective dates of punishment are authorized.
  8. Ensure the eligibility requirements are met for the TRICARE Dental Plan (TDP).
    - a. Ensure the Soldier (and dependents, if applicable) is/are eligible to enroll.
    - b. Ensure the Soldier is eligible for disenrollment.
    - c. Ensure the Soldier meets the requirements for an exception to the minimum enrollment period, if applicable.
    - d. Ensure the proper deductions are made from the Soldier's monthly pay for TDP.
  9. Ensure all pay transactions were transmitted and any question in payment are properly documented.
    - a. Ensure the document transmittal list identifies all transactions that have processed, recycled or rejected.
      - (1) Ensure Identifier column will reflect the state of each pay transaction.
      - (2) Ensure format identifier will reflect a pay event.
      - (3) Ensure action indicator describes the type of action taken for that pay event.
      - (4) Ensure variable data column is the information specific to the pay event or transaction.
      - (5) Ensure the error column identifies if the document is rejected or recycled.
      - (6) Ensure and verify all source documents are present for all processed and recycled transactions with the document transmittal list.
    - b. Ensure all pay inquiries affecting a Soldier's pay is properly documented.

**Evaluation Preparation:** You can evaluate this task by using the performance measures and the materials that appear in the CONDITIONS statement. When the NCO completes the task, the supervisor will score the NCO PASS (P) or FAIL (F) on each performance measure.

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

1. Ensured the Soldier met the requirements for special pay for enlistment, selective reenlistment, and regular reenlistment bonuses.
2. Ensured the Soldier is entitled to receive special pay for duty subject to hostile fire or imminent danger.
3. Ensured the Soldier met the requirements for special pay for foreign language proficiency.
4. Ensured the Soldier met the requirements for incentive pay for hazardous duties.
5. Ensured the Soldier received the correct allowances and that any changes were properly documented.
6. Ensured requested allotments of pay met the requirements.
7. Ensured the guidelines for nonjudicial punishment are met.
8. Ensured the eligibility requirements are met for the TRICARE Dental Plan.
9. Ensured all pay transactions were transmitted and any questions in payment were properly documented.

**Evaluation Guidance:** Score a GO if the NCO passes (P) all applicable performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong and how to perform it correctly.

**References**

**Required**

AR 27-10  
AR 37-104-4  
DA FORM 2627  
DD FORM 2558  
DD FORM 2559  
DODFMR 700.14R

**Related**

**Review Personnel Evaluation System**  
**805C-42A-4025**

**Conditions:** Given a requirement to review the personnel evaluation system and access to AR 623-105, AR 623-205, AR 690-400, DA Form 2166-8, DA Form 67-9, DA Form 7223 and DA Form 7223-1.

**Standards:**

1. Ensure Personnel Service Battalion (PSB)/administrative office responsibilities are accomplished when processing OERs.
2. Ensure Personnel Service Battalion (PSB)/administrative office responsibilities are accomplished when processing NCOERs.
3. Ensure rater responsibilities are accomplished when preparing Base System Civilian Evaluation Reports.

**Performance Steps**

1. Ensure PSB/administrative office responsibilities are completed when processing OERs.
  - a. Ensure copies of current rating chains furnished by commanders are maintained.
  - b. Ensure rating officials meet eligibility criteria.
  - c. Ensure initial counseling is completed within the first 30 days.
  - d. Ensure proper suspense controls of OERs are within local procedures.
  - e. Assist the rated officer and rating officials in preparing reports, when needed.
  - f. Review completed DA Forms 67-9 for accurate entries.
  - g. Verify the entries made by the rating officials are correct.
  - h. Ensure Mandatory Reports (90-day minimum) are processed according to the appropriate guidelines.
    - (1) Ensure the Change of Rater Report is processed.
    - (2) Ensure the Change of Duty Report is processed.
    - (3) Ensure the Annual Report is processed.
    - (4) Ensure the Departure on Temporary Duty (TDY) or Special Duty (SD) Reports are processed.
    - (5) Ensure the TDY and SD supervisor's evaluation report is processed.
    - (6) Ensure the Officer Failing Selection for Promotion is processed.
  - i. Ensure Mandatory Reports-other than 90-day minimum are processed according to the appropriate guidelines.
    - (1) Ensure the Initial tour of extended active duty is processed.
    - (2) Ensure the Application for Regular Army (RA) appointment is processed.
    - (3) Ensure the Judge Advocate General Funded Legal Education Program (FLEP) officers participating in on-the-job training is processed.
    - (4) Ensure the Relief for Cause Report is processed.
    - (5) Ensure the HRC Directed Report is processed.
  - j. Ensure the optional reports are processed according to the appropriate guidelines.
    - (1) Ensure the Complete-the-record Report is processed.
    - (2) Ensure the Senior Rater Option Report is processed.
    - (3) Ensure the Rater option is processed.
    - (4) Ensure the Sixty-day Option Report is processed.
  - k. Verify the exceptional processing procedures are followed.
    - (1) Ensure the Referred Reports are processed.
    - (2) Ensure the Relief for Cause Reports are processed.
    - (3) Ensure the Commander Inquiry is processed.
    - (4) Ensure the Supplemental Reviews are processed.

### Performance Steps

- l. Ensure requests for modifications to previously submitted reports meet the appropriate guidelines.
  - m. Notify rating officials of any discrepancies and advise them of corrective action.
  - n. Ensure OERs reach Headquarters Department of the Army (HQDA) within 90 days after the "Thru" date of the report.
  - o. Ensure appropriate entries are made on the Officer Record Brief (ORB) to show that required reports were completed and forwarded to HQDA.
  - p. Ensure personnel records of incoming/outgoing officers are reviewed for the appropriate entries.
  - q. Ensure the rated officer is provided a copy of his/her completed OER before it is sent to HQDA.
  - r. Ensure reports returned by HQDA for corrective action are revised by the appropriate officials and forwarded to HRC no later than the suspense date.
  - s. Ensure guidelines are followed for officers and their rating officials when they are not supported by the same PSB.
  - t. Advise and assist officers in the preparation of OER appeal procedures.
2. Ensure Personnel Service Battalion (PSB)/administrative office responsibilities are accomplished when processing NCOERs.
  - a. Ensure copies of current rating chains furnished by commanders are maintained.
  - b. Ensure rating officials meet eligibility criteria.
  - c. Ensure unit commanders are notified of mandatory reports and optional complete the record reports.
  - d. Ensure proper suspense controls of NCOERs IAW local procedures.
  - e. Assist the rated NCO and rating officials in preparing reports, when needed.
  - f. Review completed DA Forms 2166-8 for accurate entries.
  - g. Verify the entries made by the rating officials are in accordance with guidelines.
  - h. Verify reports comply within the restrictions.
  - i. Ensure the following reports are processed within the appropriate guidelines.
    - (1) Ensure the Annual Report is processed.
    - (2) Ensure the Change of Rater Report is processed.
    - (3) Ensure the Complete the Record Report is processed.
    - (4) Ensure the Senior Rater Option Report is processed.
    - (5) Ensure the 60-day Option Report is processed.
    - (6) Ensure the Relief for Cause Report is processed.
  - j. Ensure NCOER is completely and accurately filled out. Address all discrepancies with rater.
  - k. Notify rating officials of any discrepancies and advise them of corrective action.
  - l. Ensure NCOERs are not separated.
  - m. Ensure NCOERs reach the appropriate headquarters within 60 days after the "Thru" date of the report.
    - (1) Ensure the NCOERs reach the United States Army Enlisted Records and Evaluation Center (USAEREC), ATTN: PCRE-RE, Indianapolis, IN 46249-5301 (Active Army).
    - (2) Ensure the NCOERs reach the appropriate State Adjutant General (AG) and forward a copy to the National Guard Bureau, ATTN: NGB-ARP-CT, Washington, DC 20310-2500 (Army National Guard).
    - (3) Ensure the NCOERs reach the Army Reserve Human Resources Command (ARHRC), ATTN: ARPC-PRE-E, 9700 Page Blvd, St. Louis, MO 63132-5200 (US Army Reserve).
  - n. Ensure appropriate entries are made on the Enlisted Record Brief (ERB) to show that required reports were completed and forwarded to the appropriate headquarters.
  - o. Ensure the personnel records of incoming and outgoing NCOs are reviewed for the appropriate entries.
  - p. Ensure the rated NCO is provided a copy of his/her completed NCOER before it is sent to the appropriate headquarters.
  - q. Ensure reports returned by higher headquarters for corrective action are revised by the appropriate officials and returned no later than the suspense date.

**Performance Steps**

- r. Ensure requests to USAEREC for Enlisted Evaluation Report Data Reconciliation (MEV 2026) are processed.
  - s. Ensure redress procedures are in compliance with regulatory guidelines.
    - (1) Brief NCO on appeal procedures.
    - (2) Verify the appeal is initiated.
    - (3) Verify the appeal will be received at USAEREC within the time limitations specified.
    - (4) Ensure the NCO requesting the appeal reads the appropriate chapter in the regulation.
    - (5) Assist the NCO with the appeal application if he/she decides to appeal his/her NCOER.
    - (6) Ensure the appeal follows the specific guidance.
  - t. Ensure a written performance report is provided to the serviced units at least quarterly showing statistics, late reports, and NCOER errors.
  - u. Ensure annual NCOERs are completed for NCOs.
3. Ensure rater responsibilities are accomplished when preparing Base System Civilian Evaluation Reports.
- a. Ensure the appropriate rater is designated IAW local policy.
  - b. Ensure the DA Form 7223-1, Base System Civilian Performance Counseling Checklist Record, is completed for the following pay plans and grades.
    - (1) Ensure DA Form 7223-1 for Wage Grade (WG) employee is complete.
    - (2) Ensure DA Form 7223-1 for Wage Leader (WL) employee is complete.
    - (3) Ensure DA Form 7223-1 for Wage Supervisor (WS) employee, GS-8 or below, is complete.
    - (4) Ensure DA Form 7223-1 for General Schedule (GS) employee, GS-8 or below, is complete.
  - c. Ensure performance counseling's are conducted within 30 days of the beginning of the rating period, midpoint of the rating cycle, and any other times as required.
4. Verify evaluation reports are maintained on file.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Ensured Personnel Service Battalion (PSB)/administrative office responsibilities were completed when processing OERs.
2. Ensured Personnel Service Battalion (PSB)/administrative office responsibilities were accomplished when processing NCOERs.
3. Ensured rater responsibilities were accomplished when preparing Base System Civilian Evaluation Reports.
4. Verified evaluation reports were maintained on file.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AR 623-105  
AR 623-205  
AR 690-400

**Related**

**References**

**Required**

DA FORM 2166-8

DA FORM 67-9

DA FORM 7223

DA FORM 7223-1

**Related**



**Review Personnel Readiness Data from the Unit Status Report (USR)  
805C-42A-4026**

**Conditions:** Given a requirement to review personnel readiness data from the USR, access to a completed DA Form 2715-R (Unit Status Report) and AR 220-1 (Unit Status Reporting).

**Standards:**

1. Verify DA Form 2715-R, Section A, Block 4 is filled out completely and accurately.
2. Verify DA Form 2715-R, Section B, Blocks 10, 11, 12, 13, and 14 is filled out completely and accurately.
3. Verify DA Form 2715-R, Section C, is filled out completely and accurately.
4. Verify DA Form 2715-R, Section D, as applicable, is filled out completely and accurately.
5. Route the USR to the commander for completion.

**Performance Steps**

1. Review DA Form 2715-R, Section A, Block 4.
  - a. Verify the correct Measured Area Level of Personnel (PRRAT) is entered in Field 1.
  - b. Verify the correct Primary Reason P-Level Not P1 (PRRES) is entered in Field 2.
2. Review DA Form 2715-R, Section B, Blocks 10, 11, 12, 13, and 14.
  - a. Verify the information in Block 10.
    - (1) Verify the security classification.
    - (2) Verify the type of report.
    - (3) Verify the correct Authorized Level of Organization (ALO).
    - (4) Verify the correct As of Date of Report (RICDA) is entered in the correct format (YYMMDD).
    - (5) Verify the correct Parent Unit's Identification Code (PUID).
  - b. Verify the information in Block 11.
    - (1) Verify the transaction type.
    - (2) Verify the Assigned Strength Percentage (ASPER) calculation.
    - (3) Verify the Available Strength Percentage (AVPER).
    - (4) Verify the MOS Qualified Percentage (MSPER).
    - (5) Verify the Senior Grade Personnel Percentage (SGPER).
    - (6) Verify the Personnel Turnover Percentage (APERT).
  - c. Verify the information in Block 12.
    - (1) Ensure you are using a Professional Filler System (PROFIS) roster that is dated within 30 days of the USR.
    - (2) Verify the correct number of required PROFIS personnel is entered into Field 1.
    - (3) Verify the correct available PROFIS personnel is entered into Field 2.
  - d. Verify the information in Block 13.
    - (1) Verify the number of female Soldiers assigned to the unit including officer and enlisted members is entered in the Females Assigned (FEMASGD) box.
    - (2) Verify the number of females who are pregnant in the unit is entered in the Females Pregnant (FEMPREG) box.
  - e. Verify the correct number of Guardsmen and Reservists are entered in Block 14.
3. Review DA Form 2715-R, Section C.
  - a. Verify the administrative data is correct.
    - (1) Verify the UIC.
    - (2) Ensure the classification has a "C" entered unless otherwise indicated.
    - (3) Verify the transaction type.

### Performance Steps

- (4) Verify the label box.
- b. GENTEXT SET of Section C.
  - (1) Verify the remarks explain the specific reason why the unit's status is being downgraded.
  - (2) Ensure the remarks adhere to the prescribed format.
4. Review DA Form 2715-R, Section D.
  - a. Verify Section D of the USR is used to report additional Army data.
  - b. Verify all of the applicable pages are completed and that they are completed properly.
  - c. 2PSPER-Personnel Grade Strength of the Unit. Section D provides personnel strength by grade.
    - (1) Review the required, authorized, assigned, and available strength after the appropriate printed grade.
    - (2) Verify the UIC.
    - (3) Verify the date of the report as YYMMDD.
    - (4) Verify the data.
      - (a) Verify the required strength for each grade.
      - (b) Verify the authorized strength for each grade.
      - (c) Verify the assigned strength for each grade.
      - (d) Verify the available strength for each grade.
  - d. 2RQPER - Military Occupational Specialty Shortage Report.
    - (1) Verify the UIC.
    - (2) Verify the date of the report as YYMMDD.
    - (3) Verify the data.
      - (a) Verify the MOS code that would be required to achieve P-Level 3.
      - (b) Verify the required number of Soldiers for that MOS.
      - (c) Verify the authorized number of Soldiers for that MOS.
      - (d) Verify the assigned number of Soldiers for that MOS.
  - e. 2ADDSKIL - Additional Skill Identifier (ASI) and Special Qualification Identifiers (SQI).
    - (1) Determine if there is an ASI/SQI shortage.
    - (2) Verify the UIC.
    - (3) Verify the date of the report as YYMMDD.
    - (4) Verify the line number (DE).
    - (5) Verify the ASI data.
      - (a) Verify the required number of ASI.
      - (b) Verify the authorized number of ASI.
      - (c) Verify the assigned number of ASI.
    - (6) Verify the SQI code data. There should be an "S" entered prior to the appropriate number.
      - (a) Verify the required number of SQI.
      - (b) Verify the authorized number of SQI.
      - (c) Verify the assigned number of SQI.
  - f. 2Language - Language Identification Codes (LIC).
    - (1) Locate the required number of language skill identifiers on the MTOE.
    - (2) Locate the assigned number of language skill identifiers on the UMR.
    - (3) Verify the data.
      - (a) Verify the UIC.
      - (b) Verify the date of the report as YYMMDD.
      - (c) Verify the DE number.
      - (d) Verify the MOS for which this LIC is used.
      - (e) Verify the LIC.
      - (f) Verify the number of personnel required in the unit in the LICREQ column.
      - (g) Verify the number of personnel with this LIC assigned to the unit in the LICASGS column.
      - (h) Verify the number of personnel assigned to the unit and currently qualified in the language in the LICQUAL column.

**Performance Steps**

- g. PSPER Non-Deployable Report.
    - (1) Verify the UIC.
    - (2) Verify the date of the report at YYMMDD.
    - (3) Verify "U" for the security classification unless otherwise indicated.
    - (4) Verify the transaction type.
      - (a) "A" for initial report.
      - (b) "D" is for delete report.
    - (5) Verify the number of non-deployable with the corresponding reasons.
      - (a) Verify the number of non-deployable personnel using the appropriate regulation.
      - (b) Verify the count and reason columns. Soldiers should be combined under common reasons.
  - h. Determine the unit's P-Level.
    - (1) Locate the proper table in the regulation.
    - (2) Locate the total available strength line.
    - (3) Locate the percentage range within which your unit's Available Strength Percent (AVER) falls.
    - (4) Locate the P-Level just above this percentage range.
5. Route the USR to the commander for completion.
- a. The form must be routed through the proper channels.
  - b. DA Form 2715-R is initially sent to the installation or division level, Major United States Army Reserve Command, or the State Adjutant General.
  - c. The form is transposed into machine readable format and forwarded to the appropriate MACOM commander in the unit's chain of command.
  - d. The MACOM commander forwards the report to the Organization of Joint Chiefs of Staff (OJCS) and HQDA.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Reviewed DA Form 2715-R, Section A, Block 4.
2. Reviewed DA Form 2715-R, Section B, Blocks 10, 11, 12, 13, and 14.
3. Reviewed DA Form 2715-R, Section C.
4. Reviewed DA Form 2715-R, Section D.
5. Routed the USR to the commander for completion.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AR 220-1  
DA FORM 2715-R

**Related**

## Manage Officer Promotions

805C-42A-4027

**Conditions:** Given a requirement to manage officer promotions and access to AR 600-8-24, AR 600-8-29 (Officer Promotions), AR 600-9 (The Army Weight Control Program), AR 635-120 (Officer Resignations and Discharges).

**Standards:** Identify the eligibility requirements for officer promotions and required pre-board actions.

### Performance Steps

1. Verify the officer is eligible for promotion.
  - a. Verify the correct promotion authority.
  - b. Verify the officer is eligible for promotion by ensuring the proper procedures are followed.
    - (1) Verify the officer is in a promotable status.
      - (a) Verify the officer is not absent without leave (AWOL), in custody of, or confined by law enforcement authorities, a deserter, or not serving in the line of duty due to illness or injury.
      - (b) Verify the officer is not serving a court-martial sentence or being punished under Article 15, Uniformed Code of Military Justice (UCMJ).
      - (c) Verify the officer is not under undisposed court-martial charges.
      - (d) Verify the officer is not under investigation that may result in disciplinary action of any kind.
      - (e) Verify the officer is not under proceedings that may result in administrative elimination or discharge under other than honorable conditions.
      - (f) Verify the officer is not under suspension of favorable personnel actions.
      - (g) Verify the officer is not the subject of criminal proceedings pending in a State or Federal court.
      - (h) Verify the officer is not a Warrant Officer (WO) whose voluntary retirement application has been approved by HRC.
      - (i) Verify the officer is not a recipient of a referred Academic Evaluation Report (AER), a referred Officer Evaluation Report (OER), or a Memorandum of Reprimand.
      - (j) Verify the officer is not enrolled in the Army Drug and Alcohol Prevention Control Program (ADAPCP).
      - (k) Verify the officer is not documented as overweight as defined in AR 600-9.
      - (l) Verify the officer is not below the grade of captain and conditionally accepted into the Army General Counsel's Honors Program, and has not been admitted to practice before a Federal Court or the highest court of a State.
    - (2) Verify the officer is on the Active Duty List (ADL) on the day the board convenes.
    - (3) Verify the eligibility for promotion as determined by HRC.
    - (4) Verify time in grade (TIG) and time in service (TIS) requirements.
      - (a) WO1 - Must have at least 2 years TIG including service credit to be promoted. WO must serve 18 months on active duty as a WO1 before being promoted.
      - (b) CW2 - 4: Must have at least 3 years of active duty in current grade before being eligible for promotion to next higher grade.
      - (c) 2LT / 1LT: An officer must have at least 18 months TIG to be promoted to 1LT and 2 years TIG to be promoted to CPT. TIG requirement for promotion to 1LT has been extended to 2 years by the authority of the SA.
      - (d) CPT, MAJ, and LTC: Officers must serve at least 3 years TIG in current grade to be considered for promotion to next higher grade.
      - (e) COL and BG: Officers must service one year TIG at current grade to be considered for promotion to next higher grade.
  - c. Verify the officer eligibility for consideration by a promotion board.
    - (1) No separation or retirement date within 90 days.

**Performance Steps**

- (2) 1LT and CW2 must not have failed 2 promotion considerations by a promotion selection board.
  - (3) CWOs must have at least 3 years active duty in their current grade.
  - (4) Commissioned Officers with less than 1 year of continuous active duty before the board convenes are not eligible for consideration unless exempt by regulation.
2. Ensure proper completion of all pre-board actions.
- a. Ensure the eligible officers and data to be considered are properly verified.
    - (1) HQDA announces convening of selection board and the zones of consideration. Headquarters, Department of the Army, (HQDA), will provide a list of eligible officers so that critical data can be verified.
    - (2) Officer's Active Duty Date of Rank (ADOR) must be in the zone of consideration.
    - (3) Officer must meet the promotion criteria.
  - b. Verify officer data to be considered by selection board.
    - (1) Verify the officers on the selection board listing are eligible for promotion.
    - (2) Compare message with list of local eligible officers within command to determine discrepancies.
    - (3) Verify the following information is correct.
      - (a) Name.
      - (b) SSN.
      - (c) Branch.
      - (d) ADOR.
      - (e) Date of Original Appointment (DTRA).
      - (f) Active Federal Commissioned Service (AFCS) as announced in zone message.
      - (g) Source of Commission / Appointment.
      - (h) Date of Birth.
      - (i) Entry on Active Duty Current Tour (EADC) date.
    - (4) Verify officers in zone of consideration are eligible for promotion per regulation.
    - (5) Submit any additions, deletions or corrections by letter or message along with a short explanation.
    - (6) Correct all data that needs updating.
  - c. Verify the rules for eligible officer notifications.
    - (1) Inform each officer of his/her responsibilities for presenting the most accurate information to the promotion selection board.
    - (2) Ensure each eligible officer and a representative of the Officer Record Center audit the ORB.
    - (3) Provide official DA Photographs in hard copy if available.
    - (4) Ensure evaluation reports and communications with the board are submitted per regulation.
  - d. Perform the proper steps for officer notifications.
    - (1) Notify Battalion S1 of officers eligible for consideration and schedule ORB audit.
    - (2) Coordinate with Battalion S1 to identify officers eligible for promotion and complete the record OERs.
    - (3) Monitor all officers due OERs to ensure timely submission.
    - (4) Notify officers eligible for promotion consideration of the following:
      - (a) Explain officer responsibilities to update their records.
      - (b) Notify officer of date schedule to audit ORB.
      - (c) Explain officer OER eligibility.
      - (d) Explain he/she must update photograph every 5 years.
      - (e) Explain to the officer about the opportunity to submit correspondence to the president of the selection board per regulation.
    - (5) Verify an ORB was received for each eligible officer.
    - (6) Conduct an ORB audit with the officer. Pay special attention to:
      - (a) Assignment history.
      - (b) Awards.

### Performance Steps

- (c) Military and civilian education.
  - (d) ADOR.
  - (e) Height and Weight.
  - (f) Date of last OER.
  - (g) Branch.
  - (h) Specialties and AFCS.
- (7) If the officer is not available to perform a personal audit, mail the ORB and an explanatory letter to the officer so he/she can audit the ORB and return it.
  - (8) Verify the accuracy of changes and ensure transactions and ORB correction letters have been completed.
  - (9) Update the OMF data by forwarding a copy of the ORB with supporting documentation to the appropriate office at HRC.
  - (10) Mail the updated ORB with the officer's signature and Officer Record Center (OFRC) signature and the updated photograph to the appropriate offices at HRC.
- e. Verify and complete the Eligible Officer Checklist.
- (1) Ensure the Battalion S1 notifies each officer that is eligible for promotion of his/her responsibilities.
  - (2) Ensure the Battalion S1 informs each officer of his/her responsibilities to update records.
  - (3) Ensure the Battalion S1 informs each officer of his/her responsibility to update the photograph every 5 years.
  - (4) Ensure the Battalion S1 informs each officer of his/her opportunity to submit correspondence to the president of the board per regulation.
  - (5) Ensure ORB is sent.
  - (6) Ensure the OFRC receives each ORB.
  - (7) Ensure the ORB audit occurs.
  - (8) Ensure the OFRC conducts an ORB audit with each officer.
  - (9) Ensure changes are neatly annotated.
  - (10) Ensure each officer signs and dates a statement attesting to the accuracy of the data.
  - (11) Ensure changes to each ORB have been made.
  - (12) Ensure the OFRC send the audited ORB with the officer's signature to HRC.

**Evaluation Preparation:** You can evaluate this task by using the performance measures and the materials that appear in the CONDITIONS statement. When the NCO completes the task, the supervisor will score the NCO PASS (P) or FAIL (F) on each performance measure.

### Performance Measures

**GO**    **NO GO**

- 1. Verified the officer is eligible for promotion.
- 2. Ensured proper completion of all pre-board actions.

**Evaluation Guidance:** Score a GO if the passed (P) all applicable performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong on any failed performance measure and how to do it correctly.

### References

**Required**  
AR 600-8-24  
AR 600-8-29  
AR 600-9

**Related**

**Manage Enlisted Promotions and Reductions**  
**805C-42A-4028**

**Conditions:** Given a requirement to manage enlisted promotions and reductions, and access to:

- a. AR 600-8-19
- b. DA Form 4187 (Personnel Action)
- c. DA Form 3355 (Promotion Point Worksheet)
- d. DA Form 3072-R (Waiver of Disqualification for Reenlistment/Promotion in the Regular Army)
- e. DA Form 3356 (Board Member Appraisal Worksheet)
- f. DA Form 3357 (Board Recommendation)
- g. Enlisted Records Brief (ERB)
- h. Unit Enlisted Advancement Report (AAA-117)
- i. Eligibility Roster (AAA-294)
- j. Enlisted Distribution Assignment System (EDAS)
- k. Military Personnel Records Jacket (MPRJ)
- l. Standard office supplies and equipment.

**Standards:**

1. Ensure a complete decentralized promotion cycle is established.
2. Verify all decentralized promotions are processed correctly.
3. Ensure a complete semi-centralized promotion cycle is established.
4. Verify Soldier being considered for centralized promotions meet the eligibility criteria before the Headquarters Department of the Army (HQDA) board convenes.
5. Verify all centralized (SFC, MSG, SGM) promotions are processed correctly.
6. Verify all reductions are processed correctly.
7. Ensure wartime standards for promotions are performed properly.

**Performance Steps**

1. Ensure a complete decentralized promotion cycle is established.
  - a. Verify the AAA-117 and AAA-294 are generated on the first duty day of each month.
  - b. Verify the computation for waiver allocations is generated on the first duty day of each month.
2. Verify all decentralized promotions are processed correctly.
  - a. Ensure all promotions to PV2-SPC are processed correctly.
    - (1) Review the AAA-117 and AAA-294 reports.
    - (2) Ensure the waiver allocations are sent to the unit commander.
    - (3) Ensure the unit commander selects eligible promotees by annotating "Yes" or "No" on the AAA-117 and AAA-294 reports.
    - (4) Ensure the battalion (BnS1) prepares DA Form 4187 for each Soldier, as required.
    - (5) Ensure the BnS1 signs each DA Form 4187, as required.
    - (6) Ensure the unit commander signs each DA Form 4187, as required.
    - (7) Ensure the BnS1 prepares SPC certificates for the commander's signature.
    - (8) Ensure the BnS1 forwards the SPC certificates to the commander for signature.
    - (9) Ensure all required grade change transactions are made.
    - (10) Ensure the documents are distributed properly.
  - b. Ensure any erroneous advancements are corrected.

### Performance Steps

- (1) Ensure the BnS1 prepares DA Form 4187 if the commander determines that a Soldier was erroneously advanced.
  - (2) Ensure the BnS1 obtains the Soldier's signature.
  - (3) Ensure all required grade change transactions are made.
  - (4) Ensure the BnS1 forwards the DA Form 4187 to the promotion (PROM) section.
3. Ensure a complete semi-centralized promotion cycle is established.
- a. Ensure the following processes occur one month prior to the board month.
    - (1) Ensure the BnS1 identifies Soldiers considered for promotion.
    - (2) Ensure the BnS1 prepares each DA Form 3355, Section A.
    - (3) Ensure promotion authority's approval is obtained.
    - (4) Ensure each DA Form 3355 is forwarded to the PSB.
    - (5) Ensure the Enlisted Promotion Branch of the PSB completes each DA Form 3355, Section B.
    - (6) Ensure the Enlisted Promotion Branch of the PSB returns each DA Form 3355 to the BnS1.
  - b. Ensure the following processes occur during the board month.
    - (1) Ensure the BnS1 prepares for the board and conducts the board on or before the 15th of the board month.
    - (2) Ensure the BnS1 finalizes the boards proceedings.
    - (3) Ensure the BnS1 obtains the promotion authority's approval.
    - (4) Ensure the BnS1 forwards the results to the PSB.
    - (5) Ensure the PSB reviews the proceedings.
    - (6) Ensure the Soldiers' promotion points are inputted into EDAS.
  - c. Ensure the following processes occur two months after the board month.
    - (1) Ensure the PROM receives the monthly SGT and SSG promotion selectees by name-listing.
    - (2) Ensure the PSB/BnS1 validates, by name, the eligibility of the Soldiers selected for promotion to SGT/SSG.
      - (a) Verify the Soldier being promoted to SGT has completed the Primary Leadership Development Course (PLDC).
      - (b) Verify the Soldier being promoted to SSG has completed the Basic Noncommissioned Officer's Course (BnCOC).
      - (c) Verify the Soldier being promoted to SSG meets the service remaining requirement for promotion.
    - (3) Ensure orders are issued, if applicable.
  - d. Ensure special category promotions are processed correctly.
    - (1) Ensure appropriate special forces Soldiers are promoted to SGT on the first day of the month following attainment of recommended list status.
    - (2) Ensure appropriate Ranger School graduates are promoted on the first day of the third month following attainment of recommended list status or graduation from the Ranger School, whichever is later.
    - (3) Ensure Soldiers in the rank of SPC and below entering Officer Candidate School (OCS) or Warrant Officer Candidate Course (WOCC) are promoted to SGT prior to departure from their losing organization.
  - e. Ensure promotion point re-evaluations are processed correctly.
    - (1) Ensure administrative re-evaluations are processed correctly.
      - (a) Ensure BnS1 completed Section A of DA Form 3355.
      - (b) Ensure DA Form 3355 was signed by the Soldier's commander.
      - (c) Ensure the Soldier requesting re-evaluation has increased his/her administrative points by at least 20 points.
      - (d) Ensure the AAA-294 is updated with the appropriate changes.
      - (e) Ensure the appropriate transaction is submitted.



**Performance Steps**

- (f) Ensure the EDAS database is updated.
  - (2) Ensure total re-evaluations are processed correctly.
    - (a) Ensure BnS1 completed Section A of DA Form 3355.
    - (b) Ensure DA Form 3355 was signed by the Soldier's commander.
    - (c) Ensure DA Form 3355 was forwarded and approved by the appropriate promotion authority.
    - (d) Ensure PROM completes Section B of DA Form 3355 and it is signed by a SSG or above.
    - (e) Ensure BnS1 conducts a promotion board.
    - (f) Ensure the appropriate Soldiers appear before the promotion board.
    - (g) Ensure the AAA-294 is updated with the appropriate changes.
    - (h) Ensure the appropriate transaction is submitted.
    - (i) Ensure the EDAS database is updated.
  - f. Ensure promotion point adjustments are processed correctly.
    - (1) Ensure BnS1 prepares request for promotion point adjustment.
    - (2) Ensure PROM approves promotion point adjustment, if authorized.
    - (3) Ensure the AAA-294 is updated with the appropriate changes.
    - (4) Ensure the appropriate transaction is submitted.
    - (5) Ensure the EDAS database is updated.
    - (6) Ensure the Soldier is notified of the decision.
    - (7) Ensure orders are published, if applicable.
  - g. Verify the Soldier is correctly removed from the local promotion standing list, if applicable.
    - (1) Ensure the Soldier is informed in writing regarding removal action.
    - (2) Ensure the BnS1 verifies the conditions for removal.
    - (3) Ensure a removal board is properly composed of the appropriate personnel, if required.
      - (a) Ensure the president is a senior member.
      - (b) Ensure the board is composed of a minimum of 3 voting members senior in grade to the person being considered.
      - (c) Ensure the board has at least one member of the same sex as the Soldier being considered for a promotion.
      - (d) Ensure the board is composed of an ethnic mixture.
      - (e) Ensure the board is composed of a nonvoting recorder from the BnS1.
    - (4) Ensure the BnS1 conducts a removal board, if required.
      - (a) Ensure each board member completes a DA Form 3356 to vote on each Soldier.
      - (b) Ensure the recorder prepares DA Form 3357.
      - (c) Ensure the recorder obtains the president's signature on DA Form 3357.
      - (d) Ensure the recorder completes DA Form 3355, Section C.
    - (5) Ensure the removal board proceedings are forwarded to the PSB, using DA Form 4187.
    - (6) Ensure the AAA-294 is updated with the appropriate changes.
    - (7) Ensure the appropriate transaction is submitted.
    - (8) Ensure the EDAS database is updated.
4. Verify the Soldier being considered for a centralized promotion meets the eligibility criteria before the HQDA board convenes.
- a. Verify the Soldier meets the announced date of rank (DOR) requirements and other eligibility criteria prescribed by HQDA.
  - b. Verify the Soldier has at least 6, 8, and 10 years of total active federal service (AFS) for SFC, MSG and SGM, respectively.
  - c. Verify Soldiers eligible for promotion to MSG and SGM have 8 and 10 years, respectively of enlisted service creditable in computing basic pay.
  - d. Verify the Soldier is serving on active duty in an enlisted status on the convening date of the selection board.

### Performance Steps

- e. Verify the Soldier has a high school diploma or general education (GED) equivalent, or an associate degree or higher.
- f. Verify the Soldier is not barred from reenlistment.
- g. Verify the Soldier does not have an approved retirement.
- h. Verify the Soldier has not signed a Declination Continued Service Statement (DCSS).
- i. Verify United States Army Reserve (USAR) and Army National Guard (ARNG) Soldiers have completed a minimum of one year on active duty.
- j. Verify the Soldier eligible for promotion to MSG has completed the Advanced Noncommissioned Officers Course (ANCOC).
- k. Ensure all pre-board processing for Noncommissioned Officers (NCOs) who are in the Zone of Consideration are processed correctly.
  - (1) Ensure the BnS1 and the PSB identify all eligible Soldiers.
  - (2) Ensure an Enlisted Records Brief (ERB) is generated for each Soldier being considered for selection to SFC, MSG, and SGM.
  - (3) Ensure United States Army Enlisted Records and Evaluation Center (USAEREC) is notified of all ineligible Soldiers.
  - (4) Ensure each Soldier is notified that he/she is in the zone of consideration for promotion.
  - (5) Ensure USAEREC is notified of all Soldiers not listed on the USAEREC listing of eligible Soldiers, according to the zone announcement.
  - (6) Ensure Soldiers are scheduled for an interview.
  - (7) Ensure each Soldier reviews and signs the promotion documents for submission to the board.
  - (8) Ensure each Soldier knows that he or she should request his or her Official Military Personnel File (OMPF).
  - (9) Ensure each Soldier knows that he or she should review his or her OMPF at least six months prior to the board.
  - (10) Ensure each Soldier knows that he or she should correct any errors in his or her OMPF.
  - (11) Ensure any documents submitted for correction or addition are forwarded through proper channels.
  - (12) Ensure the promotion documents are forwarded to the USAEREC selection board.

- 5. Verify all centralized (SFC, MSG, SGM) promotions are processed correctly.
  - a. Ensure the HQDA selection list is cross-checked against the listing of eligible Soldiers.
  - b. Ensure all eligible Soldiers were considered.
  - c. Ensure to comply with announced released date.
  - d. Ensure the promotion selection list is distributed IAW internal standard operating procedures.
  - e. Ensure letters of congratulations and all other applicable documents are prepared IAW internal standard operating procedures.
  - f. Ensure Soldiers who must accept or deny promotion due to mandatory reclassification are notified.
    - (1) Ensure the Soldier submitted a memorandum officially declining the promotion.
    - (2) Ensure the Soldier's memorandum of declination is forwarded through command channels to the PSB.
    - (3) Ensure the Soldier's memorandum of declination is forwarded to HRC, ATTN: TAPC-MSP-E, Alexandria, VA 22332-0443, for removal from the promotion list and/or revocation of promotion orders.
    - (4) Ensure the Soldier is notified when a response is received from HRC.
  - g. Ensure the BnS1 notifies each NCO of the procedures used to request consideration or reconsideration by the Standby Advisory Board (STAB), if appropriate.
    - (1) Ensure BnS1 assists each NCO in writing to the career branch for a promotion potential analysis.
    - (2) Ensure documents reflecting a change in a Soldier's promotable status are forwarded to HRC, ATTN: TACP-MSP-E, Alexandria, VA 22332-0443.

**Performance Steps**

h. Ensure all promotions for a NCO requesting consideration by the STAB are processed correctly.

- (1) Ensure the BnS1 prepares a request for STAB.
- (2) Ensure PROM processes a request for STAB.
  - (a) Ensure PROM verifies a request for STAB.
  - (b) Ensure PROM forward the request to HRC.
  - (c) Ensure PROM forwards the response from HRC to BnS1.
- (3) Ensure BnS1 advises the Soldier of the results of the request.
- (4) Ensure all grade change transactions are submitted.

6. Verify all reductions are processed correctly.

- a. Verify the reason for the reduction has been properly determined.
  - (1) Verify the reason for the reduction is a result of misconduct.
  - (2) Verify the reason for the reduction is a result of inefficiency.
- b. Ensure the appropriate reduction authority processes reductions in grade.
  - (1) Ensure the company, troop, or separate detachment commander processes reductions in grade involving the grade of Specialist (SPC) or Corporal (CPL) or below.
  - (2) Ensure the field grade commander of an organization which is authorized a Lieutenant Colonel (LTC) or higher grade commander processes a reduction in grade involving the grade of SGT or SSG.
  - (3) Ensure the commanders of organizations which are authorized a Colonel (COL) or higher grade commander processes reductions in grade involving the grade of SFC, MSG, or SGM.
- c. Ensure reductions, as a result of misconduct, are processed correctly.
  - (1) Ensure there is documentary evidence that the Soldier has been convicted of an offense by a civil court.
  - (2) Ensure all grade change transactions are submitted.
  - (3) Ensure separation action was initiated, if applicable.
  - (4) Ensure the BnS1 forwarded substantiating documents through the command channel to the PSB.
- d. Ensure reductions, as a result of inefficiency, are processed correctly.
  - (1) Ensure the Soldier has served in the same unit for at least 90 days prior to being reduced one grade for inefficiency.
  - (2) Ensure there are appropriate documents showing the Soldier's inefficiency.
  - (3) Ensure the documents establish a pattern of inefficiency rather than identifying a specific incident.
    - (a) Ensure there are statements of counseling and documented attempts at rehabilitation by chain of command or supervisors.
    - (b) Ensure there are copies of the special NCO-Evaluation Report (NCOER) submitted due to inefficiency.
    - (c) Ensure there is correspondence from creditors attempting to collect a debt from the Soldier.
    - (d) Ensure there is adverse correspondence from civil authorities.
  - (4) Ensure the commander reducing the Soldier informs him or her in writing of the action and the reasons.
  - (5) Ensure the Soldier acknowledges receipt of the memorandum.
  - (6) Ensure the Soldier has the opportunity to submit rebuttal documents.
  - (7) Ensure the grade change transactions are submitted.
  - (8) Ensure the finalized case is forwarded to the PSB.
- e. Ensure the reduction board is properly composed of the appropriate personnel.
  - (1) Ensure the board is composed of at least 3 voting members senior in grade to the person being considered for a reduction.

### Performance Steps

- (2) Ensure at least one board member is thoroughly familiar with the Soldier's field of specialization for inefficiency cases.
  - (3) Ensure the board has at least one member of the same sex as the Soldier being considered for reduction.
  - (4) Ensure the board is composed of a member of an ethnic minority group if the Soldier being considered is a member of an ethnic minority group.
  - (5) Ensure there is a nonvoting recorder to serve on the board.
  - (6) Ensure no Soldier with direct knowledge of the case is appointed to the board.
  - (7) Ensure alternate board members are appointed and available as required.
  - f. Ensure the reduction board is conducted properly.
    - (1) Ensure the Soldier is given written notice at least 15 duty days before the date of the hearing.
    - (2) Ensure the result of the reduction board is forwarded to the appeal authority, if applicable.
    - (3) Ensure the grade change transaction is submitted.
    - (4) Ensure the finalized case is forwarded to the PSB.
  - g. Ensure the reduction order is prepared.
  - h. Ensure the reduction decision is properly filed.
    - (1) Ensure the ENRC updates the MPRJ.
    - (2) Ensure the ENRC forwards the packet to US Army Enlisted Records and Evaluation Center (USAEREC) for filing in the OMPF.
7. Ensure wartime standards for promotions are performed properly.
- a. Ensure centralized and semi-centralized promotions are discontinued on the battlefield.
  - b. Ensure decentralized promotions are managed as a sub-function of enlisted strength management.
  - c. Ensure promotions are based on position vacancies.
  - d. Ensure promotions are executed, recorded and reported by the promotion authority as soon as the battlefield situation permits.
  - e. Ensure the appropriate promotion and reduction authorities are identified.
    - (1) Major General in command for SFC and above.
    - (2) Lieutenant Colonel in command for SGT and SSG.
    - (3) Unit Commander for SPC and below.
  - f. Ensure data is properly maintained on personnel losses, requisitions, replacement allocations, and promotion decisions.

**Evaluation Preparation:** You can evaluate this task by using the performance measures and the materials that appear in the CONDITIONS statement. When the NCO completes the task, the supervisor will score the NCO PASS (P) or FAIL (F) on each performance measure.

### Performance Measures

**GO    NO GO**

1. Ensured a complete decentralized promotion cycle was established.
2. Verified all decentralized promotions were processed correctly.
3. Ensured a complete semi-centralized promotion cycle was established.
4. Verified the Soldier being considered for a centralized promotion met the eligibility criteria before the HQDA board convened.
5. Verified all centralized (SFC, MSG, SGM) promotions were processed correctly.
6. Verified all reductions were processed correctly.
7. Ensured wartime standards for promotions are performed properly.

**Evaluation Guidance:** Score a GO if the NCO passes (P) all applicable performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong on any failed performance measure and how to do it correctly.

**References****Required**

AAA-117  
AAA-347  
AR 600-8-19  
DA FORM 201  
DA FORM 3072-R  
DA FORM 3355  
DA FORM 3357  
DA FORM 4187

**Related**

**Process MOS Medical Retention Board  
805C-42A-4029**

**Conditions:** Given a requirement to process MOS Medical Retention Board (MMRB) for Soldiers undergoing evaluations, access to AR 600-8 (Military Personnel Management) and AR 600-60 (Physical Performance Evaluation System).

**Standards:**

1. Ensure the appropriate voting and nonvoting members are appointed to the MMRB.
2. Ensure the MMRB recorder completes all necessary administrative actions for the board.
3. Process MMRB summaries directing retention in Primary Military Occupation Specialty (PMOS) or specialty code.
4. Process MMRB summaries directing the Soldier are placed in a probationary status.
5. Process MMRB summaries directing reclassification or change in specialty code.
6. Process MMRB summaries directing that the case be referred to the Army's physical disability system.

**Performance Steps**

1. Ensure the appropriate voting and nonvoting members are appointed to the MMRB.
  - a. Ensure voting members are appointed to the MMRB.
    - (1) Ensure a commissioned officer in the rank of Colonel (06), Lieutenant Colonel (05) or a civilian doctor designated by the Medical Center (MEDCEN)/Medical Department Activity (MEDDAC) commander is appointed to the board.
    - (2) Ensure the medical officer is not appointed as the president of the board.
    - (3) Ensure two commissioned officers in the branch of Combat Arms, Combat Support, or Combat Service Support in the rank of lieutenant colonel (05) are appointed to the board.
    - (4) Ensure a command sergeant major (CSM) or sergeant major (SGM), is appointed to the board in the Soldier's Career Management Field (CMF).
    - (5) Ensure a female Soldier is appointed to the board upon the written request of a Soldier, if applicable.
  - b. Ensure nonvoting members are appointed to the MMRB.
    - (1) Ensure a non Personnel Service Battalion (PSB) personnel officer who is a commissioned officer, warrant officer or Department of the Army (DA) civilian serving as a personnel officer or adjutant in a brigade or equivalent size unit or higher is appointed to the board.
    - (2) Ensure a non-PSB senior personnel sergeant is present.
    - (3) Ensure a non-PSB enlisted member is appointed as the recorder of the board.
    - (4) Ensure additional nonvoting members are appointed to the board as needed for a fair hearing.
2. Ensure the MMRB recorder completes all necessary administrative actions for the board.
  - a. Ensure the recorder obtains all health and personnel records, the commander's evaluation of the Soldier's performance, and any other pertinent documentation for the board review for all individuals appearing before the board.
  - b. Ensure the recorder prepares a MMRB worksheet for each board member prior to the board.
  - c. Ensure the recorder notifies in writing the individuals appearing before.
  - d. Ensure the recorder notifies the board members and personnel advisor of the date, time, and place of the board.
  - e. Ensure the recorder obtains a written acknowledgment from the individual concerned of the MMRB appearance notification.

**Performance Steps**

- f. Ensure the recorder provides the Soldier a copy of the commander's evaluation.
  - g. Ensure the recorder schedules the sequence of appearance of Soldiers before the board.
3. Process MMRB summaries directing retention in PMOS or specialty code.
    - a. Ensure that MMRB summary of proceedings and decision (without enclosures) is filed in the permanent section of the Soldier's Military Personnel Record Jacket (MPRJ).
    - b. Forward one copy of the MMRB proceedings and decision to the Soldier through his or her chain of command.
    - c. Forward one copy of the MMRB summary of proceedings and decision to the Soldier's career branch (without enclosures) for Soldiers who have Career Management Individual File (CMIF) established at applicable offices.
    - d. Forward one copy of the MMRB summary of proceedings and decision (without enclosures) for inclusion in the Soldier's Official Military Personnel File (OMPF).
  4. Process MMRB summaries directing the Soldiers are placed in a probationary status.
    - a. File the MMRB proceedings and decision in the action pending section of the Soldier's MPRJ.
    - b. Retain a copy of the action for the suspense file.
    - c. Ensure the Soldier is referred to the MMRB at the end of the probationary period, or sooner if determined by the commander.
    - d. Forward a copy of the MMRB decision and instructions through the Soldier's chain of command to his unit commander.
  5. Process MMRB summaries directing reclassification or change in specialty code.
    - a. Ensure a copy of the MMRB proceedings and recommendation for reclassification or change in specialty code is filed in the action pending section of the Soldier's MPRJ.
    - b. Interview the Soldier to determine his or her MOS or specialty code preferences that relate to the recommended change.
    - c. Forward one copy of the MMRB proceedings and decision to applicable offices.
    - d. Ensure the appropriate documents are included or are attached as enclosures to the forwarding endorsement.
      - (1) Ensure there is a copy of the Enlisted Record Brief (ERB) or Officer Record Brief (ORB).
      - (2) Ensure there is a DA Form 3349 that has been updated within the past 12 months or verified as current by the doctor on the MMRB.
      - (3) Ensure there is the Soldiers Commander's or Supervisor's evaluation.
      - (4) Ensure there is a summary of the MMRB proceedings.
      - (5) Ensure there is any other documents or statements pertaining to the Soldier's physical capabilities or limitations.
    - e. Remove the suspense copy from the action pending section of the Soldier's MPRJ upon receipt of the final reclassification decision.
    - f. Ensure one copy of the decision is filed in the permanent section of the MPRJ.
    - g. Forward one copy for inclusion in the Soldier's OMPF.
    - h. Retain copy in suspense file.
  6. Process MMRB summaries directing that the case be referred to the Army's physical disability system.
    - a. Ensure that a copy of the MMRB summary and decision is filed in the action pending section of the MPRJ.
    - b. Forward a copy of the MMRB summary and decision (with enclosures) through the Soldier's commander to the servicing MTF commander.
    - c. Ensure the Soldier's name, rank, SSN, PMOS or specialty code, unit and its address or APO, PULHES, assignment limitations, and date the Soldier was referred to MTF are included.
    - d. Notify the Soldier and annotate his or her MPRJ to reflect the profile change if the Medical Evaluation Board determines that the Soldier's physical profile contains a "1" or "2" as the highest numerical factor no additional evaluation is necessary.

**Performance Steps**

- e. If the profile contains a "3" or a "4" in one or more of the numerical factors, the Soldier should be reevaluated by the MMRB in light of the new assignment limitations.
- f. Notify applicable offices of the profile change.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Ensured the appropriate voting and nonvoting members are appointed to the MMRB.
2. Ensured the MMRB recorder completes all necessary administrative actions for the board.
3. Processed MMRB summaries directing retention within PMOS or specialty code.
4. Processed MMRB summaries directing the Soldiers are placed in a probationary status.
5. Processed MMRB summaries directing reclassification or change in specialty code.
6. Processed MMRB summaries directing that the case be referred to the Army's physical disability system.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**  
AR 600-60  
AR 600-8

**Related**



## Subject Area 28: DEPLOYMENT

**Conduct Soldier Readiness Plan**  
**805C-42A-4031**

**Conditions:** Given the requirement to initiate the Soldier Readiness Program (SRP) and access to AR 600-8-101, FM 12-6, DA Form 5304-R, DD Form 2A, DD Form 93 and SGLV-8286.

**Standards:**

1. Verify the Soldier readiness processing team (SRPT) meets policy requirements and is ready to process Soldier administrative needs.
2. Verify the SRPT contains all necessary representatives.
3. Initiate SRP Level 1 basic movement processing to permit Soldier participation in a planned individual temporary duty (TDY) or in unit movement for training during peacetime.
4. Initiate SRP Level 2 administrative actions to permit deployment of Soldiers into combat or on a contingency mission.
5. Initiate SRP Level 3 administrative actions to process other readiness requirements before Soldier movement.
6. Initiate SRP Level 4 administrative actions to process deployment area or unique mission requirements before Soldier movement.
7. Initiate SRP Level 5 administrative processes to permit Soldiers to make a permanent change of station (PCS), or to make the transition from active duty.

**Performance Steps**

1. Verify the SRPT meets policy requirements and is ready to process Soldier administrative needs.
  - a. Verify all Soldiers are administratively ready for deployment at all times and incorporates planned checks on the Soldier's readiness status.
  - b. Verify administrative deployment processing through required levels one through five operation.
  - c. Verify the SRPT can evaluate an individual Soldier's readiness.
    - (1) Verify a Soldier's readiness can be checked during in-processing.
    - (2) Verify each Soldier's readiness can be evaluated annually as a unit, or as an individual.
    - (3) Verify a Soldier's readiness can be checked during out-processing.
    - (4) Verify a Soldier's readiness can be checked within 30 days of the actual unit deployment date.
    - (5) Verify the SRPT can check a Soldier's readiness within 30 days of departure for extended TDY (90 days or more).
  - d. Verify the SRPT accomplishes the unit and individual annual requirement and 30 days prior to deployment.
  - e. Verify the person in charge of the individual SRPT station has signature approval on all Level 1 and Level 2 administrative actions before granting movement clearance.
  - f. Verify the SRPT or other identified staff can process Reserve Component (RC) Soldiers identified for continental United States (CONUS) training within 72 hours of arrival at their CONUS duty station.
  - g. Verify RC Soldiers identified for outside the continental United States (OCONUS) training complete their movement requirements before OCONUS deployment.

## Performance Steps

2. Initiate SRP Level 1 basic movement processing to permit Soldier participation in a planned individual temporary duty (TDY) or in unit movement for training during peacetime.
  - a. Determine the current unit readiness status by viewing Soldier Readiness or a Unit Readiness Deficiency Report(s).
  - b. Review and determine the necessary personnel requirement actions.
    - (1) Determine a Soldier's deployment status.
      - (a) Verify the Soldier is not within seven (7) days of the expiration of the service agreement date on the day of actual deployment.
      - (b) Verify the Soldier has an approved DA Form 5304-R on file, if required.
    - (2) Review and revise the Soldier's SGLV-8286 with current information.
    - (3) Review and revise the Soldier's DD Form 93 with current information.
    - (4) Verify each Soldier is wearing two identification tags on a metal necklace placed around the neck.
    - (5) Verify the Soldier is carrying a current DD Form 2A (ID Card), Enlisted Record Brief (ERB) or Officer Record Brief (ORB).
  - c. Verify each Soldier meets the HIV antibody status before deployment.
    - (1) Verify each Soldier has a negative HIV test in their medical record that is no older than six months prior to the date of departure.
      - (a) Verify Soldiers on PCS to OCONUS (including Alaska, Hawaii, Puerto Rico, Guam and the Virgin Islands) have a negative test on record.
      - (b) Verify Soldiers deploying or going TDY OCONUS for longer than 179 days have a negative test on record.
    - (2) Verify Soldiers on orders to Ranger, Special Operations Command (SOCOM), Soldiers on rotating Cohesion, Operation Readiness, and Training (COHORT) units, or Soldiers attending military sponsored education programs have a negative HIV test on record that is no older than six months prior to the report date of new unit.
    - (3) Ensure Soldiers scheduled for deployment or for exercises not exceeding 179 days have a negative HIV test on record that is no older than 24 months prior to the date of departure.
    - (4) Ensure Soldiers confirmed to be HIV antibody positive is listed as non-deployable.
  - d. Verify Soldiers meet dental requirements prior to deployment. Ensure that the Soldier's record custodian has a complete dental record for each Soldier to include a panoramic x-ray.
3. Initiate SRP Level 2 administrative actions to permit deployment of Soldiers into combat or on a contingency mission.
  - a. Verify previous SRP administrative actions are complete before initiating Level 2 administrative actions.
  - b. Determine current unit readiness status by directing staff to print a Soldier Readiness or Unit Readiness Deficiency Report(s) and verify requirements through levels one through four, 30 days prior to departure.
  - c. Verify Soldiers meet Level 2 Personnel requirements before deployment.
    - (1) Verify there is no deployment for Soldiers meeting any of the following conditions:
      - (a) Verify Soldiers are not sent to a country in which, or by which, they have been held as Prisoner of War (POW), unless waived by the individual Soldier.
      - (b) Verify Soldiers who are German aliens are not sent to the Federal Republic of Germany.
      - (c) Verify Soldiers who are US/Turkey citizens are not sent to Turkey.
      - (d) Verify Soldiers who are former Peace Corps members are not sent to conduct intelligence missions in countries in which they previously worked.
      - (e) Verify Soldiers who are sole surviving family members are not sent to areas where normal duties involve actual enemy combat, unless waived by the individual Soldier.
    - (2) Verify Soldiers meet training requirements before deploying to OCONUS.
      - (a) Ensure a Soldier has had 12 weeks of basic training.
      - (b) Ensure a Soldier has had advanced military training, or its equivalent.

**Performance Steps**

- (3) Verify MOS Medical Reclassification Board (MMRB) evaluates any Soldier with a 3 or 4 physical profile and declares them deployable.
  - d. Ensure Soldiers meet Level 2 Medical Requirements prior to deployment by verifying that no medical readiness deficiencies exist.
    - (1) Ensure no deployment of pregnant Soldiers occurs OCONUS or with a CONUS to CONUS unit move.
    - (2) Verify that no deployment occurs for Soldiers assigned to quarters or to a medical treatment facility (MTF).
    - (3) Verify that no deployment occurs for Soldiers without current immunizations.
    - (4) Verify Soldiers requiring vision correction have two pairs of eyeglasses, and one pair of protective mask lens inserts, before deployment.
    - (5) Verify Soldiers requiring hearing correction have a hearing aid and extra batteries before deployment.
    - (6) Verify that Soldiers with special medical conditions are wearing two medical warning tags before deployment.
    - (7) Verify no deployment occurs for Soldiers who test HIV positive, or whose last HIV test date is older than 24 months.
  - e. Verify Soldiers meet Level 2 security clearance requirements before deployment.
    - (1) Verify Soldiers meet the security clearance requirements for their current duty position.
    - (2) Verify Soldiers meet the security clearance requirements for their area of deployment, if a clearance is required for that area, or deployment duty.
  - f. Ensure before deployment all Soldiers meet Level 2 legal affairs requirements by verifying that each receive a Geneva Convention briefing during their current enlistment/career.
  - g. Ensure all Soldiers meet Level 2 training requirements prior to deployment by verifying that each has qualified with individual weapons within the past 12 months.
4. Initiate SRP Level 3 administrative actions to process other readiness requirements before Soldier movement.
- a. Verify all previous SRP administrative actions are complete before initiating Level 3 administrative actions.
  - b. Verify that a general officer in command has not waived Level 3 SRP administrative actions.
  - c. Determine the current unit readiness status by directing staff to print a Soldier Readiness or a Unit Readiness Deficiency Report(s).
  - d. Verify Soldiers meet Level 3 personnel requirements before deployment.
    - (1) Verify a unit commander has not restricted the movement of Soldiers pending discharge, separation, compassionate reassignment, and those under the human reliability program.
    - (2) Verify Soldiers submitting an application for, and receiving an approval of, conscientious objector (Class 1-A-O) status are not assigned to duties that normally involve weapon handling.
    - (3) Verify the key portions of each Soldier's personnel data base information are current.
      - (a) Verify the military personnel category/code is up-to-date.
      - (b) Verify the dependent data is up-to-date.
      - (c) Verify the marital status is up-to-date.
      - (d) Verify the date of the Soldier's last PCS, the date of return from overseas (DROS), or the estimated date of return from overseas (DEROS) is up-to-date.
      - (e) Verify the Soldier's regimental affiliation and homebase are up-to-date.
      - (f) Verify the OCONUS preference is up-to-date.
      - (g) Verify the assignment eligibility and availability (AEA) and termination date is current.
      - (h) Verify the current and the last foreign service tour (FST) is up-to-date.
      - (i) Verify the Soldier's travel status is up-to-date.
      - (j) Verify the CONUS preference is up-to-date.
      - (k) Verify the Soldier's HIV test date is up-to-date.
  - e. Verify Soldiers meet the Level 3 SRP Medical requirements before deployment.
    - (1) Verify Soldiers receive a medical history screening at the time of deployment.
      - (a) Ensure the Soldier completes SF 93.

### Performance Steps

- (b) Verify the Soldier receives an interview from a physician, physician assistant (PA) or nurse practitioner.
- (c) Verify the medical records are complete before review by a physician, PA, or nurse practitioner.
- (2) Verify Soldiers are questioned for the existence of Exceptional Family Members, and are referred for screening and enrollment in the Exceptional Family Member Program (EFMP), if appropriate (DA Form 7351-R).
- f. Verify Soldiers meet the Level 3 SRP dental requirements before deployment.
  - (1) Verify Soldiers in dental classification 3 or 4 receive complete treatment for pain, trauma or oral infection, or follow-up care, before deployment.
  - (2) Ensure each Soldier has a duplicate panoramic x-ray on file at the Central Panoramic Storage Facility before deployment.
- g. Verify Soldiers meet Level 3 SRP finance requirements before deployment.
  - (1) Verify all Soldiers are enrolled in MYPAY.
  - (2) Verify Soldiers have the opportunity to initiate or to change allotments prior to movement.
- h. Verify Soldiers meet the Level 3 SRP legal affairs requirements before deployment.
  - (1) Ensure Soldiers with pending civil felony charges receive assistance and are not moved as a result of these charges.
  - (2) Ensure that, given the time, each Soldier receives power of attorney support.
  - (3) Ensure that, given the time, each Soldier receives support to make a Will.
  - (4) Ensure Soldiers receive counseling on insurance and other civil matters before deployment.
- 5. Initiate SRP Level 4 administrative actions to process deployment area or unique mission requirements before Soldier movement.
  - a. Verify all previous SRP administrative actions are complete before initiating the Level 4 administrative actions.
  - b. Verify a general officer in command has not waived the Level 4 administrative actions.
  - c. Determine the current unit readiness status by directing staff to print a Soldier Readiness or a Unit Readiness Deficiency Report(s).
  - d. Verify Soldiers meet Level 4 personnel requirements by processing each for a passport, if one is required in the deployment area.
  - e. Verify Soldiers meet Level 4 medical requirements by ensuring that each Soldier receives all the immunizations needed in the deployment area.
  - f. Verify Soldiers meet Level 4 legal requirements by briefing each on the applicable local laws in the deployment area.
  - g. Verify Soldiers meet Level 4 training requirements before deployment.
    - (1) Ensure Soldiers receive a terrorist briefing prior to deployment.
    - (2) Ensure family members receive a briefing regarding the Soldier's deployment mission and area.
- 6. Initiate SRP Level 5 administrative processes to permit Soldiers to make a PCS or to make the transition from active duty.
  - a. Verify all previous SRP administrative actions are complete before initiating Level 5 administrative actions.
  - b. Determine the current unit readiness status by directing staff to print Soldier Readiness or a Unit Readiness Deficiency report(s).
  - c. Verify Soldiers meet Level 5 personnel requirements before a PCS or a transition.
    - (1) Ensure that the reassignment requirements are checked in accordance with reassignment processing procedures.
    - (2) Ensure that out-processing is checked in accordance with out-processing procedures.
  - d. Verify Soldiers meet Level 5 medical requirements before a PCS or a transition by ensuring that each receives all immunizations required in the geographical area of future assignment.
  - e. Verify Soldiers meet Level 5 finance requirements by ensuring that Soldiers settle, or arrange for settlement, of their debts prior to PCS or transition.

**Performance Steps**

- f. Verify Soldiers meet Level 5 legal requirements by providing assistance if pending civil or military charges may result in the Soldier not complying with PCS orders.
- g. Verify Soldiers meet Level 5 security requirements by ensuring each Soldier meets security clearance requirements for their future duty positions, or area of mission or assignment.
- h. Verify Soldiers meet Level 5 provost marshal requirements before a PCS or a transition.
  - (1) Ensure Soldiers accomplish any special out-processing.
  - (2) Ensure Soldiers have prior registration and storage of privately owned weapons.
- i. Verify Soldiers meet Level 5 training requirements before a PCS or a transition by giving each a mission-oriented briefing.
- j. Verify Soldiers meet Level 5 logistics requirements before a PCS or a transition.
  - (1) Ensure the Soldiers coordinate for the proper disposition of household goods.
  - (2) Ensure each Soldier receives field equipment and clothing.
- k. Verify Soldiers meet Level 5 dental requirements by verifying that those transferring to a location lacking a Federal treatment facility achieve Class I dental condition prior to departure.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

**Performance Measures**

**GO    NO GO**

1. Verified the SRPT meets policy requirements and is ready to process Soldier administrative needs.
2. Initiated SRP Level 1 basic movement processing to permit Soldier participation in a planned individual temporary duty (TDY) or in unit movement for training during peacetime.
3. Initiated SRP Level 2 administrative actions to permit deployment of Soldiers into combat or on a contingency mission.
4. Initiated SRP Level 3 administrative actions to process other readiness requirements before Soldier movement.
5. Initiated SRP Level 4 administrative actions to process deployment area or unique mission requirements before Soldier movement.
6. Initiated SRP Level 5 administrative processes to permit Soldiers to make a PCS, or to make the transition from active duty.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**

- AR 600-8-101
- DD FORM 2A(ACT)
- DD FORM 93
- FM 12-6
- SGLV FORM 8286

**Related**

**Monitor Manifesting Procedures**  
**805C-42A-4032**

**Conditions:** Given the requirement to monitor manifesting procedures, and FM 55-12 (Movement of Units and Airforce Aircraft).

**Standards:**

1. Coordinate with the installation transportation office or traffic management for the planning and execution of the physical movement of the unit.
2. Ensure the manifest is properly created, updated, changed, or deleted as needed.
3. Ensure Soldier manifest assignments are processed and verify the manifest status.
4. Ensure the Soldier manifest assignments are processed and verify the manifest status.
5. Verify the manifest status, as required.

**Performance Steps**

1. Coordinate with the installation transportation office or traffic management for the planning and execution of the physical movement of the unit.
  - a. Ensure that the air movement operation consist of its two primary phases.
    - (1) Ensure there is a planning phase.
    - (2) Ensure there is a preparation phase.
  - b. Ensure the planning and preparation phases have been divided into five functional areas.
    - (1) Obtain the mission guidance.
    - (2) Obtain the initial planning.
    - (3) Ensure joint planning.
    - (4) Verify preparation for movement.
    - (5) Verify final coordination.
  - c. Ensure the execution phase has been divided into two functional areas.
    - (1) Verify departure airfield operations have been completed.
    - (2) Verify airfield operations have been completed.
  - d. Ensure the resources of the deploying unit are initially under the control of the unit commander and that the transported unit in the preparation of the manifest is providing personnel services during the marshaling and movement planning.
2. Ensure the manifest is properly created, updated, changed or deleted as needed.
  - a. Ensure the manifest is properly created.
  - b. Ensure the manifest is updated, as needed, by chalk number.
  - c. Ensure the manifest narrative has been changed as needed.
3. Verify the origin, destination, manifest carrier type, aircraft type, and chalk number have been assigned after the manifest has been created.
  - a. Ensure the origin has been identified, as needed.
  - b. Ensure the destination has been identified, as needed.
  - c. Ensure the manifest carrier type has been identified, as needed.
  - d. Ensure the aircraft type has been identified, as needed.
  - e. Ensure the chalk number has been assigned, as needed.
4. Ensure the Soldiers manifest assignments are processed and verify the manifest status.
  - a. Ensure the Soldiers manifest assignment is processed.
  - b. Verify Soldiers manifest status.

**Performance Steps**

5. Verify the manifest status, as required.

**Evaluation Preparation:** You can evaluate this task by using the performance measures and the materials that appear in the CONDITIONS statement. When the NCO completes the task, the supervisor will score the NCO PASS (P) or FAIL (F) on each performance measure.

**Performance Measures**

**GO    NO GO**

1. Coordinated with the installation transportation office or traffic management for the planning and execution of the physical movement of the unit.
2. Ensured the manifest is properly created, updated, changed or deleted as needed.
3. Verified the origin, destination, manifest carrier type, aircraft type and chalk number has been assigned after the manifest has been created.
4. Ensured the Soldiers manifest assignments are processed.
5. Verified the manifest status, as needed.

**Evaluation Guidance:** Score a GO if the NCO passes (P) all applicable performance measures. Score a NO GO if the NCO fails (F) any performance measure. Show the NCO what was done wrong on any failed performance measure and how to do it correctly.

**References**

**Required**  
FM 55-12

**Related**

Subject Area 29: OPERATIONS AND WAR FIGHTING

**Review Mobilization Procedures**

**805C-42A-4033**

**Conditions:** Given the requirement to review mobilization procedures and access to:

- a. AR 600-8-101, In and-Out -and Mobilization Processing.
- b. DA Pam 600-72, Army Manpower Mobilization.
- c. Defense Enrollment Eligibility Reporting System (DEERS)/ Random Access Personnel Information Dissemination System (RAPIDS).
- d. DD Form 1934 (Geneva Convention Identity Card) for Medical and Religious Personnel.
- e. DD Form 1172 (Application for Uniformed Services Identification Card Defense Enrollment Eligibility Reporting System (DEERS) Enrollment).
- f. VA Form 29-8286 (Servicemens' Group Life Insurance Election).
- g. DA Form 3955 (Change of Address and Directory Card).
- h. DD Form 2558 (Authorization to Start, Stop or Change an Allotment for Active Duty or Retired Personnel).
- i. DD Form 220 (Active Duty Report).
- j. DA Form 581 (Request for Issue and Turn-In of Ammunition).
- k. DA Form 1687 (Notice of Delegation of Authority-Receipt for Supplies).
- l. DA Form 2406 (Material Condition Status Report).
- m. DA Form 2715-R (Unit Status Report).
- n. DA Form 2765-1 (Request for Issue and Turn-In).
- o. DA Form 2970 (Subsistence Report and Field Ration Request).
- p. TD Form IRS W4 (Employee's Withholding Allowance Certificate).
- q. Appropriate agencies required for mobilization processing.
- r. Soldier's personnel, finance and medical records.
- s. Standard office supplies and equipment.

**Standards:** Review mobilization procedures to include:

1. Review Phases I through IV of mobilization processing.
2. Review mobilization processing at stations.

**Performance Steps**

1. Review Phase I (Preparatory) home station (HS) processing for reserve component (RC) units.
  - a. Verify that a mobilization packet is prepared for each Soldier with the following documents included.
    - (1) DD Form 1934 (Geneva Conventions Identity Card for Medical and Religious Personnel Who Serve in or Accompany the Armed Forces), if applicable.
    - (2) DD Form 1172 (Application for Uniformed Services Identification Card Defense Enrollment Eligibility Reporting System (DEERS) Enrollment).
    - (3) TD Form IRS W4 (Employee's Withholding Allowance Certificate).
    - (4) Marriage certificate with raised certification seal.
    - (5) Birth certificates of family members.
    - (6) DA Form 3955 (Change of Address and Directory Card).
    - (7) DD Form 2558 (Authorization to Start, Stop or Change an Allotment for Active Duty or Retired Personnel).
    - (8) Blank VA Form 29-8286 (Servicemen's Group Life Insurance Election).
    - (9) Family Care Plan if required.
  - b. Verify Soldiers are provided with deployment information.



**Performance Steps**

- c. Verify Soldiers mobilization packets are maintained on file.
  - d. Verify legal counseling is provided to Soldiers.
  - e. Verify Soldiers military personnel records are maintained on file.
  - f. Verify Soldiers Personnel Financial Record (PFR) for United States Army Reserve (USAR) and Army National Guard (ARNG) are maintained on file.
  - g. Verify Soldiers health records are maintained on file.
  - h. Verify the security clearance roster is annotated with the correct data.
  - i. Verify the appropriate action is taken for Soldiers in a non-deployable status.
  - j. Verify Soldiers family care plan, if applicable.
  - k. Verify Soldiers have proper identification.
  - l. Verify pre-mobilization briefing are conducted.
2. Review Phase II (Alert) HS processing for reserve component (RC) units.
- a. Verify non-deployable Soldiers are transferred to another unit.
  - b. Verify attached Soldiers are released and recovered.
  - c. Verify eligible Soldiers are promoted.
  - d. Verify unit personnel rosters are prepared.
  - e. Verify Soldiers, units, and other activities are furnished copies of activation orders and personnel rosters.
  - f. Verify finance personnel are notified of the unit's activation.
  - g. Verify a Soldier reassignment plan is prepared.
  - h. Verify eyeglasses, inserts, and hearing aids are requisitioned, as required.
3. Review Phase III (Mobilization) HS processing.
- a. Ensure medically disqualified Soldiers are identified.
  - b. Ensure Soldiers personnel, medical and dental records are updated.
  - c. Ensure the records are distributed to the appropriate personnel sergeant.
  - d. Verify the arrival status of Soldiers at the assembly site.
  - e. Ensure DD Form 220 (Active Duty Report) is prepared.
  - f. Ensure identification (ID) card documents are prepared for family members.
  - g. Verify the security clearance roster is updated.
  - h. Ensure claims for Soldiers travel from home to the assembly site are prepared.
  - i. Conduct the mobilization briefing.
4. Review Phase IV (Movement to Mobilization Station) HS processing.
- a. Ensure the advanced party is dispatched to the mobilization station.
  - b. Ensure the advance party arrives at the mobilization station with the following forms and reports:
    - (1) DA Form 581 (Request for Issue and Turn-in of Ammunition).
    - (2) DA Form 1687 (Notice of Delegation of Authority-Receipt for Supplies).
    - (3) DA Form 2406 (Material Condition Status Report).
    - (4) DA Form 2715-R (Unit Status Report).
    - (5) DA Form 2765-1 (Request for Issue or Turn-in).
    - (6) DA Form 2970 (Subsistence Report and Field Ration Request).
    - (7) Training outline.
    - (8) Copies of unit mobilization order.
    - (9) Personnel records, PFR, medical and dental records.
    - (10) List of items requiring calibration.
    - (11) Copy of the Modified Table of Organization and Equipment (MTOE)/Tables of Distribution and Allowances (TDA).
    - (12) Appointment order for mobilization purchasing authority, if applicable.
    - (13) Appointment order for class A agent, if applicable.
    - (14) Personnel security clearance roster.
    - (15) Unit manning rosters annotated showing non-MOS qualified, newly accessed non-deployable, and surplus personnel.
  - c. Ensure the movement plan to the mobilization station is executed.

### Performance Steps

- d. Report on the unit's arrival at the mobilization station.
5. Review mobilization processing of individual reservists at the Mobilization Station (MS).
  - a. Ensure the Soldier's personnel records, PFR, medical and dental records are collected if they are in the Soldier's possession.
  - b. Ensure the Soldier's personnel records, PFR, medical and dental records are forwarded to the control station.
  - c. Ensure the processing procedures are explained to the Soldiers.
  - d. Ensure all Soldiers are issued a processing checklist.
  - e. Verify the Army Human Resource System (AHRS) accession transaction is prepared for the Soldiers.
  - f. Assist Soldiers through Soldier readiness processing at the processing activity.
  - g. Ensure Soldiers complete all processing requirements by checking the processing checklist.
  - h. Verify the training readiness of each Soldier is validated by the training officer/noncommissioned officer (NCO).
  - i. Ensure Soldiers are signed out upon reassignment or deployment.
  - j. Ensure departure transactions are prepared when Soldiers reassigned or deployed.
  - k. Ensure completed processing checklists are filed appropriately when Soldiers are reassigned or deployed.
  - l. Assist Soldier in movement, as required.
6. Review mobilization processing at the control station.
  - a. Greet Soldiers at the control station.
  - b. Conduct the processing orientation at the control station.
  - c. Ensure the processing checklist is issued to all Soldiers.
  - d. Ensure the Soldier's personnel records, PFR, medical and dental records are collected.
  - e. Ensure the Soldier's personnel records, PFR, medical and dental records are distributed to the appropriate processing station.
  - f. Issue unit AHRS rosters to the first sergeant.
  - g. Verify the Soldiers' processing by reviewing the processing checklist.
  - h. Verify the Soldier's readiness status.
    - i. Make a decision on Soldiers not-ready conditions.
    - j. Verify the qualification for the current assignment to direct reassignment.
  - k. Ensure orders are issued to reassign Soldiers.
  - l. Follow-up to ensure changes are made in AHRS.
7. Review mobilization processing at the personnel database management station.
  - a. Verify the accession data is processed.
  - b. Verify enlisted records briefs (ERBs)/officers record briefs (ORBs) are produced.
  - c. Verify enlisted records briefs (ERBs)/officers record briefs (ORBs) are forwarded to the control station.
  - d. Schedule AHRS cycles.
  - e. Maintain the database.
    - f. Ensure the output of the cycles is distributed to the appropriate agencies.
  - g. Review daily output.
  - h. Monitor error resolution.
    - i. Maintain personnel accountability.
    - j. Coordinate cycle scheduling.
  - k. Zero balance the unit using the final roster.
    - l. Report zero balance data to the first sergeant.
  - m. Verify strength and other AHRS transactions are submitted.
  - n. Report discrepancies to higher authorities.
  - o. Provide technical assistance and analysis, as needed.
  - p. Coordinate with unit commanders for zero balance 96 hours before the unit movement.
  - q. Request/produce AHRS personnel files (PF) and officer master files (OMF).

**Performance Steps**

- r. Provide copies of the AHRS personnel files (PF) and officer master files (OMF) to the unit first sergeant before movement.
8. Review mobilization processing at the personnel information station.
    - a. Verify the AHRS accession transaction processing.
    - b. Perform a quality audit of the ERBs/ORBs.
    - c. Verify the VA Form 8286 for accuracy.
    - d. Verify the DD Form 93 for accuracy.
    - e. Verify the Soldier's physical profile.
    - f. Verify the Soldier's citizenship status.
    - g. Verify the Soldier's previous prisoner (POW) of status.
    - h. Verify the Soldier's previous Peace Corps status.
    - i. Verify the Soldier's sole surviving son status.
    - j. Verify the Soldier's weapons qualification.
    - k. Verify the Soldier completed the 12 weeks military training requirement.
    - l. Verify the Soldier's (HIV) test date and results.
    - m. Make follow-up appointments to correct Soldier readiness deficiencies.
  9. Review mobilization processing at the personnel strength management station.
    - a. Verify the Soldier's military occupational specialty (MOS)/area of concentration (AOC).
    - b. Verify if the Soldier missed a promotion.
    - c. Verify the Soldier's physical profile.
    - d. Verify the Soldier's citizenship status.
    - e. Verify the Soldier's previous POW status.
    - f. Verify the Soldier's previous Peace Corps status.
    - g. Verify the Soldier's sole surviving son status.
    - h. Verify the Soldier's weapons qualification.
    - i. Verify the Soldier completed the 12 weeks military training requirement.
    - j. Verify the Soldier's security clearance.
    - k. Verify the appropriate AHRS update transactions were submitted.
    - l. Make follow-up appointments to correct Soldier readiness deficiencies.
  10. Review mobilization processing at the finance station.
    - a. Verify the Soldier is added to the Joint Service Software (JSS) pay system.
    - b. Verify the Soldier's basic allowance for quarters (BAQ) and other pay entitlements.
    - c. Verify the Soldier's allotments.
    - d. Verify the Soldier's PAY.
    - e. Verify the Soldier is issued any casual pay authorized.
    - f. Verify the Soldier's travel entitlements.
    - g. Make follow-up appointments to correct Soldier readiness deficiencies.
  11. Review mobilization processing at the DEERS/RAPIDS/ ID card station.
    - a. Verify the Soldier's DEERS/RAPIDS enrollment.
    - b. Verify the Soldier's family members are properly enrolled in DEERS/RAPIDS.
    - c. Verify the Soldier has ID tags and medical warning tags, as needed.
    - d. Verify the Soldier has an up-to-date ID card.
    - e. Verify the Soldier's family members have up-to-date ID cards.
    - f. Make follow-up appointments to correct Soldier readiness deficiencies.
  12. Review mobilization processing at the medical station
    - a. Verify the Soldier has a complete medical record.
    - b. Verify the Soldier has Human Immune deficiency Virus (HIV) test results.
    - c. Verify the Soldier has two ID medical warning tags, if needed.
    - d. Verify the Soldier has two pair of eyeglasses, if needed.
    - e. Verify the Soldier has protective mask inserts, if needed.
    - f. Verify the Soldier has a hearing aid and spare battery, if needed.

### Performance Steps

- g. Verify the Soldier has all required immunizations.
  - h. Verify the Soldier is not in a sick, injured, or pregnant status.
  - i. Verify the Soldier's physical profile.
  - j. Verify the Soldier had a physical examination.
  - k. Make follow-up appointments to correct Soldier readiness deficiencies.
13. Review mobilization processing at the dental station.
- a. Verify the Soldier has a complete dental record.
  - b. Verify the Soldier has pantographic x-rays on file at the Central Pantographic Storage Facility (CPSF).
  - c. Verify the Soldier's dental classification.
  - d. Make follow-up appointments to correct Soldier readiness deficiencies.
14. Review mobilization processing at the security station.
- a. Verify the Soldier has the appropriate security clearance for is/her primary military occupational specialty (PMOS)/duty military occupational specialty (DMOS)/AOC.
  - b. Make follow-up appointments to correct Soldier readiness deficiencies.
15. Review mobilization processing at the Central Issue facility (CIF).
- a. Verify the Soldier is issued the required equipment.
  - b. Verify the Soldier signs for the issued equipment.
  - c. Make follow-up appointments to correct Soldier readiness deficiencies.
16. Review mobilization processing at Army Community Services station.
- a. Verify the Soldier is assisted as required.
  - b. Verify referrals are made as required.
  - c. Verify the address of the Soldier's family.
  - d. Inform the unit first sergeant of any special Soldier situations.
17. Review mobilization processing at the legal station.
- a. Verify the Soldier attends a Geneva Convention briefing.
  - b. Verify the Soldier's requirement for a will.
  - c. Verify the Soldier is provided power of attorney services.
  - d. Verify if the Soldier is pending any military charges.
  - e. Verify if the Soldier is pending any civilian charges.
  - f. Verify the Soldier has an application for the Soldiers and Sailors Relief act processed, if required.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

### Performance Measures

**GO**    **NO GO**

1. Reviewed Phase I (Preparatory) home station (HS) processing for reserve component (RC) units.
2. Reviewed Phase II (Alert) HS processing for reserve component (RC) units.
3. Reviewed Phase III (Mobilization) HS processing.
4. Reviewed Phase IV (Movement to Mobilization Station) HS processing.
5. Reviewed mobilization processing of individual reservists at the Mobilization Station (MS).

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

6. Reviewed mobilization processing at the control station.
7. Reviewed mobilization processing at the personnel database management station.
8. Reviewed mobilization processing at the personnel information station.
9. Reviewed mobilization processing at the personnel strength management station.
10. Reviewed mobilization processing at the finance station.
11. Reviewed mobilization processing at the DEERS/RAPIDS/ ID card station.
12. Reviewed mobilization processing at the medical station
13. Reviewed mobilization processing at the dental station.
14. Reviewed mobilization processing at the security station.
15. Reviewed mobilization processing at the CIF.
16. Reviewed mobilization processing at ACS.
17. Reviewed mobilization processing at the legal station.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AR 600-8-101  
 DA FORM 1687  
 DA FORM 2406  
 DA FORM 2715-R  
 DA FORM 2765-1  
 DA FORM 3161  
 DA FORM 3955  
 DA FORM 581  
 DA PAM 600-72  
 DD FORM 1172  
 DD FORM 1934  
 DD FORM 2558  
 DD FORM 93  
 IRS FORM W-4

**Related**

## Prepare Personnel Estimates

805C-42A-4041

**Conditions:** Given a requirement to prepare a Personnel Estimate and access to FM 12-6 (Personnel Doctrine), FM 101-5 (Staff Organization and Operations), DA Form 5367-R (Personnel Status Report), Personnel Summary Report (PS Report), Personnel Requirements Report (PRR) and Battle Roster (BR).

**Standards:** Prepare a Personnel Estimate to include:

1. Identify all reports and information required to prepare and analyze a Personnel Estimate.
2. Identify a problem solving techniques used when preparing a Personnel Estimate.

### Performance Steps

1. Verify the reports for the preparation of the Personnel Estimate.
  - a. Verify any previous Personnel Estimates are available for review.
  - b. Verify the reports on personnel information are available for review.
    - (1) Verify the Battle Roster report is available for review.
    - (2) Verify the PS report is available for review.
    - (3) Verify the PRR is available for review.
    - (4) Verify DA Form 5367-R reflects the information in the PS and PRR reports if automated reporting is not available.
2. Review the restated Mission statement.
  - a. Obtain the mission statement from the Commander, operations officer (S3 or G3), or from the Operations Order (OPORD).
  - b. Review the restated mission statement as determine by the commander.
  - c. Enter the restated mission statement in the Mission paragraph of the Personnel Estimate.
3. Prepare the Mission Situation and the Considerations sections of the Personnel Estimate.
  - a. Verify the intelligence information provided to the S1/G1 and add it to the Personnel Estimate.
    - (1) Determine what information to include in the intelligence situation subparagraph.
      - (a) Determine the impact of Current Area of Operation (AO) characteristics on personnel.
      - (b) Identify the strengths and dispositions of the enemy.
      - (c) Determine which enemy capabilities could affect the Mission.
      - (d) Determine which enemy capabilities could affect unit personnel.
    - (2) Prepare the Personnel Estimate subparagraph on the intelligence situation.
  - b. Review the tactical information available from the S3 (G3), or from the commander's planning guidance, and add to the Personnel Estimate.
    - (1) Review the present dispositions of major tactical elements for any impact on unit personnel.
    - (2) Review the impact on personnel of possible mission Course of Action Development (COA).
    - (3) Review the projected operations, if known, and other planning factors as required for coordination and integration of the staff estimate.
    - (4) Prepare the Personnel Estimate tactical information subparagraph.
  - c. Review the logistics information available from the S4 (G4) and add to the Personnel Estimate.
    - (1) Review the dispositions of logistic units and installations that have an effect on the personnel situation.
    - (2) Review the projected developments within the logistics field that are likely to influence personnel operations.
    - (3) Prepare the Personnel Estimate logistics situation subparagraph.

**Performance Steps**

- d. Review the Civil/Military Operations (CMO) information available from the CMO officer and add to the Personnel Estimate.
  - (1) Review the present dispositions of civil affairs units and installations that could effect the personnel situation.
  - (2) Review the projected developments within the logistics field that are likely to influence personnel operations.
  - (3) Prepare the Personnel Estimate logistics situation subparagraph.
- e. Review the troop preparedness section of the Personnel Estimate.
  - (1) Review the unit personnel strength maintenance information.
    - (a) Review all authorized, assigned, and attached personnel strengths.
    - (b) Review the effects of personnel deployment.
    - (c) Review any reports of personnel losses (both combat and noncombat).
    - (d) Review the reports of personnel gains.
    - (e) Review the reports of critical personnel MOS and skill shortages.
    - (f) Review the projections of personnel gains and losses.
    - (g) Review any local situations that will affect personnel strength.
  - (2) Review the personnel replacement situation.
    - (a) Review reports on any of the following outstanding critical personnel replacement requirements:
      - Weapons system crew.
      - Small unit requirements.
    - (b) Review the status of previous personnel allocation by unit, where allocation is critical to the current situation.
    - (c) Review the present and future location of personnel replacement processing units.
    - (d) Review any information pertinent to receiving personnel replacements.
  - (3) Review any pertinent noncombat personnel matters.
    - (a) Review the impact of prisoners of war (POW) personnel.
    - (b) Review the impact of any non-US force personnel augmentees.
    - (c) Review the impact of any civilian internees or detainees, DA civilians, and other civilians, depending on the local circumstances.
    - (d) Review the availability of noncombat personnel to meet labor requirements.
  - (4) Verify the Soldier personnel readiness status.
    - (a) Determine the status of morale and esprit de corps.
    - (b) Review any major influences that could significantly impact unit morale.
    - (c) Review any factors affecting the stability and reliability of individual Soldiers, teams, and crews to accomplishing the mission.
    - (d) Review the factors affecting organizational climate, commitment, and cohesion, when appropriate.
  - (5) Review the changes or impacts to service support.
    - (a) Review any changes or problems in Soldier support services that impact the combat mission and that require new policies or programs to maintain troop preparedness or to effect the individual Soldier's morale and welfare.
    - (b) Review any problem reported in the personnel health services.
    - (c) Review any problem found in the following personnel services:
      - Records.
      - Pay.
      - Orders.
      - Awards.
      - Assignments.
      - Reassignments.
      - Personal affairs.
      - Leaves.
      - Promotions.
      - Other administrative services.
    - (d) Review any problem reported in the personnel legal services.

### Performance Steps

- (e) Review any problem reported in the personnel postal services.
- (f) Review any problems reported in the morale support activities.
- (g) Review any problem reported with religious services for personnel.
- (h) Review any problem reported with the public affairs services.
- (i) Review any problem reported with personnel administrative services.
- (j) Review any problem reported with personnel finance services.
- (k) Review any problems or changes reported with the following personnel logistic support:
  - Personnel equipment.
  - Rations.
  - Clothing/bath/laundry.
- (6) Review the personnel organizational climate.
  - (a) Review the effectiveness of communication within the chain of command.
  - (b) Review the performance and discipline standards.
  - (c) Assess the human relations of unit personnel.
  - (d) Assess the supervision of unit personnel.
  - (e) Review the effects of physical combat stress on unit personnel.
  - (f) Review any other factors influencing personnel readiness.
- (7) Review the Soldier's commitment (strength of a Soldier's identification with and involvement in, the unit).
  - (a) Review any reports concerning Soldier morale.
  - (b) Review any reports concerning Soldier motivation.
  - (c) Review any reported Soldier confidence problems.
  - (d) Review any reported concerns the Soldiers are having with trust.
- (8) Review the cohesion being exhibited by unit personnel.
  - (a) Review any factors that attract and bind Soldiers together, produce commitment to the unit, and to accomplishing the mission.
  - (b) Assess reports of the personnel esprit de corps.
  - (c) Assess reports of the unit personnel teamwork.
- (9) Prepare the troop preparedness situation subparagraph.
- f. Prepare the information for the assumption's section of the Personnel Estimate.
  - (1) Verify and identify the assumptions used in previous paragraphs and subparagraphs of the Personnel Estimate.
  - (2) Verify assumptions can be updated once they become fact.
  - (3) Complete the assumptions subparagraph of the Personnel Estimate.
- 4. Analyze each COA for personnel requirements needs and add the information to the Personnel Estimate.
  - a. Verify each part of the Situations and Considerations paragraph is reviewed for its impact on personnel.
    - (1) Review any problem areas in each COA.
    - (2) Review any COA tendency that impacts troop preparedness.
    - (3) Identify any COA deficiencies that impact troop preparedness.
  - b. Complete the COA subparagraph in the Personnel Estimate.
- 5. Review the COA Comparison for any impacts on personnel requirements and add to the Personnel Estimate.
  - a. Evaluate each COA from a personnel standpoint.
    - (1) Review any personnel advantages with respect to accomplishing the mission.
    - (2) Review any personnel deficiencies with respect to accomplishing the mission.
    - (3) Verify and identify the personnel disadvantages of each deficiency with respect to the accomplishment of the mission.
    - (4) Verify and identify the personnel advantages of each COA under consideration.
    - (5) Verify and identify the personnel disadvantages of each COA under consideration.
    - (6) Verify and identify the methods to overcome the personnel deficiencies of each COA.



**Performance Steps**

- (7) Verify and identify any proposed personnel modifications to each COA.
  - b. Verify the addition of the COA comparison data to the Personnel Estimate.
6. Review and analyze all Conclusions for impacts on personnel requirements and make recommendations.
- a. Verify the formulation of the conclusions.
    - (1) Determine if the Mission can be supported from a personnel standpoint.
    - (2) Determine which COA are best supported from a personnel standpoint.
    - (3) Verify the commander reviews all major personnel deficiencies.
    - (4) Determine which methods can reduce or eliminate the effect of the above deficiencies.
  - b. Verify the addition of the Conclusions paragraph to the Personnel Estimate.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Verified the reports for the preparation of the Personnel Estimate.
2. Reviewed the restated Mission statement.
3. Prepared the Mission Situation and the Considerations sections of the Personnel Estimate.
4. Analyzed each COA for personnel requirements needs and add the information to the Personnel Estimate.
5. Reviewed the COA Comparison for any impacts on personnel requirements and add to the Personnel Estimate.
6. Reviewed and analyze all Conclusions for impacts on personnel requirements and made recommendations.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AAA-252  
 DA FORM 5367-R  
 FM 101-5  
 FM 12-6  
 PRR

**Related**

## Manage Casualty System

805C-42A-4042

**Conditions:** Given a casualty report, AR 600-8-1(Army Casualty Operations/Assistance/Insurance), FM 12-6 (Personnel Doctrine), DA Form 1155, DA Form 1156, DCIPS Forward User Manual, and DD Form 93.

### Standards:

1. Ensure that the casualty operations are properly managed at the battalion level.
2. Ensure that the casualty operations are properly managed at the brigade level.
3. Manage casualty operations at the division level.
4. Manage casualty operations in the Personnel Services Battalion (PSB).
5. Manage casualty operations at the Corps level.
6. Manage casualty operations at the theater level.
7. Perform duties assigned by the Casualty Area Commanders (CAC).

### Performance Steps

1. Ensure the casualty operations are properly managed at the battalion level.
  - a. Ensure all Soldiers and civilians are trained in using DA Forms 1155 and 1156.
    - (1) Verify Soldiers and civilians are trained on how to complete DA Forms 1155 and 1156.
    - (2) Verify Soldiers and civilians carry a copy of DA Forms 1155 and 1156.
  - b. Ensure the collected DA Forms 1155 and 1156 are sent to the PSB with an information copy to brigade.
    - (1) Verify DA Forms 1155 and 1156 are complete.
    - (2) Ensure DA Forms 1155 and 1156 are dispatched to the PSB.
    - (3) Ensure an information copy of DA Forms 1155 and 1156 is dispatched to the brigade, if applicable.
  - c. Ensure the S1 staff maintains a casualty log.
    - (1) Ensure the S1 establishes procedures for entries into the log.
    - (2) Verify required information is entered correctly.
  - d. Ensure letters of sympathy are produced for the division personnel management center (PMC).
    - (1) Ensure the letters are produced within the proper time frame.
    - (2) Verify the letters are written using appropriate language.
    - (3) Verify the letters contain no spelling errors.
    - (4) Verify all the facts of the casualty are correct.
    - (5) Ensure the letters are dispatched to division PMC.
  - e. Ensure emergency data changes are reported on DD Form 93.
    - (1) Ensure a new, completed form is prepared when there is a change in any one of the items, except a change in the Soldier's unit.
    - (2) Verify all required information is complete on the new form.
  - f. Ensure the S1 staff coordinates information with the battalion S4 on mortuary affairs (MA) and the disposition of the Soldier's personal effects.
    - (1) Ensure the S4 is provided with disposition of remains information from DD Form 93.
    - (2) Ensure MA is provided with disposition of remains information from DD Form 93.
  - g. Ensure the S1 staff coordinates information with host nation and other service hospitals at the Corps level and above.

**Performance Steps**

- (1) Verify the S1 staff has identified the appropriate contact person.
  - (2) Verify the S1 staff establishes communication with the appropriate contact person at a host nation and other service hospitals to determine the status of wounded or ill Soldiers.
  - (3) Ensure the S1 staff communicates with the appropriate contact person at a host nation on a regular basis to determine final status of wounded or ill Soldiers.
  - h. Ensure a status review of individuals missing in action (MIA) is complete, including the special consideration given to the MIA's dependents.
2. Ensure casualty operations are properly managed at the brigade level.
    - a. Ensure all Soldiers and civilians are trained in using DA Forms 1155 and 1156 and carry copies.
    - b. Ensure DA Forms 1155 and 1156 are sent to the PSB.
      - (1) Ensure the DA Forms 1155 and 1156 are collected from the battalion.
      - (2) Ensure the brigade personnel verify that DA Forms 1155 and 1156 are complete.
      - (3) Ensure DA Forms 1155 and 1156 are dispatched to the PSB.
    - c. Ensure the casualty reports are dispatched to the PSB.
      - (1) Verify the information in reports retrieved from Army Human Resource System (AHRS) is complete.
      - (2) Ensure the reports are dispatched to the PSB.
    - d. Ensure letters of sympathy are dispatched to the division PMC.
      - (1) Ensure the letters of sympathy are collected.
      - (2) Ensure the format and content of the letters is correct.
      - (3) Ensure the letters are dispatched to the division PMC.
    - e. Ensure emergency data changes are dispatched to the PSB.
      - (1) Ensure the DD Form 93 changes are collected.
      - (2) Ensure the brigade personnel verify that the DD Form 93's are completed correctly.
      - (3) Ensure the DD Form 93's are dispatched to the PSB.
  3. Manage casualty operations at the division level.
    - a. Ensure all Soldiers and civilians are trained in using DA Forms 1155 and 1156 and carry copies.
    - b. Manage line of duty investigations.
      - (1) Collect information about the casualty incident.
      - (2) Provide the commander with all the necessary information about the incident.
    - c. Coordinate information on MA and personal effects disposition with the MA team or platoon augmented to the main and forward support battalions.
      - (1) Establish communication with MA or platoon as appropriate.
      - (2) Dispatch the necessary information about the casualty to the MA.
    - d. Coordinate information on Soldiers and civilians separated from their units, wounded in action, or injured not in battle.
      - (1) Establish communication with MA, medical treatment facilities (MTFs), and military police (MP).
      - (2) Maintain communication to determine status updates.
    - e. Dispatch letters of sympathy to the next of kin (NOK) upon confirmation of the individual's status from theater HRC.
      - (1) Ensure the letter is prepared within the appropriate time limits.
      - (2) Review the contents of the letter for compassion, clarity, accuracy, and completeness.
      - (3) Dispatch letters to the primary next of kin (PNOK) and other appropriate NOK.
  4. Manage casualty operations in the PSB.
    - a. Verify the casualty reports for the personnel group (Corps AG) are correct.
      - (1) Determine the appropriate type of casualty report.
      - (2) Obtain the necessary information.
      - (3) Ensure the appropriate items in the report are completed.
    - b. Forward the casualty reports electronically to the personnel group (Corps AG).
      - (1) Retrieve the casualty reports.

### Performance Steps

- (2) Ensure the information in the report is complete.
  - (3) Dispatch the reports to the personnel group (Corps AG).
  - c. Obtain additional casualty information.
    - (1) Establish communication with unit for all available information.
    - (2) Maintain communication with sources until all information is obtained.
  - d. Submit supplemental casualty reports containing additional information.
    - (1) Verify the name of the casualty.
    - (2) Review the report for completeness and accuracy.
    - (3) Determine if the notifier should return to the NOK to provide an update of information.
    - (4) Submit the report electronically to the CAC.
5. Manage casualty operations at the Corps level.
- a. Establish an immediate data link between the area of operations and HRC for casualty information flow.
    - (1) Train the necessary personnel in setting up the Defense Casualty Information Processing System Forward (DCIPS-FWD).
    - (2) Verify the set-up of DCIPS-FWD is correct.
    - (3) Ensure the software functions properly.
    - (4) Distribute casualty information on the casualty reporting channel to all deploying units.
      - (a) Annotate the casualty reporting procedures and responsibilities.
      - (b) Publish the casualty reporting flow plan.
      - (c) Train the deploying units in using casualty reporting flows.
    - (5) Coordinate with the Corps surgeon to identify the location of the MTFs.
      - (a) Annotate the proposed MTFs.
      - (b) Brief the necessary personnel on the proposed MTFs.
    - (6) Coordinate with HRC to establish a casualty liaison team at each MTF within the sustaining base.
      - (a) Select personnel to serve as casualty liaison team members.
      - (b) Notify the appropriate personnel of the casualty liaison team responsibilities.
    - (7) Ensure a casualty manager from the theater HRC is deployed with the Corps PMC.
      - (a) Identify the HRC casualty manager.
      - (b) Verify the casualty manager is deployed.
    - (8) Establish the casualty management system and casualty network.
      - (a) Identify the established MTFs in the area of operations.
      - (b) Determine the necessary flow of information needs for the casualty management system and casualty network between the various echelons.
      - (c) Develop the casualty management system and the casualty network.
      - (d) Brief the necessary personnel on the newly established casualty management system and the casualty network.
    - (9) Obtain the casualty management system and the personnel casualty network personnel for liaison with MTFs.
      - (a) Determine the number of personnel needed to staff the casualty management system and the personnel casualty network.
      - (b) Select the appropriate personnel.
      - (c) Train newly assigned personnel in their functions and responsibilities as liaisons between the casualty management system and the MTFs.
  - b. Manage the Corps PMC staff actions branch.
    - (1) Determine the location of MTFs in the Corps area of responsibility.
      - (a) Annotate the proposed MTFs.
      - (b) Brief the necessary personnel on the proposed MTFs.
    - (2) Establish a casualty liaison team at each MTF.
      - (a) Determine the number of personnel needed to serve as the casualty liaison team.
      - (b) Select the appropriate personnel.
      - (c) Train the newly assigned personnel on their functions and responsibilities as liaisons.
    - (3) Operate the Corps casualty management network.

**Performance Steps**

- (a) Maintain all information on casualties.
- (b) Update the information on casualties as it becomes available.
- (4) Provide technical direction to the PSBs.
  - (a) Establish communication with the PSBs.
  - (b) Respond promptly to all inquiries from the PSBs.
  - (c) Provide ongoing support to the PSBs.
- (5) Coordinate information on casualties reported outside their normal reporting chain.
  - (a) Establish communication with the PSBs.
  - (b) Respond promptly to all inquiries from each unit.
  - (c) Provide ongoing support to the PSBs.
- (6) Coordinate casualty matters with the G1 and G4 for the non-divisional force.
  - (a) Respond promptly to all inquiries from the non-divisional force.
  - (b) Provide ongoing support to the G1 and G4.
- (7) Validate the information on casualty cases to assist the MA office in identifying remains.
  - (a) Provide the casualty report to the MA office.
  - (b) Review the information on any cases of unidentified remains.
- (8) Coordinate with G4, MTFs, MA, MP, and intelligence activities for information on disposition of remains.
  - (a) Verify information on DD Form 93 is correct.
  - (b) Communicate information to appropriate agency.
- (9) Coordinate with the G4, MTF, MA, MP, and intelligence activities for information on the disposition of personal effects.
  - (a) Verify the information on DD Form 93 is correct.
  - (b) Communicate information to the appropriate agency.
- (10) Coordinate with the G4, MTF, MA, MP, and intelligence activities for other casualty information.
  - (a) Establish communication with all agencies.
  - (b) Provide information to appropriate agencies when requested.
- (11) Process casualty reports.
  - (a) Retrieve the casualty reports from DCIPS.
  - (b) Ensure the information in the report is complete.
  - (c) Dispatch the casualty reports as required.
- (12) Validate the open cases against all potential information sources.
  - (a) Identify open cases.
  - (b) Identify potential information sources such as eyewitnesses, unit commanders, and MTF staff.
  - (c) Conduct interviews with information sources.
  - (d) Determine if the case remains open.
- (13) Prepare the initial and supplemental casualty reports.
  - (a) Obtain the necessary information to prepare initial casualty report.
  - (b) Complete the initial casualty report.
  - (c) Identify the need for a supplemental report.
  - (d) Obtain additional casualty information to prepare the supplemental casualty report.
  - (e) Review the report for completeness and accuracy.
  - (f) Determine if the notifier should return to the NOK to provide new information.
- (14) Submit initial and supplemental casualty reports to the theater PMC.
  - (a) Obtain necessary information to prepare the initial casualty report.
  - (b) Complete the initial casualty report.
  - (c) Identify the need for a supplemental report.
  - (d) Obtain additional casualty information to prepare the supplemental casualty report.
  - (e) Review the report for completeness and accuracy.
  - (f) Submit the report electronically to the appropriate agencies.
- (15) Ensure the patients in the Corps MTFs are reassigned from their original unit to a secondary unit identification code (UIC) through the AHRS for patient accountability.
  - (a) Identify the casualty's originating unit.

### Performance Steps

- (b) Verify the casualty is assigned to a compatible unit.
- (16) Provide casualty information to commanders.
  - (a) Prepare the casualty information.
  - (b) Brief the commanders of pertinent casualty information for their units.

#### 6. Manage casualty operations at the theater level.

- a. Deploy a casualty manager with an early increment of the Corps PMC.
  - (1) Identify a qualified individual.
  - (2) Assign the individual to the PMC.
  - (3) Prepare to assume theater level casualty management responsibilities from the Corps AG.
    - (a) Identify the procedures for casualty management responsibilities.
    - (b) Train subordinates as required to assist in casualty management responsibilities.
  - (4) Prepare to direct the establishment of additional casualty liaison teams (CLT).
    - (a) Identify the CLT responsibilities.
    - (b) Train CLT members.
  - (5) Assume responsibility for the theater's casualty accounting database from the Corps upon arrival in the theater.
    - (a) Identify any improvements needed in automation.
    - (b) Ensure the proper maintenance of casualty records.
    - (c) Ensure the transfer of casualty records to HRC.
- b. Manage the theater personnel services directorate.
  - (1) Operate the theater casualty management network.
    - (a) Maintain all required information on casualties in AHRS.
    - (b) Update information in the database as it becomes available.
  - (2) Synchronize casualty matters between Deputy Chief of Staff, Personnel (DCSPER) and Deputy Chief of Staff for Logistics (DCSLOG).
    - (a) Establish communications with both agencies.
    - (b) Report the need for logistical support in casualty matters to DCSLOG.
    - (c) Report accomplishment of logistical support to both agencies.
  - (3) Assist the J4 joint MA office with identifying remains.
    - (a) Review the information on any cases of unidentified remains.
    - (b) Report the information to the J4 joint MA office.
  - (4) Coordinate the information on disposition of remains.
    - (a) Verify the casualty's emergency information on DD Form 93.
    - (b) Communicate the information on DD Form 93 to appropriate agency.
  - (5) Coordinate memorial affairs.
    - (a) Verify the casualty's emergency information on DD Form 93.
    - (b) Communicate the casualty's emergency information to appropriate agency.
  - (6) Coordinate the information on disposition of personal effects.
    - (a) Verify the casualty's emergency information on DD Form 93.
    - (b) Communicate the casualty's emergency information to the appropriate agency.
  - (7) Coordinate with the J4, MTF, MA, MP, and intelligence activities for other casualty information.
    - (a) Establish communication with all agencies.
    - (b) Provide information to appropriate agencies when requested.
  - (8) Coordinate on joint casualty matters.
    - (a) Establish communication with appropriate agencies.
    - (b) Provide information to agencies when requested.
  - (9) Verify open cases against all potential information sources.
    - (a) Identify open cases.
    - (b) Identify new information on each case.
    - (c) Compare the new information to the current casualty report.
  - (10) Prepare and forward the initial and supplemental casualty reports to HRC.
    - (a) Obtain the necessary information to prepare initial casualty report.

**Performance Steps**

- (b) Complete the initial casualty report.
  - (c) Identify the need for a supplemental report.
  - (d) Obtain additional casualty information to prepare the supplemental casualty report.
  - (e) Review the report for completeness and accuracy.
  - (f) Submit the report through the HRIS to the appropriate agencies.
  - (11) Report casualties involving US Army, allied military personnel, US civilians, and military members of sister services.
    - (a) Prepare the initial casualty report.
    - (b) Submit the report to the appropriate agency.
  - (12) Validate the status of killed in action (KIA) or MIA before marking the mail for return to sender.
    - (a) Retrieve the records of the individual who is KIA or MIA.
    - (b) Mark mail as appropriate.
  - (13) Manage a theater casualty database within the HRIS.
    - (a) Establish the procedures for input and validation of information.
    - (b) Train Soldiers on procedures for input and validation of information.
  - (14) Manage US Prisoner of War (POW) and MIA cases.
    - (a) Obtain new information.
    - (b) Report to the CAC.
  - (15) Prepare to establish a Theater Army Casualty Records Center (TACREC) for casualty report processing if the tactical situation dictates.
    - (a) Identify the procedures for a TACREC.
    - (b) Draft policies and procedures for a TACREC
    - (c) Draft a plan to establish a TACREC.
7. Perform duties assigned by the CAC.
- a. Assignment of a Casualty Assistance Officer (CAO), if requested.
    - (1) Assign CAO.
    - (2) Ensure CAO is trained in duties and responsibilities.
  - b. CAO assists the families with funeral arrangements.
    - (1) Informs the families of burial benefits
    - (2) Contacts the appropriate agencies for the families.
  - c. CAO assists the families with personal effects disposition.
    - (1) Identifies the location where the families want personal effects sent.
    - (2) Verifies the personal effects have been delivered to appropriate location.
  - d. Train Soldiers to serve as notification officers or survival assistance officers.
    - (1) Provide guidelines for death or injured notification and survival assistance.
    - (2) Provide assistance as required to notification and assistance officers.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Ensured that the casualty operations were properly managed at the battalion level.
2. Ensured casualty operations were properly Managed at the brigade level.
3. Managed casualty operations at the division level.
4. Managed casualty operations in the PSB.
5. Managed casualty operations at the Corps level.

**Performance Measures**

**GO   NO GO**

6. Managed casualty operations at the theater level.
7. Performed duties assigned by the CAC.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**

AR 600-8-1  
DA FORM 1155  
DA FORM 1156  
DCIPS FORWARD USER MANUAL  
DD FORM 93  
FM 12-6

**Related**



**Conduct Replacement Operations**  
**805C-42A-4043**

**Conditions:** Given a requirement to conduct replacement operations and access to:

- a. AR 600-8-111.
- b. FM 12-6.
- c. Standing Operating Procedures (SOP).
- d. Standard office supplies and equipment.

**Standards:**

1. Conduct replacement operations at the battalion S1 level.
2. Conduct replacement operations at the brigade S1 level.
3. Conduct replacement operations at the division G1 level.
4. Conduct replacement operations at the corps AG level during early deployment stages.
5. Conduct replacement operations at the corps AG/personnel group commander level.

**Performance Steps**

1. Conduct replacement operations at the battalion S1 level.
  - a. Coordinate battalion orientation requirements.
    - (1) Determine the orientation requirements for the replacements.
    - (2) Ensure the replacements receive orientation.
  - b. Ensure that replacements have essential equipment.
    - (1) Determine the equipment requirements for the replacements
    - (2) Ensure the replacements receive equipment.
  - c. Coordinate equipment requirements with the battalion S4.
    - (1) Request the necessary equipment from the division support command headquarters (DISCOM).
    - (2) Ensure equipment is delivered to the replacements.
  - d. Coordinate meals and lodging requirements for replacements.
    - (1) Determine the requirements for meals and lodging.
    - (2) Request the necessary meals through proper channels.
    - (3) Request the necessary lodging through proper channels.
2. Conduct replacement operations at the brigade S1 level.
  - a. Receive replacements from the division replacement section and coordinate for their logistical support.
  - b. Coordinate with the brigade S4 for transportation to the battalions.
    - (1) Determine the transportation requirements for the replacements.
    - (2) Ensure that the replacements arrived at the battalions successfully.
  - c. Coordinate with the brigade S4 to resolve individual replacement equipment shortages.
    - (1) Determine if any equipment shortages exist.
    - (2) Ensure that the necessary equipment to fill any shortages is ordered.
    - (3) Ensure that the equipment is delivered.
3. Conduct replacement operations at the division G1 level.
  - a. Coordinate with the G4 for replacement transportation to brigade support areas.
    - (1) Determine the transportation requirements for the replacements.
    - (2) Ensure that the replacements arrived at the battalions successfully.

### Performance Steps

- b. Maintain contact with theater and corps personnel management centers (PMC) and supporting corps replacement units.
  - c. Maintain contact with subordinate unit personnel readiness managers.
  - d. Coordinate with medical facilities to ensure adequate support for Soldiers returning to duty.
    - (1) Determine what support elements are needed for the replacements.
    - (2) Request the necessary support elements through proper channels.
    - (3) Ensure that the support elements arrived.
  - e. Request additional resources from the corps Personnel Group (PG) to meet unusual replacement support requirements.
  - f. Receive and control replacements.
  - g. Coordinate division orientation requirements.
    - (1) Determine orientation requirements for the replacements.
    - (2) Ensure that the replacements receive orientation.
  - h. Coordinate personal equipment requirements with the division support command.
    - (1) Determine the equipment requirements for the replacements.
    - (2) Request the necessary personal equipment through proper channels.
    - (3) Ensure that the equipment arrived.
  - i. Coordinate meals and lodging support with the division support command.
    - (1) Determine the requirements for meals and lodging.
    - (2) Request the necessary meals through proper local channels.
    - (3) Request the necessary lodging through proper local channels.
    - (4) Ensure that the meals and lodging equipment arrived.
4. Conduct replacement operations at the corps Adjutant General/Personnel Group (AG/PG) level during early deployment stages.
- a. Establish a General Support (GS) replacement capacity at the port of debarkation (POD) as soon as possible.
  - b. Establish a personnel accounting system to record replacement arrivals and departures. Ensure that the personnel accounting information is updated regularly.
  - c. Manage the corps replacement management network.
  - d. Coordinate with the personnel group S3 to determine the Direct Support (DS) replacement unit location.
  - e. Provide technical direction to the corps DS replacement unit.
  - f. Provide assignment fill plans to the DS replacement company for separate brigades and corps and Theater Army Area Command (TAACOM) major subordinate unit (less divisions).
  - g. Coordinate replacement transportation requirements with the corps G4.
  - h. Maintain liaison with the theater PMC and supporting GS replacement company
  - i. Maintain communication with subordinate unit personnel readiness managers.
  - j. Coordinate with the personnel group S3 to augment division replacement sections as necessary
  - k. Coordinate with medical facilities to ensure support for Soldiers and civilians returning to duty

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

### Performance Measures

**GO   NO GO**

- 1. Conducted replacement operations at the battalion S1 level.
- 2. Conducted replacement operations at the brigade S1 level.

**Performance Measures**

**GO   NO GO**

3. Conducted replacement operations at the division G1 level.
4. Conducted replacement operations at the corps AG/PG level during early deployment stages.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**

AR 600-8-111

FM 12-6

**Related**

**Manage Wartime Strength Reporting/Accounting System**  
**805C-42A-4044**

**Conditions:** Given a Personnel Summary (PS), Personnel Requirements Report (PRR), duty status changes, documents supporting a Soldier's death, Unit Personnel Accountability Report (AAA-162), strength reports, Army Human Resource Information System (AHRIS), FM 12-6, and AR 600-8-6.

**Standards:**

1. Ensure the Wartime Personnel Accounting Strength Reporting (PASR) System is properly managed at the Battalion (Bn) level.
2. Ensure the Wartime PASR System is properly managed at the Brigade (Bde) level.
3. Ensure the Wartime PASR System is properly managed at the Personnel Support Battalion (PSB) level.
4. Manage the Wartime PASR System at the Division level.
5. Manage the Wartime PASR System at the Corps level.

**Performance Steps**

1. Ensure the Wartime PASR System is managed properly at the Bn level.
  - a. Ensure personnel strength information required in the Bn's command databases is collected, summarized, analyzed, and reported to include task force personnel.
  - b. Ensure Bn personnel enter duty status changes to the Bn database and these changes are transmitted using ARHS.
    - (1) Ensure duty status changes are reported.
      - (a) Ensure Bn personnel obtain duty status changes from the unit.
      - (b) Ensure Bn personnel verify changes and are compared to other source documents.
      - (c) Ensure Bn personnel verify the Soldiers current duty status code.
      - (d) Ensure the appropriate ARHS transactions are entered into the database.
    - (2) Ensure Bn personnel report the death of a Soldier.
      - (a) Ensure Bn personnel obtain supporting documents to verify the death.
      - (b) Ensure personnel determine the actual date and time of death from the supporting documents.
      - (c) Ensure personnel process an ARHS loss to the Army transaction.
    - (3) Ensure Bn personnel complete an ARHS arrival transaction for each Soldier upon arrival to his or her permanent duty station.
  - c. Ensure the PRR and PS reports are completed at least every 24 hours when the manual system is used.
  - d. Ensure Bn personnel enter the data for replacement Soldiers, return to duty Soldiers and Army civilians into the Bn database.
    - (1) Ensure Bn personnel report assigned or attached Soldiers.
      - (a) Ensure Bn personnel obtained a copy of the orders from the Soldier.
      - (b) Ensure Bn personnel enter the appropriate ARHS transaction for assigned and attached Soldiers.
  - e. Ensure Bn personnel reconcile strength information by comparing the manual personnel strength information to data from ARHS.
    - (1) Ensure personnel identify and resolve discrepancies.
    - (2) Ensure manual personnel strength information is collected.
    - (3) Ensure manual duty status changes collected.
    - (4) Ensure Bn personnel collect personnel strength information generated by ARHS.

**Performance Steps**

- (a) Ensure automated PSs are collected.
  - (b) Ensure the most current UNIT AAA-162 is collected.
  - (5) Ensure Bn personnel resolve any discrepancies.
2. Ensure the Wartime PASR System is properly managed at Bde level.
    - a. Ensure the Bde personnel process transactions from subordinate Bns to update the Bde's command database.
      - (1) Ensure the Bde personnel's strength reports are received from subordinate Bns.
      - (2) Ensure the Bde personnel examine the data in the strength reports from Bns for accuracy.
      - (3) Ensure the Bde personnel coordinate with the S1, S3, and S4 to verify the information in the strength reports is accurate.
    - b. Ensure the Bde personnel collect, summarize, and submit personnel strength reports to higher headquarters.
      - (1) Ensure the Bde personnel collect, summarize, and submit the ARHS generated PS.
        - (a) Ensure the ARHS generated PS is collected, summarized, and submitted.
        - (b) Ensure the manual PS is collected, summarized, and submitted.
      - (2) Ensure Bde personnel collect, summarize, and submit the PRR.
        - (a) Ensure the ARHS generated PRR is collected, summarized, and submitted.
        - (b) Ensure the manual PRR is collected, summarized, and submitted.
      - (3) Ensure Bde personnel collect, summarize, and submit the Command and Control Task Force Report.
      - (4) Ensure Bde personnel collect, summarize, and submit the ARHS generated Command and Control Task Force Report.
  3. Ensure the Wartime PASR System is properly managed at the PSB level.
    - a. Ensure the PSB manages personnel information for the Bns and the separate units within its area of responsibility.
    - b. Ensure PSB personnel process Soldiers who are in a temporary change of station status and deploying to a theater of operations as individual fillers in support of a contingency operation or execution of an OPLAN.
      - (1) Ensure PSB personnel verify transactions for each Soldier (departed, arrival attachment or reattachment) are entered into appropriate ARHS database.
      - (2) Ensure PSB personnel maintain a roster for identification and dependence service support on all Soldiers deployed in this capacity.
  4. Manage the Wartime PASR System at the Division level.
    - a. Operate the Division PASR network.
      - (1) Obtain the unit strength reports from the subordinate units.
      - (2) Verify personnel strength report data.
        - (a) Verify personnel strength report data against the tactical reports.
        - (b) Verify personnel strength report data against the medical clearing station reports.
        - (c) Verify personnel strength report data against the mortuary affairs reports.
        - (d) Verify personnel strength report data against data from other appropriate agencies.
      - (3) Merge personnel strength report data from subordinate units into the Division database.
      - (4) Produce Division personnel strength reports.
    - b. Maintain and operate a consolidated Division database.
      - (1) Ensure the PS is prepared.
        - (a) Ensure all PS roll ups from subordinate units are obtained.
        - (b) Ensure the PS data from subordinate units is merged.
        - (c) Ensure a Division roll up PS is produced.
      - (2) Ensure the PRR is prepared.
        - (a) Ensure the all roll up PS from subordinate elements are obtained.
        - (b) Ensure the subordinate PS input is merged.
        - (c) Ensure Division roll up is created.
        - (d) Ensure the Division roll up PS to the higher headquarters is submitted.
      - (3) Ensure the Command and Control Task Force Report is prepared.

### Performance Steps

- (a) Ensure all roll up PS from subordinate elements are obtained.
  - (b) Ensure all roll up PS from subordinate elements are obtained.
  - (c) Ensure a Division roll up PS is produced.
  - (d) Ensure the Bde roll up to the Division Assistant Chief of Staff, G1 or Adjutant General is transmitted.
- c. Synchronize the timely vertical flow of automated information from the Bns and separate units to the PSB.
- (1) Synchronize the timely vertical flow of the PS at least daily.
    - (a) Establish the submission times for the manual PS.
    - (b) Ensure the PS is submitted by subordinate units on schedule.
    - (c) Merge the ARHS generated PS at least daily.
    - (d) Submit the PS after merging.
  - (2) Synchronize the timely vertical flow of the PRR at least daily.
    - (a) Ensure the PRR is submitted by subordinate units on schedule.
    - (b) Merge the ARHS generated PS at least daily.
    - (c) Submit the PRR after merging.
  - (3) Synchronize the timely vertical flow of the Command and Control Task Force Report as needed.
    - (a) Ensure the Command and Control Task Force Report is submitted by subordinate units in a timely manner.
    - (b) Roll up the Command and Control Task Force Report.
    - (c) Submit the Command and Control Task Force Report to the higher headquarters.
5. Manage the Wartime PASR System at the Corps level.
- a. Manage the Wartime PASR System at the Corps personnel group level.
    - (1) Establish the PASR system by aligning all arriving units with a supporting PSB.
      - (a) Identify units to arrive at the point of debarkation.
      - (b) Identify civilian, joint, and contractor personnel for manually or in stand-alone automated systems. Establish procedures to report civilian, joint, and contractor personnel. Establish procedures to merge reports into the database at each level. Establish procedures to submit the merged reports to the next higher headquarters.
      - (c) Identify the PSB locations.
      - (d) Establish guidelines for data links with sustaining base/home stations Personnel Information System processing activity.
      - (e) Establish procedures to receive unit strength reports and personnel strength reports. Establish procedures to merge unit strength reports into the database at each level. Establish procedures to submit the merged strength reports to the next higher headquarters.
    - (2) Provide manpower to establish a collection point at the port of debarkation for unit personnel databases.
    - (3) Ensure a PASR manager from the forward deployed theater Human Resources Command or contingency Human Resources Command is deployed with an early Corps Personnel Management Center increment.
  - b. Manage the Wartime PASR System at the Corps personnel readiness management branch level.
    - (1) Manage the corps PASR management network.
    - (2) Maintain a derivative unit identification code to account for inpatients at medical facilities.
      - (a) Establish procedures to remove inpatients from the deploying unit's database.
      - (b) Establish procedures to place inpatients in the unit identification code listing.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Ensured that the Wartime PASR System is managed properly at the Bn level.
2. Ensured that the Wartime PASR System is properly managed at Bde level.
3. Ensured that the Wartime PASR System is properly managed at the PSB level.
4. Managed the Wartime PASR System at the Division level.
5. Managed the Wartime PASR System at the Corps level.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References****Required**

AAA-117  
 AAA-347  
 AR 600-8-19  
 DA FORM 201  
 DA FORM 3072-R  
 DA FORM 3355  
 DA FORM 3357  
 DA FORM 4187

**Related**

Subject Area 30: REDEPLOYMENT

**Manage Demobilization Procedures**

**805C-42A-4051**

**Conditions:** Given the requirement to manage the demobilization procedures when wartime is over, access to DA Pamphlet 600-72 (Army Manpower Mobilization), Soldiers' personnel, finance, and medical records, appropriate manpower and agencies, and standard office supplies and equipment.

**Standards:**

1. Establish a plan to accomplish demobilization procedures.
2. Ensure that all required processing is completed.
3. Provide a suitable departure ceremony for Soldiers.

**Performance Steps**

1. Establish a plan to accomplish demobilization procedures.
  - a. Plan administrative and personnel demobilization requirements.
  - b. Ensure adequate manpower is available to perform separation tasks.
  - c. Ensure appropriate agencies participating in demobilization are available.
  - d. Ensure demobilization procedures are accomplished within five days.
2. Establish initial receiving procedures for incoming Soldiers.
  - a. Meet incoming Soldiers upon their arrival to the separation center.
  - b. Assign incoming Soldiers to the separation center for command and control purposes.
  - c. Orient incoming Soldiers to the separation center layout.
  - d. Inform incoming Soldiers of the sequence of events that will take place at the separation center.
  - e. Ensure adequate military personnel are available to accomplish initial receiving procedures.
3. Initiate the records processing of Soldiers.
  - a. Determine what needs to be accomplished to close Soldiers' active duty records.
  - b. Prepare active duty records for reserve service or use in validating veterans' benefits, as appropriate.
  - c. Ensure adequate military or civilian personnel are available to accomplish records processing procedures.
4. Ensure medical examinations are completed.
  - a. Ensure medical authorities make a tentative determination of Soldiers' eligibility for discharge or continued services on active duty (AD) or reserve component (RC) assignments.
  - b. Ensure qualified physicians, preferably civilian physicians, complete medical examinations.
5. Ensure reenlistment counselings are conducted.
  - a. Assist Soldiers in making informed decisions on continued Army service on AD or RC.
  - b. Ensure selected Soldiers who desire to reenlist meet eligibility requirements.
6. Ensure separation counselings are conducted.
  - a. Ensure Soldiers are briefed on job and career planning, civilian living expenses, civilian job-search activities, benefits of college or vocational school, and veterans' benefits.
  - b. Obtain qualified counselors through appropriate channels to conduct briefings.
7. Ensure clothing and equipment turn-in are accomplished.
  - a. Ensure Soldiers are provided uniforms for their trip home.



**Performance Steps**

- b. Ensure reenlisting Soldiers retain uniform items needed for future AD or RC assignments.
  - c. Ensure adequate military or civilian personnel are available for clothing and equipment turn-in.
8. Conduct final records reviews.
    - a. Ensure personnel and finance records are properly closed out.
    - b. Ensure adequate military or civilian personnel are available for the final records review.
  9. Provide a suitable departure ceremony for Soldiers.
    - a. Present final award to departing Soldiers if appropriate.
    - b. Ensure a field grade officer presides over awards ceremonies.
  10. Ensure final pay and transportation requirements are met for Soldiers.
    - a. Ensure final pay and transportation is authorized to a final destination.
    - b. Ensure adequate military or civilian personnel are available for the final pay and transportation requirements.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

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

1. Established a plan to accomplish demobilization procedures.
2. Established initial receiving procedures for incoming Soldiers.
3. Initiated the records processing of Soldiers.
4. Ensured medical examinations were completed.
5. Ensured reenlistment counselings were conducted.
6. Ensured separation counselings were conducted.
7. Ensured clothing and equipment turn-in was accomplished.
8. Conducted final records reviews.
9. Provided a suitable departure ceremony for Soldiers.
10. Ensured final pay and transportation requirements were met for Soldiers.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**  
DA PAM 600-72

**Related**

Subject Area 33: REVIEW MANAGEMENT MAINTENANCE AND CONTROL

**Review the Personnel Organization Structure**

**805C-42A-4011**

**Conditions:** Given a requirement to define the Personnel Organization Structure and access to FM 12-6 (Personnel Doctrine).

**Standards:**

1. Identify the Battalion, Brigade, Division, Corps Organization Structure.
2. Identify the Postal Company, Reception Battalion, Band, Organization Structure, Replacement Battalions, Companies of Outside the Continental United States (OCONUS), and Continental United States (CONUS).
3. Identify the Human Resources Command organization Structure to include the Group, Battalion and Detachments levels.

**Performance Steps**

1. Define the Battalion Organization structure.
  - a. The Unit Support Element.
    - (1) Postal Operation Management.
    - (2) Morale, Welfare, and Recreation (MWR) program administration.
    - (3) Equal Opportunity (EO) program administration.
    - (4) Sponsorship Program administration.
    - (5) Alcohol and Drugs Abuse Prevention and Control (ADAPC) program formulation.
    - (6) Line of Duty investigation.
    - (7) Information Management Support.
  - b. The Legal Support Element.
    - (1) Officer and enlisted transfers and discharges.
    - (2) Military Justice actions.
    - (3) The Courts and Boards functions.
  - c. The Personnel Support Element.
    - (1) Personnel Accounting and Strength Reporting (PASR)
    - (2) Readiness Management.
    - (3) Database Management.
    - (4) Casualty Reporting.
    - (5) Replacement Operations.
    - (6) Personnel Actions.
    - (7) Evaluations.
    - (8) Retention (Reenlistment).
    - (9) Promotions and Reductions.
    - (10) Awards and Decorations.
    - (11) Military Pay and Leaves.
    - (12) Safety Program Administration.
    - (13) Coordination for Command Information Activities.
    - (14) Chaplaincy Activities.
    - (15) Stress Management Services.
    - (16) Straggler Control.
2. Define the Brigade Organization structure and the commander's principal staff officer for personnel support responsibilities.

**Performance Steps**

- a. Personnel Readiness Management.
  - b. Replacements.
  - c. PASR.
  - d. Personnel Information.
  - e. Casualty Reporting.
  - f. Postal Operations.
  - g. MWR and community support.
  - h. Essential Personnel Services.
3. Define the Division Organization structure.
    - a. The Personnel Readiness Branch.
      - (1) Personnel Readiness Management.
      - (2) PASR.
    - b. The Personnel Operations Branch.
      - (1) Casualty Management System.
      - (2) Postal Operations Management.
      - (3) MWR Program.
      - (4) Essential Personnel Services.
      - (5) Band Activities.
      - (6) Congressional Inquiries.
  4. Define the Corps Organization structure.
    - a. The Corps G1.
      - (1) MWR Program Management.
      - (2) ADAPC Program.
      - (3) EO.
      - (4) Safety Program.
    - b. The Corps AG/Personnel Group Commander.
      - (1) Personnel Operations Division.
      - (2) Personnel Readiness Management Division.
      - (3) Staff Actions Branch.
      - (4) Personnel Automation Branch.
  5. Define the Postal Company Organization structure.
    - a. The Postal Operations Platoon.
      - (1) Mail Process Section.
      - (2) Directory Services Section
    - b. The Postal Services Platoon.
      - (1) Mail Process Section.
      - (2) Postal Finance Section.
  6. Define the Outside the Continental United States (OCONUS) Replacement Battalion and Company Organization structure.
    - a. The Replacement Battalion.
      - (1) Company Operations.
      - (2) Replacement allocations.
      - (3) Fill plans.
      - (4) Transportation and life support requirements.
      - (5) Internal personnel support.
    - b. The Replacement Company.
      - (1) Company Headquarters.
        - (a) Command and Control.
        - (b) Internal administration support.
        - (c) Food Services.
        - (d) Internal logistical support.
      - (2) The Company Operations.

**Performance Steps**

- (a) Operational orders.
  - (b) Operational plans.
  - (c) Operational control.
  - (d) Operational guidance.
  - (e) Battlefield orientation.
  - (f) Readiness management.
  - (g) Issue orders.
  - (h) Replacement transportation.
  - (i) Intelligence and security.
  - (3) Replacement Personnel Supplies.
  - (4) Replacement Platoons.
  - (5) Replacement Management.
7. Define the Continental United States (CONUS) Replacement Battalion and the CONUS Replacement Company (CRC) Organization structure.
- a. The Replacement Battalion.
    - (1) Soldier readiness processing qualifications.
    - (2) Installation processing requirements.
    - (3) Equipping of Soldiers, DA civilians, contract civilians, and American Red Cross personnel.
    - (4) Personnel training.
    - (5) Theater-specific briefings.
    - (6) Manifests.
    - (7) Army Human Resource System.
    - (8) Non-deployable personnel.
    - (9) Classes of personnel.
    - (10) Out-processing procedures.
    - (11) Non-dischargeable personnel.
  - b. The CONUS Replacement Company (CRC).
    - (1) Command and control of Non-Unit Related Personnel (NRP) for deployment to OCONUS operations and redeployment from OCONUS operations.
    - (2) Dependent upon CONUS installation and Replacement Battalion for support.
      - (a) Billeting.
      - (b) Personnel and Administrative Services.
      - (c) Legal and Finance.
      - (d) Unit Maintenance.
      - (e) Food and Health Services.
      - (f) Supplemental Transportation.
      - (g) Communications.
      - (h) Training Equipment and Facilities.
8. Define the Reception Battalion Organization structure.
- a. Command and Control.
  - b. Administration.
  - c. Supply for cadre and Soldiers undergoing processing.
  - d. Policies for processing new Soldiers.
  - e. Training unit fill schedules.
  - f. Unit training loads.
  - g. Documentation required to accompany the Soldier upon shipment.
  - h. Initial Soldier orientation training.
  - i. Army Human Resource System.
9. Define the Band Organization structure.
- a. The National Support Element.
    - (1) United States Army Band.
    - (2) United States Army Field Band.
    - (3) United States Military Academy Band.

**Performance Steps**

- b. The General Support Element.
    - (1) Theater Army Band.
    - (2) Theater Army Area Command (TAACOM) Army Band.
  - c. The Direct Support Element.
10. Define the PSB Organization structure.
    - a. Command Section.
    - b. Headquarters Support.
    - c. Operations and Logistics Section.
    - d. Personnel Detachments 1, 2, 3, 4, 5, and 6.
    - e. Postal Company.
  11. Define the Personnel Detachment Organization structure.
    - a. Detachment Headquarters.
    - b. Personnel Information Section.
    - c. Personnel Information Team.
    - d. Personnel Systems Section.
    - e. Personnel Systems Team.
    - f. Personnel Services Section.
    - g. Personnel Services Team.
  12. Define the Personnel Group Organization structure.
    - a. Deputy AG/Personnel Operations Division.
    - b. Deputy Commander.
    - c. S1/Adjutant.
    - d. S2/S3 Operations Officer.
    - e. S4 Supply Officer.
    - f. Headquarters Detachment.
  13. Define the Personnel Command Organization structure.
    - a. The Personnel Operations Directorate.
      - (1) Long Range Plans Division.
      - (2) Plans and Operations Division.
    - b. The Personnel Service Directorate.
      - (1) Personnel Information Management Division.
      - (2) Personnel Actions Division.
      - (3) Casualty Division.
    - c. The Replacement Directorate.
      - (1) Requirements and Operations Division.
      - (2) Combat Arms Division.
      - (3) Combat Support Division.
      - (4) Combat Service Support Division.
      - (5) Officer Personnel Management Cell.
    - d. The Postal Directorate.
      - (1) Postal Plans Division.
      - (2) Postal Inspections Division.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

**Performance Measures**

**GO**    **NO GO**

1. Defined the Battalion Organization structure.
2. Defined the Brigade Organization structure and the commander's principal staff officer for personnel support responsibilities.
3. Defined the Division Organization structure.
4. Defined the Corps Organization structure.
5. Defined the Postal Company Organization structure.
6. Defined the Outside the Continental United States (OCONUS) Replacement Battalion and Company Organization structure.
7. Defined the Continental United States (CONUS) Replacement Battalion and the CONUS Replacement Company (CRC) Organization structure.
8. Defined the Reception Battalion Organization structure.
9. Defined the Band Organization structure.
10. Defined the PSB Organization structure.
11. Defined the Personnel Detachment Organization structure.
12. Defined the Personnel Group Organization structure.
13. Defined the Personnel Command Organization structure.

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**References**

**Required**  
FM 12-6

**Related**

**GLOSSARY****Section I**  
**Acronyms & Abbreviations**

|                  |  |
|------------------|--|
| <b>A/SPOE</b>    | aerial/sea port of embarkation                             |
| <b>AAM</b>       | Army achievement medal                                     |
| <b>ACIPS</b>     | Army Casualty Information Processing System                |
| <b>AD</b>        | active duty  |
| <b>AEA</b>       | assignment eligibility and availability                    |
| <b>AFCS</b>      | active federal commissioned service                        |
| <b>AG</b>        | Adjutant General   |
| <b>AGCM</b>      | Army good conduct medal                                    |
| <b>AGR</b>       | Active Guard Reserve                                       |
| <b>AGS</b>       | Adjutant General School                                    |
| <b>ANCOC</b>     | Advanced Noncommissioned Officer Course                    |
| <b>APFT</b>      | Army physical fitness test                                 |
| <b>APO</b>       | Army Post Office   |
| <b>APOD</b>      | aerial port of debarkation                                 |
| <b>APOE</b>      | aerial port of embarkation                                 |
| <b>ARCOM</b>     | Army commendation medal; Army Reserve Command              |
| <b>ARNG</b>      | Army National Guard  |
| <b>ARTEP</b>     | Army Training and Evaluation Program                       |
| <b>ARTEP-MTP</b> | Army Training and Evaluation Program-Mission Training Plan |
| <b>ASAT</b>      | Automated Systems Approach to Training                     |
| <b>ASI</b>       | additional skill identifier                                |
| <b>ASNJ</b>      | assigned not joined  |
| <b>AWOL</b>      | absent without leave                                       |
| <b>BASD</b>      | basic active service date                                  |
| <b>Bde</b>       | brigade  |

|               |  |
|---------------|--|
| <b>BESD</b>   | basic enlisted service date                        |
| <b>Bn</b>     | battalion  |
| <b>BNCOC</b>  | Basic Noncommissioned Officer Course               |
| <b>BR</b>     | battle roster                                      |
| <b>BSA</b>    | brigade support area                               |
| <b>C2SRS</b>  | command, control, and strength reporting system    |
| <b>CASCOM</b> | Combined Arms Support Command                      |
| <b>CCA</b>    | confined civil authority; component cost analysis  |
| <b>CG</b>     | Commanding General                                 |
| <b>CIP</b>    | command information program                        |
| <b>CMF</b>    | career management field                            |
| <b>CMIF</b>   | career management individual file                  |
| <b>CO1</b>    | enlisted promotion report                          |
| <b>CPMOS</b>  | career progression military occupational specialty |
| <b>CRC</b>    | CONUS Replacement Center; camera-ready copy        |
| <b>CRS</b>    | casualty record system                             |
| <b>CSS</b>    | combat service support                             |
| <b>DA</b>     | Department of the Army                             |
| <b>DCSLOG</b> | Deputy Chief of Staff Logistics                    |
| <b>DCSPER</b> | Deputy Chief of Staff Personnel                    |
| <b>DCSS</b>   | declination of continued service statement         |
| <b>DEROS</b>  | date eligible for return from overseas             |
| <b>DFAS</b>   | Defense Finance and Accounting Service             |
| <b>DLOS</b>   | date of loss                                       |
| <b>DMOS</b>   | duty military occupational specialty               |
| <b>DOB</b>    | date of birth                                      |
| <b>DOR</b>    | date of rank; detail obligation report             |
| <b>DROS</b>   | date returned from overseas                        |



|              |   |
|--------------|---|
| <b>DTG</b>   | date-time group                           |
| <b>DYST</b>  | duty status                               |
| <b>EDAS</b>  | enlisted distribution assignment system   |
| <b>EPMD</b>  | enlisted personnel management directorate |
| <b>ERB</b>   | enlisted records brief                    |
| <b>EREC</b>  | Enlisted Records and Evaluation Center    |
| <b>ESA</b>   | expiration of service agreement           |
| <b>ETA</b>   | estimated time of arrival                 |
| <b>ETS</b>   | Expiration Term of Service                |
| <b>FOUO</b>  | for official use only                     |
| <b>FRAGO</b> | Fragmentary Order                         |
| <b>FSOP</b>  | Field Standard Operating Procedure        |
| <b>FTX</b>   | field training exercise                   |
| <b>FY</b>    | fiscal year                               |
| <b>GCM</b>   | general court-martial                     |
| <b>GCMCA</b> | general court-martial convening authority |
| <b>GRCH</b>  | grade change                              |
| <b>HHC</b>   | headquarters and headquarters company     |
| <b>HHD</b>   | headquarters and headquarters detachment  |
| <b>HIV</b>   | human immunodeficiency virus              |
| <b>HOR</b>   | home of record                            |
| <b>HQ</b>    | headquarters                              |
| <b>HQDA</b>  | Headquarters, Department of the Army      |
| <b>HRC</b>   | Human Resources Command                   |
| <b>IET</b>   | initial entry training                    |
| <b>KIA</b>   | killed in action                          |
| <b>LES</b>   | Leave and Earnings Statement              |
| <b>MACOM</b> | Major Army Command                        |

|               |  |
|---------------|--|
| <b>MEPS</b>   | Military Entrance Processing Station                   |
| <b>METL</b>   | mission essential task list                            |
| <b>METT-T</b> | mission, enemy, terrain, troops, and time available    |
| <b>MIA</b>    | missing in action                                      |
| <b>MILPER</b> | military personnel                                     |
| <b>MILPO</b>  | military personnel office                              |
| <b>MMRB</b>   | MOS/medical retention board                            |
| <b>MOPP</b>   | mission oriented protective posture                    |
| <b>MOS</b>    | military occupational specialty                        |
| <b>MOSC</b>   | military occupational specialty code                   |
| <b>MOSQ</b>   | MOS-qualified  |
| <b>MPC</b>    | military personnel class; military payment certificate |
| <b>MSC</b>    | major subordinate command                              |
| <b>MSM</b>    | meritorious service medal                              |
| <b>MSPER</b>  | MOS trained strength                                   |
| <b>MTOE</b>   | modified table of organization and equipment           |
| <b>NBC</b>    | nuclear, biological, and chemical                      |
| <b>NCOER</b>  | noncommissioned officer evaluation report              |
| <b>NCOES</b>  | NCO education system                                   |
| <b>NG</b>     | National Guard   |
| <b>NOK</b>    | next of kin  |
| <b>OER</b>    | officer evaluation report                              |
| <b>OMF</b>    | officer master file; organization master file          |
| <b>OMPF</b>   | official military personnel file                       |
| <b>OPCON</b>  | operational control                                    |
| <b>OPLAN</b>  | operations plan  |
| <b>OPORD</b>  | operations order                                       |
| <b>OPSEC</b>  | operations security                                    |

|                |  |
|----------------|--|
| <b>OSTR</b>    | organization strength change   |
| <b>PAB</b>     | Personnel Automation Branch  |
| <b>PAC</b>     | Personnel and Administration Center  |
| <b>PAC/PSC</b> | Personnel Assistance Center/Personnel Service Center                         |
| <b>PAS</b>     | personnel automation section   |
| <b>PASR</b>    | personnel accounting and strength reporting                                  |
| <b>PBAR</b>    | promotion bar  |
| <b>PDS</b>     | personnel daily summary; permanent duty station                              |
| <b>PDY</b>     | present for duty; principal duty   |
| <b>PEBD</b>    | pay entry basic date   |
| <b>PERSTAT</b> | personnel status   |
| <b>PMOS</b>    | primary military occupational specialty                                      |
| <b>PMOSC</b>   | primary military occupational specialty code                                 |
| <b>PNOK</b>    | primary next of kin  |
| <b>POD</b>     | point of departure; port of debarkation                                      |
| <b>POE</b>     | port of embarkation; program office estimate                                 |
| <b>POSN</b>    | position; position number  |
| <b>PQR</b>     | personnel qualification record   |
| <b>PSB</b>     | personnel services battalion   |
| <b>PSC</b>     | personnel service company  |
| <b>PSNCO</b>   | personnel staff noncommissioned officer                                      |
| <b>PSR</b>     | personnel summary report; personnel status report; personnel strength report |
| <b>PTRO</b>    | personnel transaction register by originator                                 |
| <b>PULHES</b>  | physical profile serial code   |
| <b>PZB</b>     | personnel strength zero balance report                                       |
| <b>QMP</b>     | qualitative management program   |
| <b>RA</b>      | regular army   |
| <b>REVA</b>    | revocation of arrival/assigned not joined                                    |

|               |  |
|---------------|--|
| <b>REVD</b>   | revocation of departure                        |
| <b>RFO</b>    | request for orders                             |
| <b>S1</b>     | adjutant (US Army)                             |
| <b>SCN</b>    | shipment control number                        |
| <b>SEP</b>    | separation                                     |
| <b>SGLI</b>   | servicemembers' group life insurance           |
| <b>SGPER</b>  | senior grade personnel                         |
| <b>SGT</b>    | sergeant                                       |
| <b>SL</b>     | skill level                                    |
| <b>SMOS</b>   | secondary military occupational specialty      |
| <b>SMOSC</b>  | secondary military occupational specialty code |
| <b>SPC</b>    | specialist                                     |
| <b>SPC4</b>   | specialist fourth class                        |
| <b>SPECAT</b> | special category                               |
| <b>SQI</b>    | skill qualification identifier                 |
| <b>SRB</b>    | selective reenlistment bonus                   |
| <b>SSG</b>    | special study group; staff sergeant            |
| <b>SSN</b>    | social security number                         |
| <b>TAACOM</b> | Theater Army Area Command                      |
| <b>TDA</b>    | table of distribution and allowance            |
| <b>TDRL</b>   | temporary disability retired list              |
| <b>TDY</b>    | temporary duty                                 |
| <b>TF</b>     | task force                                     |
| <b>TFPS</b>   | task force personnel summary                   |
| <b>TIS</b>    | time in service                                |
| <b>TRADOC</b> | Training and Doctrine Command                  |
| <b>UCMJ</b>   | uniform code of military justice               |
| <b>UIC</b>    | unit identification code                       |

|                      |   |
|----------------------|---|
| <b>UMR</b>           | unit manning report   |
| <b>Unit training</b> | Training (individual, collective, and joint or combined) conducted in a unit. |
| <b>UPAN</b>          | unit personnel accountability notice  |
| <b>UPC</b>           | unit processing code  |
| <b>USAR</b>          | U.S. Army Reserve   |
| <b>USAREUR</b>       | United States Army, Europe  |
| <b>USASSI</b>        | United States Army Soldier Support Institute                                  |

## **Section II**

### **Terms**

#### **aptitude**

The ability of a Soldier to acquire skill or show the potential for acquiring skill when given the opportunity and proper training. Aptitude may be the ability to learn a specific skill or the potential to receive general training.

#### **ARR**

arrival

#### **auth**

authorized

#### **Bde**

brigade

#### **cmd**

command

#### **Critical skill**

A military occupational specialty (MOS) with less than 80 percent assigned of the ARNG wartime required strength.

#### **Critical task**

A task which is essential for accomplishment of successful individual skill performance.

#### **DPRT**

depart; departure

#### **Duty MOS**

The MOS of the position on the TOE/TDA/MTOE to which a Soldier is assigned.

#### **gr**

grade

#### **PARA**

paragraph

**reenl**

reenlistment

**Separation**

An inclusive term used in personnel actions to describe release from active duty, discharge, retirement, dropped from the rolls, release from military control of personnel without military status, death, or transfer from unit status to the IRR.

## REFERENCES

### Other Product Types

AAA-002 EDAS Cycle Audit Sheet

### Army Regulations

AR 220-1 Unit Status Reporting 10 June 2003  
 AR 25-30 The Army Publishing Program 15 July 2002  
 AR 25-50 Preparing and Managing Correspondence 3 June 2002  
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 AR 27-10 Military Justice 6 September 2002  
 AR 310-50 Authorized Abbreviations, Brevity Codes and Acronyms 15 November 1985  
 AR 37-104-4 Military Pay and Allowance Policy and Procedures-Active Component 30 September 1994  
 AR 380-5 Department of the Army Information Security Program 29 September 2000  
 AR 40-501 Standards of Medical Fitness 30 September 2002  
 AR 600-60 Physical Performance Evaluation System 25 June 2002  
 AR 600-8 Military Personnel Management 1 October 1989  
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 AR 600-8-101 Personnel Processing (In-and-Out and Mobilization Processing) 18 July 2003  
 AR 600-8-104 Military Personnel Information Management/Records 27 April 1992  
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 AR 614-200 Enlisted Assignments and Utilization Management 12 July 2001  
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 AR 680-29 Military Personnel Organization, and Type of Transaction Codes 29 March 1996  
 AR 690-400 Total Army Performance Evaluation System (Chapter 4302) 16 August 1998

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DA FORM 1155 Witness Statement on Individual 1 June 1966

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| DA FORM 1156     | Casualty Feeder Report 1 June 1966   |
| DA FORM 1687     | Notice of Delegation of Authority - Receipt for Supplies 1 January 1982              |
| DA FORM 201      | Military Personnel Records Jacket, U.S. Army 1 August 1971                           |
| DA FORM 2166-8   | Noncommissioned Officer Evaluation Report 1 October 2001                             |
| DA FORM 2166-8-1 | NCO Counseling Checklist/Record 1 October 2001                                       |
| DA FORM 2339     | Application for Voluntary Retirement 1 June 1983                                     |
| DA FORM 2406     | Material Status Report 1 April 1993  |
| DA FORM 2627     | Record of Proceedings Under Article 15, UCMJ 1 August 1984                           |
| DA FORM 2715-R   | Unit Status Report 1 April 1996  |
| DA FORM 2765-1   | Request for Issue or Turn-In 1 April 1976  |
| DA FORM 3072-R   | Waiver of Disqualification for Reenlistment/Promotion in the Regular Army 1 May 1988 |
| DA FORM 31       | Request Authority for Leave 1 September 1993   |
| DA FORM 3161     | Request for Issue or Turn-In 1 May 1983  |
| DA FORM 3349     | Physical Profile 1 May 1986  |
| DA FORM 3355     | Promotion Point Worksheet 1 April 1991   |
| DA FORM 3355-E   | Promotion Point Worksheet 1 April 1991   |
| DA FORM 3356     | Board Member Appraisal (Worksheet) 1 April 1991                                      |
| DA FORM 3357     | Board Recommendation 1 April 1991  |
| DA FORM 3739     | Application for Compassionate Actions 1 January 1996                                 |
| DA FORM 3955     | Change of Address and Directory Card 1 February 1979                                 |
| DA FORM 3986-R   | Personnel Asset Inventory 1 October 1993   |
| DA FORM 4036-R   | Medical and Dental Preparation for Overseas Movement 1 May 1990                      |
| DA FORM 4037     | Officer Record Brief 1 July 1982   |
| DA FORM 4179-R   | Leave Control Log 1 September 1993   |
| DA FORM 4187     | Personnel Action 1 April 1995  |
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| DA FORM 4787-R   | Reassignment Processing 1 May 1990   |
| DA FORM 4856     | General Counseling Form 1 June 1985  |
| DA FORM 4941-R   | Statement of Option 1 December 1994  |
| DA FORM 4991-R   | Declination of Continued Service Statement 1 May 1998                                |
| DA FORM 5117-R   | Reassignment Control Sheet 1 May 1990  |
| DA FORM 5118-R   | Reassignment Status and Election Statement 1 May 1990                                |
| DA FORM 5138-R   | Separation Action Control Sheet 1 July 1984  |
| DA FORM 5367-R   | Personnel Status Report 1 December 1984  |
| DA FORM 581      | Request for Issue and Turn-In of Ammunition 1 August 1989                            |
| DA FORM 647      | Personnel Register 1 August 1978   |
| DA FORM 647-1    | Personnel Register 1 August 1978   |
| DA FORM 67-9     | Officer Evaluation Report 1 October 1997   |
| DA FORM 7223     | Base System Civilian Evaluation Report 3 August 1998                                 |
| DA FORM 7223-1   | Base System Civilian Performance Counseling Checklist/Record 3 August 1998           |
| DA FORM 873      | Certificate of Clearance and/or Security Determination 1 December 1969               |

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| DA PAM 25-33  | User's Guide for Army Publications and Forms 15 September 1996 |
| DA PAM 600-72 | Army Manpower Mobilization 8 July 1990                         |
| DA PAM 600-8  | Management and Administrative Procedures 1 August 1986         |



DA PAM 600-8-11 Military Personnel Office Separation Processing Procedures 1 July 1984  
 DA PAM 611-21 Military Occupational Classification and Structure 31 March 1999

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DD FORM 1351 Travel Voucher 1 July 1999  
 DD FORM 1351-2 Travel Voucher of Subvoucher 1 March 2000  
 DD FORM 1934 Geneva Conventions Identity Card for Medical and Religious Personnel Who Serve in or Accompany the Armed Forces SERVE IN OR ACCOMPANY THE ARMED FORCES 1 July 1974  
 DODFMR 700.14R DoD Financial Management Regulation

### Field Manuals

FM 101-5 Staff Organization and Operations 31 May 1997  
 FM 101-5-1 Operational Terms and Graphics 30 September 1997  
 FM 12-6 Personnel Doctrine 9 September 1994  
 FM 55-12 Movement of Units in Air Force Aircraft  
 FM 71-100 Armored & Mechanized Division Operations (How to Fight) 28 August 1996

### Other Product Types

AAA-002 EDAS Cycle Audit Sheet  
 AAA-105 Interface Output Transaction List  
 AAA-117 Unit Enlisted Advancement Report (AA)  
 AAA-132 Assignment Adjustment Roster  
 AAA-133 Gaining Command Deletion/Deferment Notices  
 AAA-161 Unit Manning Report Position and Incumbent Data  
 AAA-252 Battle Roster Report  
 AAA-347 Enlisted Records Brief  
 DCIPS FORWARD USER MANUAL Defense Casualty Information Processing System Forward User Manual 1 July 2003  
 DD FORM 1172 Application for Uniformed Services Identification Card-DEERS Enrollment 1 September 1996  
 DD FORM 214 Certificate of Release or Discharge from Active Duty 1 November 1988  
 DD FORM 2558 Authorization to Start, Stop, or Change an Allotment for Active Duty or Retired Personnel 1 November 1996  
 DD FORM 2559 Savings Bond Allotment Authorization/Active Duty or Retired Pay 1 March 1990  
 DD FORM 2A(ACT) Active Duty Military ID Card 1 July 1974  
 DD FORM 458 Charge Sheet 1 August 1984  
 DD FORM 93 Record of Emergency Data 1 August 1988  
 IRS FORM W-4 Employee's Withholding Allowance Certificate  
 MILPER MEMO 95-1 Process Requests for Deletion, Deferment and Early Arrival 1 June 1995  
 MILPER MESSAGE 02-114 Processing NCO-ERS with Gaps in Reporting Periods (Update)  
 MILPER MESSAGE 02-122 Processing NCO-ERS with Gaps in Reporting Periods (Clarification)  
 PRR Personnel Requirements Report  
 SF 520 Electrocardiographic Record  
 SF 600 Chronological Record of Medical Care  
 SF 88 Report of Medical Examination 1 October 1994  
 SF 93 Report of Medical History 1 June 1996

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| SGLV FORM 8285 | Request for Insurance   |
| SGLV FORM 8286 | Servicemembers' Group Life Insurance Election and Certificate |

### Related Publications

Related publications are sources of additional information. They are not required in order to understand this publication.

#### Army Regulations

|            |   |
|------------|---|
| AR 600-8-6 | Personnel Accounting and Strength Reporting 24 September 1998 |
| AR 614-200 | Enlisted Assignments and Utilization Management 12 July 2001  |

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| DA PAM 600-8  | Management and Administrative Procedures 1 August 1986           |
| DA PAM 611-21 | Military Occupational Classification and Structure 31 March 1999 |

#### Other Product Types

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| AAA-161 | Unit Manning Report Position and Incumbent Data |
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#### Army Correspondence Course Program Subcourses

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| AG 0222 | Preparing Special Purpose Memorandums and Letters 1 March 1994 |
| AG 0613 | Certifying Enlisted Retirement Applications 1 March 1993       |
| IS 1400 | Effective Writing  |
| IS 1401 | Effective Army Writing   |
| IS 1402 | Preparation for Writing  |
| IS 1403 | Putting Your Thoughts on Paper                                 |
| IS 1404 | Spelling, Abbreviation, and Capitalization                     |
| IS 1405 | Punctuation  |
| IS 1406 | Reviewing Your Writing   |
| IS 1408 | Effective Written Communications                               |

#### Army Regulations

|             |   |
|-------------|---|
| AR 135-100  | Appointment of Commissioned and Warrant Officers of the Army 1 September 1994       |
| AR 220-1    | Unit Status Reporting 10 June 2003  |
| AR 25-11    | Record Communications and the Privacy Communications System 4 September 1990        |
| AR 25-30    | The Army Publishing Program 15 July 2002  |
| AR 25-400-2 | The Modern Army Recordkeeping System (MARKS) 18 March 2003                          |
| AR 25-50    | Preparing and Managing Correspondence 3 June 2002                                   |
| AR 25-51    | Official Mail and Distribution Management 30 November 1992                          |
| AR 25-55    | The Department of the Army Freedom of Information Act Program 1 November 1997       |
| AR 310-50   | Authorized Abbreviations, Brevity Codes and Acronyms 15 November 1985               |
| AR 37-104-4 | Military Pay and Allowance Policy and Procedures-Active Component 30 September 1994 |

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| AR 380-5     | Department of the Army Information Security Program 29 September 2000   |
| AR 50-5      | Nuclear Security 1 August 2000  |
| AR 50-6      | Chemical Surety 26 June 2001  |
| AR 600-38    | Meal Card Management System 11 March 1988   |
| AR 600-60    | Physical Performance Evaluation System 25 June 2002   |
| AR 600-8     | Military Personnel Management 1 October 1989  |
| AR 600-8-1   | Army Casualty Operations/Assistance/Insurance 20 October 1994   |
| AR 600-8-10  | Leaves and Passes 1 July 1994   |
| AR 600-8-104 | Military Personnel Information Management/Records 27 April 1992   |
| AR 600-8-105 | Military Orders 28 October 1994   |
| AR 600-8-11  | Reassignment 1 October 1990   |
| AR 600-8-111 | Wartime Replacement Operations 13 August 1993   |
| AR 600-8-14  | Identification Cards for Members of Uniformed Services, Their Family Members, and Other Eligible Personnel 29 July 1999 |
| AR 600-8-19  | Enlisted Promotions and Reductions 2 May 2003   |
| AR 600-8-2   | Suspension of Favorable Personnel Actions (FLAGS) 30 October 1987   |
| AR 600-8-22  | Military Awards 25 February 1995  |
| AR 600-8-24  | Officer Transfers and Discharges 3 February 2003  |
| AR 600-8-29  | Officer Promotions 30 November 1994   |
| AR 600-8-7   | Retirement Services Program 1 June 2000   |
| AR 600-9     | The Army Weight Control Program 10 June 1987  |
| AR 601-210   | Regular Army and Army Reserve Enlistment Program 28 February 1995   |
| AR 614-200   | Enlisted Assignments and Utilization Management 12 July 2001  |
| AR 614-30    | Overseas Service 30 August 2001   |
| AR 623-105   | Officer Evaluation Reporting System 1 April 1998  |
| AR 623-205   | Noncommissioned Officer Evaluation Reporting System 15 May 2002   |
| AR 630-10    | Absence Without Leave, Desertion, and Administration of Personnel Involved in Civilian Court Proceedings 31 August 2001 |
| AR 635-10    | Processing Personnel for Separation 1 July 1984   |
| AR 635-200   | Enlisted Personnel 1 November 2000  |
| AR 635-5     | Separation Documents 15 September 2000  |
| AR 680-29    | Military Personnel Organization, and Type of Transaction Codes 29 March 1996  |
| AR 690-400   | Total Army Performance Evaluation System (Chapter 4302) 16 August 1998  |

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| DA FORM 1155     | Witness Statement on Individual 1 June 1966  |
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| DA FORM 2166-8-1 | NCO Counseling Checklist/Record 1 October 2001                                       |
| DA FORM 2339     | Application for Voluntary Retirement 1 June 1983                                     |
| DA FORM 2715-R   | Unit Status Report 1 April 1996  |
| DA FORM 3072-R   | Waiver of Disqualification for Reenlistment/Promotion in the Regular Army 1 May 1988 |
| DA FORM 31       | Request Authority for Leave 1 September 1993   |
| DA FORM 3349     | Physical Profile 1 May 1986  |
| DA FORM 3355     | Promotion Point Worksheet 1 April 1991   |

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| DA FORM 3355-E | Promotion Point Worksheet 1 April 1991                          |
| DA FORM 3356   | Board Member Appraisal (Worksheet) 1 April 1991                 |
| DA FORM 3357   | Board Recommendation 1 April 1991                               |
| DA FORM 3986-R | Personnel Asset Inventory 1 October 1993                        |
| DA FORM 4036-R | Medical and Dental Preparation for Overseas Movement 1 May 1990 |
| DA FORM 4037   | Officer Record Brief 1 July 1982                                |
| DA FORM 4179-R | Leave Control Log 1 September 1993                              |
| DA FORM 4187   | Personnel Action 1 April 1995                                   |
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| DA FORM 4787-R | Reassignment Processing 1 May 1990                              |
| DA FORM 4856   | General Counseling Form 1 June 1985                             |
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| DA FORM 5117-R | Reassignment Control Sheet 1 May 1990                           |
| DA FORM 5118-R | Reassignment Status and Election Statement 1 May 1990           |
| DA FORM 5138-R | Separation Action Control Sheet 1 July 1984                     |
| DA FORM 5367-R | Personnel Status Report 1 December 1984                         |
| DA FORM 647    | Personnel Register 1 August 1978                                |
| DA FORM 647-1  | Personnel Register 1 August 1978                                |
| DA FORM 67-9   | Officer Evaluation Report 1 October 1997                        |

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| DA PAM 25-33    | User's Guide for Army Publications and Forms 15 September 1996                            |
| DA PAM 351-4    | U. S. Army Formal Schools Catalog 30 October 1995   |
| DA PAM 360-539  | SBP Survivor Benefit Plan for the Uniformed Services - The Simple Facts<br>1 January 1994 |
| DA PAM 600-67   | Effective Writing for Army Leaders 20 June 1986   |
| DA PAM 600-72   | Army Manpower Mobilization 8 July 1990  |
| DA PAM 600-8    | Management and Administrative Procedures 1 August 1986                                    |
| DA PAM 600-8-11 | Military Personnel Office Separation Processing Procedures 1 July 1984                    |
| DA PAM 608-4    | A Guide for the Survivors of Deceased Army Members 23 February<br>1989                    |
| DA PAM 611-21   | Military Occupational Classification and Structure 31 March 1999                          |
| DA PAM 623-205  | The Noncommissioned Officer Evaluation Reporting System "In Brief" 29<br>January 1988     |

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| DD FORM 1351   | Travel Voucher 1 July 1999                             |
| DD FORM 1351-2 | Travel Voucher of Subvoucher 1 March 2000              |
| DODDIR 1320.12 | Commissioned Officer Promotion Program 30 October 1996 |

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| FM 101-5   | Staff Organization and Operations 31 May 1997                             |
| FM 101-5-1 | Operational Terms and Graphics 30 September 1997                          |
| FM 12-6    | Personnel Doctrine 9 September 1994                                       |
| FM 55-12   | Movement of Units in Air Force Aircraft                                   |
| FM 71-100  | Armored & Mechanized Division Operations (How to Fight) 28 August<br>1996 |

**Other Product Types**

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| AAA-105                   | Interface Output Transaction List   |
| AAA-132                   | Assignment Adjustment Roster  |
| AAA-133                   | Gaining Command Deletion/Deferment Notices  |
| AAA-134                   | Automated Foreign Service Tour Extension (FSTE) Report  |
| AAA-161                   | Unit Manning Report Position and Incumbent Data   |
| AAA-227                   | EDAS Gaining Assignment Report  |
| AAA-232                   | EDAS Letter of Instruction (LOI)  |
| AAA-233                   | EDAS Losing Assignment Recap  |
| AAA-234                   | EDAS Individual Losing Assignment   |
| DA LABEL 87               | For Official Use Only Cover Sheet 1 April 1982  |
| DCIPS FORWARD USER MANUAL | Defense Casualty Information Processing System Forward User Manual 1 July 2003                            |
| DD FORM 1392              | Data Message Form 1 August 1962   |
| DD FORM 1966 SERIES       | Record of Military Processing Armed Forces of the United States 1 August 1997                             |
| DD FORM 214               | Certificate of Release or Discharge from Active Duty 1 November 1988                                      |
| DD FORM 2558              | Authorization to Start, Stop, or Change an Allotment for Active Duty or Retired Personnel 1 November 1996 |
| DD FORM 2A(ACT)           | Active Duty Military ID Card 1 July 1974  |
| DD FORM 458               | Charge Sheet 1 August 1984  |
| DD FORM 93                | Record of Emergency Data 1 August 1988  |
| MILPER MEMO 98-044        | Procedural Changes to AR 623-205 13 February 1998   |
| MISC PUB 38-1             | U.S. Government Printing Office (GPO) Style Manual  |
| SF 703                    | Top Secret Cover Sheet 1 August 1985  |
| SF 704                    | Secret Cover Sheet 1 August 1985  |
| SF 705                    | Confidential Cover Sheet 1 August 1985  |
| SF 88                     | Report of Medical Examination 1 October 1994  |
| SF 93                     | Report of Medical History 1 June 1996   |
| SGLV FORM 8286            | Servicemembers' Group Life Insurance Election and Certificate   |
| SOFTWARE-JSS              | Joint Uniform Military Pay System-Active Component/Joint Service Software 1 July 1991                     |
| USERS MANUAL-ADSM-AC      | Automated Data System Manual-Active Component (ADSM-AC) 1 July 1991                                       |
| USERS MANUAL-ADSM-RC      | Automated Data System Manual - Reserve Component (ADSM-RC) 1 July 1991                                    |

**Technical Manuals**

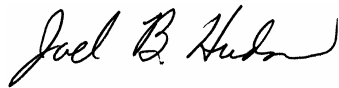
|                   |   |
|-------------------|---|
| TM 11-7010-213-12 | Operator's and Organizational Maintenance Manual for Tactical Army Combat Service Support Computer System (TACCS) AN/TYQ-33 (V) 15 May 1992 |
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**3 DECEMBER 2003**

By Order of the Secretary of the Army and the Air Force:

**PETER J. SCHOOMAKER**  
*General, United States Army*  
*Chief of Staff*

Official:



**JOEL B. HUDSON**  
*Administrative Assistant to the*  
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