

# Sector Hampton Roads Reserve Force Standard Operating Procedures (SOP)



7 Feb 2019

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## Contents

<b>Acronym List .....</b>	<b>5</b>
<b>Chapter 1: Purpose and Scope .....</b>	<b>7</b>
1-1 Purpose .....	7
1-2 Scope .....	7
1-3 References .....	7
<b>Chapter 2: Roles and Responsibilities .....</b>	<b>9</b>
2-1 Reserve Force Readiness System (RFRS) .....	9
2-2 Sector Commander .....	10
2-3 Active Duty Department Head/OIC .....	10
2-4 Senior Reserve Officer (SRO) .....	11
2-5 Reserve Command Chief (RCC) .....	12
2-6 Reserve Department Advisor (RDA)/Team Leader/Supervisors .....	12
2-7 Senior Enlisted Reserve Advisor (SERA) .....	13
2-8 Select Reserves (SELRES) .....	13
<b>Chapter 3: Reserve Component (RC) .....</b>	<b>14</b>
3-1 Reserve Component Guiding Principles .....	14
3-2 Commandant Reserve Policy Statement .....	15
<b>Chapter 4: Communication Support .....</b>	<b>16</b>
4-1 Sector Hampton Roads Flow of Information .....	16
4-2 Email List .....	16
4-3 Communications Plan and Process .....	16
<b>Chapter 5: Annual Planning Items .....</b>	<b>17</b>
5-1 Annual Calendar .....	17
5-2 FY Inactive Duty for Training (IDT) Orders Memo .....	18
5-3 Exercise Planning .....	18
<b>Chapter 6: Inactive Duty for Training (IDT) .....</b>	<b>18</b>
6-1 IDT Scheduling & Pay Processing .....	20
6-2 Alternate Drill Site Location .....	22
6-3 IDT Berthing .....	22
<b>Chapter 7: Active Duty for Training (ADT) .....</b>	<b>23</b>
<b>Chapter 8: Mobilization/ADOS/EAD .....</b>	<b>26</b>
<b>Chapter 9: Readiness Compliance Process and Notifications .....</b>	<b>28</b>
9-1 RED in readiness .....	29
9-2 Sample CG-3307 for Non-Compliance .....	29
<b>Chapter 10: Awards .....</b>	<b>29</b>
<b>Chapter 11: Enlisted Evaluation System .....</b>	<b>30</b>
<b>Chapter 12: Officer Evaluation System .....</b>	<b>30</b>
<b>Chapter 13: Change in Reserve Component Category (RCC) .....</b>	<b>30</b>
13-1 RCC Workflows .....	32
<b>Chapter 14: Reserve assignments .....</b>	<b>33</b>
<b>Chapter 15: Clearance Validation .....</b>	<b>33</b>
<b>Chapter 16: Competency and Training Management .....</b>	<b>33</b>
16-1 Officer Specialty Management System .....	33
16-2 C- Schools .....	34
16-3 Position-Assigned Competency Update Process .....	34
<b>Chapter 17: New Member Welcome Aboard Process .....</b>	<b>35</b>
17-1 New Member Reserve Indoctrination .....	35
17-2 Indoctrination Schedule .....	36

<b>Chapter 18: CGBI Personal Email Notifications .....</b>	<b>37</b>
<b>Chapter 19: Reserve Data Analysis .....</b>	<b>37</b>
19-1 ADT/IDT Details.....	37
<b>Chapter 20: Additional information .....</b>	<b>38</b>

## Acronym List

AC	Active Component (active duty)
ADHC	Active Duty for Health Care
ADOS	Active Duty for Operational Support
ADT	Active Duty for Training
AOPS	Abstract of Operations
ASL	Active Status List
CAC	Common Access Card
CGBI	Coast Guard Business Intelligence
CP/FR	Contingency Planning/Force Readiness
CSB	Contingency Staffing Bill
CSO	Command Security Officer
DA	Direct Access
DOL	Director of Operational Logistics
DTO	Department Training Officer
DXR	District Reserve
EAD	Extended Active Duty
ePAL	Electronic Personnel Allowance List
ESGR	Employer Support of the Guard and Reserve
ETQC	Education and Training Quota Management Command
ETR	Electronic Training Request
FTS	Full-Time Support
FPD	Financial Procurement Desktop
GAL	Global Address List
GTCC	Government Travel Credit Card
ICS	Incident Command System
IDT	Inactive Duty for Training
IMR	Individual Medical Readiness
IRR	Individual Ready Reserve
ISL	Inactive Status List

ITP	Individual Training Plan
LOD	Line of Duty
MSU	Marine Safety Unit
MT	Mandated Training
NOE	Notice of Eligibility
OJT	On-the-Job Training
OSC	Officer Specialty Code
PAL	Personnel Allowance List
PDR	Personnel Data Record
PQS	Performance Qualification Standard
PSC	Personnel Service Center
RCC	Reserve Command Chief
RDA	Reserve Department Advisor
RELAD	Release from Active Duty
RFRS	Reserve Force Readiness System
RMP	Readiness Management Period
RPA	Reserve Program Administrator
RPAL	Reserve Personnel Allowance List
RPM	Reserve Personnel Manual
SELRES	Selected Reserve
SERA	Senior Enlisted Reserve Advisor
SHR	Sector Hampton Roads
SME	Subject Matter Expert
SOP	Standard Operating Procedures
SRO	Senior Reserve Officer
TDY	Temporary Duty
TMS	Training Management System
TMT	Training Management Tool
TO	Training Officer
VO	Verifying Officer
WQSB	Watch Quarter Station Bill

## Chapter 1: Purpose and Scope

### 1-1 Purpose

The Reserve Force Standard Operating Procedures (SOP) will outline and document the roles, services, and processes managed and implemented by the RFRS staff at Sector Hampton Roads for the Reserve Component.

This is the first edition of the SOP and is a starting point to capture processes and best practices to improve communication between and amongst Reserve and Active Duty members and the RFRS staff. This document will be reviewed and updated annually (by 31 Oct). Any changes should be notated on the Record of Changes page within the document.

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### 1-2 Scope

The scope of this SOP will primarily focus on the standardization and execution of frequent administrative processes used to manage and oversee Sector reserve member readiness compliance.

### 1-3 References

- (a) Reserve Policy Manual, COMDTINST M1001.28 (series)
- (b) Reserve Force Readiness System (RFRS) Staff Element Responsibilities, COMDTINST 5320.4A (series)
- (c) D5 RFRS Branch (DXR): <https://cg.portal.uscg.mil/units/d5/dx/dxr/SitePages/Home.aspx>
- (d) Military Medals and Awards Manual, COMDTINST M1650.25E
- (e) Personnel and Pay Procedures Manual, PPCINST M1000.2B
- (f) Reserve Component (RC) Line of Duty Determination for Medical and Dental Treatments and Incapacitation Pay Entitlements Department of Defense Instruction, DoDI1241.01
- (g) Coast Guard Medical Manual, COMDTINST M6000.1 (series)
- (h) Physical Disability Evaluation System, COMDTINST M1850.2 (series)
- (i) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2B COMDTINST M1000.2B
- (j) Military Separations, COMDTINST M1000.4 (series)
- (k) Deputy Commandant for Mission Support: <https://www.dcms.uscg.mil/>
- (l) U.S. Coast Guard Competency Management System Manual, COMDTINST M5300.2 (series)
- (m) Coast Guard Officer Specialty Management System Manual, COMDTINST M5300.3 (series)
- (n) Performance, Training and Education Manual, COMDTINST M1500.10 (series)
- (o) Sector Hampton Roads Enlisted Evaluation System Procedures and Rating Chain, SECHRINST 1616.1
- (p) Officer Accessions, Evaluations, and Promotions COMDTINST M1000.3 (series)
- (q) Government Travel Charge Card (GTCC) Program, Policies, and Procedures COMDTINST M4600.18

- (r) Certificate of Release or Discharge from Active Duty, DD Form 214 CGPSCINST 1900.1 (series)
- (s) Coast Guard Weight and Body Fat Standards Program Manual COMDTINST M1020.8 (series)
- (t) Sector Hampton Roads Awards Procedures, SECHRINST 1650.1
- (u) Senior Enlisted Reserve Advisor (SERA) Program COMDTINST M1306.3 (series)



## Chapter 2: Roles and Responsibilities

The below roles and responsibilities are highlights from ref (b).

### 2-1 Reserve Force Readiness System (RFRS)

RFRS is responsible for the management of the Reserve Program at Sector Hampton Roads. The current staff is comprised of four (4) FTS billets. RFRS utilizes a distribution list for all communications. [D05-DG-SectorHR-RFRS@uscg.mil](mailto:D05-DG-SectorHR-RFRS@uscg.mil).

#### RFRS Contact Information

RFRS Member	Position	Contact Info
LT Jeff Hiatt	RFRS Branch Chief, Reserve Program Administrator (RPA)	(757) 483-8566
Ms. Kristin Beard	Reserve Readiness	(757) 295-2293
BMC Josh Reagan	Readiness and Training	(757) 686-6733
YN1 Paulina Reed	Readiness and Training	(757) 295-2305

The primary function of the Sector RFRS is to facilitate and promote SELRES mobilization readiness and administrative preparation to execute assigned contingency roles through augmentation and training. Additional functions include:

- Provide the Sector Commander with information regarding the deployability of the Reserve force and serve as the Reserve SME for the AC and the SELRES assigned;
- Collaborate with the SRO, Silver Badge, Department Heads, subordinate units/SERAs, and other RFRS elements throughout the Coast Guard, as necessary, to meet command needs/requirements;
- Coordinate mobilization/demobilization of the Sector SELRES workforce and maintain access to contact information for mobilization and recall;
- Manage SELRES positions on the RPAL;
- Monitor reserve workforce participation status, RCC transfers, coordinate disciplinary actions for assigned reservists, and advise the command and DXR staff on reserve administrative matters such as: discharge, retirement, government travel card issues, change in rate packages, pay and personnel discrepancies, LOD status, NOE, ADHC, Medical Hold, and other medical items;

- Serve as the initial contact for all incoming SELRES members, member information passed to RDA;
- Maintain GTCC SELRES accounts as the hierarchy manager and increase limits in accordance with policy;
- Facilitate retirement requests through SHR Admin and follow up with SELRES retiring;
- Make SELRES aware of voluntary active duty opportunities (EAD, ADOS) through use of email distribution group.

## 2-2 Sector Commander

The Sector Commander holds ultimate responsibility and is directly accountable for the total force, including the readiness of assigned reservists. Through an appropriate level of administrative support, unit commanders must ensure Reserve readiness by providing opportunities for mobilization training and for augmentation in support of the Commandant's Reserve Policy Statement. Sector Commander's responsibilities include:

- Ensure a qualified Reserve workforce capable of delivering Critical Competencies to meet the Coast Guard Reserves Core Strategic Functions;
- Provide guidance and mentorship to the SRO.

## 2-3 Active Duty Department Head/OIC

Oversee all SELRES assigned to their department:

- Collaborate with RFRS to track assigned SELRES performance against participation and readiness standards including IDT/ADT, ASQ, medical, dental, weight, GTCC, and other required readiness related data. Highlight discrepancies for assigned SELRES to both members and the command to expedite resolution or assist in participation compliance measures;
- Interact with RDA/SERA to ensure department is run in accordance with Reserve Policy and Sector Hampton Roads policy;
- Ensure each division has an active duty E-6 or above as Reserve liaison; AC Supervisors must identify the liaison to the RDA;
- Ensure training is held for SELRES every drill weekend with coordination between department liaison and RDA/team leader. Training may span CG-wide requirements to department specific issues;
- Maintain the RPAL that aligns mobilization requirements and staffing requirements in coordination with the SRO and RCC;
- Recommend corrections and changes to the RPAL through RFRS;

- Ensure the overall readiness and mobilization ability of SELRES including compliance with medical, dental, ASQ, weigh-in, and all other administrative requirements (i.e. security clearance, IT/IS system access and verifications, Generally Mandated Training, etc.) is completed for mobilization and administrative readiness;
- Regularly touch base with RDA to ensure SELRES members are in compliance with drilling requirements (IDT & ADT);
- Execute the programs, policies, and training/support to SELRES and their families to be ready for and supported during periods of mobilization;
- Execute annual training plan, including Reserve All-Hands events, mandated training, ICS, and other training required for highest levels of achievement in terms of member job role and readiness, mobilization requirements;
- Assist SELRES with training and development goals and objectives; Ensure IDPs are completed and ITPs are followed;
- Coordinate with the Sector Training Officer and Command Cadre to support SELRES members for job performance and knowledge development as well as advancements and certifications;
- Ensure timely updates and reporting of SELRES training completion, TMT, record documentation, board and qualifications letters, etc.;
- Provide workspace for SELRES members;
- Complete officer evaluations and enlisted marks in a timely manner; and
- Work with the Command Cadre in recognition and awards for SELRES members and unit performance inclusive of the reserve component.

#### 2-4 Senior Reserve Officer (SRO)

The SRO, CDR Maureen Kallgren, serves the Sector Commander as a subject matter expert on reserve issues and as the primary advocate for assigned reserve personnel. These responsibilities include assuring the administrative welfare of reservists and facilitating training for mobilization. The SRO collaterally provides guidance and leadership to Coast Guard junior officers and enlisted personnel assigned to the Sector and serves as a role model and mentor providing knowledge-based career and personnel professional guidance.

- The primary duty for all SROs is to gain the knowledge, skills, and qualifications required for their mobilization assignment. While qualifying for mobilization takes precedence over augmentation, once SROs have attained their mobilization qualification(s), their commands are strongly encouraged to have their assigned SRO utilize their skill sets and incorporate them into the commands decision-making process to enhance their overall exposure and awareness of their

assigned unit's responsibilities. Commands must ensure any augmentation activities for SROs directly support the member gaining the knowledge, skills and qualifications necessary for mobilization. SROs are expected to maintain their qualifications for mobilization while they concurrently fulfill their leadership responsibilities to their command;

- Collaborate with the command cadre, senior staff, Gold/Silver Badge command master chiefs and RFRS staff on Reserve administration, training, decisions, and recommendations that affect assigned Reserve personnel;
- Keep informed on issues, policies, and procedures affecting Reserve personnel, ensuring assigned reservists have access to all current information.

## 2-5 Reserve Command Chief (RCC)

The Sector RCC (Sector Silver Badge), MKC William Boyle, promotes balance between workforce needs, Command goals, and Coast Guard requirements. Accessible to all crewmembers, the Sector RCC encourages communications between Reserve Command Cadre and enlisted personnel affecting personnel and mission accomplishment and to assist with the resolution of unit level reserve problems and concerns.

## 2-6 Reserve Department Advisor (RDA)/Team Leader/Supervisors

RDA is the primary liaison between the AC Department Head and the reserve department. RDA may employ other officers and Chiefs assigned in the department as team leaders/supervisors:

- Collaborate with RFRS to track assigned SELRES performance against participation and readiness standards including IDT/ADT, ASQ, medical, dental, weight, GTCC, and other required readiness related data. Highlight discrepancies for assigned SELRES to both members and the command to expedite resolution or assist in participation compliance measures;
- Ensure SELRES members are in compliance with drilling requirements (IDT & ADT);
- Approve member IDT drills and forward to IDT distribution list for completion;
- Coordinate ADT dates for SELRES between AC and SELRES for best suitable time to accomplish training and/or needs of department;
- Recommend corrections and changes to the RPAL through RFRS;
- Oversee and ensure SELRES are up to date in mobilization readiness;
- Track SELRES Awards (i.e. Good Conduct) and ensure timely processing of awards;
- Assist members in obtaining access to all applicable CG databases; and
- Take appropriate administrative or disciplinary action for SELRES who do not meet standards or abide by the Coast Guard's Core Values.

## 2-7 Senior Enlisted Reserve Advisor (SERA)

Report directly to unit officer-in-charge or Supervisor, in coordination with the RDA/executive petty officer, to advise the command on Reserve policy, training, individual SELRES issues, and Reserve billet management. SERAs are assigned to administer the Reserve program and are not required to maintain operational competencies. SERAs have been designated at the following units: STA Milford Haven, STA Little Creek, STA Portsmouth, STA Cape Charles, and Sector Field Office Eastern Shore (SFO ES).

- Collaborate with RFRS to track assigned SELRES performance against participation and readiness standards including IDT/ADT, ASQ, medical, dental, weight, GTCC, and other required readiness related data. Highlight discrepancies for assigned SELRES to both members and the command to expedite resolution or assist in participation compliance measures;
- Provide input for pending disciplinary actions against assigned reservists;
- Review assigned reservist Individual Development Plans (IDPs) and ITPs for completion, content, and progress. Work with supervisors and RFRS staff elements to resolve discrepancies;
- Serve as an advocate and mentor for assigned reservists, ensuring professional and leadership development. Track assigned reservist's progress towards certification and advise reservists and the command regarding progress status;
- Collaborate with the unit-training officer to monitor MT and unit operational training for assigned SELRES. Ensure non-rated members are scheduled to attend "A" school. Monitor availability and attendance at "C" schools relevant to assigned reservist's training, certification, and professional development requirements;
- Coordinate drill schedules of assigned reservists with unit AC supervisors as required;
- Monitor issuance of all mission-required equipment, including personal gear and PPE necessary to perform missions for assigned reservists. Assist in resolving shortfalls with appropriate members of command, SRO, and RFRS staff; and
- Verify and validate assigned SELRES activities and training have been input into management information systems, e.g., TMT, DA, AOPS, MRTT, MISLE, etc.

## 2-8 Select Reserves (SELRES)

SELRES is an actively drilling reserve member whose focus is on earning qualifications in order to augment SHR and mobilize in response to national needs per ref (a):

- Attend at least 90% of scheduled, authorized IDT drills with pay per fiscal year;
- Complete ADT for 12 days (exclusive of travel time) each fiscal year unless otherwise advised;
- Complete an application to obtain GTCC within 2 months of reporting, activate card and maintain account information;

- Complete the ASQ in October annually or anytime deployable status changes (incapacitation, confirmed pregnancy, etc.) by using job aide available at the following link;

[https://cg.portal.uscg.mil/units/ppc/RoboHelp/DAGP/ReserveSSMBR/ASQ\\_Self\\_Service\\_Member.aspx](https://cg.portal.uscg.mil/units/ppc/RoboHelp/DAGP/ReserveSSMBR/ASQ_Self_Service_Member.aspx)

- Maintain updated DA information and notify supervisor of changes to point of contact information immediately;
- Maintain fitness and weight standards;
- Maintain CGBI readiness;
- Obtain qualifications in pre-determined time established by command;
- Ensure capabilities to earn and retain the appropriate security clearance for job requirements; and
- Maintain access to DA, CG Portal and other databases as appropriate.

### **Chapter 3: Reserve Component (RC)**

#### **3-1 Reserve Component Guiding Principles**

The guiding principles for the Sector Reserve program are:

- Inactive Duty for Training (IDT) and Active Duty for Training (ADT) must improve mobilization readiness;
- Augmentation using qualified reserve personnel is highly encouraged as a means to maintain and strengthen Coast Guard wide surge capacity for local, regional, and national contingency operations; and
- Position assignments are prioritized based on opportunities for mobilization training, augmentation, and professional development.

### 3-2 Commandant Reserve Policy Statement



THE COMMANDANT OF THE UNITED STATES COAST GUARD  
Washington, DC 20593

#### RESERVE COMPONENT POLICY STATEMENT

America's Coast Guard is an Armed Service, a critical instrument of national security, and a key component to the Nation's emergency response capability. As the Coast Guard's ready force in garrison, the Reserve Component provides operationally capable and ready personnel to support Coast Guard surge and mobilization requirements in the Homeland and abroad. For over seventy-five years, our extraordinary reservists have accomplished this through augmenting the Service's day-to-day missions while standing ready to mobilize in times of crisis.

Serving as the Coast Guard's only dedicated surge force the Reserve Component is a contingency-based workforce, trained locally and deployed globally to provide appropriately trained personnel to meet mission requirements within the prioritized focus areas of Defense Operations, Ports, Waterways, and Coastal Security, Incident Response and Management, & Mission Support.

It is the duty of every commander, commanding officer, officer-in-charge and program manager to provide the leadership and training necessary for assigned Reserve Component members to be expertly trained and prepared for active-duty when and where they are required. Active Duty for Training (ADT), Inactive Duty Training (IDT) and assigned competencies should relate to the prioritized focus areas. Additionally I place the same level of responsibility on every reservist to acquire and maintain the skills and personal readiness that our Coast Guard mission sets and core values demand.

The Reserve Component is as relevant and critical to the Coast Guard's organizational success today as at any time since 1941. We will continue to honor our citizen-sailors and meet the needs of the Nation by adhering to our core values and bringing a total workforce perspective to solve complex problems.

A handwritten signature in black ink, reading "Karl L. Schultz".

KARL L. SCHULTZ  
Admiral, U.S. Coast Guard

## Chapter 4: Communication Support

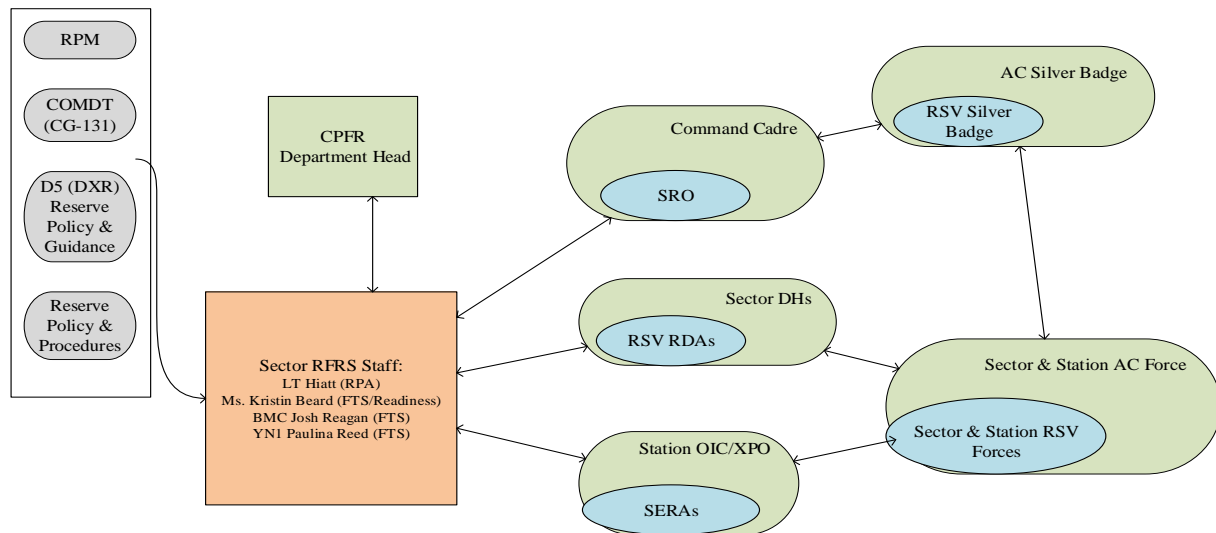
RFRS provides communication support when conducting calls and meetings with reserve leadership personnel. Communication support includes attending pre-drill teleconference, SRO monthly tickler, and SRO Monthly Reserve Report. Other pertinent information can be found on RFRS portal page:

<https://cg.portal.uscg.mil/units/sectorhamptonroads/Planning/Pages/RFRS.aspx>

### 4-1 Sector Hampton Roads Flow of Information

Efficient and effective communication between RFRS, SELRES, Sector Hampton Roads Command Cadre and field units is vital. The diagram below outlines the flow of information regarding reserve policy and procedures from RFRS to Sector personnel and field unit personnel.

#### Sector Hampton Roads Flow of Information



### 4-2 Email List

RFRS will maintain reserve-specific rosters to be used for email notifications, mobilization efforts, and overall RPAL employee roster maintenance.

Each SELRES are required to validate their personal emails whenever changes in both DA and with RFRS. DA updates will be conducted by the individual member.

### 4-3 Communications Plan and Process

The best form of communication with RFRS is an email to [D05-DG-SectorHR-RFRS@uscg.mil](mailto:D05-DG-SectorHR-RFRS@uscg.mil). This allows for all of RFRS to engage in email and address the issue as soon as possible. Initial



communications in regards to SELRES will be coordinated through RDAs. Further conversations will have supervisor carbon copied in emails. RFRS will utilize all methods (email, telephone, text) to correspond with individual SELRES members when necessary. All SELRES members are required to answer correspondence throughout the month in order for RFRS to best assist. RFRS will provide a CAC reader for home use as an option, which also allows access to CGPortal. Any problems with CAC can be submitted to CG-FIXIT ticket.

## Chapter 5: Annual Planning Items

Each fiscal year, RFRS will organize annual events and develop/distribute yearly documentation for Sector personnel. Planning items include but are not limited to the FY IDT Orders Memo and Exercise Planning.

### 5-1 Annual Calendar

Month	Task
October	-Start new Fiscal Year (FY) -Weigh-in (NLT last day of month) -Flu Shot (ALCOAST 308/18. Due date 1/15/19) -Annual Verifications (due between October/November) -Annual Screening Questionnaire (ASQ) (due Oct 31) -Reserve Service wide Exam (RSWE)
November	-Flu Shot (ALCOAST 308/18. Due date 1/15/19) -Annual Verifications (due between October/November) -E-8 EER (NLT last day of the month)
December	-Flu Shot (ALCOAST 308/18. Due date 1/15/19) -All MT Expires (last day of month) -Boat Crew currency hours expire (Last day of month)
January	-Start new Calendar Year (CY) -E-1/E-2 EER (NLT last day of the month)
February	-E-3 EER (NLT last day of the month)
March	-E-4 EER (NLT last day of the month) -O-1 OER (NLT last day of the month) -O-5 OER (annually, last day of the month)
April	-- <b>All ADT requests submitted &amp; Supervisor recommended (1st of the month)</b> -- <b>All IDT requests submitted &amp; approved (1st of the month)</b> -Weigh-in (NLT last day of month) -E-5 EER (NLT last day of the month) -CWO4 OER (biennial, last day of the month) -O-4 OER (biennial/even years, last day of the month)
May	-E-6 EER (NLT last day of the month) -O-3 OER (biennial/even years, last day of the month)
June	-E-9 EER (NLT last day of the month) -CWO2 OER (biennial, last day of the month) -O-2 In Zone for O-3 OER (last day of the month)
July	-CWO3 OER (biennial, last day of the month) -O-2 OER (last day of the month)
August	-N/A
September	-End FY (last day of the month) -E-7 EER (last day of the month)

## 5-2 FY Inactive Duty for Training (IDT) Orders Memo

Annually, RFRS will collaborate with the SRO and RDAs to develop the upcoming fiscal year IDT Orders Memo. This memorandum contains designated drill weekend dates. Memo will be published prior to October 1, so that SELRES are given adequate notification for scheduling purposes. The memo shall be followed unless given prior approval from Supervisor/Team Leader/ RDA or SRO.

## 5-3 Exercise Planning

The CP/FR staff will provide opportunities for ICS qualification attainment throughout the year. Exercise dates will be sent to SELRES as soon as a calendar is compiled for greatest participation. Exercise focus areas will be determined each fiscal year by CP/FR.

## Chapter 6: Inactive Duty for Training (IDT)

IDT drills are performed throughout the fiscal year (typically 4 drills per month); any approval for batch drill requests for more than 3 days in a row must be authorized by the SRO and AC Department Head in writing and a copy sent to RFRS.

SELRES members assigned to Sector Hampton Roads and field units are authorized only 48 IDT drills annually. They must attend at least 90% scheduled authorized IDT drills with pay per fiscal year. Reserve Supervisors shall take administrative actions as when members fail to satisfy participation requirements.

Excused Absences: Members must show reason of absence to Reserve supervisors. If a notification of a scheduled drill conflict occurs within 48 hours of the start of the scheduled drill, per ref (a) the drill may be rescheduled only for:

- Illness or injury of the reservist;
- Serious or unusual hardship due to unforeseen emergency;
- Accident or illness of a family member requiring presence or other action by the reservist;
- Death, or imminent death, of a member of the immediate family; or
- At command discretion.

### Actions for Unexcused Absences

Event		Outcome	Procedure
Misses 1-8 Drills	Unexcused no show for any drill period up to 8 within 12 months of first offense (combined, not consecutive).	Each instance will result in member receiving CG-3307.	1-Supervisor will document each instance in DA by marking as unexcused (therefore unavailable for make-up). 2-Supervisor will prepare CG-3307 for each instance to be signed by SRO/OIC and ensures members signs following counseling. SRO ensures signed copy sent to RFRS and Sector HR Admin. If member not available to acknowledge, RFRS will send form via certified mail.
Misses 9+ Drills	Member fails to report for the 9 <sup>th</sup> (or more) unexcused IDT drill period within the same 12 months.	Member processed for discharge.	1-Supervisor will document each instance in DA by marking as unexcused (therefore unavailable for make-up). 2-RFRS will initiate discharge process and coordinate with Sector HR Admin for completion. 3-RFRS will send member certified letter of discharge processing notification.

#### ➤ Scheduling

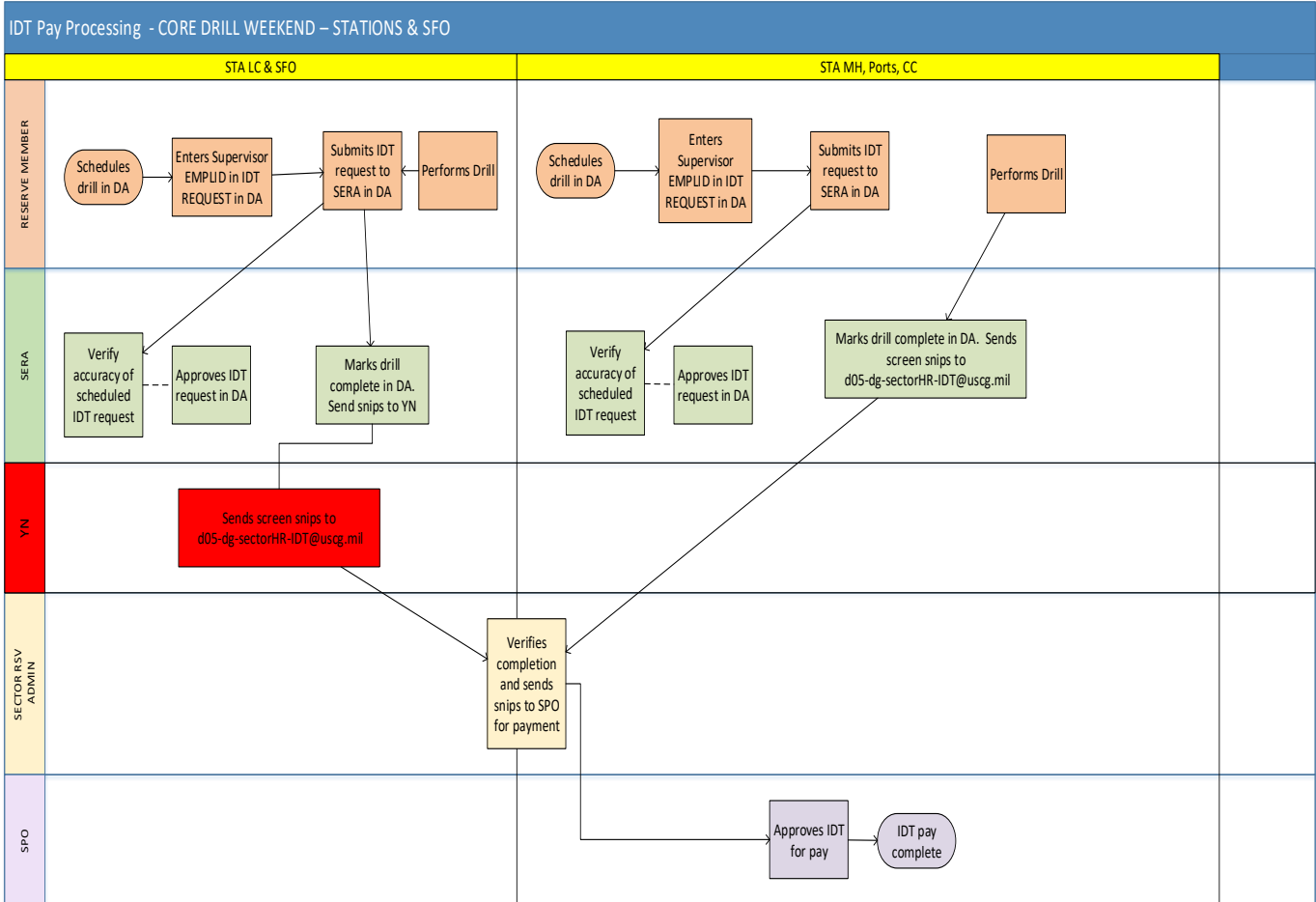
- **DA is the official record of IDT/ADT.** All scheduling must be done through this program;
- Core IDT Drill Weekend: All SELRES personnel are expected to drill as published annually on the FY IDT Memo unless an alternate drill schedule is approved by the member's respective RDA and AC Department head;
- Member must enter all IDTs for a FY into Direct Access, by **1 April**. The member will not travel to drill location without a supervisor approving drill dates in DA for the IDT period. Only the approved IDT period will protect the member and the Coast Guard should an unforeseen circumstance occur in transit to/from a drill. The April 1st date is subject to change by District 5 DXR or CG-131;
- For guidance on how to enter IDT in Direct Access, utilize the Pay and Personnel Center (PPC) Self Service guides located at: [http://www.dcms.uscg.mil/Portals/10/CG-1/PPC/guides/gp/selfservice/reserve/Self%20Service%20-%20Inactive%20Duty%20for%20%20Training%20%20\(IDT\).pdf](http://www.dcms.uscg.mil/Portals/10/CG-1/PPC/guides/gp/selfservice/reserve/Self%20Service%20-%20Inactive%20Duty%20for%20%20Training%20%20(IDT).pdf)
- Meal eligibility for SELRES members:
  - Meals are Not Authorized for Officers;
  - Enlisted members' authorized to perform a paid multiple IDT drill are listed below:

IF	AND	THEN
Member not authorized lodging	member arriving drill day, not staying overnight	Authorized Lunch
	member works past 1800	Authorized lunch & dinner
Member authorized lodging	Member arriving night before drill for 1 paid multiple IDT drill the next day	Authorized Breakfast and Lunch
	Member arriving morning of 1st drill for paid multiple IDT drills and staying overnight between drills	1st Day Authorized Lunch and Dinner, 2nd Day Authorized Breakfast and Lunch
	Member arriving night before for 2 paid multiple IDT drills	1st Day Authorized Breakfast, Lunch and Dinner and 2nd Day Authorized Breakfast and Lunch

### 6-1 IDT Scheduling & Pay Processing

It is vital that SELRES properly follow the IDT Pay Processing so that they receive their IDT pay in a timely manner. Supervisors MUST complete member's drills and send to IDT distribution list within 2 days of member drilling: [D05-DG-SectorHR-IDT@uscg.mil](mailto:D05-DG-SectorHR-IDT@uscg.mil). Reserve admin will process for pay on core drilling weekends. RFRS will process pay any other time.

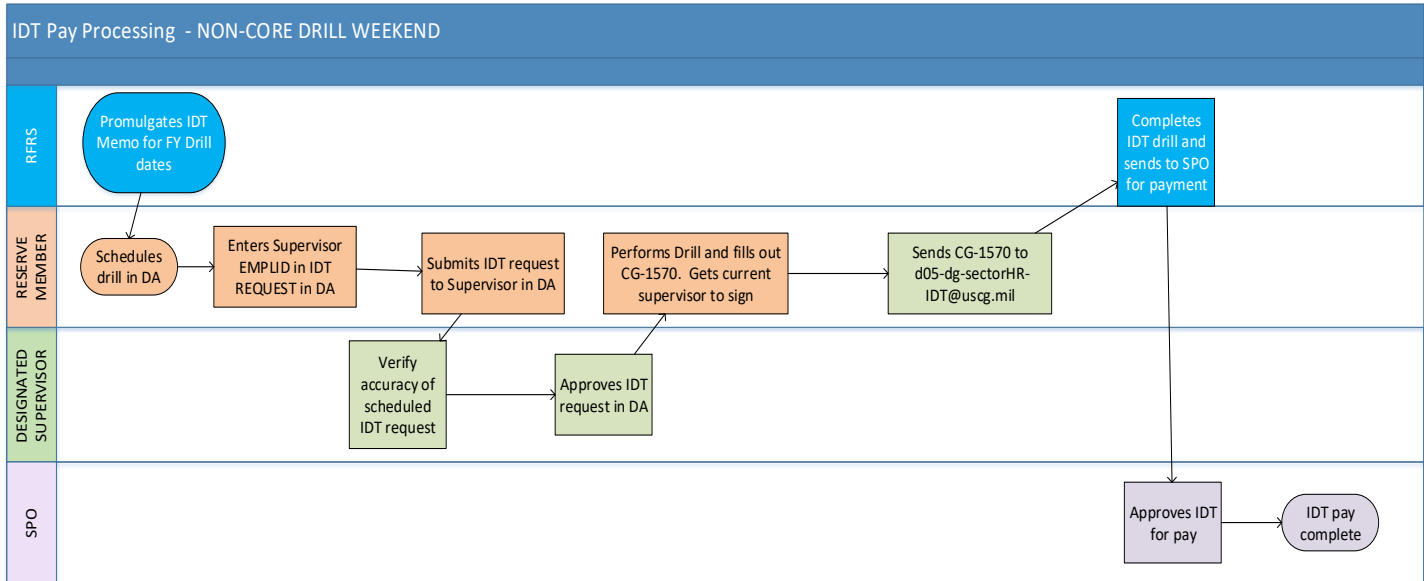
- The request, approval and completion of IDT drills shall be accomplished through DA.
  - Member: Enters IDT drill requests into Direct Access and notifies their supervisor for approval;
  - Supervisor: must change the member's IDT drill request to "approved" prior to commencement of the IDT drill period if authorized and all drills approved before 1 April;
  - Supervisor: Upon completion of the IDT drill period, the supervisor must "complete" the IDT drills in DA; Using "snip" tool, take screen shot of all members that drilled with batch numbers and send snip to [D05-DG-SECTORHR-IDT@uscg.mil](mailto:D05-DG-SECTORHR-IDT@uscg.mil) for payroll processing and approval;
  - RDA get their drills approved by AC Department Head. This enables AC Department Head to know when RDA will be drilling.



- If drilling outside the Sector Hampton Road's IDT Drill memo core weekends, the member must complete IDT Completion Sheet (CG-1570) and have on-duty supervisor sign for completion then CG-1570 is forwarded to [D05-DG-SECTORHR-IDT@uscg.mil](mailto:D05-DG-SECTORHR-IDT@uscg.mil) for processing. RFRS will complete pay and forward on to SPO for processing. Form can be found on RFRS portal page: [https://cg.portal.uscg.mil/units/sectorhamptonroads/Planning/Reserve%20Documents/CG\\_1570-IDT%20Completions%20Sheet.pdf](https://cg.portal.uscg.mil/units/sectorhamptonroads/Planning/Reserve%20Documents/CG_1570-IDT%20Completions%20Sheet.pdf)
- Changes to individual IDT drills must be changed by Reserve supervisor by cancelling in DA. Member must then submit new dates into DA and supervisor will then approve those dates. RDAs must get their drills changed by the AC Department Head;
- Any drill changes after May 1<sup>st</sup>, must have email sent to IDT distribution list, so we can get approval from DXR;
- All excused and cancelled IDT drills must be rescheduled in DA as soon as possible;
- It is the responsibility of the member to ensure their drills are approved for pay after completion within 3 days of drilling by going into DA and looking at view member drills.

Under “Pay Approved by” tab will have information stating pay was approved by SPO;

- Drills performed without prior approval are not authorized and **MAY NOT** be approved;
- SELRES serving on active duty for a period of 30 days or more may not make up drills for that period of active duty per ref (a).



## 6-2 Alternate Drill Site Location

- To request an alt. drill site location, you must have permission from the alt drill location and your Reserve supervisor;
- Email RFRS and we will provide a MEMO for you to drill in a different location than SHR. This must be completed prior to drilling;
- Then complete a CG-1570 for each drill day and get a signature from Supervisor at drilling location and send to IDT distribution list email for completion and pay.

## 6-3 IDT Berthing

Funding for IDT Berthing is subject to availability and annual justification. Per ref (a) Berthing is not an entitlement and should not be confused with ADT allowances. D5 DXR controls all berthing for Sector Hampton Roads.

- Following table is authorized for Officer and Enlisted Personnel:

Between 50-100 miles	Authorized Berthing the night between multiple drill duty days performing multiple drills on both duty days
100+ miles	Authorized berthing the night before a multiple drill duty day and if needed night between multiple drill duty days in which both duty days are multiple drills
SWE 100+ miles	Authorized night before Service Wide Exam

- Ensure all berthing requests are completed through the below link. This link can be accessed via internet:  
<https://einvitations.afit.edu/inv/anim.cfm?i=364893&k=016746017254>
- Make berthing requests a minimum of 30 days in advance;
- Verify berthing confirmation on District 5's DXR's CG Portal webpage at  
<https://cg.portal.uscg.mil/units/d5/dx/dxr/SitePages/Home.aspx>;
- All parties who receive hotel lodging must print their name(s) and sign the final copy of the hotel bill (also referred as folio). This completed receipt, with signatures, must be e-mailed to [D05-SMB-RESERVEBERTHING@USCG.MIL](mailto:D05-SMB-RESERVEBERTHING@USCG.MIL). Your signed receipt is required to verify lodging was received by the intended recipients and becomes part of the audit package in accordance with Coast Guard policy. In no case should you be expected to pay anything associated with these reservations including tax except incidentals. Please contact duty Store Keeper (757-647-2240) if hotel asks you to pay for anything;
- All D5 berthing requirement are subject to changes in the requirements.

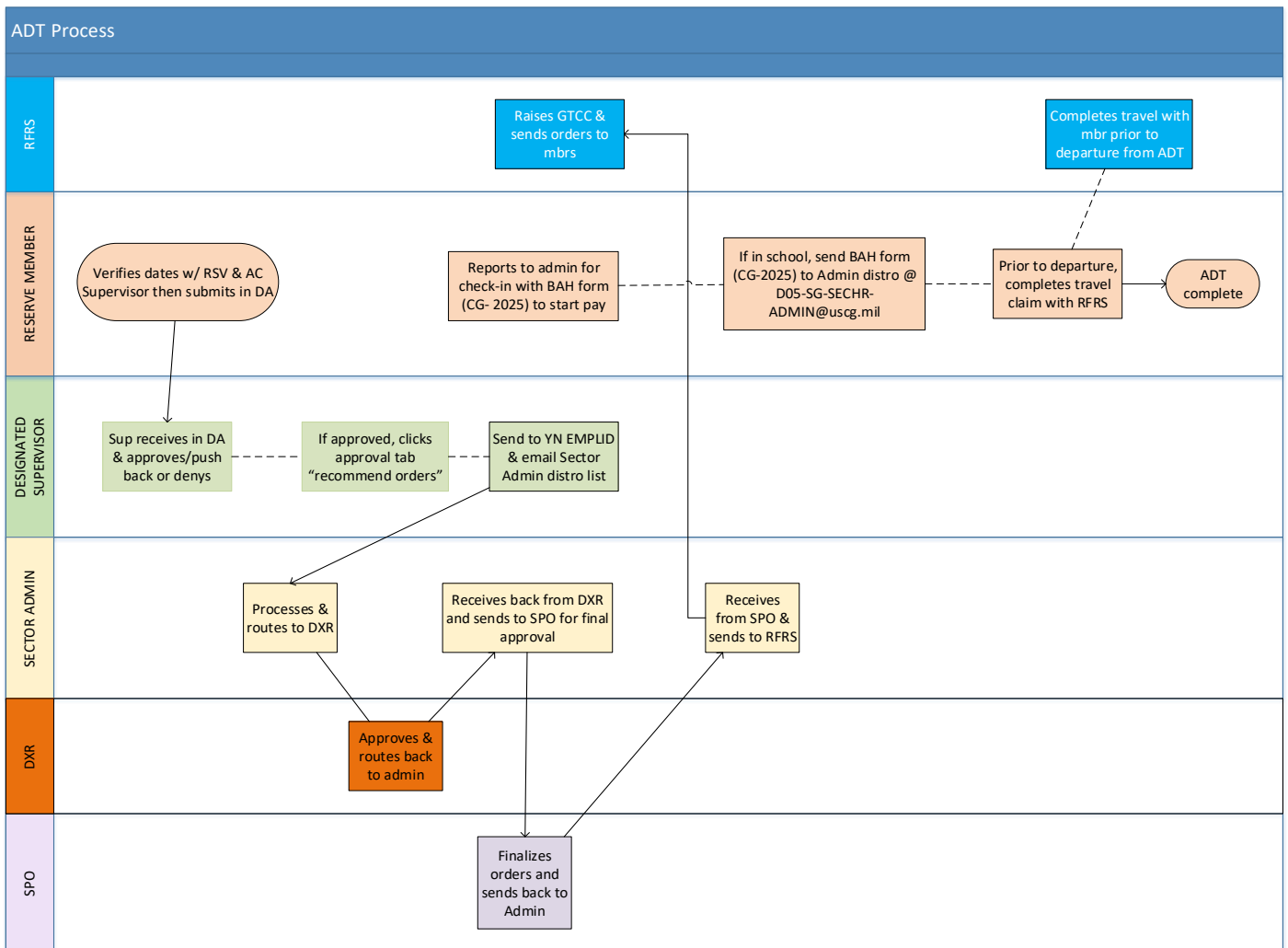
## Chapter 7: Active Duty for Training (ADT)

ADT is intended to enhance, refresh or use to acquire skills or qualifications that support military operations or future mobilizations during war or a national emergency. RFRS will inform individual members if ADT period is not required/authorized due to mobilization or long term orders. Per ref (a) SELRES are responsible for completing their annual requirement of 12 days of ADT. This requirement may be performed through OJT or formal school completion.

- SELRES shall coordinate with their Reserve and AC supervisor or SERA and OINC's to schedule their ADT periods;
- SELRES are responsible for requesting ADT orders through DA. ADT must be scheduled by **01 April**, unless extended by RFRS. No SELRES will be permitted to schedule ADT past this date unless authorized to do so by RFRS. This date is subject to change if an

earlier date is promulgated by District 5 DXR or CG-R. The member must enter supervisor EMPLID to get approval for their ADT orders in Direct Access;

- SELRES members who fail to schedule or report for ADT as required shall receive an Administrative Remarks, Form CG-3307 for non-participation and other disciplinary measures as deemed by the SELRES's chain of command;
- ADT must be performed as 12 consecutive days. Non-consecutive days may be allowed in special circumstances (i.e. 1 week school and then a separate ADT period) or needs of the Coast Guard. If traveling, you must have a copy of your approved ADT orders on your person during your travel;
- To start ADT pay, you MUST check in and complete a CG-2025 BAH worksheet, [https://media.defense.gov/2017/Sep/18/2001811639/-1/-1/0/CG\\_2025.PDF](https://media.defense.gov/2017/Sep/18/2001811639/-1/-1/0/CG_2025.PDF) on your first day of ADT with Sector Hampton Roads AC Admin staff. If you go to a school contact Admin for alternative check-in procedures. Upon completion of your ADT period, you must submit a travel claim and check out with RFRS and Admin;





- For guidance on how to enter ADT: <https://www.dcms.uscg.mil/Portals/10/CG-1/PPC/guides/GP/SPO/Reserve/SPO%20-%20Reserve%20Active%20Duty%20Orders%20Processing.pdf>
- Waiver of ADT: Commanding officers and officers-in-charge are authorized to waive the ADT requirements. The waiver only excuses completion of the ADT for participation standards. It does not waive, replace, or count for points required for a qualifying year of service for retirement or for the good conduct requirement;
- Points Statement: Reserve retirement points data is available in DA under Employee - View. It provides the number of points earned during the last anniversary year and the cumulative total for members' complete military career. SELRES who find discrepancies on their retirement point statement shall send a request for correction with supporting documents to RFRS;
- Questions regarding point accumulation can be sent to RFRS or ask supervisor. Guide is located here: <https://www.dcms.uscg.mil/Portals/10/CG-1/PPC/guides/gp/selfservice/reserve/Self%20Service%20-%20My%20Reserve%20Point%20Statement.pdf>

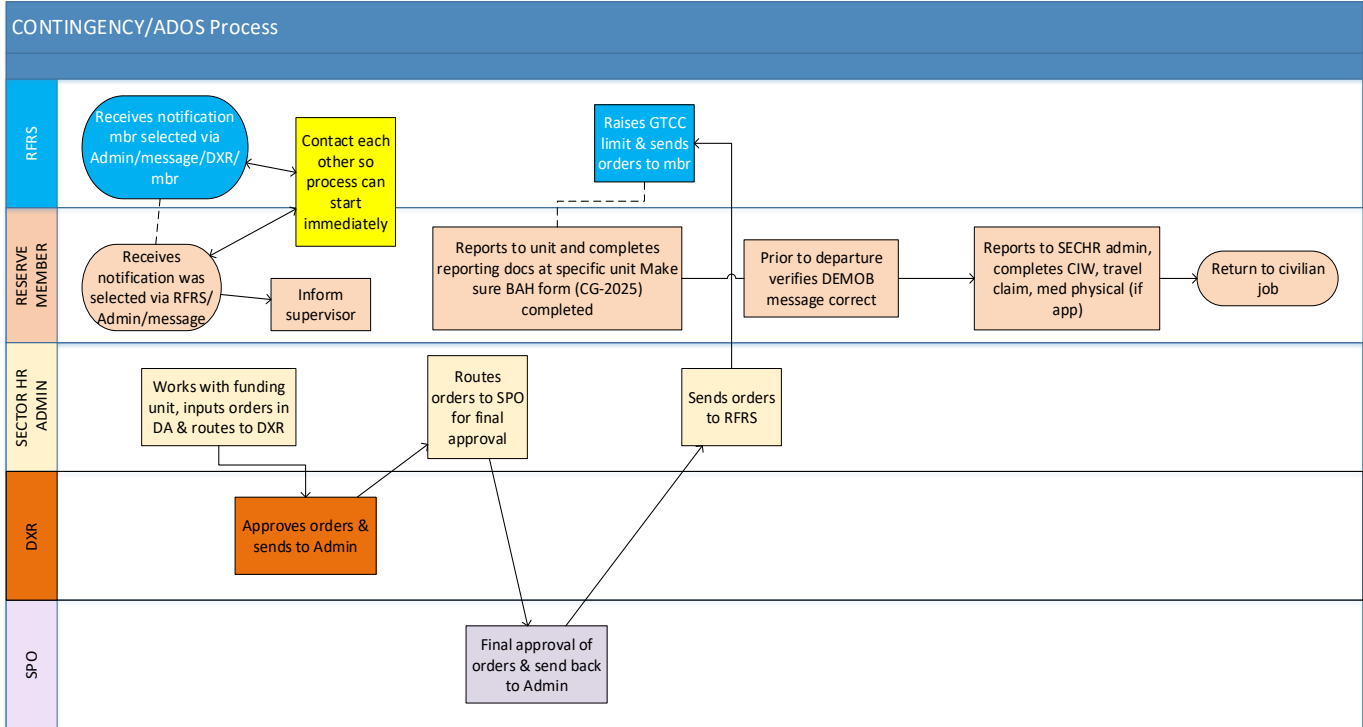
Anniversary Year vs. Fiscal Year. Commonly, there is confusion concerning requirements that must be completed within an anniversary year. An anniversary year is used to determine retirement eligibility and other administrative matters related to length of service. Each Reservist has a unique "anniversary year" start date. It is generally the date they officially entered the Reserve. In order to have a "good year", which will count as a year of service, a Reservist must accumulate 50 points. This is very important for a Reservist and his/her supervisor to monitor in regard to scheduling drills. If a Reservist only achieves 49 points, they will not be credited for a year of service. Participation standards are based solely on the fiscal year. **Note: Your 15 membership points won't populate until the last day of the Anniversary Year.**

## Chapter 8: Mobilization/ADOS/EAD

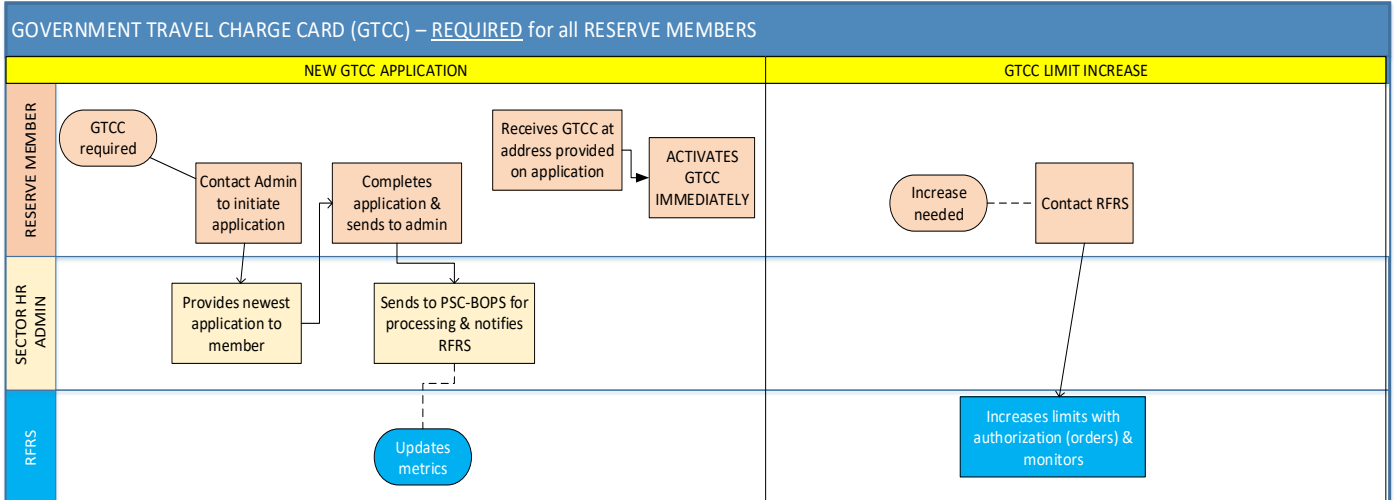
All Coast Guard members shall be available for unrestricted worldwide mobilization. RFRS works with the chain of command to identify appropriate candidates for involuntary/voluntary mobilization based on rate/rank, qualifications, readiness, and hardship considerations. Being red in any factor of readiness other than GTCC **will NOT stop** you from being deployed or the opportunity to volunteer for any disaster. If SELRES wishes to apply for EAD/ADOS, member must be GREEN in readiness to be approved. For each aggregate 90 days (time does not have to be consecutive) **within a fiscal year**, the member can reduce their RET-1 eligibility date by 3 months

<https://cg.portal.uscg.mil/units/ppc/PD/GlobalPay/Lists/Posts/Post.aspx?List=534027f5%2D4710%2D49bb%2D94df%2D486500bc85e2&ID=977&Web=b95d9f71%2D7253%2D44f1%2Dbb59%2D78de09eade93>.

- Command endorsements: Any volunteer opportunities must have command endorsement to apply for positions. Command endorsement comes from CO MILPERS (LOGS) or OIC through DA. All members must request through chain of command via email before requesting final command endorsement; SRO must be notified. After approval has been granted by supervisor and SRO, send copy to RFRS so they may follow up with LOGS/OIC;
- Contingency Operations:
  - Volunteer: Use the Direct Access Mobilization Module (DAMM) guide to apply for positions. <https://www.dcms.uscg.mil/Portals/10/CG-1/PPC/GUIDES/GP/SelfService/Member/Direct%20Access%20Mobilization%20Self-Service%20User%20Guide.pdf?ver=2017-04-24-141450-070>
  - Involuntary: Advise your chain of command and RFRS. Admin/RFRS will work together to deploy member.



- EAD/ADOS: SELRES may volunteer at any time for these positions. EAD opportunities typically are in message traffic in early spring. ADOS opportunities show up throughout the year. RFRS will notify SELRES when any opportunities exist via email;
- DD-214: Per ref (r), A DD-214 will be prepared for personnel who have orders associated with contingencies, T10, T14, separated for cause, or for physical disability regardless of the length of active service. It will also be prepared for personnel separated from a period of service with 90 days or more;
- Government Travel Charge Card (GTCC): Per ref (q), All SELRES members are required to apply, activate, and maintain an account in good standing to facilitate mobilization requirements.  
<https://cg.portal.uscg.mil/units/sectorhamptonroads/LOGISTICS/ADMIN/SitePages/TDY%20and%20GTCC.aspx>



## Chapter 9: Readiness Compliance Process and Notifications

RFRS will regularly monitor SELRES readiness compliance status for required administrative and medical items. RFRS will send out monthly CGBI pulls to supervisor for all deployability factors beginning of each month.

- Medical Readiness: All SELRES must be fully ready to deploy at all times. The annual requirements include IMR (PHA, dental, immunizations, Medical readiness lab studies (i.e. HIV), Individual Medical Equipment, and deployment limiting conditions), and ASQ;
- All appointments for IMR must be made through Base Medical. Base Medical coordinates with LHI (or outside vendors) for medical service unless Reserve member is on orders over 30+ days. Members with 30+ day orders are eligible to receive treatment at base facilities for readiness. Refer to Sector Hampton Roads Admin website for job aid:  
<https://cg.portal.uscg.mil/units/sectorhamptonroads/Planning/Reserve%20Documents/Member%20PHA%20Job%20Aid.pdf>;
- Readiness Management Period (RMP). RMPs may be performed for pay or without pay. RMP must be requested & approved before appointment. Currently only 1 paid RMP is allowed with a max of 30 (29 unpaid). RMPs must last a minimum of 3 hours. Only the RFRS BMC is authorized to approve RMPs through DA;
- Annual Screening Questionnaire (ASQ). Reserve members are required to complete the ASQ in Direct Access on an annual basis in October of each year. If a member indicates that they are unavailable as a first responder, then the member shall be considered “not qualified” and will be recommended for reassignment pending resolution of the situation and/or discharge. ASQ must be completed annually at a minimum and as often as the SELRES information or recall availability changes.  
[https://cg.portal.uscg.mil/units/ppc/RoboHelp/DAGP/ReserveSSMBR/ASQ\\_Self\\_Service\\_Member.aspx](https://cg.portal.uscg.mil/units/ppc/RoboHelp/DAGP/ReserveSSMBR/ASQ_Self_Service_Member.aspx)

## 9-1 RED in readiness

Each month a member remains “Red” in a required compliance metric is a member potentially not able to deploy (pending external factors that affect readiness status). After the 2<sup>nd</sup> month of notification (pending external factors that affect readiness status), the member will receive an Administrative Remarks, CG-3307 to sign and be added to their PDR as acknowledgement of consistent non-compliance per ref (a). Continued non-compliance could result in discharge.

## 9-2 Sample CG-3307 for Non-Compliance

Sample Administrative Remarks CG-3307 for non-compliance:

DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD CG-3307 (Rev. 10-08)	<b>ADMINISTRATIVE REMARKS</b>
<p>Entry Type: Reserve Participation Management (RPM-5)          Reference: Section 4.B., Reserve Policy Manual, COMDTINST M1001.28 (series)          Responsible Level: Unit          Entry:  <b>DDMMYYYY</b>: On this date, you were counseled for failure to complete the required annual dental/medical exam scheduled on <b>(DATE)</b> per the reference listed above. <b>(NAME OF SUPERVISOR)</b> received a telephone call on <b>(DATE)</b> from medical indicating you failed to make the medical/dental appointment. <b>(NAME OF SUPERVISOR)</b> contacted you on <b>(DATE)</b> to determine why you missed the medical appointment <b>(enter details as appropriate)</b>. You are directed to reschedule a medical/dental exam within the next 30 days and notify your supervisor of the new appointment date. Future incidents will result in additional administrative and/or disciplinary actions.</p>	
<b>A. B. SEA, CAPT, USCG</b> Commanding Officer	
<b>DDMMYYYY</b> : I acknowledge the above entry and have been afforded the opportunity to review the Reserve Policy Manual, COMDTINST M1001.28 (series).	
<b>J. P. JONES</b>	

## Chapter 10: Awards

The Awards Process outlines the development, submission, and approval of personal and/or unit awards for SELRES. Please refer to ref (t). Any awards for SELRES will go through member’s chain of command and include AC Department Head up to the SHR awards board via email [D05-DG-SectorHR-Awards@uscg.mil](mailto:D05-DG-SectorHR-Awards@uscg.mil). **All awards should be started 4-6 months prior to an anticipated presentation date.** The CG-1650 form must accompany the award’s submission to Admin.

## Chapter 11: Enlisted Evaluation System

EERs will be routed through member's chain of command. Refer to ref (o) for all EES information. All forms on the new EES can be found on the SHR portal:

<https://cg.portal.uscg.mil/units/sectorhamptonroads/LOGISTICS/ADMIN/EES/Forms/AllItems.aspx>

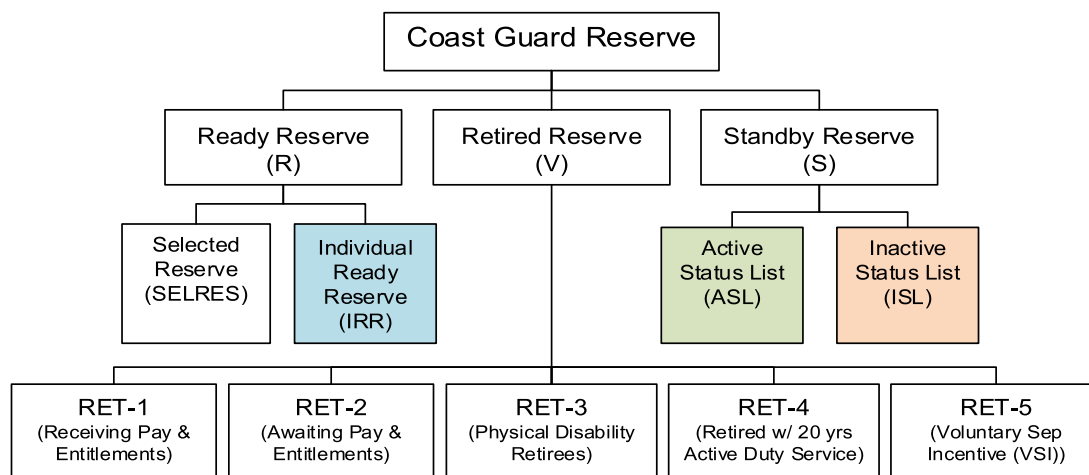
## Chapter 12: Officer Evaluation System

OERs will be routed through member's chain of command through AC Department Head. Refer to ref (p) for all OES information. All forms or other information can be obtained at OPM website at: <https://cg.portal.uscg.mil/units/psc/psc-opm/opm-3/SitePages/Home.aspx>

## Chapter 13: Change in Reserve Component Category (RCC)

Changes in RCC will change the reserve status, associated benefits and pay (based on service obligations) for reserve personnel. There are three categories differentiated by their mission and training requirements: Ready Reserve, Standby Reserve, and Retired Reserve. On occasion a member may need to change his/her status because of an inability to meet the mission and training requirements of a particular RCC or because of a renewed ability to meet the mission and training requirements of a particular RCC per ref (a).

- The SELRES to IRR/ISL/ASL Transfer Request is available at <https://dcms.uscg.afpims.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Personnel-Service-Center-PSC/Reserve-Personnel-Management-PSC-RPM/RPM-3/Individual-Ready-Reserve-IRR/>. Supervisors shall complete the required Administrative Remarks, Form CG-3307 and counsel the member as appropriate, SRO signs as Department Head and send to RFRS. RFRS will send to CO MILPERS (LOGS)/OIC for final signature. The transfer request form, Administrative Remarks, CG-3307, and all required documentation shall then be submitted back to RFRS for submission to D5 (dxr). RFRS will track and monitor effectuation of the transfer.



Note:

All members of the Ready Reserve are in an active status, and are subject to immediate recall to active duty. Standby Reserve members are an additional mobilization resource who are eligible for involuntary recall to active duty. Membership in the Standby Reserve is limited to those individuals having mobilization potential.

**A. Inactive Status List (ISL)**

The ISL consists of reservists who may be ordered to active duty in time of war or national emergency if it is determined there are not enough qualified reservists in an active status available to meet service requirements. Members on the ISL may not train for pay or retirement points, are ineligible for promotion or advancement, and do not accrue credit for qualifying years of federal service for retirement.

**B. Active Status List (ASL)**

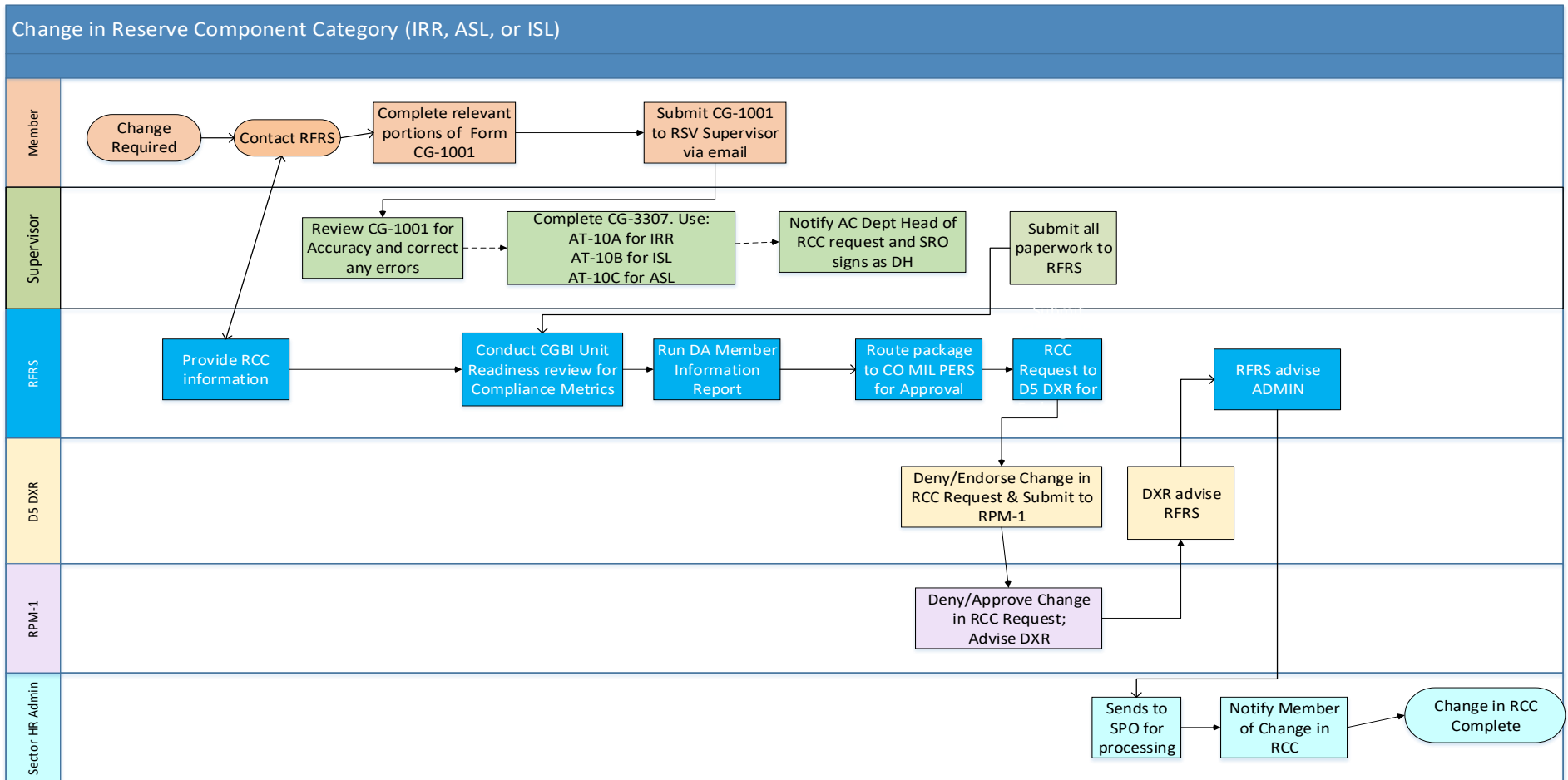
The ASL consists of reservists who may be ordered to active duty in time of war or national emergency if it is determined there are not enough qualified members of the Ready Reserve available to meet service requirements. ASL members may participate in reserve training activities without pay, may earn retirement points, and are eligible for promotion and advancement.

**C. Individual Ready Reserve (IRR)**

The IRR consists of trained members that previously served in the active forces or in the SELRES. The IRR consists of members of the RC who must fulfill their military service obligation, and those who have fulfilled their military service obligation and voluntarily remain in the IRR.

- SELRES requesting change to Active Duty or to another branch of service is called a conditional release and should contact RFRS to gain further information;
- SELRES requesting retirement must complete a minimum of 20 years of qualifying service to earn a Reserve retirement. Retirement eligible reservists shall complete a Reserve Retirement Transfer Request, form CG-2055A, selecting either RET-1 or RET-2 blocks, and submits it through the chain of command for approval. Form CG-2055A must be received by PSC-RPM at least 90 days prior to requested retirement date. SELRES members who are eligible for either RET-1 or RET-2 should contact RFRS for additional guidance on the retirement process. More information is available at <https://www.dcms.uscg.mil/ppc/ras/RetirementProcessing/>;

## 13-1 RCC Workflows





## Chapter 14: Reserve assignments

SELRES shall request assignment via the “PCS e-Resume” module in DA. This is the primary method for members to communicate their assignment preferences. Official Assignment Policy may be found in the RPM and through CG Portal messages per ref (a).

- PCS e-Resumes will not be accepted outside of the e-resume submission period noted in the AY Reserve Personnel Management Kickoff message unless a member is relocating their residence outside of RCD (currently 100 miles) of their current assignment or requesting a critical fill assignment (e.g., PSU, Strike Team, etc.). A command endorsement is required for all e-resumes submitted outside the submission period;
- SERA: To become a SERA, you must be E7-E9. A SERA position requires strong favorable command endorsement during the E-resume period. No panel or board exists, but is selected by AO based upon record and endorsement. See ref (u) for more information.
- Link to the e-Resume user guide for DA:  
<https://cg.portal.uscg.mil/units/ppc/PD/guides/Documents/SelfService/Command/eResume%20Command%20Endorsement%20Guide.pdf>.

## Chapter 15: Clearance Validation

Members must actively monitor the status of their security clearance, if required by their position to hold one, as well as the currency of their clearance investigation. CGBI tracks clearance status. If a member’s security clearance is expiring within six months or less, the Sector’s CSO (OSC Jason Waldo, (757) 638-6641, [Jason.D.Waldo@uscg.mil](mailto:Jason.D.Waldo@uscg.mil)) must be notified to initiate the revalidation process with SECCEN.

## Chapter 16: Competency and Training Management

RFRS will play a support role when it comes to SELRES competency and training management. Primarily, oversight should be done by the RDA and Supervisors, as well as the SELRES. Support functions may include: assistance with submission of Officer Specialty Code (OSC) completion package, training course request submissions (ETRs), TMT qualification/certification/course/task completion entries, and facilitating position-assigned competency updates (additions and removals).

### 16-1 Officer Specialty Management System

This system provides the means to determine officer specialty demand (the billets) and supply (the officers) by way of assigned officer specialty codes. When an officer has completed a position-assigned OSC, they must complete the CG-5319A, Officer Specialty Code Application-Competency dictionary and further information can be found at:

<https://cg.portal.uscg.mil/communities/competency-mgmt-systems/Competency%20Management%20Systems/Forms/AllItems.aspx>;

## 16-2 C- Schools

C-Schools are determined by CG-131. The current process is new and is being fulfilled by position-based required c-schools before any other c-schools may be requested. This is based upon the Individual Training Plan (ITP) assigned to each position. The following FY19 guidelines are subject to change as CG-131 works to improve their system:

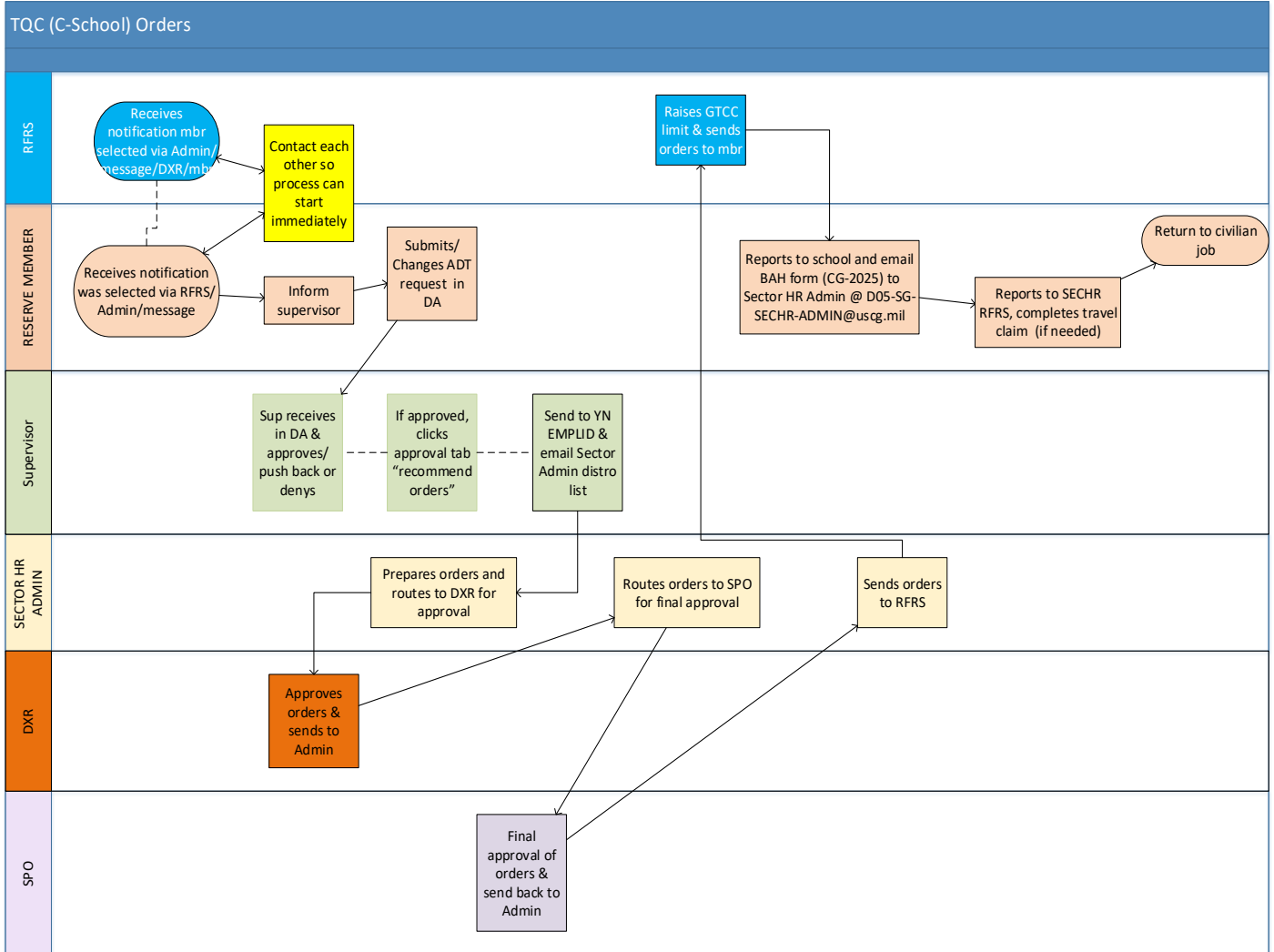
- After FORCECOM identifies school dates (typically mid-August), RFRS will provide all classes required for each member and dates available;
- Supervisors must provide information back to RFRS by deadline with prioritized list of personnel for each class with primary and alternate dates;
- RFRS combines all class lists from each department and forwards to DXR to LANT. Each unit prioritizes class participants and forwards up to CG-131 who finalizes list and sends back to RFRS;
- ETRs must be entered through Reserve Training Officer after acceptance to a C-school;
- ADT dates will be requested based upon being selected for a course;
- If orders are received, attendance to a course is required. Courses are very difficult to get as Reservist and cancelling schools could affect competency, advancements & future positions. Any changes/conflicts must notify RFRS as soon as possible if a conflict exists;
- ETQC Website: <https://cg.portal.uscg.mil/units/forcecom/ETQC/SitePages/Home.aspx>.

## 16-3 Position-Assigned Competency Update Process

RFRS and AC Department Heads should regularly verify position-assigned competencies for billets within their respective departments. This is inclusive of rating-specific competencies, ICS-related competencies, as well as assigned Officer Specialty Codes (OSC). To make changes to current position-assigned competencies, the CG-5311 Form (Request to Assign Competencies, Education, or Officer Specialty to a Position) must be submitted through Reserve Supervisor to AC Supervisor through the Sector's Chain of Command for review and final approval by CO MILPERS.

Once reviewed at the Sector level, the request is then submitted to DXR (review and approval), LANTAREA (review and approval), and then finally submitted to CG-1B1 ([HQS-DG-1st-CG-1B1-Competency@uscg.mil](mailto:HQS-DG-1st-CG-1B1-Competency@uscg.mil)) for review, approval, and update.

Competencies Assigned/Attained for members can be found in CGBI under skills. More information can be referenced on the CGBI Support/Training and Outreach CGPortal page at <https://cg.portal.uscg.mil/communities/cgbi/training/SitePages/Home.aspx>, under "Community Specific" and then "Reserve Management".

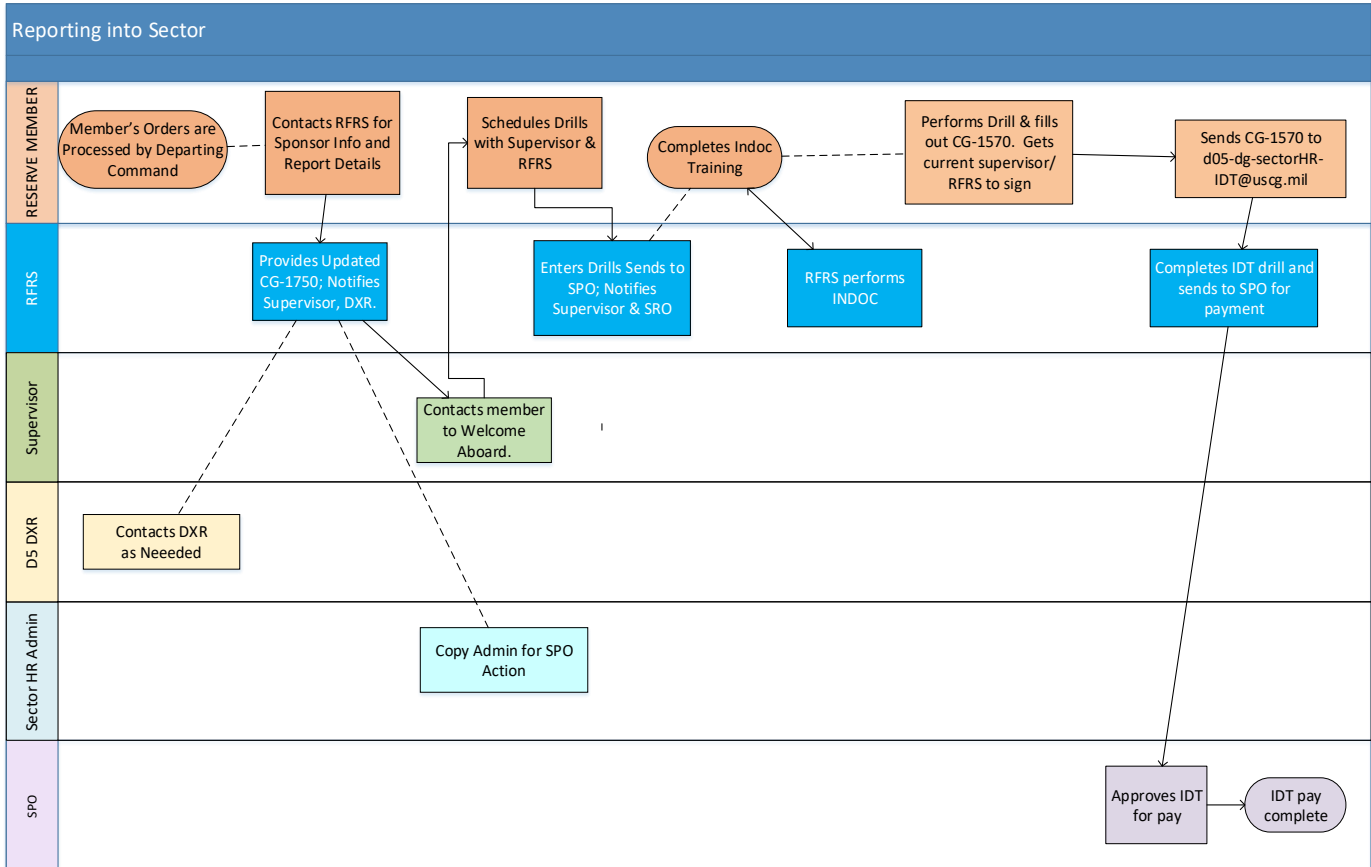


## Chapter 17: New Member Welcome Aboard Process

RFRS is responsible for providing pertinent information to newly assigned reservists to Sector Hampton Roads. Each new member will be contacted before reporting by RFRS. RFRS will work with RDA of incoming member's department to designate a sponsor who will assist the new member with reporting procedures and check-in during a drill weekend.

### 17-1 New Member Reserve Indoctrination

This event is held any drill weekend that new personnel arrive in order to educate new Reserve members on how to be a productive Reservist within the Coast Guard and what the organization's expectation. The target audience is a mixture of new accessions, RELAD personnel, and AD members heavily involved with Reserves.



## 17-2 Indoctrination Schedule

- Check in Checklist:
  - Overview of Sector & outlying units
    - Active Duty Organization Chart
    - Reserve Organization Chart
    - RFRS
  - Participation Standards Overview
    - IDT Schedule memo
    - IDT/ADT Berthing Policy
    - ALCOAST policy for current FY
    - CAC reader issue if needed
    - MT A/B completion status
    - GTCC
    - Complete ASQ/ Check Status
    - Medical Readiness Status
  - Personnel actions
    - Complete Admin check in/paperwork
    - Review member info report

- CGBI email notifications
- Points (good year fiscal v anniversary)
- Member signs positive 3307 stating they understand
  - SOP
  - Participation standards
  - Compliance measures

## Chapter 18: CGBI Personal Email Notifications

It is highly recommended that members use the CGBI Personal Email Notification tool. This tool sends email alerts when or more selected compliance measure status' changes. It is an optional service provided to all Active Duty and Reserve members. The designated email address (member can select from what is listed from DA), measures, and frequency of email alerts are determined by the member.

A step-by-step job aid on the CGBI Email Notifications (sign-up, update, and cancellation of notifications) can be found on the CGBI Support/Training and Outreach CGPortal page at <https://cg.portal.uscg.mil/communities/cgbi/training/SitePages/Home.aspx>, under “General Job Aids” and then “Email Notifications.”

For supervisors, CGBI has a report called the CGBI Email Notification Usage Report that displays when members have subscribed to the tool and when they unsubscribe. Use the CGBI Search tool on the home page of CGBI to locate and launch report.

RFRS will send monthly update on all Reserve members at the beginning of each month on all deployability factors.

## Chapter 19: Reserve Data Analysis

The RFRS staff will regularly use the Coast Guard Business Intelligence (CGBI) system and its products (i.e. reports, cubes, and interface) for data analysis and readiness metric compliance management. CGBI job aids and other resources can be found on the CGBI Support/Training and Outreach Portal Page:

<https://cg.portal.uscg.mil/communities/cgbi/training/SitePages/Home.aspx> under sections “Community Specific,” “General Job Aids, and “Training Tip of the Month”

### 19-1 ADT/IDT Details

RFRS monitors SELRES ADT and IDT metrics using CGBI & excel file to ensure that members are completing required drills each fiscal year. Discrepancies in DA can directly affect the availability of useable funding that D5 can provide to a unit for additional training and short-term active duty opportunities. In addition to members accessing their IDT drills in DA, they also have the ability to view their current IDT schedule as well as any scheduled ADT in CGBI (Personal View – Skills Tab). Updates in DA will replicate in CGBI normally within 24-48 hours.



## Chapter 20: Additional information

- RFRS portal page with example memos, quarterly newsletter, ALCOAST messages and change to policy can be found at:  
<https://cg.portal.uscg.mil/units/sectorhamptonroads/Planning/Pages/RFRS.aspx>