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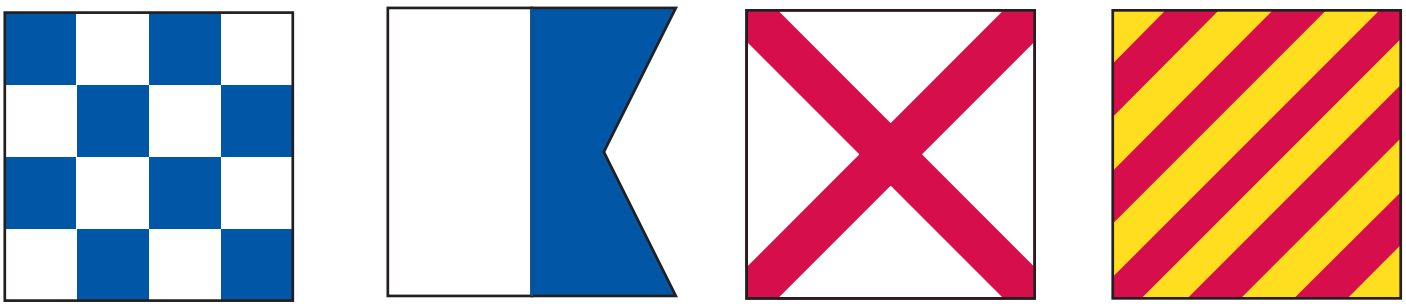

# RETENTION TEAM MANUAL

**The primary goal of the Navy Career Information Program is to ensure each Sailor, wherever stationed, be provided with a sufficient quantity and quality of career information, in a timely manner, to allow them to make sound career decisions.**

NAVPERS 15878H

# PREFACE

The purpose of the Retention Team Manual is to provide clear direction and instruction for Command Career Information Team members to follow in the daily performance of their assigned duties and responsibilities. It should serve as the most basic framework allowed upon which to build an effective Career Information Program at each specific command.

The Navy has gone through a period of unprecedented change in size, technology and capability. Manning this new fleet and reserve force with the highest quality of experienced people is the most serious personnel readiness challenge we may ever face.

Retention of our highest quality Sailors is the key to meeting this manpower challenge. The Command Career Information Team is the cutting edge, and requires dedicated support from the chain of command to be successful. Our military leadership is pledged to provide an attractive career information climate -- loyalty, pride and professionalism through the chain of command. A total force effort is required to ensure we keep the very best, in the right numbers and right skills.

Through a combination of sound guidance, leadership and command attention at all levels, we can ensure active duty and reserve force requirements are met with motivated, quality people.

*Respectfully dedicated to the memory of*

*ADM Jeremy M. Boorda*

*and*

*NCCM(SW) John R. Hall*

## Summary of Changes

Listed below is a summary of changes dated **APRIL 2000** to the Navy Retention Team Manual (NAVPERS 15878H):

| | |
|---|---|
| Chapter 1 | Updated mailing address for completed Navy Retention/Separation Questionnaires (OPNAV 1910/5) to *Navy Personnel Research Studies and Technology, 5720 Integrity Drive, Millington, TN 38054-5026*. Pages 1-6,1-8, and 1-11 refer. |
| Chapter 2 | Minor administrative changes. |
| Chapter 7 | Changed GUARD III to read as GUARD 2000. The second guaranteed assignment could be used at an individual's discretion anytime up to the commencement of the seventeenth vice twenty-fifth year of active military service. |
| Chapter 16 | Changes per NAVADMIN 025/00: (1) PARs are eliminated for all ratings and paygrades; and (2) completion of Non-Resident Training Courses (NRTCs) is NOT required for exam participation by “rated” Sailors. |
| Appendix D | Revised reenlistment/discharge certificates’ corresponding form numbers and Navy stock numbers (NSN) as follows:<br>Certificate of Reenlistment (Navy) NAVPERS 1650/78 NSN: 0106-LF-983-9800<br>Certificate of Reenlistment (Naval Reserve) NAVPERS 1650/77NR NSN: 0106-LF-983-8600<br>Certificate of Appreciation (Spouse/Navy) NAVPERS 1650/76N NSN: 0106-LF-984-2200<br>Certificate of Appreciation (Spouse/Naval Reserve) NAVPERS 1650/75NR<br>NSN: 0106-LF-984-1000<br>Discharge Certificate, Honorable (Navy) DD256N<br>NSN: 0102-LF-002-4203 |
| Appendix F | The Navy Classifier's Ratings Fact Sheets are currently being revised by Commander, Navy Recruiting Command, Millington, TN. Upon completion, ratings fact sheets will be published as Appendix F. |
| Appendix G | Chapter 2 (Enlisted Advancement System): Per NAVADMIN 025/00, (1) PARs are eliminated for all ratings and paygrades; and (2) completion of Non-Resident Training Courses (NRTCs) is NOT required for exam participation by “rated” Sailors.<br>Chapter 3 (Career Incentives): Changed GUARD III to read as GUARD 2000. |

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## Chapter 1 OBJECTIVES AND RESPONSIBILITIES OF THE NAVY RETENTION TEAM

**1.1 OBJECTIVES.** The Navy Retention Program provides a means of strengthening policy and programs designed to:

1. Obtain personnel stability through the retention of top quality personnel in proper balance and required numbers.

2. Provide the means to successfully fulfill the Navy's obligation to increase awareness of Navy opportunities for Sailors and their families.

3. Provide continuing career guidance so individuals best develop and use their talents while in the Navy.

4. Increase goodwill and respect for the Navy so that, upon leaving the service, Sailors become "Navy ambassadors" to the civilian community.

5. Provide a method by which active duty members being separated will be encouraged to actively participate in the Naval Reserve.

6. Motivate Sailors to seek career information from their chain of command.

**1.2 RESPONSIBILITIES OF THE NAVY RETENTION TEAM.** This section deals with the functional responsibilities of the Navy Retention Team.

**1. Deputy Chief of Naval Operations (Manpower, Personnel and Training)** shall:

a. Exercise overall management and coordination of the Navy Retention Program.

b. Administer the Standard Navy Enlisted Retention Report (7 Part), which provides all commanders a single retention statistical report utilizing one common data file. This Manpower, Personnel and Training System (MAPTIS) Data File is updated by diaries and OCR documents submitted by Fleet activities.

**2. Navy Retention Office (N136)** acts as the point of contact for Echelon 2 commands regarding career information not available at the local level (DSN 225-3428/3394, commercial 703-695-3428/3394) and shall:

a. Monitor Naval retention trends using data provided by the Enlisted Personnel Retention System (EPRS).

b. Assess impact of personnel policies and proposed changes on Naval retention.

c. Analyze retention problem areas and formulate recommendations for corrective action(s).

d. Provide liaison and guidance throughout the Navy concerning retention programs with particular emphasis on CIPM methods.

e. Provide information to Echelon 2 commands on policy and planning for retention matters.

f. Monitor Navy recruiting programs and Fleet assistance to recruiting.

g. Monitor participation in, and Fleet assistance to, Naval Reserve programs.

h. Monitor leadership matters and coordinate with the office of the Master Chief Petty Officer of the Navy.

i. Monitor career counselor training and recommend changes when appropriate.

j. Sponsor Career Counselor Advanced Training (CCAT) for Command Career Counselors Navy-wide. CCAT attendees are nominated by their Type Commanders and Fleet Retention Offices. Eligibility requirements are:

(1) Assigned as Command Career Counselor (hold NEC 9588 for non NCs),

(2) Not having previously attended CCAT. Extenuating circumstances will be considered, such as a Command Career Counselor returning from a recruiting tour.

k. Monitor and provide recommendations concerning Transition Assistance Management Program (TAMP) requirements and policies.

l. Act as the ultimate point of contact and expertise for Navy-wide retention issues.

m. Liaison with the Navy Counselor (NC) Detailer and Fleet Retention Offices concerning distribution of Navy Counselors and NEC 9588 assets.

n. Present enlisted and officer career information briefs worldwide.

o. Maintain the "Retention Team Manual" (NAVPERS 15878H).

**3. Deputy/Assistant Chiefs of Naval Operations (other than Manpower)** shall:

a. Establish specific organizational procedures and responsibilities to evaluate the impact of management decisions on personnel retention.

b. Provide formal impact statement on all plans, programs, and policies developed under their cognizance, which have the potential to degrade the career satisfaction environment.

**4. Commander, Naval Reserve Force** shall:

a. Maintain an immediate responsive source of currently trained personnel available to augment active forces upon mobilization. The Naval Reserve shall be structured into the same mission programs as the regular Navy.

b. Provide a formal Naval Reserve career information presentation when requested by individual commands for all officers (LCDR and below) and all enlisted personnel undergoing separation counseling.

**5. Chief of Naval Education and Training** shall create a training environment to fully prepare each student to perform their assigned duties, fulfill student expectations, reinforce the advantages of training, and produce career-motivated individuals.

**6. Commander, Navy Recruiting Command** shall establish recruiting programs, policies, and procedures supportive of the Navy Retention Program; including a dynamic approach to attracting qualified veterans.

**7. Commander, Naval Medical Command** shall ensure when decisions in the execution of the responsibility to provide medical and dental care to eligible beneficiaries are made, the maintenance of a positive retention environment should be considered a significant factor in the decision making process.

**8. Chief of Naval Information (N09C)** shall utilize all products and media available to inform all Naval personnel of every aspect of the Navy's current and projected programs, policies, and plans.

**9. Fleet Commanders in Chief and other Superiors in Command** shall:

a. Establish organizational responsibilities and procedures to evaluate the impact of management decisions on the career satisfaction environment. Decision areas include: tempo of operations, employment schedules, overhaul schedules and locations, and readiness inspection programs.

b. Monitor personal services, family assistance, and housing programs to ensure a high quality-of-life environment.

c. Monitor command climate at unit and staff levels to ensure the highest degree of command attention is given to organizational development, leadership and management practices, and the consideration of human needs.

**10. Fleet Retention Offices** shall:

a. Monitor fleet retention trends using data provided by the Enlisted Personnel Retention System (EPRS).

b. Assess impact on retention of personnel policies and proposed changes.

c. Analyze problem areas and formulate recommendations for corrective action(s).

d. Assist subordinate commands' retention programs utilizing the minimum guidelines contained in Appendix C. Echelon 2 commands may, at their discretion, evaluate additional criteria.

e. Provide staff liaison and guidance concerning Fleet retention programs with particular emphasis on CIPM methods.

f. Provide liaison with COMNAVPERSCOM and Type Commanders on policy and planning for retention matters.

g. Monitor Navy recruiting programs and Fleet assistance to recruiting.

h. Monitor leadership matters and coordinate with the Fleet Master Chief in resolving resulting issues.

i. Manage the Fleet Retention Excellence Awards program for recognition of dynamic and pro-active command retention/personnel programs.

j. Monitor career counselor training and recommend changes when appropriate.

k. Monitor and provide recommendations concerning Transition Assistance Management Program (TAMP) programs, requirements and policies.

l. Monitor officer resignation letters, making recommendations on developing trends when appropriate.

m. Act as central point of contact and expertise for retention issues.

n. Monitor and provide recommendations concerning distribution of Navy Counselors and NEC 9588 assets within the Fleet.

o. Disseminate monthly statistical retention report data from EPRS to Type Commanders and other commanders that report directly to Fleet CINCs.

p. Provide nominations for Career Counselor Advanced Training (CCAT) to the Navy Retention Office (N136).

q. Monitor participation in, and Fleet assistance to, Naval Reserve programs.

**11. Type Commanders/Force/Base Commander/Regional Coordinators/other Fleet Third Echelon Commanders/Immediate Superiors in Command** shall provide subordinate commands with guidance for establishing local programs in support of the Navy Retention Program. Such guidance shall include:

a. Establishment an Officer Retention Program. This program shall be the direct responsibility of the Commanding Officer.

b. Establishment of an Enlisted Retention Program using CIPM principles contained in Chapter 2.

c. Support of the Fleet Retention Excellence Awards program recognizing dynamic and pro-active command retention and personnel programs.

d. Individual commands shall schedule all officers and enlisted personnel (LCDR and below) undergoing separation processing to attend a formal LANTFLT/PACFLT Career Information Team (CARIT) Pre-Separation Presentation no later than 180 days prior to resignation date/EAOS.

e. A feedback system to ensure timely recognition of retention enhancers and/or detractors.

f. Establish Force CIPM guidelines necessary to implement this directive and directives from higher authority.

g. Support subordinate commands to ensure standardization of all retention programs based on CIPM methods.

h. Ensure pre-separation seminars for separatees and retirees are conducted for subordinate commands in all geographic areas of responsibility. Force/Base Commanders should assume lead as regional coordinators to monitor and provide recommendations concerning TAP seminars and formal LANTFLT/PACFLT CARIT pre-separation presentations.

i. Visit all direct reporting subordinate commands periodically and upon request. Provide the Commanding Officer with an outside perspective on the administration of the command's retention and personnel programs.

j. Monitor the promotion of upward mobility programs for all personnel in subordinate commands.

k. Ensure subordinate commands are pursuing the retention of qualified personnel and are pro-active in encouraging conversion from overmanned to undermanned ratings.

l. Ensure subordinate commands support Navy recruiting programs.

m. Ensure subordinate commands support Naval Reserve programs.

n. In coordination with COMNAVRESFOR, monitor retention of selected reserve personnel in Naval Reserve Force units assigned.

o. Assist command career counselors in coordinating and conducting Career Information Training Courses (CITCs) for their Retention Team members. Monitor CITCs for quality of instruction and to ensure up-to-date information is being provided.

p. Provide career information training to subordinate unit command career counselors as necessary.

q. Provide nominations for Career Counselor Advanced Training (CCAT) to the Echelon 2 command.

**12. Commanding Officers/Officers in Charge.** The Commanding Officer is the senior career counselor of his/her command and is ultimately responsible for the establishment of a formal Command Retention Program. The Commanding Officer shall:

a. Support a retention program in accordance with CIPM methods in Chapter 2.

b. Ensure Retention Team meetings (command and departmental/divisional) are periodically conducted. Recommended periods are monthly for departmental/divisional and quarterly for the command.

c. Use the Command Career Counselor (CCC) as the primary source of career information expertise and to organize, manage and train the Command Retention Team. Although administratively assigned elsewhere, the CCC shall work as a Special Assistant to the Commanding Officer/Executive Officer in the performance of assigned duties. Additionally, the Command Master Chief shall be intimately involved and strongly support and enforce the responsibilities of the CCC.

d. Ensure the CCC has adequate computer support to include:

(1) Computer system(s) to support:

(a) A CIPM automated program.

(b) Job Assignment Selection System (JASS).

(c) CD-ROM data conversion for all naval publications.

(2) Modem, telephone line (with DSN capability), and communications software.

(3) Authorization to access the BUPERS Web Page and all other retention-related web sites.

e. Ensure all personnel who are separating, transferring to the Fleet Reserve or retiring attend a TAP seminar and/or a formal CARIT pre-separation briefing within 180 days prior to separation.

f. Ensure all personnel in paygrades E-1 through E-4 attend a First Term Personnel Success Workshop/one-day CITC, or a higher course of instruction within six months of reporting aboard.

g. Ensure CITC training for Retention Team members/career counselors is conducted. Minimum acceptable level of CITC training is 100 percent of all designated Retention Team members/career counselors.

h. Ensure an effective Personnel Entry System is established and maintained.

i. Ensure an effective enlisted Professional Development Board (PDB) program is established and maintained.

j. Ensure an effective Officer Retention Program is established and maintained.

(l) Ensure timely and frank performance counseling is conducted for all officer and enlisted personnel. Such counseling should communicate the command's expectations and evaluate an individual's strengths and weaknesses.

k. Ensure all single parents and military couples (with dependents) are counseled and family care certificates are executed.

l. Ensure all officers and enlisted personnel complete the Navy Retention/Separation Questionnaire (OPNAV 1910/5) when required, and that copies are filed by the CCC for two years. Completed forms shall be mailed to:

Navy Personnel Research Studies & Technology
5720 Integrity Drive
Millington, TN 38054-5026

m. Ensure command career counseling, retention and personnel programs are evaluated as needed using Appendix C.

n. Promote upward mobility programs for all personnel, pursue retention of qualified personnel and encourage conversion from overmanned to undermanned ratings.

o. Comply with support of current Navy recruiting efforts.

p. Ensure the CCC has adequate privacy for counseling sessions.

q. Ensure equal opportunity for assignments to minorities and women using the Command Assessment Team Survey System (CATSYS).

r. Ensure the Navy Goal Card Program is being utilized to its fullest potential within the command.

s. Conduct Retention Team meetings periodically.

**13. Executive Officer (Staff Equivalent)** shall:

a. Ensure policies of the Commanding Officer (relating to retention efforts) are published and enforced.

b. Monitor and take appropriate action to establish and maintain an effective command CIPM system.

c. Ensure all Retention Team members/career counselors have received the one-day CITC or SELRES CITC as appropriate. Appendices G and H refer.

d. Ensure the timely flow of all administrative items.

**14. Command Master Chief.** The Command Master Chief serves as a key member of the command Retention Team and participates with the Command Career Counselor in advising the CO/XO on the direction, execution and effectiveness of the command's retention program. Responsible for the overall effectiveness and administration of the Personnel Entry System that includes the Command Sponsorship Program, Command Indoctrination Program, Command Check-in Process, and the Command Professional Development Boards (PDBs). These programs are described in Chapter 2. The Command Master Chief shall:

a. Support command career information, retention and personnel programs, emphasizing chain of command involvement under the CIPM concept.

b. Assist the Command Career Counselor in the performance of his/her duties (e.g., scheduling of Retention Team meetings, gaining support of the CPO community, being a visible Retention Team asset, etc.), by providing management guidance and leadership training.

c. Attend the one-day First Term Personnel Success Workshop and CITC training to monitor quality and content.

d. Chair or serve as member on boards dealing with personnel issues (e.g., evaluation review/ranking, PDBs, Command Advancement Program, Warfare Specialty Qualifications, Sailor of the Month/Quarter/Year, etc.).

e. Coordinate and assist in the instruction of the Petty Officer and Chief Petty Officer Indoctrination Courses.

f. Randomly interview separating personnel to ensure everything has been done to retain qualified individuals and/or assist in their transition to civilian life.

g. Support the Navy Goal Card Program as it pertains to the PDB, Command Indoctrination, and leadership counseling.

**15. Command Career Counselor.** The Command Career Counselor (CCC) is the Commanding Officer's direct representative for the effective administration of the CIPM system. In the Naval Reserve Force, this is the RUIC Command Career Counselor. The CCC shall:

a. Be assigned as a Special Assistant to the Commanding Officer/ Executive Officer in the performance of career counseling duties. This organizational relationship is crucial for effective program management.

b. With the assistance of the ISIC Career Counselor; train, support and update the chain of command and command Retention Team utilizing the one-day CITC course, Appendix G for active duty. For SELRES, use the one-day CITC module, Appendix H.

c. Help administer an internal unit evaluation of the retention program as directed by the Commanding Officer, using Chapter 2 and Appendix C for guidance.

d. Keep the CO/XO informed of situations having a positive or negative impact on retention and make appropriate recommendations.

e. Maintain gender and ethnic command retention and advancement statistics to support your Command Managed Equal Opportunity (CMEO) program, paying particular interest to specific trends often unseen when general averages are used. For example, break out from the standard "1st Term, 2nd Term and Careerist" percentages and be specific with "1st Term, Personnelman, Caucasian/Black/Hispanic/Asian/Other, Male/Female". Forward data, including demographic information to the CMEO Officer as required.

f. Maintain a reference library or locator list of publications, records and materials listed in Appendix D to sustain an effective Command Retention Program.

g. Maintain an effective tickler system, preferably by a CIPM automated program to allow efficient scheduling of required interviews and PDBs.

h. Provide career information lectures during General Military Training.

i. Distribute and collect career counseling interview sheets, preferably by automation, in a timely fashion using Chapter 2 for guidance.

j. Maintain liaison with Family Service Center and the Command Ombudsman to establish and maintain an accurate flow of pertinent career information.

k. Assist Department Heads and Division Officers in screening prospective Department/Division/Reserve Activity or RUIC career counselors.

l. For active duty, meet all eligibility requirements in accordance with the Enlisted Transfer Manual, and be a graduate of the Command Career Counselor Course (A-501-0011). For SELRES, must be a graduate of the Naval Reserve Professional Development Center Career Information Course (R-501-005) and billet qualified of 71% or greater. It is highly recommended that all assigned career counselors complete the Navy Counselor 1 and C, Part 1 Rate Training Manual correspondence course.

m. Represent the Commanding Officer and manage an aggressive and pro-active retention program.

n. Provide the Commanding Officer with a monthly written report of career counseling/retention related activities. Recommended sample format is contained in 2-F-1. As a minimum, this report will include:

(1) 12 month EAOS/PRD list.

(2) Status of Retention Team members/career counselors training level.

(3) Status of completion of required interviews.

o. Ensure all officers and enlisted personnel separating, transferring to the Fleet Reserve or retiring receive formal pre-separation counseling that includes completing the Pre-separation Checklist (DD Form 2648) and, in concert with the local TAMP office, ensure that an Individual Transition Plan (ITP) is prepared. A recommended sample ITP Package is provided in 14-A-1.

p. Ensure delivery of Verification of Military Experience and Training (DD Form 2586) documents to all command enlisted personnel leaving the Navy and a copy of the first page maintained in command files for two years. The DD Form 2586 can be requested from:

Navy Personnel Command
PERS-662D
5720 Integrity Drive
Millington, TN 38055

q. Coordinate with the LANTFLT/PACFLT Career Information Teams (CARITs) to ensure all eligible officers and enlisted personnel attend a formal pre-separation briefing prior to separation. Personnel will normally receive this briefing during the TAP seminar.

r. Ensure all officers and enlisted personnel complete the Navy Retention/Separation Questionnaire (OPNAV 1910/5), when required. Maintain copies for a period of two years and mail completed forms to:

Navy Personnel Research Studies & Technology
5720 Integrity Drive
Millington, TN 38054-5026

s. Evaluate effectiveness of the Command Retention Program periodically. Specific emphasis should be placed on compliance with command retention directives and the dissemination of timely/accurate information during required interviews, group presentations and training.

t. Maintain a positive working relationship with the Command Master Chief in support of the Navy's retention policies and ongoing initiatives.

u. Support Command Managed Equal Opportunity (CMEO) by:

(1) Serving as a member of the Command Assessment Team (CAT).

(2) Providing retention data to the CAT as required.

(3) Providing career development via equal opportunity for assignments to women and minorities.

v. Conduct group presentations, using Chapter 2, for personnel requiring career counseling interviews.

w. Serve as a member on the command's PDBs and Indoctrination Team.

x. TAR NCs and full-time support Command Career Counselors will assist in the coordination, administration and management of the Montgomery GI Bill-Selected Reserve (MGIB-SR) Programs, Reserve Bonus Program, Transition Assistance Management Program (TAMP) and Reserve Education Benefits (i.e., DANTES, VA Work Study, Health Professional Scholarship/DVA and Stipend/ COMNAVRESFOR Programs, and the Reserve Allied Medical Program (RAMP)). Further, they will coordinate with the RSTARS Operator on personnel issues such as reenlistments, MGIB-SR eligibility, etc.

y. Use BUPERS Web Site and Access, RIBBS/RESRIBBS in their daily routine.

z. Use the Navy Goal Card Program when conducting reporting interviews, retention interviews and any subsequent interviews to which it pertains.

**16. Department Head/Division Officer** shall:

a. Oversee the retention program as it pertains to the personnel of their department/division.

b. Screen department/division personnel for all upward mobility programs (i.e., enlisted commissioning, advancement and educational programs).

c. Ensure attendance of departmental/divisional/reserve Retention Team members at scheduled meetings.

d. Submit departmental career counselor nominees to be interviewed by the Command Career Counselor and Executive Officer for assignment. Upon completion, nominees will be submitted to the Commanding Officer for final approval.

**17. Departmental/Divisional/Reserve Unit Retention Team Members/Career Counselors.**

a. Qualifications:

(1) For assignment as a Departmental/Reserve Unit Career

Counselor, be a career first class petty officer or above; for Divisional Career Counselor, be second class petty officer or above. SELRES Advance Paygrade (APG) members must complete permanent paygrade requirements.

(2) Have broad experience in the Navy and be in the second or subsequent term of enlistment.

(3) Have clearly demonstrated excellence in counseling, judgement, initiative, flexibility, objectivity and leadership abilities.

(4) Have an excellent command of the English language and be persuasive in conveying ideas.

(5) Have a clear record, free from conviction by courts-martial, civil court (except for minor, non-repetitious traffic offenses), or non-judicial punishment during the previous three years.

b. Duties of Departmental/Reserve Unit Retention Team Members/Career Counselors:

(1) Coordinate departmental/reserve unit retention efforts, and keep the Command Career Counselor and Department Head/Reserve Unit or RUIC Commanding Officer informed of ongoing retention activities.

(2) Oversee Division and Work Center Career Counselors' activities and ensure required interviews are completed.

c. Duties of Divisional Retention Team Members/Career Counselors:

(1) Keep the Division Officer and Departmental Career Counselor informed of divisional retention activities.

(2) Conduct required counseling interviews, and forward required reports to the Departmental Career Counselor.

(3) Screen training records. Coordinate with the Command Career Counselor to determine eligibility requirements are met, or a waiver is submitted, for all retention-related requests. Make appropriate comments before forwarding requests up the chain of command.

**1.3 PERSONNEL SUPPORT FUNCTIONS.** Support provided by the Administrative Office, Personnel Office, Disbursing Office, Medical Department, Legal Office and Public Affairs Office have a lasting effect on attitudes, performance and career decisions and, accordingly, play a vital role in the retention effort of any command.

**1. Administrative, Personnel and Disbursing Office** shall:

a. Provide all retention-related instructions, notices, publications, messages, etc., to the Command Career Counselor.

b. Process all personnel retention special requests, messages, 1306/7, etc., as quickly as possible.

c. Provide the Command Career Counselor with the required information to maintain command retention statistics.

d. Furnish the Command Career Counselor with a current copy of the Enlisted Distribution and Verification Report (EDVR), Source Data System (SDS) Part Three and a command alphabetical roster.

e. Compute Selective Reenlistment Bonuses (SRB), submit pre-certification data requests, and make payment of reenlistment bonuses at the time of reenlistment.

f. Keep the Command Career Counselor informed of the status of all SRB requests and any other pay matters effecting an individual's reenlistment eligibility.

g. Ensure required pre-separation paperwork is filed in the separating member's Service Record and a copy maintained in command files for two years.

h. For Reserve Components and Activities, maintain RSTARS database and work closely with the RUIC and Reserve Unit Career Counselors to provide MGIB-SR, advancement and EOS adhoc reports.

i. Ensure all officer and enlisted personnel complete the Navy Retention/Separation Questionnaire (OPNAV 1910/5), when required. Mail completed forms to:

Navy Personnel Research Studies & Technology
5720 Integrity Drive
Millington, TN 38054-5026

**2. Medical Department** shall provide physicals for reenlistments and special programs and provide final recommendation as to members meeting required physical and mental conditions.

**3. Public Affairs Office** shall:

a. Provide photographs for reenlistments, advancements, awards and other ceremonies or special occasions.

b. Provide appropriate coverage, including photographs and news stories, to local, hometown and Navy news media of reenlistments, advancements, awards and other ceremonies or special occasions.

**4. Legal Office** shall keep the Command Career Counselor informed on any legal matters affecting an individual's reenlistment eligibility.

## Chapter 2 COMMAND RETENTION PROGRAM

2.1 PURPOSE. This chapter is to assist command efforts in establishing and maintaining a viable retention program based on the principles of Career Information Program Management (CIPM). A properly organized and efficient Command Retention Team directly reflects the support of the organization and involvement of the entire chain of command.

2.2 BACKGROUND. Many commands have structured their retention programs to rely too heavily upon the Command Career Counselor to provide the majority of services relating to career information. This one-to-one counseling philosophy demands the Command Career Counselor personally contact all members of the command whenever retention-related matters are involved. In addition, the Command Career Counselor is often tasked with performing functions rightfully belonging to the command master chief, the personnel office, and others. It must be made clear that all levels of the command will be held accountable for fulfilling their areas of responsibility in the command retention effort. The idea of building an entire program around a single individual has serious drawbacks because the absence of the key person (permanently or temporarily) ends the program. The organization must then be restructured around the personality and capabilities of the replacement individual. The end result is a constantly changing program not understandable by the personnel it is designed to serve, nor does it function continuously at a high level of efficiency. At least 70 percent of the interviews conducted by the Command Career Counselor could be conducted by a trained division/work center career counselor or supervisor. In effect, individuals are being encouraged to bypass the chain of command, by directing them to "see the Command Career Counselor" for all counseling. The result of this type of command wide attitude is loss of supervisory credibility, loss of man-hours from the work center, frustration of personnel, and continued breakdown of the command retention effort.

2.3 DECENTRALIZATION. By decentralizing the Command Retention Team, the Command Career Counselor assumes a totally different role; one of career information program manager. As the career information program manager, the Command Career Counselor responsibilities include management, training, and administration of the command's retention program, internal public relations, and other retention-related facets. Obviously, as an overall manager, one-on-one counseling becomes a smaller part of the Command Career Counselor's job. The key to the success of the program is the delegation of responsibility for counseling to the appropriate team members or, in other words, decentralization of counseling activities. To make the decentralization process work, the chain of command must assume the responsibility for conducting routine counseling. To carry out this responsibility, the chain of command must be trained. The minimum career information training required is the one-day Career Information Training Course (CITC), which is incorporated in Appendix G. For SELRES units, this course is modified to fit into a two-drill period (one weekend), one half day over two drill weekends, or one day unit annual training (see Appendix H). It is further recommended that a minimum of one hour of SELRES Benefits Training is dedicated during each drill weekend to update Reserve Unit/Departmental Career Counselors. This is a function of the RUIC/Reserve Activity Command Career Counselor. Decentralization of counseling activities provides increased credibility for the chain of command; a progressive increase in the counseling expertise of supervisory personnel; a lower client-to-counselor ratio through the use of all available command assets; better informed personnel at all command levels; more time for Command Career Counselors to manage the program and for one-on-one counseling of the 30 percent of individual cases requiring their expertise and experience; increased program effectiveness because of workload sharing and elimination of the crisis

management approach because one individual has too many priorities and too few hours to accomplish them.

2.4 CAREER INFORMATION PROGRAM MANAGEMENT (CIPM). CIPM provides the basics for establishing and managing a Command Retention Program. CIPM provides Command Career Counselors with formal training in program management techniques, a technique for self-evaluation of retention program effectiveness, and feedback to the commanding officer. It sets minimum standards of a Command Retention Program and requirements for career information training of collateral duty career counselors, selected supervisory personnel, and first term personnel through a First Term Personnel Success Workshop. CIPM is designed specifically to bring all command resources into operation to support the local program while making full use of the chain of command.

2.5 PROGRAM DEVELOPMENT. The following discussion is the recommended approach for the Command Career Counselor to establish and maintain CIPM within the command.

1. Inform the CO and XO on the concept, requirements and benefits to the command.

2. Provide a brief overview of how CIPM works and the benefits to be derived.

3. Conduct a command unit assessment using Appendix C.

4. Assist CMEO in conducting a CATSYS command diagnostic.

5. Brief the command on the results of the unit assessment and develop a Command Retention Program action plan to correct the deficiencies.

6. Develop and train an active Command Retention Team utilizing the Career Information Training Course (CITC) provided in Appendix G.

7. Establish a 12-month tracking system, identifying all personnel within 12 months of expiration of active obligated service (EAOS)/expiration of reserve enlistment (EREN) or obligation (EOS) and/or planned rotation date (PRD)/high year tenure (HYT).

8. Develop a career information program management system as described in this chapter.

9. Carry out the retention program action plan.

10. Recommend conducting a second unit assessment within 12 months of the first and every 12 months thereafter to allow the command to continually improve its retention program goals and objectives.

2.6 CIPM PROGRAM ELEMENTS. The basic elements of the Navy's CIPM program outlined in this chapter are designed for use at the unit level to achieve the goals set by the Chief of Naval Operations in OPNAVINST 1040.6 series. Having the basic program in place will not guarantee total success. Retention is affected by many other factors, some we have no control over and many we can control. Among the factors a unit cannot control are operational schedules, pay, sea/shore rotations, and so on. Be aware of the uncontrollable factors but don't dwell on them. Instead, focus your attention on the factors you can control. Some of the factors to control are an effective advancement program, recognition of individuals, family involvement, and above all, command climate. Command retention programs must contain, but are not limited to, the nine basic elements listed below:

1. Command Retention Team
2. Personnel Entry System
3. Professional Development Board (PDB)
4. Interview System
5. Communications System
6. Loss Tracking System
7. Program Evaluation System
8. Program Manager

2.7 CIPM ELEMENT #1 -- THE COMMAND RETENTION TEAM. Underlying the entire program is the building of an effective Command Retention Team--a well-organized command team decentralizing the overall effort and providing a means to guarantee continuity in career information program efforts. Effective Command Retention Teams are the key ingredient of a successful program. Properly organized, efficient teams, perhaps the most frequently neglected area of retention programs, directly reflect the support of the organization and everyone in the chain of command.

1. TRAINING THE COMMAND RETENTION TEAM. One of the primary reasons the multilevel Command Retention Team has not been successful in the past is because the team has not been properly trained to take care of its responsibilities. We cannot expect our Command Retention Team to act on their responsibilities just because of their position or because they have been in the Navy for a long time. Untrained or improperly trained team members and supervisors have a negative impact on the command. First, the credibility of our team and supervisors is seriously challenged. When young Sailors consistently get as a standard response to their questions, "Go see the career counselor," they begin to wonder if anyone else knows anything or even cares about their careers besides the career counselor. In addition to a credibility loss, valuable man-hours are lost while important personnel are away from the work center seeking answers from the Command Career Counselor or other, possibly unreliable, sources. Another important factor is that the chain of command is weakened by unresponsiveness to the needs of its personnel. The Command Retention Team is considered trained and qualified to assume its responsibilities if they have attended CITC on their current tour of duty. The minimum training is the active duty/reserve one-day CITC, Appendix G. It is recommended attendance be within three months of reporting on board, but must be within six months of reporting.

2. FORMAL TRAINING. For many years the Navy has depended on the 4-week Command Career Counselor Course (CCCC) school offered at Norfolk and San Diego identified in the Catalog of Navy Training Courses (CANTRAC) to provide information to personnel on programs and benefits. The Naval Reserve has relies on its own two-week Career Information Course offered at the Naval Reserve Professional Development Center, New Orleans. Annual schedules are printed via NAVRESPRODEVCEN 1500 Notice (usually released July/August timeframe). This training meets the requirements of effectively educating our personnel in the many programs available in the Naval Reserve.

3. INFORMAL TRAINING

(a) Career Information Training Course (CITC). The primary source of training for the Command Retention Team is the active duty/reserve one-day CITCs. Guidance for these courses is provided in Appendices G and H. Any graduate of the CCCC is qualified to instruct the active duty CITC. Any graduate of the two-week NAVRESPRODEVCEN Career Information Course may teach the Naval Reserve CITC, Appendix H. Immediate Superiors in Command (ISICs) and training commands are responsible for conducting this course. The active duty CITC regarded in this manual can been further shortened for any group required to receive training, notably for the First Term Personnel Success Workshop. It may be advisable to send department/reserve unit counselors to the active duty abbreviated as much as possible. Keeping track of Command Retention Team members and their CITC attendance is important to ensure a

complete and well-trained staff. The first task is to identify the Command Retention Team members. One of the best sources for obtaining the names is the EDVR/RUAD or an RSTARS adhoc report. Once personnel have been identified, the next step is to verify their attendance at CITC since reporting to the command. This can be done by checking Page 4s of the enlisted service record and Page 13s in the officer's service jacket. Also, CIPM automated programs currently being used generally provide a CITC tracking system in the software.

(b) Quarters/Divisional Training. A CIPM Training Schedule is provided on pages 2-A-1 and 2-A-2. This schedule provides weekly topics to be included in your Quarters/Divisional Training pipeline. For programs requiring package submission deadlines, the training topics are arranged in a timely fashion to assist with the Naval Programs Application Due Date Matrix provided at 17-A-1.

4. COMMAND RETENTION TEAM MEETINGS. Meetings allow for distribution of information, gathering of information, problem solving, and decision making. The entire Command Retention Team should have a meeting at least once a quarter. This meeting should be general in nature and the CO and/or XO and CMC should attend these meetings. To meet more often than this is probably a waste of the team's time because the group is too large to accomplish much more than to distribute wholesale information pertaining to the whole group or to establish or reestablish policy governing the Command Retention Program. Your real working meetings are the monthly departmental/reserve unit meetings. The purpose of having smaller departmental meetings is to tailor the agenda to a particular group with the same common interest. Participation will be better, you will get more accomplished in a shorter time, and people's time will not be wasted discussing subjects not concerning them. Meetings should be scheduled at command planning boards for training. In any case, you must consult each department head before scheduling any meeting for their department. Department heads will feel more obligated to attend the meeting if they schedule the meeting. The goal is to have the department head and all supervisors, along with the department/reserve unit/division/work center counselors attend the meeting. Problem solving and decision making will be enhanced with supervisors in attendance.

a. Publishing and Planning an Agenda. Always have a planned agenda for each meeting. The agenda is the real "meat" of the meeting and should contain a sequence of the issues you intend to cover. Headings and agenda items should be detailed enough to inform team members of exactly what will be discussed at the meeting. You may also note beside each agenda item, "For Information," "For Discussion," "For Decision," and so on. This gives people attending the meeting information concerning what is expected of them. Because it is so important, you should consider several factors when putting your agenda together. Every topic, or agenda item, can be placed into one or more of the following categories of objectives:

(1) Informative--This category covers the distribution and clarification or discussion of information. No requirement exists for group conclusion. Typical of this category is telling the Command Retention Team about a modification to the SCORE program based on the latest change to the MILPERSMAN, for example.

(2) Constructive--This category requires something new to be devised. Members must contribute their knowledge, experience, judgment, and ideas; for example, development of a Command Retention Program.

(3) Action--This category of agenda items ideally starts with a policy and ends when a plan of attack has been devised. Agenda items of the action category enable the people attending to find the best means of achieving a goal as a group. Action items allow those attending to understand and influence the way their duties mesh with the duties of other group members and with the overall task of the group.

(4) Modification--Agenda items in this category usually change a system or method or operation. The key member must collectively make or confirm the decisions reached on these agenda items. Change can be disturbing, since it may be perceived as a threat to status and/or long-term security; therefore, it is dangerous to simply close any discussion and make the decision by decree. Unless you have firmly committed backing, plan on a good deal of discussion if you are introducing or promoting radical change.

b. Required Agenda Items. There will be certain items on your agenda for every meeting:

(1) Review the loss tracking system as it pertains to your department/reserve unit.

(2) Review all interview sheets from the previous month to determine what, if any, action is required to assist personnel within the department/reserve unit to achieve their career goals.

(3) Discuss all retention-related request chits (BCNRs, 1306/7s, etc) on personnel in the department/reserve unit.

c. Agenda Distribution. Consider distributing a written agenda to the members of the group 2 or 3 days before the meeting. Less than 2 days prevents time for research and more than 3 days may result in the papers getting lost by some.

d. Meetings and How to Chair Them. Meetings can be held for a variety of needs; for example, rapid distribution of information, information gathering, problem solving, decision making, and so on. Meetings also serve a variety of other functions, some obvious and some subtle. A meeting can be an occasion where a group's collective knowledge is revised, updated, and/or increased. A meeting should help every person attending to understand the group's collective goals and how each person's individual efforts can contribute to meeting those goals. A successful meeting creates a commitment to group decisions and goals on the part of each person attending. Often, a meeting is the only occasion where all the individuals work as a collective body and, in some cases, it is the only occasion where you are actually perceived as the leader or manager of the team. Unless you have a clear requirement for calling a meeting, there is a high probability it will be a waste of everyone's time. Just because a meeting is held the second Tuesday of every month is not enough reason for holding the meeting. If there is no real benefit for the meeting, cancel it! If you do cancel a meeting, do it as far in advance as possible so everyone concerned knows it and can reschedule their time. The success or failure of a Command Retention Team meeting can hinge on various types of potential problems, most of which can be eliminated by proper preparation for the meeting. The basics of the meeting can then be constructed to achieve best results.

e. Size of Meetings. The issue of size for a meeting is a problem and nagging concern for leaders, members, and organizers. Specific factors influence the determination of the optimum size of a meeting. Purpose is a simple and yet decisive consideration to be analyzed before the determination of group size. Certain persons because of their official positions or their level of competence in a certain area automatically tend to occupy positions of status and must be considered for attendance at meetings. Physical facilities impose obvious limitations upon size. A basic principle to use is the least number of members. Another way to state this is don't have anyone at the meeting who can't contribute or benefit from the meeting. When the least number of members is present to achieve the goals for the meeting at hand, the group is of optimum size. Generally, a small working group of four to seven people will allow for interaction between all members present.

f. The Chairperson's Job. Many traits are required of a

successful chairperson and the more traits you can develop the better chairperson you will be; hence, the better meetings you will have. Various responsibilities of a good chairperson are listed in the following paragraphs:

(1) They establish and enforce ground rules.

(2) They maintain the focus on the purpose of the meeting and keep the objectives of the meeting clearly in mind and deal only with subject matters pertaining to the objectives.

(3) They must assist the group in determining the best possible conclusion or discussion in the most efficient manner possible. To perform this job successfully, they should understand the structure of a problem-solving discussion within the meeting context. Here are the steps in problem solving:

(a) The problem is explained.

(b) The history of the problem is given.

(c) The present state of the problem and actions taken to date are explained.

(d) The problem is diagnosed (identification of probable causes).

(e) A remedy to the problem is formulated.

(f) The chairperson accepts all ideas, disallows value judgments of the ideas, records all ideas, and evaluates them, at a later time in the meeting, for usefulness.

(g) The chairperson clarifies ideas and views by questioning, rephrasing, restating, or summarizing. The chairman interrupts as often as necessary to clarify the idea or thought for each member; this is necessary to keep the discussion moving forward.

(h) The chairperson seeks team agreement and brings the team to a resolution everyone understands and accepts as being the consensus of the group.

(i) The chairperson must trust participants to be valuable, resourceful, interested members of the organization and must task them to help in future meetings (with gathering additional information, action planning, and other needed tasking).

g. Minutes of the Meeting. The minutes of the meeting are important. Include the time and date of the meeting, place held, and who chaired it; names of members present and absent; all agenda items discussed and decisions reached; if action is agreed on, the names of the members responsible for the action; time the meeting concluded; the date, time, and place of the next meeting.

h. The Participants' Job. The success or failure of a meeting is not the sole responsibility of the chairman. Participants must know what their responsibilities are in a meeting and act upon them. Various responsibilities of the participants are listed in the following paragraphs:

(1) Participants should plan their schedules so they are available at the appointed time and place, know what the meeting is to achieve, provide their informational inputs, and bring appropriate note-taking utensils.

(2) Participants must assume responsibility for keeping the

meeting focused on accomplishing the purpose of the meeting within the time frame allotted. They should speak up if they feel bored, upset, or displeased when emotion is getting in the way of task completion.

(3) They should take notes on items concerning them or the personnel in their work groups and before the closing of the meeting they should make sure they know the time, place, and purpose of the next meeting (if any).

(4) After the meeting they are responsible for informing their work group of items of concern developed during the meeting, take planning action steps resulting from the meeting, and help develop possible agenda items for the next meeting.

i. General Information. Time for general discussion should be left at the end of the meeting. The early part of a meeting is more dynamic than the final portion, so if an item requires creative input, it should be early on the agenda. By the same token, if there is an item of interest or concern to all personnel attending the meeting, this "star" item can be used to counter the attention lag often setting in after the first 20 minutes of the meeting. Some agenda items unite the meeting on a common ground while others may divide the members of the group. As a general rule, it is a good idea to find a unifying item with which to end the meeting. Few meetings achieve any results of value after two hours. An hour and a half is usually adequate for most purposes. It might be helpful to put the end time as well as the beginning time on the agenda. If meetings consistently go on too long, schedule the start one hour before lunchtime or secure time. The practice of circulating background or point papers is a good idea, as it helps in formulating useful questions and considerations in advance. These should, however, be brief or consist of a short summary.

2.8 CIPM ELEMENT #2 -- THE PERSONNEL ENTRY SYSTEM. The purpose of the personnel entry system is to guarantee the career information needs of all newly reporting members and their dependents are met. The documentation associated with this system provides methodical administrative instruments to aid in placing both the new members and their dependents into the command retention program. The personnel entry system is put into effect at the time a command is notified of the pending arrival of a new member and concluded at a time when the newly reported member is functioning and fully productive in a working environment. The personnel entry system includes the sponsor program, check-in process, indoctrination, and professional development program. However, the Professional Development Program efforts continue beyond initial entry to the command and is a separate element of CIPM. There should be a directive governing all phases of the personnel entry system as it applies to each unit. The Command Master Chief is personally responsible for the overall effectiveness and administration of the personnel entry system. This responsibility cannot be delegated.

1. SPONSOR PROGRAM. The purpose of the sponsor program is to provide assistance to relocating service members and their families. Minimum requirements for the program are contained in MILPERSMAN 1740-010. A sponsor program guide is provided in OPNAVINST 1740.3 Series to assist commands in developing a sponsor program. The realization even the most effective program will have only an 80 to 90 percent success rate will keep you from doing unnecessary paper work in an effort to achieve a 100 percent success rate. In many instances a member simply "shows up on the quarterdeck" with no advance warning or notification the individual has orders to the command. This is not to say commands should not try for a perfect success rate; only those commands having an 80 to 90 percent success rate have successful programs. If the rate falls below 80 percent, the central control point should make every effort to find out what the deficiencies are and take corrective action. This includes the initiation of an administrative system to guarantee proper procedures are being followed. An overabundance of paper work only slows down the process.

Every effective sponsor program has three key elements:

a. A system to request a sponsor for transferring members. All members transferring must be counseled concerning the advantages and benefits to be gained from using a sponsor. Whether the member accepts or declines sponsor assistance, the information contained in the Navy Sponsor Notification, NAVPERS Form 1330/2, will be provided to the member's prospective commanding officer by the transferring command. When time prevents the use of this form, the information is transmitted by other more timely means. Attention by detaching and receiving commands in a timely manner is crucial to the success of any sponsor program. The NAVPERS 1330/2 must be completed and mailed to the receiving command within 5 working days of receipt of orders. Special attention by receiving commands is required to make sure prospective members, in fact, receive advance accurate and complete information before their detachment and transfer.

b. A system for assigning sponsors and providing information and assistance to prospective gains and their families. Assignment of a sponsor is mandatory in all cases of permanent change of station (PCS) orders. Personal contact through letters, messages, and telephone calls is essential. All sponsors require briefing, not only about their responsibilities, but also about the importance of their duties in view of the impact relocation has on career information and retention. Sponsors should be at least paygrade E-5 and receive formal training on their duties and responsibilities. The main component of the sponsor program is the individual sponsor. OPNAVINST 1740.3 contains a list of skills and attitudes making the difference between just assigning someone to act as a sponsor and actively choosing the person most qualified. MILPERSMAN 1740-010 requires all receiving commands to send activity information material even if the individual does not desire a sponsor. Other organizations such as personnel support activities (PSAs) and detachments (PSDs) and family service centers are valuable resources to support command sponsor programs, however, they cannot be allowed to substitute for the command's direct communication with the member. There is a sample welcome aboard package in OPNAVINST 1740.3 to be modified to meet the needs of all commands. Welcome aboard packages will be sent first class mail or by faster means. These packages are time sensitive and should go the fastest means possible to ensure timely arrival. At a minimum, the package should include:

(1) Housing information.
(a) Government housing - waiting period.
(b) Civilian housing - current rental rates and availability.

(2) Household goods shipment information.

(3) Local military facilities.

(4) School information for children (if applicable).

(5) Child care facilities and rates.

(6) A detailed map of the city in which the command is located and a map or detailed instructions indicating major roads/streets leading to base, and a base map or detailed instructions showing location of the Housing Referral Office, medical facilities, nursery/child care facilities, commissary and exchanges.

(7) Maps and detailed instructions on how to reach the command from local transportation terminals.

(8) A list of guest housing available and motels, or temporary lodging, in various price ranges in the area of the command to assist with house hunting.

(9) Overseas area information on what personal goods are required to make in-country living comfortable at overseas commands.

(10) Detailed and up-to-date information on passports, visas, local economy, availability of housing and furniture, automobile restrictions/
insurance, electrical cycle and voltage requirements and Temporary Lodging Allowance (TLA) criteria, etc.

(11) A command welcome aboard letter. Samples are in OPNAVINST 1740.3 series.

(12) SITES System information available at the Family Service Center.

c. A system to monitor, evaluate, and make changes to the program. The use of a central control point for monitoring the program is necessary if the program is to be uniform and successful. As assigned in OPNAVINST 1306.2B, the command master chief will personally monitor the central control point. The central control point must be aware of the following key elements of the program:

(1) Determining the whereabouts of prospective gains so information will reach the member.

(2) Sending welcome aboard packages to prospective gains at the earliest possible date, preferably on receipt of an advance copy of orders, on checking section 1 (prospective gains) of the Enlisted Distribution and Verification Report (EDVR), when appearing on the prospective gains list on BUPERS Access, or on receiving a request for a sponsor.

(3) Assigning a sponsor within 5 days of notification of prospective gains.

(4) Providing guidance and training to sponsors.

(5) Providing evaluation of the program by making sure a questionnaire (OPNAVINST 1740.3) is completed by newly reporting members to determine the adequacy of the program. This may be done during the check-in process or during indoctrination training.

(6) Ensuring program simplicity. Generally, the simpler a program is, the easier it is to administer. Care should be taken to avoid a system not providing administrative capability for follow-up or a system generating large quantities of otherwise useless paper work. Some suggestions for a simple yet effective system are as follows:

(a) Use a computerized log as a single source of reference containing the dates when the welcome aboard package was mailed, when the request for a sponsor was made to the department or division, when the sponsor was assigned, when the correspondence giving sponsor information was sent, and the name, rate, and division of the sponsor. A log of this type will reduce or eliminate some of the paper work requirements and yet provide key information.

(b) Use form letters whenever possible because creativity takes time and time is of the essence if the prospective gain is to receive any information before arrival. Include a telephone number and two envelopes addressed to the sponsor to make it easier for the prospective member to contact the command for assistance.

(c) The requirement for division officers to personally notify sponsors of their assignment and the transmission of this

assignment to the central control point by telephone could eliminate the need for an appointing letter. In any case, the use of the computerized log eliminates the need for copies to be maintained at the central control point.

d. Two resources to be aware of for detaching and newly reported personnel are the Relocation Assistance Program (RAP) and the Standard Installation Topic Exchange Service (SITES) at the Family Service Center. Specialists within the RAP assist members in being fully prepared for moving transitions. They offer information and services helping Sailors make the right decisions at the right time. RAP services include:

(1) Needs assessments related to the circumstances and requirements of their move,

(2) The SITES automated database with extensive information on over 300 military communities worldwide including: housing availability, sales and rental price ranges, cost of living information, education and recreational opportunities, medical facilities, climate, and general employment information,

(3) Help developing a relocation plan: providing information specifically related to the member's unique set of needs, enrolling them in special programs, and referring members to other offices providing assistance,

(4) Workshops and individual sessions on managing relocation stress for adults and children.

Visiting the RAP specialist will help members identify exactly what they need, so they can ask the right questions and achieve the desired result as they navigate through their transfer process.

2. CHECK-IN PROCESS. Commanding officers should simplify the check-in and check-out procedures to reduce to an absolute minimum the number of offices where members must present themselves when reporting on board or being detached. While recognizing the need to control service, health, and pay records, close command scrutiny is required to make sure procedures are as streamlined and efficient as ingenuity and initiative can make them. Personnel responsible for checking in new personnel should be indoctrinated about the importance of courtesy and helpfulness to newly reporting personnel. This process helps set the new member's attitude about the command. Make sure new members have assigned bunks and are assisted in storing their gear before any check-in process. There should be someone assigned for each duty section to help members who report in after normal working hours. This individual should make sure all the immediate needs of the new member are met and be responsible for notifying the command duty officer of all new arrivals.

3. INDOCTRINATION PROGRAM. The purpose of the indoctrination program is to acquaint newly reporting personnel with the role, policies, and services of the new command; to reduce much of the anxiety felt by newly reporting members and their families; and to enhance the individual productivity of new members. All personnel below department head level reporting to a command must receive indoctrination. The nature and scope of the indoctrination program varies depending on the size and needs of each command and the facilities and personnel available to perform the function. The conduct of the indoctrination program must be governed by a command directive specifying program responsibility and content.

a. Commands of more than 500 personnel. Due to the volume of incoming personnel, large commands will probably find it desirable to assign newly reporting personnel to an I division before sending them to their assigned work center. Countless hours can be saved by processing newly reporting members as soon as possible after they report aboard. Large commands will also find it beneficial to hold a Navy rights and responsibilities (NR&R) workshop, as well as have new members start general

personal qualifications standards (PQS) and appear before a professional development board during the indoctrination training.

b. Commands of less than 500 personnel. Smaller commands may find it desirable to hold indoctrination training on a monthly basis, allowing members checking into the command to be assigned directly to the appropriate division. The division officer gives the necessary watch and PQS orientation and gives the member the opportunity to tour the unit before undergoing full indoctrination. These smaller commands may, depending on the turnover of personnel, find it undesirable to conduct the NR&R workshop or convene the professional development board until appropriate numbers of personnel are available to make the project worthwhile. The use of this direct assignment method may save a considerable number of hours while at the same time fulfilling the objectives of the indoctrination program.

c. Indoctrination subjects. Many areas can be covered in an I division. Some are mandatory, some are recommended, and some are suitable to be given to dependents. The areas and activities listed below, although not all-inclusive, are either mandatory (M), recommended (R), and/or suitable for dependents (D):

(1) Commanding officer's welcome aboard address (M) (D)

(2) Command master chief functions (M) (D)

(3) Service, pay, and health records reviewed jointly by the individual, division officer, and responsible unit personnel (M)

(4) Command policy, to include command organization, command orders, battle bill, and the damage control and watch standing organization as appropriate (M)

(5) An orientation tour of the unit and/or station (M) (D)

(6) Command mission (M) (D)

(7) The operating schedule (for mobile units) (M)

(8) Standards of conduct, command performance and evaluation standards, leave, and liberty (M)

(9) Proper grooming standards and regulations as to appropriate attire (M)

(10) Career information (cover material required for reporting interview) (M) (D)

(11) Deck, operations, and engineering departments and damage control (M)

(12) Navy rights and responsibilities workshop (R)

(13) Sexual harassment and fraternization policies (M)

(14) Religious facilities and services offered (R) (D)

(15) Special services/recreation department facilities and services offered (R) (D)

(16) Navy exchange facilities and services offered (including ship's store operations and benefits available) (R) (D)

(17) Navy relief facilities and services offered (R) (D)

(18) Legal services (R) (D)

(19) Medical and dental facilities and services (R) (D)

(20) Dependent aid services (R) (D)

(21) Red Cross services (R) (D)

(22) Postal services briefing (R)

(23) PQS orientation in general skills (R)

(24) Disbursing services (R) (D)

(25) Shipboard/shore safety (R)

(26) Public affairs (R)

(27) Drug/alcohol education services (R)

(28) Command ombudsman functions (R) (D)

(29) Nearby bases and facilities available (R) (D)

(30) Local events/places dealing with recreation and local establishments that are off limits (R) (D)

(31) Review of Navy Goal Card Program and Pocket Goal Card (M)

d. Helpful hints. The methods chosen for presentation of indoctrination material depend on the material to be presented, the availability of personnel to perform briefings, and the facilities available in which to perform the indoctrination process. These methods include the following:

(1) Use only persons who are knowledgeable in the subject being presented (for example, the chaplain to give a religious brief, the legal officer to give the legal services and standards of conduct brief, and so on) and make sure they have an approved lesson guide to follow. An approved lesson guide helps to make sure the proper material is presented each time the subject is given and it also allows another expert in the field to act as a substitute when the regular speaker is absent. The central control point must have a copy of all approved lesson guides on file.

(2) Use handouts and provide onsite training (especially useful for shipboard training) whenever possible.

(3) Use video tape presentations, if available, to reduce the number of hours required of the various individuals to prepare and present indoctrination material. An individual who is an expert in the area being presented should be available to answer questions after the video tape presentation.

(4) Use training films and/or slides such as training in general damage control, drug and alcohol education, and so on, whenever available.

(5) All indoctrination presentations, regardless of duration, should be designed so material applying to all newly reporting personnel is completed first. Material designed for a particular group of personnel, such as the NR & R workshop, professional development board, and so on, should be performed last.

(6) It is preferable to schedule presentations on an ongoing basis. Schedules should be prepared and distributed to both those giving and receiving the training.

(7) Obtain feedback in the form of a written critique from those receiving the indoctrination as a means of evaluating the program content. Daily critiques are most effective and, in addition, it is useful to have another critique 30 days following the indoctrination program to determine effectiveness and value of information provided after the new arrival has had a chance to use the information.

e. Documentation of Indoctrination. The central control point must make sure a list of those personnel receiving indoctrination training is maintained. The lists must be retained on file for a minimum of 1 year. A copy must be provided to the personnel or Pay/Personnel Administrative Support System (PASS) office, and an appropriate page 13 entry made in the individual's service record.

2.9 CIPM ELEMENT #3 -- THE PROFESSIONAL DEVELOPMENT BOARD. The primary purpose of the professional development board, as set forth in OPNAVINST 1306.2C, is to provide a visibly fair and impartial opportunity for enlisted personnel (E1-E9) to attain positions of greater responsibility commensurate with their potential and consistent with Navy and command manning requirements. Additionally, commanding officers should use the professional development board as an intermediate quality control screening device in matters relating to the professional development of career personnel.

1. PROFESSIONAL DEVELOPMENT BOARD (PDB) COMPOSITION. The PDB will have permanent members and supplemental members. The permanent members are the Command Master Chief, Command Career Counselor (active duty/reserve), Personnel Officer, and Educational Services Officer. The supplemental members are the division career counselor and the division officer/division leading chief/division training assistant of the member being interviewed (as available and appropriate). The division representative(s) must be able to provide information to the board and have the authority to incorporate the recommendations of the board. The PDB may have as many supplemental members as deemed necessary to carry out its task.

2. COMMAND CONFIGURATION. A command may elect to design a PDB program to suit the needs of that command, provided all enlisted personnel are afforded an opportunity to appear before a PDB. The number of enlisted personnel assigned, the command's physical characteristics or mission may dictate developing a program to allow departments and/or divisions to coordinate their own programs.

3. RESPONSIBILITIES OF THE PDB. The PDB is designed to provide expertise in complicated rating entry/advancement/special program procedures not normally available at the supervisory and lower management levels. The command's approach to professional development should be proactive rather than reactive. The PBD should function to anticipate the needs of a member rather than wait for the member to request assistance. It is not designed to circumvent the chain of command but rather to function within the chain of command to give those personnel requiring its specialized services accurate and up-to-date information and sound advice. Specifically, a PDB will perform the following services when applicable:

a. Interview all non-designated personnel within 60 days/3rd drill weekend of reporting to the command to provide guidelines on choosing a career path, advancement procedures, rating entry information, Navy College Program opportunities, and courses of action to benefit the member and the Navy the most.

b. Review requests for career path selection of individuals meeting the requirements as prescribed in current directives and forward the

recommendations to the Commanding Officer. The Commanding Officer makes the final resolution on all recommendations made by the PDB. If the request is disapproved, the individual should be made aware of the reasons for the disapproval.

c. Establish a follow-up program. As members of the PDB, the interviewee's division officer, leading petty officer, and division career counselor should monitor, assist, and encourage members in making progress toward advancement.

d. Schedule all personnel who are within one year but not less than six months of high-year tenure to appear before a PDB, to provide guidance, advice, and training programs to assist the member. If a member who was administratively reduced in grade becomes high year tenured, schedule this person immediately to appear before a PDB.

e. Interview individuals desiring commissioning programs, special programs, advanced training, and other programs requiring a command assessment or endorsement. The PDB can be used to provide recommendations to the Commanding Officer as to the eligibility, suitability, and probability of the individual succeeding in the special program requested.

f. Provide advice and/or assistance to career personnel who have prolonged difficulties in being selected for advancement and/or attaining PQS as required by the command.

g. Update member's Navy Goal Card and Pocket Goal Card.

4. REPORTS AND RECORDS. The minutes of each meeting should be maintained and forwarded to the commanding officer via the executive officer for approval or disapproval. The minutes should contain, as a minimum, progress reports and recommendations concerning all those interviewed. Commands should implement a data collection system to track various areas of professional development within the command. For example, tracking the number of personnel who have earned a warfare qualification, those who are qualified vs. those who are not qualified/qualifying. This information will allow the command master chief to "pull the string" on certain internal programs to maximize the professional development efforts within the command.

5. SCHEDULING BOARD MEETINGS. The professional development board should be convened monthly for most commands; however, the size of the command will determine the frequency of the meetings. The monthly meeting should be scheduled for the same time each month (for example, the second Tuesday of the month). The meetings and a list of scheduled attendees should be published in the plan of the day.

2.10 CIPM PROGRAM ELEMENT #4 -- THE INTERVIEW SYSTEM. The interview system is composed of group presentations for the required interviews, the required interviews, situational interviews, individual counseling files, tickler systems, and counseling techniques to enable the Command Retention Team to conduct the interviews professionally. An interview is a formal consultation, a meeting at which information is obtained from a person. The success or failure of interviews hinges on a number of variables: the evaluation of the member's attitude, emotions, needs, and values; preparation for the interview; knowledge of the topics to be discussed; and the ability to resolve a problem and/or effect a plan of action. The interview system must contain the following elements: a method to provide individuals with the information needed to make sound career decisions based on facts; a tickler system to make sure all individuals are interviewed at the proper time; and a method to record and verify the completion of all interviews.

1. GROUP PRESENTATIONS. Division/work center counselors do not have enough training or time to provide all the information required for each

interview. Moreover, it is impractical to try and provide all the information required on a one-to-one basis, since the time required is prohibitive. Because of these reasons, group presentations are prerequisites for each required interview. The presentations provide members who are due an interview the information required by Appendix B. Group presentations are given at least a month before the scheduled interview. The presentation must be conducted by the Command Career Counselor (CCC). This will allow individuals time to analyze the information provided and better prepare them for the personal interview to follow. To be productive, the group presentation should have at least four people in attendance. Groups at large commands may exceed this number, but small commands may not have four people due a specific interview the following month. Small commands may combine 2 or more months of required interviews in advance to have a sufficient number for a group presentation, or they can join with other small commands in the area to make the group presentations productive. When commands join together to give the group presentations, they can take turns hosting the different presentations and share in the instruction responsibilities. This method is very beneficial to all.

A POD note should be published stating who must attend and the time, place, and date of the presentation. When a presentation is listed in the POD, it should be referred to simply as a career information brief. Personnel usually have less objection to attending a career information brief than attending an incentive programs, retention programs, or 17-year monitor presentation. They like receiving information but they don't always like to attend a presentation they perceive as a reenlistment pitch.

2. ONE-ON-ONE INTERVIEWS. After attending a group presentation for one of the required interviews, members will have a personal interview by a departmental/divisional/reserve unit career counselor. Each of the required interviews will normally only take 15 minutes. Not to say once the interview is concluded, there won't have to be follow-up interviews scheduled. A follow-up interview may have to be scheduled with the CCC because the member has requested a certain action be taken the division/work center/reserve unit counselor is not trained to handle. Perhaps the division/work center/reserve unit counselor needs to do research on a subject before a realistic answer can be provided to a question asked by the member. It is better to schedule a follow-up interview than to keep the individual waiting while research is being conducted.

3. REQUIRED INTERVIEWS. The five required interviews are the reporting, the retention programs, the incentive programs, the 17-year monitor, and the preseparation/retirement interview. Each is designed to be conducted at specific career points during an individual's career and to provide certain information relating to that particular career point. The action plan for the five required interviews is set forth in Appendix B. The retention programs interview and 17-year monitor interview will only be conducted one time for each individual during an entire career. The reporting, incentive programs, and preseparation interviews may be conducted many times during an individual's career. It is imperative the required interviews be conducted when they are due because they impact heavily on the member's retention process.

a. Reporting Interview (all personnel). The reporting interview's group presentation should be conducted as part of the indoctrination process (I Division). This presentation should be part of the CCC's I Division lecture. The one-on-one reporting interview must be conducted within 30 days/one reserve drill weekend from the time an individual reports on board a command. This interview should always be conducted by the division/reserve unit/work center career counselor. This will enforce the Command Retention Team concept to the new member from the start. Review the member's Navy Goal Card and Pocket Goal Card during the Reporting Interview.

b. Retention Programs Interview (first termers). The group

presentation should be conducted at active duty service date (ADSD) plus 17 months and the personal interview held by the division/work center/reserve unit career counselor at ADSD plus 18 months for active duty personnel. For SELRES, use the first drill pay affiliation with a Naval Reserve Unit vice ADSD. The division/work center/reserve unit career counselor must be prepared to discuss any material covered in the group presentation, as brought up by the individual being interviewed. Review the member's Navy Goal Card and Pocket Goal Card during the Retention Interview.

This interview is a formal expression of the command's interest in the member's progress to date. An examination of the member's service record, training record, and division officer's notebook before the interview will disclose the efforts and progress the individual has made. It is here the career counselor might discover the trends, both favorable and unfavorable, to be corrected or complimented. It is strongly recommended the spouse be invited to the interview (subject to member approval). Remember to stress the good the spouse can do to assist the husband or wife in reaching full potential. Be patient when explaining services and programs available, since the spouse most likely will not be as familiar with benefits and entitlements as the member is.

c. Incentive Programs/Transfer Interview (all personnel). The proper time frame for conducting the group presentation is 13 months before the individual's HYT date/expiration of active obligated service (EAOS) or projected rotation date (PRD) for active duty. For SELRES, use expiration of obligated service (EOS) or end of reserve enlistment (EREN). For SELRES HYT, the proper time for conducting the group presentation is 12 months for individual counseling prior to the year of the calendar year of reaching High Year Tenure (HYT). Because SELRES HYT is always on 31 December and the paperwork for submitting waivers, extensions, retirement, etc., conduct the group presentation during the February drill weekend and the individual interview during the March drill weekend 22 and 21 months prior to HYT.

The group presentation is the same for all individuals, but the personal interviews should be conducted differently on the basis of whether the member is approaching their PRD or EAOS. The personal interview should be conducted by the division/work center career counselor 12 months before the individual's EAOS or PRD. The division/work center career counselor will primarily be concerned with reviewing and updating the enlisted duty preference form for the individual who is only transferring. This is also the time to talk about advance training for these individuals. Detailers are more likely to give individuals advance training (C school) with permanent change of station (PCS) orders than during the middle of a tour. This is the time to submit a 1306/7 for a school. Another important issue for these people is to make sure their training record and service record are up to date.

d. 17-Year Monitor Interview (careerists).

(1) The group presentation should normally be given when members have 16 years and 11 months of active duty/qualifying years of reserve service for retirement; and the personal interview by the division/work center/reserve unit career counselor should be given at the 17 year point. The group presentation for this interview will probably include 2 or more months of scheduled interviews in advance to have a quorum for a group presentation. During this interview the benefits of remaining on active duty/reserve service past the initial Fleet Reserve/Retirement Without Pay eligibility date should be stressed. There should be a complete discussion of SBP/RC-SBP and other survivor annuities during the interview.

(2) SELRES personnel are required by law to make an election to the RC-SBP within 90 days of receiving a Notice of Eligibility (NOE) for Retired Pay. This mandatory interview must be scheduled three years from the 17-Year Monitor Interview to ensure the member is aware of their RC-SBP options and the importance of the retirement NOE.

e. Pre-Separation/Retirement Interview (all personnel). There will be a group presentation for the members due a separation interview because of EAOS/HYT/ EOS only and a separate presentation for members retiring or going to the Fleet Reserve. The presentation for both groups will be scheduled no later than 180 days before leaving the service. The personal interviews for both groups will be conducted by the Command Career Counselor no later than 120 days before actual separation. Specific information and guidance on the Transition Assistance Management Program (TAMP) is OPNAVINST 1900.2 Series. Specific guidance for Reserve Transition Benefits (RTB) is COMNAVRESFORINST 1740.1 Series. Chapter 14 discusses both TAMP and RTB.

f. Documentation of Required Interviews (all personnel). It is a requirement to document the results of all the required interviews. The results are recorded on the Career Counselor Record, NAVPERS 1160/11, the RSTARS Interview Sheet, or a computer generated interview form in CIPM99. The original interview form will be maintained by the Command Career Counselor. Updating the form may be conducted by departmental/divisional/reserve unit counselors as appropriate and then returned to the Command Career Counselor via the member's Retention Team chain of command so it can be reviewed and placed in the member's individual counseling file. NOTE: Commands with individual departments in excess of 300 enlisted personnel may, at their discretion, allow departmental/reserve activity/RUIC career counselors to maintain individual Career Counselor Records provided the particular counselor possesses the NEC 9588 or be a graduate of the Reserve CI Course. The Command Career Counselor will ensure the Career Counselor Record is forwarded to the Personnel Office/PSD for inclusion in the member's service record prior to separation or transfer from the command. Keep in mind all interviews conducted during the month will be discussed during the next month's departmental/reserve activity/RUIC Retention Team meeting. Having accurate results of interviews will help the team determine what action, if any, is needed to help the individuals meet their goals or correct any problems they are experiencing.

(1) Disposition of the Career Counselor Record (NAVPERS 1160/11). The following procedures will be followed to forward documentation.

(a) If a member is transferring to another command on PCS orders, forward the records to the member's ultimate duty station with a cover letter signifying the member's anticipated arrival.

(b) If a member is transferring to the Fleet Reserve, Retired List or to the Retired Reserve with or without pay; forward all documents to PSD/Personnel Office for inclusion in the member's permanent record.

(c) If a member is separating from active duty and has a reserve drilling obligation, forward all documents to the member's reserve center, if known. Otherwise, place in the member's service record.

(d) If a member is separating from active duty and has a favorable separation code (RE-R1, RE-1 or RE-3R), forward all documents to Naval Reserve Career Information Team, Atlantic or Pacific Fleet, as appropriate.

(e) If a member is separating from active duty and has an unfavorable separation code (RE-4), forward all documents to PSD/Personnel Office for inclusion in the member's permanent record.

g. Situational Interviews. Situational interviews are either scheduled or walk-ins and they are usually held to assist members with specific problems. Follow-up interviews for required interviews are in the category of situational interviews.

(1) Scheduled Interviews. If possible, all situational interviews should be scheduled interviews. If the interview is scheduled the counselor will know why a member requested the interview. This allows time for proper research of the problem and interview action planning. The interview should be scheduled so the member does not have to "hurry up and wait." Make sure adequate time is available for the counselor and the member to conduct the interview in a relaxed, unhurried atmosphere. Research the member's service record to verify there have been no changes in marital status, rating, past performance, past assignments, educational level, in-service education and advancement achieved, PRD, EAOS/ERC/EOS, extensions that have been effected, disciplinary problems, and pending requests for special programs. This step is necessary to determine how these factors may affect resolution of any problems and to make sure the individual counseling file is up to date. For instance, low performance marks can prevent a GUARD III assignment and consistent disciplinary problems may indicate a command recommendation for approval will be impossible.

(2) Walk-in Interviews. The very nature of walk-in interviews and the ease of access to division/reserve unit career counselors by division members will make interview action planning a spontaneous event. Accordingly, you must prepare your division counselors to handle walk-in interviews. Since these interviews are not scheduled, thereby allowing no time for research, the course of the interview will be determined using the standard decision-making model by:

(a) attempting to provide the member with as much factual information as possible to satisfy their initial question

(b) emphasizing the need for additional research of the question, if necessary

(c) committing to respond back to the member, in a timely fashion, with the information gathered from your additional research.

h. Interview Action Planning. Interview action planning can eliminate many potential problems during the interview. By planning each interview, the counselor will know what reference material or information will be needed and will also be better prepared to deal with the member's needs, desires, and attitudes. The interview action plan is formulated by setting goals for the interview and listing the specific actions necessary to meet those goals. The need for interview goal setting cannot be overemphasized. If goals are set for the conduct of an interview, it is not difficult to conduct a productive interview. Any member who receives help in the development of a definite, workable plan of action during an interview is going to develop faith in the accuracy and validity of the information provided. Scheduled interviews all have readily definable goals. There are two steps in defining unscheduled interview goals:

(1) List each topic to be discussed with the member during the interview. List all specific information to be provided to the member. List any possible decisions the member will have to make as a result of this information and any member action(s) as well as service(s) that will have to be provided.

(2) Summarize the action(s) required by category. Example: If all the actions required in the interview are of the nature of providing information, the goal of the interview is to provide information of a specific nature. A more realistic view of any interview is there will be varied goals for each given interview; the providing of specific information, assisting the member in making a rational (as opposed to an emotional) decision, and the formulation of a plan of action for the member.

i. Individual Counseling Files. The individual counseling file

functions as a reference and documentation of all career counseling actions for a single member. The individual counseling file provides the Command Retention Team members with the information necessary for most interviews without need for referral to the member's service record. Properly maintained, the individual counseling file documents the command's counseling efforts on behalf of each Sailor in the command. This record keeping should be computer automated using CIPM99.

4. INTERVIEW TICKLER SYSTEMS. The purpose of an interview tickler system is to allow the CCC to schedule and monitor all of the required and some of the situational interviews. An effective tickler system is the most dependable means to make sure every Sailor in the command is counseled at the proper time with the appropriate information. The program manager has the responsibility to set up and maintain a workable tickler system to meet this goal. A wide variety of tickler systems are currently in use; some are efficient and accurate; others are not quite as efficient or accurate. The EDVR, for example, provides very valuable information. Its use as a tickler, however, is limited since it is not accurate to the degree a tickler system needs to be, access to it is sometimes limited, and it does not allow for interview follow-up. CIPM99, on the other hand, has one of the most efficient interview tickler systems available. To activate a tickler system, you must know who is on board and when a member is due for an interview. You must have a means of notifying the responsible Command Retention Team members of interviews due and a means for verifying the interviews have been completed. Some of the ways the tickler system is used are: an alphabetical locator for personnel attached to the command containing scheduled dates for required interviews; a method to identify individuals for whom and when an interview is required; a method to identify which interview is to be conducted; a method to show which required interviews were completed. A good tickler system is simple to maintain, but like any other administrative duty, it needs constant attention to detail. There are three types of interview tickler systems available; the fully automated tickler system, the semi-automated system, and the manual/card system. The most preferred and accepted is the fully automated tickler system in the CIPM99 program.

a. Automated Interview Tickler System. The fully automated interview tickler system can be and should be the most efficient system possible. The CIPM99 program available for downloading from the BUPERS Access system is the recommended tickler system to use. Even though we say it is a fully automated system, it is not totally true. Someone has to put in accurate data before accurate data can be extracted. Any computer program system requires constant attention to detail just as a manual system does. Automated systems have many advantages over manual systems. With computer systems it is easier and faster to add the names of new people reporting into the command and to delete the names of personnel leaving the command. Another advantage is obtaining printed copies of the interviews due in a particular month without having to sit down and manually type the list. Above all, an automated system provides an accurate system in less time, and time is very valuable to the CCC.

b. Semi-automated Interview Tickler System. The semi-automated system is a tickler file system created by using a simple word processing program. If this type of system is used, all names should be double-spaced to allow ease in adding new people manually as they report on board. The tickler file should be updated on the computer once each month. The dates for required interviews should be listed by year and month. Example: The retention programs interview should appear as 9003 instead of 0390. This allows the manager to use the search and replace mode of the word processing software to efficiently manage the system. This type of tickler file is more difficult to establish and maintain, but it is still more efficient than any manual system.

c. Manual Interview Tickler System. The card system has been used as the primary interview tickler system for many years, however it is not

time efficient and is considered obsolete for all career counseling purposes. The tickler system is composed of an alphabetical listing of all personnel assigned, a set of tickler cards, and one or more containers capable of holding the tickler cards with dividers. The alphabetical file has two functions. First, it is used to verify all personnel attached to the command are in the interview system. Second, it is used as a locator to find the tickler card in the system. It is important to be able to find the tickler card to remove it from the system when an individual transfers or to move it because of situational interview requirements. The individual counseling file can be used for the alphabetical listing or a card can be designed. The individual counseling file is more efficient because it contains the Career Counselor Record, NAVPERS 1160/11, which, in turn, has all the information necessary on the front side to schedule interviews. The dividers are used in the alphabetical file to separate each letter of the alphabet. They are also used to separate years and each month of the year. You will need 24 dividers marked JAN, FEB, MAR, APR, and so on. You will need yearly dividers for the current year and at least the next 3 years. One set of monthly dividers should be placed in the current year and the other set of monthly dividers should be placed in the next year. Once all required interviews have been scheduled, the tickler card is then placed in the tickler file according to the date of the next required interview or the next scheduled situational interview. Example: The next required interview is the retention programs interview and it is scheduled for Feb 1990. The card should be placed behind the yearly divider marked 1990 and the monthly divider marked FEB. If the next scheduled interview is more than 2 years in the future, there will be no monthly dividers. Once the tickler cards for the current month have been verified that all the scheduled interviews have been conducted, they are placed in the year and month for the next scheduled interview. The monthly divider is then placed in the next year not having a monthly divider. The tickler card can be used to schedule follow-up interviews or schedule non-required interviews in the future; that is, scheduling interviews as a result of professional development board actions, and others as required. The tickler card may also be used to follow up on PCS order requests, Fleet Reserve/retirement applications, and a variety of other personnel-oriented actions. For example, if a Fleet Reserve request is submitted in March for a December retirement, the upper right corner (tickler month) could be annotated with the latest month in which a reply is expected; in this case, July. When using the card for this purpose, the reason the tickler month deviates from the interview schedule should be written in the Remarks section.

d. Using Tickler Systems. Each month the CCC should identify the individuals due an interview the next month, group them according to the required interview, and schedule the required group presentation. The names will be needed to write the required POD note notifying the individuals who must attend the different group presentations. On the first working day of each month the CCC will draft a memorandum for the executive officer's signature listing the required interviews and group presentations to be conducted during the month. This memorandum will also show the interviews that were not completed during the last month. Copies of this memorandum should be distributed to all department/reserve unit heads and departmental/ reserve unit career counselors. For each individual identified as requiring an interview, pull the individual counseling file (making sure that a file-out card is put in its place). Then group the individual counseling files by division, attach the memorandum to the individual counseling file(s), and forward the package to the department/reserve activity career counselors for distribution to the division/work center/reserve unit counselors. The division/work center/reserve unit career counselor conducts the interview, documents the results, and informs the Retention Team chain of command. When the interviews are completed and the individual counseling files are returned, review them for accuracy, annotate the interview tickler system indicating the interview was completed, and have them ready for discussion at the next departmental/reserve activity Retention Team meeting. This is done by you if you maintain the individual counseling file or by the department/reserve unit career counselors if they maintain the files. Discussing these interviews at

departmental/reserve activity meetings makes sure the proper action is being taken to help the people in the department/reserve activity with their careers and it keeps the chain of command informed. When all action is completed, the individual counseling file is then returned to the file and the file-out card is removed.

2.11 CIPM ELEMENT #5 -- THE COMMUNICATIONS SYSTEM. Information dissemination is communication. We deal with people and we must know how to communicate with them. We must be able to provide information to groups of people and to individuals alike by all means of communication media available. One of the Command Career Counselor's primary jobs is the communication of information and ideas. To function as a Command Career Counselor you must be able to communicate on all levels of the chain of command. You must be an effective communicator with the Command Retention Team as well as with clients. Most counselors are keenly aware of the importance of being able to effectively communicate with clients but sometimes lose sight of the importance of good communications when dealing with the team.

1. COUNSELOR FILTERS. Everything you say or write is affected by filters. These filters are the way you interpret and express information. They are based on your own personal experience and life-style. They are caused by your attitudes, age, knowledge of the subject information, communication skills, social and cultural background, personality, and education.

2. THE MEDIUM YOU SELECT TO PASS INFORMATION. The medium you select may contribute to distortion or information loss. You should select the medium by the quality of reproduction or accuracy required, the location of you and your client, and the appropriateness of the medium itself.

3. THE CLIENT'S FILTERS. Attitudes, age, knowledge of the subject matter, communication skills, social and cultural background, personality, and education all affect the client's filters just as they do yours. It is important your filters and the client's filters are not the same!

4. THE MESSAGE AS RECEIVED. The received message may not be anything like what you wanted the member to hear. Since you want the message to result in a decision, an action, a bias or an opinion to be formed, or to pass information or knowledge, you need a means of feedback whenever possible. Some information can be expected to be lost each time it passes through filters or is encoded into the medium used to send the message.

5. DISTORTION. Due to the possibility of distortion or misunderstanding, you must develop automatic habits when you have information to pass on to members. No matter how you send the information to your clients, there are four key elements to any method of information transmission.

a. Your Attitude. How you feel about the information is affected by how well you have researched the information, your interest in or enthusiasm for the information, and by your implied attitude which is perceived by the member based on the professionalism of your presentation.

b. Topic Interest/Relevance. You must consider the member may not realize the information is of interest or relevant. You need to sell the information by revealing its importance or relevance to the member.

c. Effectiveness of Presentation Media Selected. Selection of the appropriate media is of great importance. For example, you would not try to fully explain the enlisted assignment system in a plan of the day (POD) note.

d. Effectiveness of the Presentation. No matter how relevant the material is, if the presentation is uninteresting, unprofessional, confusing,

or boring, the member's attention will wander, and you can be sure some of the information will be lost.

6. TYPES OF INFORMATION. For distribution purposes, information falls into two types: one-time and recurring.

a. One-Time Information. One-time information is either time sensitive, requiring some action by a specified date, or is relevant for only a short period of time. Nearly all new information you receive will be of a one-time nature because almost all new information counselors receive is subject to change. An example is a change to an existing program, such as GUARD III. One-time information is generally received in the form of change transmittals, instructions, messages, notices, and official periodicals. One-time information is the more difficult of the two types to acquire and you may miss some one-time items because of routing errors, or because you were not sure where to look, or what to look for. Distribution of one-time information is one of the most important parts of your job as a counselor. Getting the word out on one-time items gives you additional counseling tools, gives your clients accurate up-to-date information from you (thus giving you credibility) rather than distorted facts via scuttlebutt, and meets the needs of the Navy. While one-time information items can be gleaned from virtually anything you see or hear, there are some sources that you should use as a matter of habit. These sources include, but are not limited to, BUPERS Access/RIBBS/RESRIBBS, conversations with detailers, your immediate supervisor in charge (ISIC) and/or type commander (TYCOM), other counselors, PASS or ship's office personnel, CHINFO Newsletters, LINK magazine, All Hands, NAVADMIN, NAVOP and ALNAV/ALNAVRESFOR messages, Navy Times (not to be considered as an official source, but you will receive many questions based on it), Navy News/Naval reservist News, CAMPUS, your command's command master chief, and so forth.

b. Recurring Information. Recurring information is information on programs in existence for some time and are likely to be continued; for example: SRB, HARP, STAR, SCORE, GUARD, and so forth. After one-time information has been initially issued, consider it as recurring information once you are fairly sure it will remain relatively stable, and issue it as such. You should develop a system by which you issue recurring information in a periodic manner.

7. INFORMATION SOURCES. Official information sources include but are certainly not limited to the following:

a. Electronic Sources.

(1) BUPERS Access and its Retention Information Bulletin Board Systems (RIBBS/RESRIBBS) sections are the career counselor's most valuable source of up-to-date information. The system provides electronic communication with all detailers; status reports of SRB, Fleet Reserve, NAVADMINs and NAVOPs; policy guidance and a global networking ability between career counselors worldwide

(2) The Internet and World Wide Web are state-of-the-art sources of communication for the Counselor, Sailors and commands. The BUPERS Navy homepage address is *http://www.bupers.navy.mil/*.

(3) The JASS (Job Advertising Selection System) prototype of the future officer and enlisted assignment system, Military Assignment System (MAST) is a communication system between the career counselor (or command or Sailor) and the Detailer. It allows Sailors to electronically request valid billets off the current requisitions. Detailers find the "best match" between the command's needs and the Sailor's wishes during order negotiations. JASS currently applies to specific ratings. All ratings will be included with MAST. Telephone numbers for the JASS Help Desk are: (504) 678-7070/DSN 678-7070 or 1-800-537-4617; the Bulletin Board number is (202)

422-8411/DSN 288.

(4) The Interactive Voice Response (IVR) System is designed for Sailors to use when desiring results or status updates of requests to COMNAVPERSCOM. Sailors call 1-800-NAVY-789 from a touch-tone or rotary phone and proceed through the program over the telephone. It frees up the Detailer from researching request statuses and allows the Sailor immediate access to results on advancement, SRB, Fleet Reserve, Retirement and more.

b. LINK magazine, NAVPERS 15980, one of the best sources of one-time information, is published quarterly by COMNAVPERSCOM and contains articles written by detailers. In many cases, LINK contains information not otherwise available to personnel outside COMNAVPERSCOM and is considered a MUST READ for counselors. You should retain a file of all issues as reference material. If nothing else, LINK is a quarterly listing of the names and phone numbers of the detailers. Articles taken from LINK and used as POD notes will generate a strong interest throughout your command. Make sure departmental and divisional counselors receive a copy. A good way to ensure this is to offer to distribute them when they are received by the command. Be sure the departmental counselors are aware you (and the divisional counselor, if possible) retain copies of LINK on file for review.

c. NAVADMINs, NAVOPs and ALNAVRESFORs are available on BUPERS Access for downloading and received at the command in message format. They often contain details on new programs and changes to existing programs. Each message is numbered (in ascending order) to provide a means of making sure you have reviewed all the messages generated. Files of NAVADMINs, NAVOPs and ALNAVRESFORs are normally maintained in the communications, administration, and command master chief offices. Information contained in these messages can take up to 6 months to be distributed in directive format, thus it is in your interest to maintain a complete file.

d. Transmittals (instructions, notices, and changes) are numbered in ascending order, by year. Transmittal 2-93, for example, would be the second transmittal mailed out in the Calendar Year 1993. You should, as Command Career Counselor, be on your command's routing list for transmittal sheets, since almost every program inception or change is in directive form. The administrative services office is responsible for maintaining a file of transmittal sheets for the past 2 years.

e. CHINFO Newsgrams are originated by the Chief of Information (CHINFO) each week and are generally picked up with Monday morning message traffic and are also uploaded into the BUPERS Access. CHINFO Newsgrams are in message format and contain changes and new programs started during the past week at the bureau level. These summarized changes may not be received by your command for several weeks via the Navy Directives Issuance System, thus the CHINFO Newsgram can give you advance information in most cases. Many useful POD notes are to be found in the Newsgram and, since many members do not manage to read it, you should make every effort to issue any appropriate items in a timely manner. If you are not receiving this very informative weekly message, contact the administrative officer or the communications officer. After all, you cannot use or publicize information you do not get!

f. Navy periodicals, such as CAMPUS or All Hands often contain new or revised information relevant to your job as a career counselor. All Hands often has information on duty stations or homeports members may not have noticed at the time of publication. These same members may later receive duty assignments to one of the areas covered. For this reason, if no other, you should retain a file copy of All Hands.

g. Detailer conversations can often yield information that can affect the rate or rating handled by the detailer or all personnel in a specific category. You can obtain much advance notice of changes in assignment policy from detailers. They will usually volunteer it; after all,

you and the detailer are trying to balance the desires of your members with the needs of the Navy.

h. In-house assets often provide information in newsletters about their specialty.

(1) The ship's office or PASS activity can provide you with much information, such as the newsletter published by Navy Finance Center, Cleveland. Many PASS offices provide a newsletter for the commands they support. While these newsletters are not aimed at the career counselor, they often have items of interest to counselors.

(2) The Command Master Chief, Senior Chief, or Chief Petty Officer receives information in the form of newsletters from the Master Chief Petty Officer of the Navy, and from FORCE, TYCOM, and/or ISIC Master Chiefs. These newsletters often contain advance information relevant to your job as a distributor of information. You should also share with the command master chief/senior chief/chief petty officer the information you acquire since each of you obtains information from different sources and you are both information distributors. Legal office personnel can provide information in both military and civil legal areas.

j. Some information sources require special caution. "Navy Times", a weekly publication, is not an official naval source. "Navy Times" carries editorials and summaries of changing information as well as graphs, charts, and figures not issued in the directive format by bureau-level naval activities. The information printed in the "Navy Times" is in many cases editorialized or slanted, and, while informative, is not to be taken as an official release on policy or practice. Do not issue information based on the "Navy Times" as official. The information contained in "Navy Times" is fairly reliable, but all too many Sailors construe anything they see in the "Navy Times" to be official, no matter how speculative the article concerned may be. Due to the widespread readership, you should review each issue in order to verify, identify as speculative, or clarify articles read by your members. It is considered very useful to have a file of "Navy Times" in your office to head off questions beginning "I read in the Navy Times that . . .". If an article is published causing interest or concern, you should research and either verify or clarify the article. This will keep your members accurately informed and increase your credibility.

k. Plan of the Day Notice. The plan of the day (POD) is the simplest and most commonly used method of information distribution within a command. It is distributed to each department, and the contents are generally read at quarters and/or posted on bulletin boards. Properly used, a POD note can become your most effective method of information distribution. Improperly written, the POD note becomes a major source of embarrassment to you and one of major confusion to the readers. While the format for POD notes will vary from command to command, any POD note can be considered a news article. The heading or headline may be a word, phrase, statement, or question placed at the beginning of a POD note. It is generally underlined and is usually in uppercase or all capital letters to attract attention, and it is worded to draw attention to the content or target audience for whom the note is intended. The heading chosen naturally will either motivate the reader to read or ignore the POD note, and an otherwise good POD note may not be read at all if the reader is "turned off" by the heading. Your target audience should be your foremost consideration when considering a heading. If the purpose of the POD note is to establish the time, place, or attendees of a meeting, the name of the committee should be used as the heading; for example: Command Retention Team Meeting, Professional Development Board Meeting, and so on. If the notice is to coordinate required group presentations, it is preferable to identify the participants, since the title may not catch their attention. For example, Sailors due for separation are to receive a Naval Reserve briefing. A POD note with the heading Attention--Personnel due to be released from active duty within the next 6 months meets the target audience requirements

and the target audience knows they are expected to attend the briefing since they are within 6 months of EAOS. The target audience in many cases would not realize they were required to receive a briefing on the Naval Reserve and would have ignored a heading of Naval Reserve Briefing.
You should always be as tactful as possible in writing a POD notice. While it is often useful to make action mandatory, a request for encouragement for action is a more desirable motivational tactic. After all, the POD is an official order, and all hands are responsible for compliance, so a little "sugar" may soften the "bite" of the POD note. Any notice directed toward a senior should always be worded "is requested" or "is encouraged." The POD notice, when correctly used, is one of the best means you have of reaching the entire crew; its importance to your information distribution program cannot be overemphasized.

8. MANAGING THE COMMUNICATION SYSTEM. Managing the communication system is essentially a problem-solving exercise in which you use a four-step cycle: fact-finding, planning, implementation, and evaluation. Each of the steps is equally important, and each is vital to an effective communication system. Often your communication system is affected adversely by too little planning and too much publicity. An emphasis on fact-finding and planning distinguishes between a good and a poor communication system. Unplanned, uncoordinated publicity will not yield anything approaching the results obtained by a well-planned communication system.

a. Step 1: Fact-Finding Phase. During the fact-finding phase you must determine what resources you have available to issue information. Listed below are resources you need to look for:

(1) Plan of the day (POD)
(2) Bulletin boards (number and location)
(3) AFRT/SITE TV
(4) Base newspapers
(5) Billboards
(6) Familygrams
(7) General military training (GMT)
(8) Commercial broadcasting stations
(9) Commercial newspapers
(10) Local Area Network (LAN) or Email systems

After you have identified your resources, you must determine if and how they are currently being used. When you have gathered, organized, and analyzed all the information from the fact-finding phase, you should be able to clearly define your problem areas: areas needing to be included in your communication system; areas in which the existing program is sufficient; and areas where the program in existence needs to be improved.

b. Step 2: Planning Phase. The Planning Document will include a general statement of your main goal. It will contain the types of information, types of media to be used, and the schedule for getting the information to the proper audience. In addition, it will list who is responsible for preparing and submitting the information for release plus the approving authority for each type of media used. Your completed planning document should be flexible enough to allow for any change in requirements that may develop. Time, topics, populations, and Navy programs change frequently and often with little warning. Naturally, the support material and facilities will vary from one duty station to another. The more imagination and innovation you apply, the more positive results you will receive.

c. Step 3: Implementation Phase. This stage requires you identify information of a recurring nature and set time frames for issuing this information. Once you have identified the recurring information and set time frames for issuing this information, prepare your articles for publication. POD notes can be written and saved on a computer. The important thing is to have the notes ready well in advance of the time they need to be

put in the POD. Keeping a computer file of POD notes will save you time in the future. The same notes can be used over and over. There is no reason to write a new article every time unless there has been significant changes to the program and even then all you should have to do is update the article. Use your tickler system to make sure the information is issued on time. Of course the most reliable and accurate tickler will be developed using the computer. The tickler should also list the types of media you plan to use for each piece of information. You will need to make posters or prepare notes for bulletin boards. These should also be kept on file for future use. If you have SITE TV and/or a radio station, you might want to prepare cassettes to use with these media. The final action in this stage is to brief all the people involved to make sure they fully understand their duties and responsibilities. It is essential to make sure each person knows what to do; when to do it; and how to do it.

d. Step 4: Evaluation Phase. Feedback is essential in evaluating your program. You know the word is getting out when someone comes and ask you about the program they read in the POD or saw on a bulletin board. Another indicator is an increase in activity, such as telephone calls, division/work center counseling, "drop-in" clients, and so forth. The unit assessment provides good feedback on your communication system and is your major tool for evaluating the system. It will tell you if the system is working fine or if you have a command, department or division problem. The information received from the assessment is then used again in the updated planning phase of your program.

2.12 CIPM ELEMENT #6 -- THE LOSS TRACKING SYSTEM. The primary reason for developing a loss tracking system is to make sure all personnel approaching HYT, EAOS/EOS and PRD/ERC are made aware of all the opportunities available to them. An effective loss tracking system is contained in the CIPM99 program. It will readily identify potential losses far enough in advance to allow the chain of command and Retention Team to ensure requests for reenlistment duty station and/or school negotiations, as well as pre-separation counseling can be conducted. There are many reenlistment incentive programs available, but we must know far enough in advance which incentive program will meet the needs of the individual. We must avoid the embarrassing situation of conducting the initial retention interview with personnel holding check-out sheets. The ideal tracking system lists all persons who will be HYT or with an EAOS/EOS and PRD/ERC for a 12-month period. The list should also include persons who have an extension becoming operative within this period. Members with extensions are included because it has been shown when first- or second-term members allow an extension to become operative, they are more likely to separate at EAOS/EOS as extended rather than reenlist. Identifying persons 12 months early provides time for total command involvement in counseling all individuals approaching EAOS/EOS, PRD/ERC. Not only should we be concerned about those individuals who express the desire to leave the Navy but we must make certain we don't forget to take care of those individuals who have previously expressed their intent to reenlist or extend. The loss tracking sheet should have, as a minimum, the name, rate, division/reserve unit, EAOS/EOS before extensions become operative, PRD/ERC, advancement recommendation, and a Remarks section for each individual with an EAOS/EOS from the current month forward for 12 months. The loss tracking sheet should be distributed to the Command Retention Team each month and should be a topic of discussion in each Command Retention Team meeting. Additionally, this information is useful to members of the professional development board. The member's reenlistment eligibility or ineligibility must be determined as soon as the individual comes into the 12-month window. The Reenlistment Quality Control Program (OPNAVINST 1160.5 Series), OPNAVINST 1160.7 Series, COMNAVRESFORINST 1001.5 Series, and MILPERSMAN (NAVPERS 15560 Series); must be used when determining a person's eligibility for reenlistment.

For active duty, the EDVR can be used to help prepare the loss tracking

sheet. Section 2 of the EDVR lists members who must extend, reenlist, separate, or transfer for separation within the next 10 months and lists members by the month in which their EAOS will expire. You can complete the loss tracking sheet by using the alphabetical listing contained in section 3 of the EDVR. Column S of section 3 lists the EAOS of all individuals in the command by YR-MO-DA. There is a high chance for error when scanning column S of section 3 and accordingly you must verify your loss tracking sheet every month. For SELRES personnel, use the RSTARS EOS Listing. The source document for verifying the EAOS/EOS is the enlisted service record.

2.13 CIPM ELEMENT #7 -- THE PROGRAM EVALUATION SYSTEM. The primary reason for evaluating your program is so that you may identify improvement opportunities and develop a plan of action to achieve them. The objective is to assess the strength of a program as perceived by its customers. You might assume the only customer of this program is the individual Sailor, however, there are others. The Sailor’s family members are customers in that they too have a need for the information, training and support offered by this program. The command itself is a customer in that this program helps to retain trained assets onboard, stimulate morale, lower attrition and increase productivity. The Immediate Superior in Command (ISIC), Force or Fleet Commander and the Navy as a whole is a customer of this program in that the retention of quality Sailors benefits the organization as a whole. Accordingly, the program evaluation system allows all customers to voice an opinion. There are two separate and distinct tools used to evaluate the success of the Command Retention Program; the Command Assessment Team System (CATSYS) Program and the Unit Assessment. Both will be conducted annually.

Command Assessment Team System (CATSYS) Program. This vital survey allows for feedback from the individual Sailor and provides the command with an evaluation of the program and support systems directly impacting upon the command's climate. This automated program canvasses Sailors on a wide range of issues including equal opportunity, sexual harassment, training and retention initiatives. Information regarding the CATSYS Program can be found in OPNAVINST 5354 series, from your Command Managed Equal Opportunity Officer (CMEO) and from the Command Assessment Team.

The Unit Assessment, on the other hand, helps to determine if Navy/Fleet/Force program objectives are being met. The assessment of a command program is essential to ensure all Sailors are provided with a consistent level of quality information. The Unit Assessment is also a way to benchmark a command’s progress in career development and should be viewed as a turnover item during the transfer of career counselors. The departing Career Counselor, with the assistance of the Command Master Chief, will complete Appendix C and forward it to the Executive Officer prior to transfer.

There are two tools used to evaluate the success of the Command Retention Program; the internal Unit Assessment (Appendix C) and the Command Assessment Team System (CATSYS) Program Command Diagnostic. These tools provide the command with an evaluation of the programs and support systems directly impacting upon the command's retention climate. The Command Retention Program must be assessed, at a minimum, every 12 months to truly measure its effectiveness. Information regarding the CATSYS Program can be found in OPNAVINST 5354 series and from your command's Command Managed Equal Opportunity Program and Command Assessment Team.

2.14 CIPM ELEMENT #8 -- THE PROGRAM MANAGER. A program manager is needed to provide direction, control activities, and conduct retention business with economy and care. The management of the Command Retention Program is the primary responsibility of the Command Career Counselor under the CIPM concept. No job is more vital to our counseling effort than the program manager. With the inception of Career Information Program Management (CIPM), the defined role of the Command Career Counselor has changed. Before CIPM, a Command Career Counselor was thought of as the command's counselor. Now a Command

Career Counselor is the manager of the Command Retention Program who performs some counseling. You must know what your duties and responsibilities are and continually analyze your actions to see if you are actually doing the job you are supposed to do. Program managers are vested with formal authority over the Command Retention Program. From formal authority comes status, which leads to varied interpersonal relationships from which comes access to information. Information, in turn, enables managers to make decisions and strategies for their own areas of responsibility.

1. IMAGE ENHANCEMENT. The image you project at all levels within your command and outside your command will have a major impact on the degree of support received and overall success of your Command Retention Program. If you project a poor image, your program, regardless of technical and/or professional quality, will receive little support or credibility. On the other hand, even a program of mediocre quality will receive high levels of support, trust, and confidence PROVIDED the Command Career Counselor projects a good image at all levels of command. It is highly desirable to have both a program of high technical and professional quality and the ability to present a good image.

a. First Impressions. Make a good first impression. A poor first impression undermines your program with both the command leadership and your constituents. If you consistently present a good first impression, you will find your approachability is considerably enhanced. Suggestions for presenting a good first impression are as follows:

(1) Always maintain a neat, military appearance. This does not mean a divisional counselor who works in the engine room should wear whites every day! What it does mean is career counselors should present a neat, clean, well-groomed appearance, regardless of the appropriate or prescribed uniform. In fact, you should bear in mind the choice of uniform for a particular occasion can affect first impressions. A presentation to engineering personnel on board ship in working uniform instead of office clean whites lends credibility by implying you really do know where and how they work. A neat military appearance is more than just a clean pressed uniform. It also includes a properly fitting uniform and a physical bearing conforming to Navy standards. Career counselors are considered role models and an overweight, out of shape counselor is not the role model we want to project.

(2) Maintain a proper military bearing. By displaying open pessimism for command programs or personnel, you are inviting disaster, especially when doing so before a newcomer who has no understanding of the circumstances causing the pessimism. Loud, boisterous, or undignified behavior, such as open ridicule of juniors, is likely to alienate not only newcomers to the command, but everyone who observes such behavior on your part. Remember the visibility of your job.

(3) Display your interest in new members of the command. When meeting members reporting to the command, whether during a casual meeting or the reporting interview, SMILE, and introduce yourself and your function in a friendly manner. Let these members know you are there to provide service at their convenience. Leave those individuals secure in the knowledge you are interested in them as a person, not just another statistic.

(4) Know the community you serve. If you are assigned to a type of command that is a different community from those in which you have previously served, learn the jobs and insignia of the ratings in your new command. For instance, if you were serving in one of the aviation ratings before converting to NC, and are reporting to a Seabee battalion, make an obvious effort to learn as much as possible about each of the construction ratings. Each community has its own peculiarities in terminology, slang, job-related conditions, and so on. The better versed you are in the way of life in the new command, the better and more quickly you can establish rapport with the members of the command.

(5) Be service oriented. If personnel know they can approach you at any time with any problem without being harassed, ridiculed, or ignored, they will readily seek assistance when the need arises. When you provide information or service in a timely manner, requesters can see your value and the value of your program firsthand. They, in turn, will depend on you and support you. This is one of the best ways to earn the confidence and support of the entire chain of command. At every opportunity you should publicize your service orientation to your peers, subordinates, and seniors. This can be overdone ONLY if you are insincere and your promises of prompt and courteous service are not fulfilled. Insincerity or lack of service orientation will result in an ineffective or nonexistent program. It is strongly recommended you schedule a specific time and day for work center visits and individual discussions. KEEP YOUR APPOINTMENTS!

(6) Provide accurate information. Of paramount importance to your credibility is the accuracy of the information you send out. If you give a Sailor inaccurate information, the Sailor is not likely to forget who gave it and, in all probability, is going to pass resulting disenchantment on to others. If you give faulty information or statistics to seniors, you will not only suffer embarrassment, but you will also lose their trust. Do not guess. The information you give out is either correct or incorrect! If you are not absolutely positive that the information you plan to pass on to others is accurate, you should read thoroughly and make sure you understand the reference material. If you are counseling an individual, and you state you are not positive about something and must look it up, you will gain respect for your enthusiasm and initiative in solving the member's problem. Having the answer "right off the top of your head" is not impressive if answer happens to be wrong. Information you give to others must be checked for accuracy. Occasionally, despite your best efforts you may issue faulty information. When such an error is found, you should immediately inform the member of the faulty information. Explain how the error occurred, apologize, and provide assurance you will do everything possible to prevent a repetition in the future. At a minimum, this procedure will let the member know you feel responsible for the accuracy of the information you provide. More often than not, members will feel they are being provided with the very best of service.

(7) Your office should provide privacy. People are reluctant to explain or discuss a problem if the interview is subject to public scrutiny. Your office should also be maintained in a neat and orderly fashion. A sloppy office may be viewed by a member as a sign of disorganization. Due to job-related requirements, you will frequently be out of your office. This may be misinterpreted by others as misuse of your time. Some counselors, in the past, have said they were counseling while they were pursuing personal matters. These people are always found out! It is obvious to other counselors and those who deal frequently with counselors that a good counselor spends as much (or more) time working as any other Sailor. This may not be quite so obvious to a member requiring assistance from an absent career counselor! To avoid misconceptions, you should use a sign when you are out of the working space stating where you went, when you will return, and, if you deem necessary, a phone number where you can be reached. You will find it helpful if an administrative assistant can be assigned to answer the phone, take messages, schedule interviews, and provide information on your whereabouts.

(8) Confidentiality. The Command Career Counselor will have access to various forms of personal information about the members of their command. A routine review of a service record, discussions with the executive officer, command master chief and other leaders within the chain of command may provide information on members not to be made public. Examples of this information could be allegations against a member for spousal abuse, non-payment of debts, or other potentially damaging information. This information is sensitive and the Command Career Counselor will hold this information in the strictest confidence. However, the Command Career Counselor is legally

bound by the UCMJ and Navy Regulations to report any violation or infraction. Information provided during an interview is not protected by any statute, regulation or law concerning counselor-client privilege. If a member discloses incriminating information during the course of an interview, the career counselor is required to report this information to the appropriate authorities. A general rule of thumb for career counselors is not to discuss any member's personal or professional business unless the member is present and agrees to the disclosure.

2. TIME MANAGEMENT. Career counselors must solve the problem of having too many demands made on their time. Other people try to control your time and your workday gets longer and longer as you take on more commitments. If you don't manage your time, you could fail to achieve your full potential. Perhaps the foremost authority on the subject of time management is Alan Laken, whose book "How to Get Control of Your Time and Your Life" is the basis of most of this section. Despite all the timesaving machines of the computer age, you probably find yourself in a time trap, always short of time and unable to do everything you need to do and would like to do. You think, "If only I had more time, I'd be able to get out from under this mess." Think a moment! You cannot get more time. There are only 24 hours in a day, and the challenge is to use your time more effectively. Time is a limited resource so don't take a haphazard approach to managing it. Resolve to manage your time and not let time manage you. Realize you are the probable cause of most of your own time problems and the painful task of changing your habits will be required; then you can begin to develop a time management strategy. As a career information program manager, one of the most important assets you have, and one of the most difficult to manage, is your time. You will be dealing with diverse management activities and people at all levels of the chain of command. All of them will be demanding your time. You must be as careful in managing your time as in managing your funds or your subordinates. No one can tell you how best to schedule your time, but the following hints may provide you with some ideas for time management.

a. ABC System. You must learn to set priorities to your goals and complete the goals according to priority. This will allow you to complete the most important goals each day, even if you can't complete all your goals. While there are many different ways one might rank all the things to do, one simple method is the ABC system. Place an A next to the items on your list that must be done. These are items with a high value. Then place a B next to items of medium value and a C for items of lowest value. You might make a few mistakes here, but remember it is a subjective rating system. The idea is to force you to recognize all items on your list are not equal; some are more important than others.

(1) You can now take it a step further and break down the priority groups by assigning numbers to each item in a group according to the priority within the group; for example, A-1, A-2, A-3, and so on. Just because you assign a certain priority to an item doesn't mean that it must always keep that same priority. Events may require that a C item become an A item or vice versa. This means you are going to be required to set priorities continually.

(2) The most important part of planning is the determination of what not to spend your time on. Some items should not be done, while other items should be assigned to someone else. Good time management does not mean looking for ways to do everything; it means doing only those things needing to be done by you. Do not waste time doing a bunch of Cs just so you can say you did not have time to do your As.

NOTE: Some of your priorities will be set by other people. For instance, if your executive officer gives you a specific task to perform by 1600, your priority system will suddenly reflect this new input. This does not mean your system is permanently paralyzed. It merely means a new priority has been placed at the top of your list, but only temporarily. Remember, priorities

are based on goals.

(3) The 80/20 Rule. It states, "If all the items are arranged in order of value, 80 percent of the value would come from only 20 percent of the items, while the remaining 20 percent of the value would come from 80 percent of the items." The 80/20 rule suggests in a list of 10 items, 2 items will yield most (80 percent) of the value. Find those two items, label them A and get them done.

(4) Swiss Cheese Method of Time Management. We often have a tendency not to start a job, task, or assignment if we feel we don't have enough time to complete the job without interruption. You say to yourself, "I have a report due next week that will take 4 hours to prepare and I don't have 4 hours available now so I will just postpone it until I can set aside 4 hours next week." Did this ever happen to you? Unfortunately, we never seem to be able to find a full 4 hours at one time. We end up in a panic on the night before the report is due when we could easily have completed the job during normal working hours. The problem lies in our feeling that we have to do the job all in one sitting because breaking the task into pieces might cause us to lose our train of thought. The Swiss cheese method means punching a bunch of small holes in a large task. You punch holes in the task by getting started and spending whatever time you have on the task. Even if you only have 10 or 15 minutes to spend on it just before a meeting or just before going home, do it! Soon you will find that 20 minutes here and an hour there finishes the job.

b. Set a List of Goals and Priorities. Set goals you want to complete each day and write them down. Make it a habit to sit down at the same time each day. Either make it your first, or last, piece of business each day to draw up a to do list. Some people try to keep this list in their heads. Why clutter up your mind? Why add fuel to the crisis management syndrome because you forgot some item? It is much better to leave your mind free for creative pursuits.

c. Increase Reading and Writing Skills. Your goal should be to do more reading and writing of better quality in less time. As the Command Career Counselor, you will have vast quantities of correspondence, directives, and Navy publications pertaining to your Command Retention Program. Most will not require a written response. Scan it, look for changes, and pick out the important points. Develop a standardized action form. Check the applicable blocks and then get it out of your basket. Develop standard formal files for your routine kinds of correspondence. Some examples are plan of the day note files for recurring items, meeting notices, letters of appreciation, evaluation forms, report forms, and message forms.

d. Note Taking. You meet dozens of people a day and participate in many meetings during which you are constantly gathering information. You simply cannot afford to rely on your memory. The practice of relying on only your memory usually prevents you from making the best use of your time because you must act while your memory is fresh or you will probably forget. Keep good notes but do not spend more time writing a note than it takes to perform the action. You may want to transcribe some of the notes to your master weekly or monthly calendar or put other notes in subject files at the end of each day. Just beware of the Privacy Act and the confidentiality of your clients. Don't leave your notes where prying eyes might see.

e. Use a Reminder System. A reminder system will help you make sure those good notes of yours don't get lost in the shuffle, also all the big and little things you can't do at once get put on your schedule of things to complete. An obvious base for a reminder system is the master interview tickler file, the training tickler file and the yearly tickler file. The yearly tickler file should also be the basis for developing a monthly planning schedule. These planning schedules can be established using any of the various electronic calendar features on many computer systems throughout the

fleet. The yearly tickler and monthly planning schedule should include all major activities of a recurring nature such as meetings, interviews, group presentations, program announcements, diagnostics, reports, and so forth.

f. Make Weekly and Daily Plans. Make a weekly plan of all the important, regular, special, and creative jobs to be done during the week and put it in writing. This is not a schedule. It may not be possible to do everything you planned during the week, but if you don't put it in your plan it will never get done. Once this is done then rank your jobs according to the ABC system described previously. Make your daily plans from the weekly plan. Don't schedule all the As for the same day, but put the most important projects toward the beginning of the week. You should take your personal plans and those of your staff into account when making up any schedule. Include items for your entire office and make the schedule readily available to all members. This is a good way of avoiding double obligations on your time and the resulting misunderstandings when people don't know what the plans for the week/day are. Don't avoid the big difficult projects by doing the minor projects, thereby wasting time better spent on top priority items.

g. Control the Telephone. The first step in controlling the telephone is not to answer your own phone if you can avoid it. Give the person answering the phone guidance about when you'd prefer to have a message taken or when you want to accept calls. You will find that your assistants will take on more responsibility and deal with more routine matters when they know your wishes. Group your calls, set time aside each day to make detailer calls, publish the times, and do not break this schedule unless it is an emergency. Don't become a slave to the phone.

h. Make Appointments. Joe wants to discuss something, so he calls you and asks when you and he can get together. Do you answer him, "Any time"? That's the wrong answer! Any time may be the worst possible time for you if Joe appears as you're calling a staff meeting to order. Tell Joe, "Now" or, "At 11:30," or some other specific time. Schedule a specific day and time for work center visits, division evaluations, and individual discussions. Here's another useful hint. Have you had the experience of making several appointments with the same individual, and the individual always forgets, or is always late? Next time make the appointment for an odd time; make it for 9:17 or 2:43 or 11:11. The oddness of the time tends to stick in a person's mind. One last point--keep your appointments; break appointments only in extreme emergencies.

i. Advance Notice of Meetings. Schedule meetings well in advance and make sure they do not conflict with standard meetings in the command or important evolutions requiring several participants to miss your meeting. Limit and closely monitor the times of your meetings. Advertise your meetings well and have your administrative assistant telephone the participants the day before. There is nothing more time-consuming than waiting 30 minutes past the starting time for participants to show up for a meeting and then have them not show up at all.

j. Control Social Conversation. Purely social conversation is an important part of business relations. It's pleasant and it's good for morale. A few pleasantries are fine, but they can easily be overdone. Everyone in the command knows the Command Career Counselor, and 5 minutes of purely social conversation with each person can waste your whole day.

k. Don't Be a Fidgeter. Know when to spend time, especially during interviews. Make sure you will not have interruptions. Worrying about the rest of your day will prevent you from giving your client the deserved attention. If you appear to be in a hurry or have other things on your mind during an interview, the person being interviewed will also be distracted. They will hurry, too, and probably not tell you all you should know. They may not really understand what you said because you hurried through the interview. You may save 2 or 3 minutes but it could cost you 1 or 2 hours later to

straighten out the mess that could have been avoided by total concentration to the task at hand. All important tasks should receive the same attention as interviews.

3. LEADERSHIP AND THE PROGRAM MANAGER. Motivate people to do their job right. This is the basic rule for getting the job done through people. Be a leader, not a driver. People do things reluctantly for a driver and enthusiastically for a leader. There are many ways to motivate your Command Retention Team. Some of these ways are discussed in the following paragraphs.

a. Know Your Staff. You must continuously study each individual on the Command Retention Team to try to determine what makes each one tick. The program manager must know the personal characteristics of all members and treat them accordingly to get the best from each individual.

Security is a main driving force in many, if not most, people, so building up the importance of their work and themselves is an effective way to motivate most people. Yet people vary widely in personal characteristics. Well-timed praise may spur one person to new heights of achievement, but it may inflate the ego of another. Perhaps the latter person may respond better to constructive criticism or some other factor. Don't let a successful method for motivating most of your people fool you into thinking that it will work for all people. Managers who know their people, their worries, personalities, touchy points, and pet prides, know how they tick and what motives stir them. The best and fastest way to know them is to encourage them to talk, to draw them out, to ask questions. A good listener does this the best. A talker only encourages them to be silent. Never dominate a conversation unless for a very good reason. If both you and another person start to say something at the same time, always let the other person speak first. The important thing you must remember is the team is made up of individuals and if you are going to be a successful manager you must find the method to will motivate each individual.

b. Praise and Criticism. Most people thrive on judicious praise; furthermore, praise others can hear has multiple impact. Praise raises the morale and self-confidence of any person. Praise is an important factor in developing capable supervisors, but be sure the person who is being praised is the one who deserves it and all other people who are involved are recognized also. Taking the credit for yourself for doing something done by one of your people destroys initiative and the willingness to take responsibility. Giving team members proper recognition for what they have done is doubly productive. The members receive credit for doing the job and you, the manager, receive credit for building a successful Command Retention Team. When you criticize, be sure of what you're talking about. Get all the facts, review them, and then suggest a constructive course for future action. Try to precede criticism by a bit of praise. Be careful, though, because some managers do this so regularly their people get wise and the compliment loses its value. Criticize people only in private. This fundamental rule is broken every day. Reprimands in the presence of others cause shame, humiliation, and resentment instead of a desire to do better. Criticizing team members in front of other people from their department undermines authority as well as morale.

c. Be Considerate and Consistent. Managers set the style for their people. If the manager is irregular in habits, late for appointments, careless about facts, and bored in attitude, subordinates will follow the example. Set a positive, correct style as a manager and your team will be even more eager to follow that example. Nothing contributes more to building a strong, hardworking, loyal Command Retention Team than a considerate manager. Considerate managers are courteous to subordinates and always put themselves in the subordinates' place before making any decisions affecting them. The considerate manager realizes team members have tough problems of their own, both business and personal. Team members have pride, personality, and self-respect, and the considerate manager knows this. The considerate manager will get much more effective work by treating those characteristics as assets rather than liabilities. A manager who flies off the handle and sets

off fireworks can frighten subordinates to withdraw into a shell. When you're wrong or make a mistake, admit it. No subordinate expects the manager to be infallible; managers don't lose face when they admit being wrong unless it happens too often. What you gain is their confidence in your fairness and honesty, an asset beyond price to a program manager. Team members can truly follow only the leader whose course is steady and whose reactions are predictable.

d. Delegate Responsibility. Delegating responsibility is the essence of administration. You are not a manager if you do not delegate. The manager who insists on running everything discourages subordinates by competing with them. Capable personnel will quit, while others will sit back and let the manager do the work. Able managers think of the team as working with them, not for them. In the end, the manager who will not delegate will not have time for the important monitoring and planning are such important parts of a manager's job.

e. Suggestions or Requests Versus Orders or Commands. Make your wishes known by suggestions or requests. If your people have initiative and ability, this will get better results than orders or commands. Issue direct orders only as a last resort. If you should find that only orders work, maybe you had better look for some new career counselors or they should look for a new manager. When you make a request or suggestion, be sure to tell the reasons for it. The day of "Treat 'em rough and tell 'em nothing" has passed. People want to know what they're doing, and why they're doing it. The explanation can be oral or written, but be sure to make it.

f. Establish Goals. Establish goals for the Command Retention Team to give them direction. They need to know where they are going, what they are doing, and why they are doing it in order to plan their course intelligently and work efficiently. Good team members cannot get interested in working day to day, without a clearly established relationship between day-to-day work and larger goals. For example, the retention interview is not held just because it is required, but rather to make people more knowledgeable of Navy programs and to increase reenlistments. Keep your people informed on matters affecting them and let them know in advance, whenever possible. As members of a team, they feel entitled to know what's going on. If they are informed, their thinking is directed toward the unit's goals and realistically adapted to that environment.

g. Let Your Team Participate in Plans, Ideas, and Decisions. Command Retention Team members and everyone else, for that matter, perform according to what is expected of them. If they know their boss has the confidence in them to expect a first-rate job, that's what they will usually give. Ask your counselors for help. This brings them into the picture, gives them a feeling of belonging, and builds self-confidence. As the principles of Total Quality Leadership (TQL) indicate, this approach makes members want to work harder than ever. Plans should be discussed with team members before they are in final form. It will give them that all important sense of participation. Furthermore, because they have taken part in shaping the plan and had a say in the decision, they are much more likely to accept it enthusiastically. Even if they don't agree with the plan or decision, they will still back it more strongly because they will know that their point of view was considered. They have good ideas that may never see daylight unless asked for. Give weight to the fact that people carry out their own ideas best. It's good managerial strategy to plant the seeds of ideas in the minds of others, so those who execute them will feel they are their own. People like to think their jobs are important. Many of us like to feel that we not only have an important job, but that we are essential in getting this important job done. Use every opportunity to build in the team members a sense of the importance of their work.

4. MANAGING THE PROGRAM. Now we have covered the facts about how to be a good manager, let's look at the manager's job with regard to the Command

Retention Program. In this section, we provide you with some useful ideas and tools to use in managing the program.

a. Statistics. Achieving high statistics alone does not prove a command has an effective retention program, but neither does low statistics prove the opposite. Reenlistment statistics must be considered as only one of many tools that a command has to gauge the effectiveness of its retention program.

(1) Large commands with many transactions each month should consider statistics as a reliable gauge in determining the effectiveness of their program. Large commands may even break the statistics down by department/unit and/or division depending on size. This breakdown can help to isolate problems or at least potential problems and also identify areas of strength. Once you have broken the statistics down you will need to take a closer look at the departments/reserve units with low statistics to see if you can determine if there is a problem or potential problem to be corrected to bring up their statistics. The other side to this coin is you will also want to look at the departments with high statistics to see why they are more successful in retaining their personnel. They may be doing something that you would want to implement command-wide.

(2) Small commands with few transactions, on the other hand, will find using reenlistment statistics as a major tool in determining their effectiveness is less reliable. This is because one reenlistment or one discharge can cause such a swing in the statistics as to go from 0 percent to 100 percent or vice versa in 1 month. The weight each transaction carries is too great to base the success or failure of the Command Retention Program solely on statistics. No matter whether you have a large command or a small one you will find that statistics based on 6 and 12 months of cumulative figures provides a more accurate retention rate.

b. Attrition. Another factor the Navy is deeply concerned with is the attrition of members on their initial enlistment. The prime target market population of military available is the smallest it has ever been. With fewer prospects available CRUITCOM is finding it more difficult to meet its goals. This means fewer people are coming in the Navy and when one attrites for whatever reason, the chances of getting a replacement are more difficult. Accordingly, a Command Retention Program must be more tuned to meeting the needs of members on their initial enlistment and doing everything possible to reduce attrition of these members. The Navy is tracking attrition more closely than ever before and, accordingly, you are required to monitor attrition of members on their initial enlistment more closely. The method of tracking and reporting attrition is determined by your ISIC, TYCOM, or fleet commander.

c. Statistical Reporting. The Command Career Counselor is responsible for maintaining command retention statistics, monitoring attrition, and preparing reports. You may be requested to submit an internal report including statistics on a monthly basis to the commanding officer. Command retention reports and statistics may even be requested by higher authority on a monthly, quarterly, or on an individual transaction basis. The frequency of submission and format for reporting are determined by the major manpower claimant under whose cognizance your command falls (i.e., CNET, CINCLANTFLT, CINCPACFLT, COMNAVRESFOR, CINCUSNAVEUR, COMNAVSECGRU, COMNAVTELCOM, and so forth). Your ISIC or TYCOM may require reports on a different reporting schedule than the major manpower claimant.

d. Computing Statistics. Statistics are based on retention and attrition percentages. There are two ways of expressing retention statistics: NET and GROSS. NET is the percentage resulting when the number of reenlistments and qualifying extensions is divided by the total number of eligible personnel.

(1) GROSS is the percentage resulting when the number of reenlistments and qualifying extensions is divided by the total number of eligible and ineligible personnel. Qualifying extensions are computed when the extensions become operative, not when they are executed. The six-months' gross statistics are obtained by adding the total number of reenlistments and qualifying extensions for the current month and the 5 preceding months and dividing the total by the total number of eligible and ineligible for the same period.

(2) NET percentages exclude the ineligibles. You obtain the 12- months' statistics by using all transactions for the current month and the 11 preceding months. Never add the percentages for each month and divide by 6 or 12 to obtain your percentages for the 6-and/or 12-month period. Obviously, the net percentage looks much better than the gross. It is easier to compute and produces a higher retention figure. Gross, however, is more accurate, since those ineligibles may reflect a failure to retain an otherwise good Sailor through poor leadership.

Leadership and personnel management are primary facets of a Command Retention Program effort, and all commands are naturally expected to make every REASONABLE effort to counsel problem individuals and help them develop into responsible, mature Sailors. Whether your report format is based on net or gross figures is determined by your ISIC, TYCOM, or fleet commander.

(3) Reenlistment statistics are divided by terms of enlistment. There are normally three terms of enlistment considered and sometimes four--first term, second term, third term, and sometimes fourth term. Fourth term, when used, normally indicates personnel reaching decision points between 20 and 29 years of service who reenlist, extend, or transfer to the Fleet Reserve before completing 30 years of active service. The method used to separate individual transactions into terms and the number of terms to be used is determined by your ISIC, TYCOM, or Fleet Commander.

e. Verifying Statistical Data. You should keep track of transactions used to compute your statistics on an "as it occurs" basis. You can best do this with a CIPM automated program, preferably CIPM99. The document to verify the CIPM reports is your command's diary/RSTARS sheet and the EDVR/Reserve Unit Activity Document (RUAD). The Enlisted Distribution and Verification Report (EDVR) is also used to verify all transactions. The use of these documents, coupled with your loss tracking system, will cut out error or oversight in the maintenance of command statistics.

(1) Diary Message Reporting System. The diary message reporting system (DMRS) reduces preparation time and mailing delays and provides more accurate personnel management and manpower information. A DMRS message is submitted each normal workday when personnel changes have occurred. The DMRS message will provide you with the most up-to-date information on personnel changes. Each entry on the diary message begins with a transaction code (TAC) identifying the type of transaction occurred. You must know the TACs to identify reenlistments, operative extensions, discharges, and releases to inactive duty to use the diary effectively for compiling data for statistics.

(a) Reenlistments and operative extensions -- To be sure you have accounted for all reenlistments and operative extensions, compare all transactions with TACs 405, 406, RN1, and RN2 against your reenlistment/ separation worksheet. Not all operative extensions will qualify as a reenlistment and must be verified by using the member's service record.

(b) Discharges and releases from active duty -- To be sure that you have accounted for all discharges and personnel released from active duty, compare all transactions with a TAC beginning with 8 or 9. The TAC 680 indicates the member was transferred to a separation activity and is counted as a discharge or release from active duty on the day the member

transfers to the separation activity.

The DMRS is a valuable tool in managing a Command Retention Program and accordingly you need to keep current on any changes in the system. Your source document for learning how the system works and keeping current with the changes is the Diary Message Reporting System Users' Manual (DMRSMAN).

(2) Enlisted Distribution and Verification Report. The EDVR-1080 is organized into 11 sections. Use sections 2 and 3 (the SDS Alpha Report replaces Section 3 for shore commands) for verifying data to compile your reenlistment/separation statistics. Section 2 lists prospective personnel losses, transfers from the command due to projected rotation date (PRD), or expiration of active obligated service (EAOS). Section 3 is an alphabetic listing of all personnel assigned to the unit identification code (UIC) covered by the EDVR-1080. You will use column S, active duty obligation, to double-check all persons with an EAOS for the time frame for which you are compiling reenlistment/separation statistics. Losses projected by the system can be identified using either section. You should use the following categories in section 2:

(a) Expired EAOS -- Members who should have already extended, reenlisted, separated, or transferred for separation, listed by the month in which their EAOS expired.

(b) Current EAOS -- Members who must extend, reenlist, separate, or transfer for separation during the current month.

(c) Future EAOS -- Members who must extend, reenlist, separate, or transfer for separation within the next 10 months listed by the month in which their EAOS will expire.

(d) EAOS (with extensions) less than PRD -- Members whose EAOS is within 1 to 10 months and the EAOS is less than PRD listed in EAOS (plus extensions) sequence.

(3) Reserve Standard Training, Administration and Readiness Support (RSTARS) is an ordinary hardware and software microcomputer configuration designed to meet local Reserve Activity requirements and provide an electronic telecommunications interface to the COMNAVRESFOR Information Systems and external data processing environments. It is a single point of entry in personnel administration, mobilization and training readiness in the Reserve Activity. RSTARS can generate manpower, training, administration and supply reports and allows a Reserve Activity to create any type of report via the adhoc option using its relational database.

5. COMMAND INTERNAL REPORT OF CAREER COUNSELING ACTIVITIES. The Command Career Counselor should, at a minimum, formally document their activities in the form a report to the commanding officer on a quarterly basis. A monthly report may be more desirable. A Sample Monthly Retention-Related Activity Report is provided at the end of this chapter. This report should give the commanding officer a "snapshot" view of all areas within Command Retention Program. For example, the command internal report could provide statistics on training levels, the training provided for the Command Retention Team. Goals or objectives of the team should also be listed. The Command Master Chief may also want to include information concerning the status of the Personnel Entry System. This report should also show the commanding officer how the Command Career Counselor has managed the Command Retention Team. This report is also a formal vehicle for the Command Career Counselor to express his or her opinions and observations regarding command climate or any other matter dealing with retention and to make recommendations accordingly. Command Career Counselors will keep a file of all reports for a minimum of 24 months and a maximum of 60 months.

6. NAVY RETENTION/SEPARATION QUESTIONNAIRE. The Navy Retention/

Separation Questionnaire is used to determine predominant factors influencing service members' decisions to remain in or to leave active duty, whether USN or TAR. This questionnaire provides information for statistical analysis to improve and develop personnel-related policies and is the basis for presentation before Congress to sponsor legislative initiatives. Instructions for the administration of this questionnaire are found in OPNAVINST 1040.8 series. All service members, officer and enlisted, leaving active naval service are asked to fill out the Navy retention/separation questionnaire. Enlisted service members are also asked to fill out the questionnaire when they reenlist and officers in the grades of lieutenant (03) through captain (06) are asked to fill out the questionnaire as part of the execution of permanent change of station (PCS) orders. Parent commands are responsible for making sure correct procedures for the completion of this form are followed. This includes submitting a questionnaire with information on the front page completed for personnel declining to participate voluntarily. Parent commands not supported by a personnel support detachment (PSD) are responsible for completing the questionnaire. The Command Career Counselor administers the questionnaire to all enlisted members. The administrative officer administers the questionnaire to each officer. PSDs have the responsibility for administering the questionnaire to all personnel processed by PASS activities.

This questionnaire is intended to provide data for statistical studies for the Navy. However, it will also provide data for possible use in improving your command's retention efforts. The current mailing address is provided in Chapter 1.

7. CAREER INFORMATION PROGRAM MANAGER DATA BOOK. Another valuable management tool is the manager's data book. It provides the program manager with readily available and easily accessible information to perform their job as a manager. The data book should be maintained in large three-ringed binders. This will help you keep the material together and allow you to take it to other areas for briefings as necessary. It should contain, as a minimum, the following material:

a. All instructions governing the retention program and its elements.

b. Copy of the 12-month EAOS/PRD list.

c. Copy of the projected reenlistment list.

d. Copies of active reenlistment check-off sheets.

e. Copy of a current EDVR (or at least section 3) or current RSTARS Alpha List.

f. Copy of a computer interview tickler file.

g. Retention statistics.

h. Roster of the Command Retention Team.

i. Copies of the last two internal unit assessment reports.

j. Copy of the Command Retention Program action plan.

k. Copies of past command internal reports to the commanding officer.

l. Attrition/ineligible statistics.

m. For SELRES, copy of MGIB-SR or local RSTARS adhoc reports.

8. CAREER INFORMATION TRIPS TO THE NAVY PERSONNEL COMMAND. If

command funds are available, periodic trips to COMNAVPERSCOM will be an asset to your efforts in maintaining the retention program at your command. Such trips should include visiting the detailers and the Microfiche/ESR Section. Whenever possible, junior personnel should be included in these trips to experience firsthand the structure of COMNAVPERSCOM. Understanding the inside workings of COMNAVPERSCOM is an invaluable asset when policies and guidelines of Navy benefits and opportunities need to be explained.

9. CENTERS OF INFLUENCE. As the manager of your command's retention program, you need to understand realistically the makeup of the centers of influence, what impact they have on the command, who their leaders are, how they function, and how you, as a Command Career Counselor, can most effectively accomplish your goals within this system. Your goals are the goals of your CO/XO/CMC, and your responsibility is to your command and not necessarily to these centers of influence. It is necessary to recognize that centers of influence will change as people come and go.

a. Command Formal Power Structure. Every command has leaders and managers who play dominant roles in shaping command opinions and activities. These are the individuals who have been delegated responsibility or authority (power) to manage and supervise the various functions that meet the mission of the command. To have an effective program, you must identify key people and actively seek their advice and guidance in planning, supporting, and carrying out the retention program. The formal organizational power structure is easily determined within the command. The command family ombudsman is a very important part of this formal structure and accordingly should be considered a resource for the retention program.

b. Command Informal Power Structure. The informal power structure is yet another level for consideration. It consists of persons who yield influence in an informal but very effective manner. They can provide an easier acceptance of your retention program and can make sure that support of your program is given throughout the command. It should be observed at this point that command directives authorize and direct programs, but the acceptance and support must come from both the formal and informal power structures within your command. The informal power structure is normally composed of three types of individuals:

(1) Decision makers. These personnel are in management positions with high credibility. They have a good reputation throughout the command and are respected by the formal power structure. They exert influence both directly and indirectly. Examples of decision makers are officers, chief petty officers, and leading petty officers.

(2) Influential personnel. These personnel are not in key management positions but generally exert influence indirectly, rather than directly. Their power is subtle, but they can be identified by reputation, primarily by their effect on co-workers. Family support groups, such as family clubs, must be considered part of the informal power structure and a center of influence. We should all be aware of the influence the family has when a member is making career decisions.

(3) Opinion leaders. These personnel may be members of an economic, ethnic, or social group. They are found at all levels within a command. They generally exert influence on both peers and co-workers. Their impact is primarily on social matters, but they are a definite database for information distribution. Careful cultivation of these individuals can turn them into a positive database.

CAUTION: The type of influence exerted by influential personnel and opinion leaders may, in some cases, be counterproductive to your program's goals and missions. You still must have access to these and other influence areas to help evaluate if the program is meeting command goals, is meeting the needs of the personnel within the command, and is being accepted to the proper degree.

c. Other Support Groups. As previously discussed, there are many command members and offices that are crucial to a smooth Command Retention Team. However, a Command Career Counselor must cultivate other centers of influence to enhance retention within the organization. Dependent organizations such as ombudsmen, family support groups, and family clubs should be provided career information. Family members have a great influence on the career decisions that members make. More often than not the family member’s influence is based on emotions rather than facts. The ombudsman should be provided the same career information training as departmental or divisional career counselors and the Command Career Counselor should be available to the family support groups and family clubs to give presentations on career information. A well-informed family member can be an asset to the Command Retention Program.

d. Managing Centers of Influence. To have an effective program, you must have the support of as many centers of influence as you can acquire. By now, you have probably noticed that the multilevel Command Retention Team contains at least one of each type of individual found in the informal power structure. Each center of influence has certain likes and dislikes. Effective programs that worked before may not work for you or a new retention program. This might be due to new management, a personality clash, different interests, or any of many other reasons, but you have a responsibility to make it work. It is up to you, as the career information program manager, to develop a successful program. Unfortunately, there is no set formula for performing this task, but the following guidelines should be helpful.

e. Guidelines for Relations with Centers of Influence. Be honest and sincere in your dealings within the command. When you want or need something, ask. Do not be coy or try to "get around" people. People do not like to feel that they are being used. Remember that you can create a negative contact just as easily as you can develop a positive one (sometimes even more easily). Negative influences can erode not only your credibility, but that of your entire program. However, you cannot ignore any sphere of influence because the damage caused can be irreparable. Such individuals may be beyond convincing as to the value of your efforts, but they are NOT beyond being charged with their professional responsibilities to the command and the Navy.

CAUTION: If the career information program manager (you) loses credibility, and is perceived by the command as dishonest, inefficient, or lacking in sincerity, the only solution is to find a new program manager.

Most people are glad to help if approached properly. Our leaders and managers in today's Navy are very aware of people and have a sincere desire to retain good personnel through the programs available. Do not make yourself a liability to others. They have their own jobs, with their own pressures and commitments. Use common sense to avoid repeated unexpected interruptions that can create resentment. People who assist you and support the program want and deserve to be appreciated. Give feedback to the CO, XO, and department heads on the support you receive. Ask them to feed it back down the chain of command. This reinforces the chain of command and gives COs a good feeling about their people. Do not be "one-way" in your relationships. Let your contacts know that you are available to assist them and in what ways. Success is a two-way street, so work together! Never let your network of contacts become stagnant. You must constantly cultivate new relationships (contacts) with new people. The more contacts you make, the more productive your program will be. Contacts are among your most valuable assets--treat them as such!

10. PROGRAM MANAGER ROLES. Program managers are vested with formal authority over the Command Retention Program. From formal authority comes status, which leads to varied interpersonal relationships from which comes access to information. Information, in turn, enables managers to make decisions and strategies for their own areas of responsibility. These areas

of responsibility require that the manager fulfill three roles: interpersonal, informational, and decisional.

a. Interpersonal Roles. Duties that involve interpersonal roles may sometimes be routine, involving little serious communication and no important decision making. Nevertheless, they are important to the smooth functioning of your organization and cannot be ignored. Three of the program manager's roles arise directly from the possession of formal authority and involve basic interpersonal relationships.

(1) Figurehead Role. By virtue of your position as the manager of the Command Retention Program, you will perform duties of a ceremonial nature, attending reenlistments, retirements, advancements, and so on. You should expect to spend about 10 percent of your time in this capacity. Such duties are important to the smooth functioning of your program and cannot be ignored or taken lightly.

(2) Leader Role. You are the career information program manager and in charge of technical aspects of the program and, as such, are responsible for the counseling activities of your team members. The influence of a manager is most clearly seen in the leader’s role. Formal authority vests you with potential power; your leadership determines in large part how much of this power you will realize.

(3) Liaison Role. In your liaison role, you will be making contacts outside your vertical chain of command, an aspect generally ignored until recently. Yet virtually every study shows that managers spend as much time with peers and other people outside their units as they do with their own subordinates. Surprisingly, very little time is spent with their own superiors. Three separate studies show that managers spend 44 percent of their time with their peers, 46 percent of their time with people outside their unit, and only 10 percent of their time with their superiors. A program manager cultivates contacts outside the unit largely to find information. The liaison role is devoted to building up your external information system; informal, private, verbal, but effective.

b. Informational Roles. By virtue of interpersonal contact, both inside and outside of the command, the program manager will emerge as the nerve center of information. The manager may not know everything, but typically knows more than any other member of the staff. Processing information is a key part of the program manager's job and consists of three distinct roles.

(1) Monitor Role. Program managers have the natural advantage of collecting information because of their many contacts. You will or should find yourself constantly scanning your environment; maintaining liaison with contacts; talking with seniors, peers, and subordinates; and in the process receiving a large quantity of unsolicited information.

(2) Disseminator Role. As you collect information in the monitor role, you must also share and distribute the information that you gain, otherwise your clients and the members of your team will have no access to the new information and your program will suffer.

(3) Spokesperson Role. This role is normally applied to group addresses: welcome aboard or indoctrination, spouse information classes, career information or training classes, and so forth. This role also applies to people outside your routine sphere of influence.

c. Decisional Roles. Information is not an end in itself, but rather it is the basic input to decision making. The manager plays a major role in the program's decision-making system. You will assume four roles as a decision maker for the program.

(1) Innovator. In this role you seek to improve your program, and thus your command, by adapting to changing conditions or by adopting, modifying, or developing new ideas.

(2) Disturbance Handler. This role is not new to any leader. It becomes a mode of operation when change or conditions create a situation that appears out of control, and you must act because the pressures of the situation are too severe to be dealt with in a routine manner.

(3) Resource Allocator. Certainly the most important resource your program has is you. You must allocate your time carefully to make sure all areas of the program receive adequate attention. You are charged with designing the structure of your program and the pattern of formal relationship that determines how counseling is assigned and coordinated.

(4) Negotiator. Consider how much time you spend in trying to get a space to hold a career information or training class, space and furniture for your office, or administrative support. Negotiations are a way of life for any career counselor. Negotiations may be routine, but they cannot be shirked; they are an integral part of your job.

It should be obvious that these roles are not separate. No one role can be removed and leave your other functions intact. If, for instance, you ignore the need for the Monitor role, your program would be quickly out of date. Validity and accuracy of information would vanish, followed rapidly by loss of program credibility. Naturally, equal time is not needed for each of the roles. Depending on the circumstances and the state of the command's program, you will spend more time in some roles than others. The important thing to remember is that you will perform in each of the roles at one time or another.

## SAMPLE CIPM TRAINING SCHEDULE

Use this schedule for weekly presentations during quarters and at divisional training. Use topic-knowledgeable instructors outside the department/ division as often as possible.

| | | |
|---|---|---|
| JANUARY | - | Navy College Program<br>Survivor Benefit Program<br>CREO<br>Obligated Service Requirements |
| FEBRUARY | - | SGLI<br>Transition Assistance Management Program (TAMP)<br>Special Programs<br>Command Advancement Program |
| MARCH | - | Enlisted Commissioning Program (ECP)<br>GUARD III Program<br>Navy Assignment System/JASS<br>Ombudsman Program |
| APRIL | - | NROTC 4 Year<br>BOOST Program<br>VA Benefits<br>Career Information Program Management (CIPM) |
| MAY | - | Medical Enlisted Commissioning Program (MECP)<br>Duty Preferences<br>Sponsorship Program<br>Navy and Marine Corps Relief Society |
| JUNE | - | Naval Academy Prep School/Naval Academy<br>TRICARE<br>Combined Federal Campaign<br>Incentive Programs |
| JULY | - | Legal Assistance Program<br>NROTC 2 Year<br>Worldwide Assignability Policy<br>LDO/CWO Programs |
| AUGUST | - | Savings Bond Program<br>Rating Entry for Non-Designated Personnel<br>MCPO/SCPO/CPO Selection Boards<br>Dependency Care Certificate |
| SEPTEMBER | - | Selective Conversion and Reenlistment Program (SCORE)<br>Career Information Web Sites<br>HARP/Blue Jacket HARP<br>National Apprenticeship Program |
| OCTOBER | - | Selective Reenlistment Bonus (SRB) Program<br>Split Tours/Swaps<br>Pays and Allowances<br>Lateral Conversions |

| | | |
|---|---|---|
| NOVEMBER | - | Selective Training and Reenlistment (STAR) Program<br>Types of Duty<br>Professional Development Boards/Career Review Boards<br>Financial Management Resources |
| DECEMBER | - | BUPERS Access<br>Advancements<br>Fleet Reserve/Retirement Programs<br>Family Services Centers (FSC) |

**SAMPLE AGENDA FOR COMMAND RETENTION TEAM MEETINGS**

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*Use this format for several meetings until you become comfortable with the way agendas should be constructed. After that, modify it to your command's needs.*

---

Meeting Date:_____ Place:_____ Start Time:_____

Career Information Team Goals: *(Note: Have your team goals listed on the agenda. They can be typed onto the master form before it is copied.)*

| | ITEM TYPE | MUST DO/ SHOULD DO? | TIME ESTIMATE |
|---|---|---|---|
| 1. Opening Comments *(XO, C/MC, CCC)* | I | Y | 5 |
| 2. Icebreaker | A | Y | 10 |
| 3. Review the Agenda *(add/modify/delete items)* | A | Y | 5 |
| 4. Status Reports | | | |
| a. Loss Tracking System | R | Y | ____ * |
| b. Prior Month's Interview Sheets | R | Y | ____ * |
| c. Pending Request Chits | DI | Y | ____ * |
| d. PDB Schedule | R | Y | ____ * |
| e. CITC Training Schedule | R | Y | ____ * |
| 5. New Business | | | |
| a. | __ | _ | ____ |
| b. | __ | _ | ____ |
| 6. Old Business | | | |
| a. | __ | _ | ____ |
| b. | __ | _ | ____ |
| 7. Upcoming Events, Presentations, Special Meetings, etc | | | |
| a. | __ | _ | ____ |
| b. | __ | _ | ____ |
| 8. Agenda Items for Next Meeting | | | |
| a. | __ | _ | ____ |
| b. | __ | _ | ____ |
| 9. Assignments *(what? by whom? due date?)* | | | |
| a. | __ | _ | ____ |
| b. | __ | _ | ____ |
| 10. Special Activity for This Meeting | __ | _ | ____ |
| 11. Meeting Evaluation | C | Y | 5 |

End Time:

* = Reports Attached

A = Action
C = Constructive
DE = Decision
DI = Discussion
I = Information
M = Modification
R = Review

**SAMPLE REQUIRED MONTHLY CAREER INFORMATION INTERVIEWS AND GROUP PRESENTATIONS MEMORANDUM**

Date: _____

MEMORANDUM FOR DISTRIBUTION

Subj: REQUIRED MONTHLY CAREER INFORMATION INTERVIEWS AND GROUP PRESENTATIONS

Ref: Retention Team Manual, Chapter 2

1. The required career counseling interviews for personnel during the month of _____ are listed below. These interviews will be given by the member's Departmental/Divisional Career Counselor as soon as possible and the appropriate documentation forwarded to the Command Career Counselor, as outlined in reference (a), within 30 days.

| | Rate/Rank | Name | Dept/Div |
|---|---|---|---|
| Reporting Interviews | | | |
| a. | | | |
| b. | | | |
| c. | | | |
| Retention Interviews | | | |
| a. | | | |
| b. | | | |
| c. | | | |
| Incentive Interviews | | | |
| a. | | | |
| b. | | | |
| c. | | | |
| 17th Year Monitor Interviews | | | |
| a. | | | |
| b. | | | |
| c. | | | |
| Pre-Separation Interviews | | | |
| a. | | | |
| b. | | | |
| c. | | | |

2. The personnel slated for group presentations with the Command Career Counselor are listed below. Departments/Divisions will coordinate the schedules of these members to ensure full participation at the specified date and time.

Subj: REQUIRED MONTHLY CAREER INFORMATION INTERVIEWS AND GROUP PRESENTATIONS

| | Rate/Rank | Name | Dept/Div | Date/Time/Place |
|---|---|---|---|---|
| Reporting Interview Group Presentation | | | | |
| a. | | | | |
| b. | | | | |
| c. | | | | |
| Retention Interview Group Presentation | | | | |
| a. | | | | |
| b. | | | | |
| c. | | | | |
| Incentive Interview Group Presentation | | | | |
| a. | | | | |
| b. | | | | |
| c. | | | | |
| 17th Year Monitor Interview Group Presentation | | | | |
| a. | | | | |
| b. | | | | |
| c. | | | | |
| Pre-Separation Interview Group Presentation | | | | |
| a. | | | | |
| b. | | | | |
| c. | | | | |

Executive Officer

Distribution:
Department Heads
Command Master Chief
Department/Division Career Counselors
File

**SAMPLE INTERVIEW ACTION PLANNER**

Rate/Rank Name _____ Date _____

SSN _____ DEPT/DIV _____ Work Phone _____

Interview Goal: INFORMATION ACTION DATA COLLECTION OTHER _____

Topics to be discussed _____
_____
_____

Specific information to give member _____
_____
_____

Decisions member will need to make _____
_____
_____

Actions for CCC _____
_____
_____

Actions for member _____
_____
_____

Services necessary _____
_____
_____

Summary of interview _____
_____
_____
_____

Follow-up meeting needed? YES NO Place/Time _____

_____ _____
Member's Signature Date CCC's Signature Date

**REQUIRED INTERVIEW/GROUP PRESENTATION PROCESS FLOW CHART**

CCC identifies required interviews due this month and group presentations for interviews due next month using their CIPM software program.

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.

CCC prepares monthly memo for XO signature.

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CCC generates required interview sheets.

.

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CCC forwards and distributes copies of signed monthly memo, with required interview sheets attached, to the Department Head.

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Department Head reviews monthly memorandum and forwards to Department CCs.

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Department CCs distribute required interview sheets to Division CCs.

.

.

CCC conducts the group presentations for the upcoming monthly interviewees.

.

.

Division CCs or Work Center CCs conduct the required interviews, record the results of the interviews on the required interview sheets and forward them to the Division Officer.

.

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Division Officer reviews required interview forms and forwards them to Department CCs.

.

.

Department CC reviews required interview forms and returns them to CCC.

.

.

CCC inputs the completed required interview information on their CIPM software program's tickler system.

.

.

CCC puts pertinent required interview information on monthly departmental career information team meeting agendas.

.

.

Departmental Retention Team Meeting is held.
Interview results are discussed to ensure all actions are being taken.

.

.

CCC follows up on any outstanding actions.

.

.

CCC updates their CIPM software program with completed actions.

.

.

CCC identifies required interviews due this month and group presentations for interviews due next month using their CIPM software program.

**SAMPLE MONTHLY RETENTION-RELATED ACTIVITY REPORT**

Date: _____

From: Command Career Counselor
To: Commanding Officer
Via: Executive Officer

Subj: MONTHLY RETENTION-RELATED ACTIVITY REPORT

1. Career information related activity for the month of _____ is listed below ("*" denotes a change in status).

**Reenlistments**

| Rate/Rank | Name | Date/Time | Place | Uniform |
|---|---|---|---|---|

**Fleet Reserves/Retirements**

| Rate/Rank | Name | Program | Current Status | Key Date |
|---|---|---|---|---|

**Separations**

| Rate/Rank | Name | Program | Current Status | Key Date |
|---|---|---|---|---|

**Professional Development Board Candidates**

| Rate/Rank | Name | Reason | Board Date |
|---|---|---|---|

**Professional Development Reboard Candidates**

| Rate/Rank | Name | Reason | Reboard Date |
|---|---|---|---|

**BCNRs**

| Rate/Rank | Name | Current Status |
|---|---|---|

**Rate Conversions Approved**

| Rate/Rank | Name | Requested Rate | Current Status |
|---|---|---|---|

Subj: MONTHLY RETENTION-RELATED ACTIVITY REPORT

**Rate Conversions Pending**

| Rate/Rank | Name | Requested Rate | Current Status |
|---|---|---|---|

**Commissioning Program Requests**

| Rate/Rank | Name | Program | Current Status |
|---|---|---|---|

**TAP Seminar Candidates**

| Rate/Rank | Name | EAOS | Seminar Date |
|---|---|---|---|

**1306/7 Requests**

| Rate/Rank | Name | Request | To | Current Status |
|---|---|---|---|---|

Respectfully,

Copy To:
Department Heads
Command Master Chief
Admin Office
Personnel Office
Disbursing Office
Medical Department
Public Affairs Office
Legal Department
PSD
Departmental/Divisional Career Counselors
File

## CHAPTER 3 - PAY, ALLOWANCES, AND ENTITLEMENTS

**3.1 BACKGROUND.** The present military pay system was not designed as a whole; rather it has evolved over the years in response to the needs of the military community. The result is a complex network which includes various special pays and allowances, plus other pay elements created for specific groups or skills. The legal term used when referring to military pay is "Regular Military Compensation" (RMC). RMC is a combination of basic pay, basic allowances for housing (BAH) or overseas station housing allowance (OHA), basic allowance for subsistence (BAS) and the federal tax advantage on the non-taxable allowances (BAH, OHA and BAS). The RMC of personnel not receiving BAS and BAH is based on in-kind values (meals and quarters provided by the government). Other entitlements such as special and incentive pays and allowances, reenlistment bonuses, benefit package, and the present and future value of the retirement system are an additive to RMC. Specific guidance for current rates and conditions of entitlements are located in the Department of Defense Financial Management Regulation (DODFMR) Volume 7, Part A.

### 3.2 BASIC PAY

1. Basic pay is the primary means of compensating members of the uniformed services. Except for certain periods of unauthorized absence, excess leave, and confinement after an enlistment has expired, every active duty member is entitled to basic pay on a regular basis. The rate of this pay is determined by paygrade and length of service. Pay rates are designed to avoid pay inversions so personnel having the same time in service will normally make more money than personnel in a lower paygrade. The rates are also fixed so personnel stop receiving raises for increased length of service at certain points in each paygrade, thus providing an incentive to attain increased pay levels by earning promotions. (Note: Warrant Officers and LDO's basic pay structure is an exception to the general guidelines discussed above.)

2. Many other pays and allowances are linked to basic pay. For example, basic pay is utilized when computing various military compensation entitlements such as Selective Reenlistment Bonuses and retirement pay rates.

3. The following types of service count toward longevity for pay:

   a. Active Duty

   b. Annual Training (AT)

   c. Inactive Reserves

   d. Temporary Disability Retirement (TDRL)

### 3.3 BASIC ALLOWANCE FOR SUBSISTENCE (BAS)

1. By law, enlisted personnel are provided three meals a day, "subsistence in-kind". When subsistence in-kind is not provided, BAS is authorized. BAS is provided as a cash allowance to officers. It is payable at all times, to partially reimburse officers for the expense of subsisting themselves. Both officer and enlisted subsistence allowances were originally intended to be a cash equivalent of the approximate cost to the government of feeding its personnel. Such equivalency no longer exists except with respect to enlisted commuted rations and leave allowances. A 1974 change to the law abandoned the correlation between government food costs and subsistence allowances. Military personnel generally tend to view the subsistence

allowance as intended to meet their normal food costs. However, BAS rates are tied neither to government nor service members' food costs, but represent an arbitrary amount of cash pay received by officers and by enlisted personnel under certain conditions.

2. The rates of BAS differ between officer and enlisted members. All officers draw BAS on a monthly basis, regardless of grade. Officers are required to pay when they eat in a government dining hall or a shipboard mess. Enlisted members, on the other hand, are subsisted in-kind because government messes are funded by the Congress to provide their meals. When there is no government mess available, the member collects BAS at a specified daily rate. Some enlisted personnel are given permission to mess separately even though there is a mess available. This payment is called separate rations (COMRATS) and is slightly less than the regular daily BAS rate. Personnel are entitled to BAS when they are married and live at home or are single and are authorized to live off base. Those who live in barracks or aboard ship are normally not entitled to BAS payment.

3. BAS also is paid when leave is taken and, under certain circumstances, may be paid while a service member is on a temporary duty (TDY) assignment.

4. BAS eligibility and rates are listed in Chapter 25 of the DODFMR.

## 3.4 BASIC ALLOWANCE FOR HOUSING (BAH)

1. Traditionally, and by law, military members are provided quarters. BAQ is a cash allowance provided to military personnel when they are not furnished adequate government quarters. Members without dependents in paygrades E7 and above, including shipboard personnel (E-6 and above), may elect to receive BAH in lieu of assignment to government quarters.

2. According to law and practice, single members are provided single quarters and members with dependents are provided family quarters. Consistent with this, the rate of BAH is dependent upon whether the member has dependents or not and upon paygrade. BAH does not vary with number of dependents, but is a flat "with dependents" or "without dependents" rate. The rate payable is also based on housing prices for the geographic location of the member's permanent duty station. Therefore higher cost areas will have higher BAH rates than lower cost areas, however the average member of a given paygrade and dependency status will pay the same out-of-pocket cost regardless of location. The BAH "without dependents" rate can be a full rate or a partial rate. The full rate is paid to both officers and enlisted members (without dependents) not living in government quarters. The partial rate is paid to members, without dependents, who are assigned to single-type quarters or are on field or sea duty, and therefore not entitled to receive BAH at the full rate. Partial BAH reflects a reallocation of the basic pay raise into BAH which occurred in 1976 to 1977.

3. BAH policy can be found in Chapter 26 of DODFMR.

## 3.5 TAX ADVANTAGE

1. In its formal sense, the federal income tax advantage is the additional amount of pay a military member would have to earn under a system in which cash and in-kind quarters and subsistence allowances are fully taxable to produce the same after-federal-income-tax regular military compensation the member receives under the system where quarters (housing) and subsistence allowances are tax-exempt. This formal tax-advantage varies among individual members and is dependent upon:

a. Paygrade and length of service.
b. Whether subsistence and quarters are received in cash or in-kind.
c. The amount of subsistence and quarters allowances (including any BAH or OHA).
d. The number of member's personal tax exemptions.
e. The member's marital and dependency status.

2. In summary, basic pay is subject to income tax, while BAS, BAH and OHA are not. The federal income tax advantage is a savings, rather than a payment, to military members.

## 3.6 INCENTIVE SPECIAL PAYS AND ALLOWANCES

1. Incentive Pay for Hazardous Duty

a. Flight Pay. Members under competent orders to participate in regular and frequent aerial flights as crew or non-crew members are entitled to flight pay. Officers who are qualified for aviation service (aeronautical rated or designated) are not entitled to hazardous duty incentive pay for flight, but may be entitled to Aviation Career Incentive Pay (ACIP).

b. Other Hazardous Duty Incentive Pays

(1) Flight Deck Pay. For duty involving frequent and regular participation in flight operations on the flight deck of an aircraft carrier or other air capable ship.

(2) Demolition Duty Pay. For duty involving the demolition of explosives as a primary duty, including training for that duty.

(3) Stress Pay (Experimental). For duty as a human test subject in acceleration-deceleration tests, thermal stress experiments, and duty inside a high or low pressure chamber.

(4) Parachute Pay. For duty involving parachute jumping as an essential part of military duty.

(5) Toxic Pesticides/Live Dangerous Viruses or Bacteria Pay. For duty involving frequent and regular exposure to highly toxic pesticides or involving laboratory work that utilizes live dangerous viruses or bacteria.

(6) Toxic Fuels Pay. For duty involving the servicing of aircraft or missiles with highly toxic fuels or propellants.

(7) Air Weapons Controller Crew Member Pay. For duty by an officer serving as an air weapons controller crew member aboard an airborne warning and control aircraft when not entitled to Aviation Career Incentive Pay.

c. Monthly rates for the performance of any hazardous duty described above can be found in Part 2, Chapter 3 of the DODFMR.

2. Special Pays

a. Submarine Duty Incentive Pay. To qualify for submarine pay, personnel must be: attached to a submarine in an active status; assigned a submarine designator and assigned as a prospective crewmember of a submarine; assigned a submarine designator and assigned as a prospective crewmember of a submarine under construction; or designated and undergoing periods of instruction to prepare for assignment to a position of increased responsibility on a submarine. Also, submarine pay is authorized for officers

and enlisted personnel while serving on shore duty if the following specified years of operational submarine service (gates) are met (gates apply only to those members with greater than 12 years of submarine service).

(1) SUB PAY to 26 years of service

(a) at least 6 of first 12 years

(b) or at least 10 of first 18 years

(2) SUB PAY to 22 years of service: at least 8 of first 18 years

(3) Enlisted personnel on shore duty must have minimum of 14 months obligated service beyond established tour PRD.

(4) Officers must additionally meet professional screen standards (XO-CO).

(5) Submarine pay gates commence upon entry into the submarine service (assignment of designator or commencement of submarine training).

Submarine pay rates can be found in Part 2, Chapter 1 of the DODFMR.

b. Career Sea Pay

(1) Career Sea Pay provides a special payment in recognition of the greater than normal rigors of sea duty, the arduous duty involved in long deployments, and the repetitive nature of assignment to such duty. Department of the Navy policy is to designate eligible self-propelled vessels (ships or craft) in which service entails the arduous conditions and separation from home and family demanded of service at sea as duty in one of two sea-duty categories (Category A or B) authorized in law. Members assigned to the predominance of ship-based staffs, ship-based aviation units, Fleet Marine Force units, and mobile units that temporarily serve in either Category A or B vessels, will normally receive cumulative sea-duty credit and CSP (and CSP Premium if eligible) only when both assigned to and serving in a qualifying vessel.

(2) Officer and enlisted personnel assigned to a ship whose primary mission is accomplished underway are entitled to career sea pay on a continuous basis.

(3) Officers and enlisted personnel assigned to a ship whose primary mission is accomplished in port are entitled to career sea pay on a day-for-day basis when underway or away from homeport by at least 50 miles.

(4) Personnel are eligible for career sea pay when they meet the following criteria:

(a) Enlisted members in paygrades E4 and above and warrant officers, regardless of previous sea duty creditable for sea pay.

(b) Officers must have at least three years of sea duty and be in paygrade O3 or above. However, an officer in paygrade O1 or O2 with at least four years of active service as an enlisted member or as a commissioned warrant officer, is eligible for the pay.

(5) Specifies for CSP can be found in SECNAVINST 7220.77D or Chapter 18 of the DOD Financial Management Regulations.

c. Diving Pay. Authorized for military members who are assigned diving duty. The purpose of this special pay is to encourage personnel to

volunteer for diving duty. Enlisted divers are closed-loop detailed by their diving NEC (e.g., Fleet Divers, Explosive Ordnance Disposal, UDT/SEAL, and Corpsman). The rates for diving pay can be found in Part 1, Chapter 11 DODFMR.

d. Special Duty Assignment Pay (SDAP). Special Duty Assignment pay is a monthly pay used to help attain high quality personnel for designated Special Duty Assignments and then sustain adequate manning levels in those assignments. Special Duty Assignments involve demanding duties requiring extraordinary effort for satisfactory performance or an unusual degree of responsibility in the accomplishment of assigned duties. SDAP varies in the amount from $55 to $275 per month. Ratings/NEC's eligible for SDAP and eligibility criteria are specified in OPNAVINST 1160.2 and OPNAVNOTE 1160.

e. Certain Places Pay (Foreign Duty Pay). Enlisted personnel are entitled to Certain Places Pay at specific overseas locations. Foreign Duty Pay is payable to enlisted members otherwise entitled to basic pay who are assigned to duty at certain places outside the 48 contiguous states and the District of Columbia, as designated by Secretary of Defense. Eligibility criteria include: dependents not authorized; less than the normal accompanied tour length; climate; and assignment to communist-controlled countries. Current monthly rates and locations can be found in Part 1, Chapter 6, DODFMR.

f. Hostile Fire Pay (Imminent Danger Pay). Officers and enlisted personnel assigned to duty in designated hostile fire/imminent danger areas or who are subjected to hostile fire in an area not so designated are entitled to Hostile Fire Pay. Hostile fire areas are delineated in Part 1, Chapter 10, DODFMR.

g. Medical, Dental and Optometry Pay. Description and rates of pay for these specialty areas are addressed in Part 1, Chapter 5, DODFMR.

h. Aviation Continuation Pay (ACP). A bonus program for pilots designed to improve retention and solve the aviator shortfall. Rates vary depending upon aircraft. Targeted communities change annually.

## 3.7 ALLOWANCES

1. Family Separation Allowance. Family Separation Allowance (FSA) is authorized for officers and enlisted personnel (all paygrades and lengths of service) with dependents. Two types of FSA are authorized, Family Separation Allowance for Housing (FSH) and FSA S/R/T.

a. The purpose of FSH is to pay a member for added housing expenses caused by enforced separation from dependents. FSH is payable to each member with dependents who is on permanent duty at a location where:

(1) Transportation of dependents to the permanent duty station or to a place near that station is not authorized at government expense;

(2) Dependents do not live at or near the permanent duty station;

(3) Adequate government quarters or housing facilities are not available for assignment to a member and government quarters or housing facilities are not assigned.

Specific criteria for FSH in DODFMR, Chapter 27. FSH is payable in a monthly amount equal to BAH/OHA w/o.

b. FSA S/R/T provides compensation for added expenses incurred

because of an enforced family separation due to PCS, duty aboard ship, or TDY. Normally, separations of more than 30 days are required for entitlement to this allowance. Specific criteria for FSA S/R/T are in DODFMR, paragraph 30304.

c. FSA is not subject to FITW or FICA tax.

2. Overseas Station Allowances

a. Cost of Living Allowance (COLA) and Overseas Housing Allowance (OHA). COLA is an allowance paid to service members permanently stationed in high-cost areas overseas (including Alaska & Hawaii). COLA is a supplement to regular pay that reflects price differences between overseas and continental U.S. goods and services. COLA helps maintain purchasing power so a member can purchase about the same goods & services overseas, as in the United States. Overseas Housing Allowance (OHA) system provides an allowance to uniformed members assigned to overseas locations which defrays a significant amount of housing costs.

b. COLA and OHA payments are described in the Joint Federal Travel Regulations, Volume 1, Chapter 9 and MILPERSMAN 7220-240, 7220-250 and 7220-260, available at local finance or personnel support offices. Payments vary with location, paygrade and number of dependents.

3. Clothing Monetary Allowances. Clothing monetary allowances fall into three major categories:

a. Initial Clothing Allowances (Officers & Enlisted).

b. Civilian Clothing Monetary Allowance (Officers & Enlisted).

c. Clothing Maintenance Allowance (Enlisted only).

Consult with the local command administrative or finance office for specific criteria and clothing allowance rates. DODFMR and MILPERSMAN 7220-230 provide amplifying information.

## 3.8 TRAVEL AND TRANSPORTATION

1. Travel pay is quite complex, therefore only a brief summarization is presented in this publication. Specific criteria and rates/options of reimbursement for officially executed travel can be obtained from the local command's administrative or finance office. Generally, the government reimburses military personnel and their dependents for government directed travel for which no in-kind transportation is/was provided.

2. Permanent Change of Station (PCS) Travel. The most common elements of travel/transportation which affect the majority of military members are:

a. Monetary Allowance in Lieu of Transportation (MALT) Plus Per Diem. MALT is a reimbursable payment made to a member when travel is performed by privately owned conveyance (POV). MALT is set at 15 cents per mile. A flat rate per diem of $50 for military members is paid for each travel day. Refer to the Joint Federal Travel Regulations (JFTR), Volume 1, Chapter 5 for specific information.

b. Per Diem - If traveling by commercial carrier (usually COMAIR) Per Diem is used to reimburse the traveler for lodgings, meals and incidentals. In the CONUS, normally one day of travel (COMAIR) is authorized for per diem purposes. For foreign travel, the actual time of transit is normally authorized if by the most direct means available. Per Diem rates vary

according to local economic conditions. See JFTR.

c. Dependent Travel - Members are normally entitled to direct transportation of dependents at government expense upon a permanent change of station (PCS). Specific information can be found in the following references:

(1) Transportation requests - JFTR, Volume 1, Chapter 3, Part B and U5105.

(2) Reimbursement for actual cost of transportation - JFTR, U5105, U5205 and U5212.

(3) A monetary allowance in lieu of transportation - JFTR, U5105.

d. Dislocation Allowance. The purpose of dislocation allowance (DLA) is to partially reimburse a military member with or without dependents for the expense incurred in relocating a household upon a permanent change of station. All bachelor personnel are entitled to receive DLA at the single rate when transferred to a permanent station where government quarters are not assigned. See JFTR, Volume 1, Chapter 5 and MILPERSMAN 7220-220 for more specific information.

e. Transportation of Household Goods. Entitlement to transportation of household goods or personal effects is authorized when complying with PCS orders. Transportation of a reduced weight allowance is allowed under temporary duty orders when authorized by the order issuing authority or the member's commanding officer. Authorized weight allowances are contained in the JFTR, Volume 1, Chapter 5.

f. Trailer Allowance. Those members authorized transportation of dependents who own a trailer and are executing a PCS move are entitled to a trailer allowance. The trailer must have been acquired prior to effective date of the orders, the member must intend to use the trailer in the new location as the residence, and the member must elect the trailer in the new location as the transportation of household goods and must put the body and chassis in a condition to withstand the strain of travel. The amount payable is limited to the actual expenses associated with the transportation of the trailer and cannot be greater than the cost to move the member's authorized household goods weight allowance. Specific information is located in JFTR, Volume 1, Chapter 5.

g. Temporary Lodging Allowance (TLA). TLA is intended to defray the cost of occupying temporary lodging and subsistence in an OCONUS location when reporting to or departing from an overseas station. The daily amount of TLA is a graduated percentage depending on the number of dependents and the travel per diem allowances in effect for the area in question. Travel per diem allowances are listed by locality in JFTR, Volume 1, Appendix B. Specific information is located in JFTR, Chapter 9 and MILPERSMAN 7220-270.

h. Temporary Lodging Expense (TLE). TLE is intended to partially offset lodging and meal expenses when the member and/or dependents need to occupy temporary lodgings in CONUS incident to a PCS. TLE is authorized for:

(1) a total of ten days in connection with a PCS between two PDSs in CONUS;

(2) a total of ten days in connection with a PCS from a PDS outside CONUS to a PDS in CONUS;

(3) a total of five days in connection with a PCS from a PDS in CONUS to a PDS outside CONUS.

See JFTR, Volume 1, Chapter 5, Part H and MILPERSMAN 7220-280.

# CHAPTER 4 - MILITARY HEALTH SYSTEM AND TRICARE

**4.1 INTRODUCTION.** Many changes have taken place in the military health care system in the past several years. The most important of these changes is the transition to the Department Of Defense (DOD) TRICARE managed health care system.

It's important to talk to your Health Benefits Advisor (HBA) at the nearest military treatment facility (MTF), your TRICARE Service Center (TSC) representatives, or to your Primary Care Manager (if you're enrolled in TRICARE Prime) before you try to get care from either a MTF or civilian source.

Active duty family members, retired members and their family members, and surviving families of deceased active or retired members are eligible to use Uniformed Services Health Benefits. The program provides medical care through uniformed services medical facilities on a prioritized, space-available basis and based on capabilities of the professional staff or through participation in TRICARE on a cost-sharing basis, until member and spouse (if applicable) become MEDICARE-eligible at the age of 65.

**4.2 ELIGIBILITY**

1. Defense Enrollment Eligibility Reporting System (DEERS) is a way of verifying who is entitled to direct health care at military hospitals and clinics. It is used also to verify eligibility for TRICARE benefits.

DEERS is a mandatory enrollment system for active duty and retired service members and their family members and eligible survivors. The system is expected to reduce the number of TRICARE claims that have to be returned because of inaccurate or inadequate eligibility information. Eligibility records are kept in the DEERS computer files. All active and retired military members are listed automatically, but they must take action to have their family members (including newborns) enrolled or deleted. They must also enter all changes, such as marriages, divorces, adoptions, changes of address, etc., into the DEERS database. Enrollment can be done through the nearest military personnel office.

You can now send address changes --including address changes for geographically separated family members-- to the DEERS database through the internet at **http://www.tricare.osd.mil/DEERSAddress/.** Other alternatives for updating your mailing address information include:

- Initiating a request through your nearest military personnel office
- Calling the DEERS Support Office at one of its toll-free numbers: 1-800-334-4162 (California only); 1-800-527-5602 (Alaska and Hawaii); or 1-800-538-9552 (all other states). The best time to call the DEERS Support Office is 9 a.m.-3 p.m., Pacific Time, Wednesday, Thursday or Friday, to avoid delays
- Faxing address changes to (408) 655-8317
- Mailing the address-change information to the DEERS Support Office, ATTN: COA, 400 Gigling Road, Seaside, CA 93955-6771.

2. Proof of Eligibility. As evidence of eligibility for medical care from uniformed services sources and for TRICARE benefits, a beneficiary must have either an Armed Forces Identification Card, DD Form 2N (gray or blue) or

a Uniformed Service Identification and Privilege Card, DD Form 1173. Additional information and assistance with respect to obtaining ID cards may be obtained from any nearby military installation, at the member's command, or from the headquarters of the appropriate uniformed service.

## 4.3 TRICARE

TRICARE is a regionally managed health care program for active duty and retired members of the uniformed services, their families, and survivors. TRICARE brings together the health care resources of the Army, Navy and Air Force and supplements them with networks of civilian health care professionals. There are 11 TRICARE Regions in the U.S. plus TRICARE Europe, TRICARE Latin America and TRICARE Pacific.

**Who is Eligible for TRICARE?**

- Active duty members and their CHAMPUS-eligible families;
- CHAMPUS-eligible retirees and their families under age 65; and
- Survivors of all uniformed services who are not eligible for Medicare.
- Medicare-eligibles under age 65 because of a disability, and are enrolled in Medicare Part B.

If you have other primary health care insurance, TRICARE Prime may not be your best option. Health Benefits Advisors are available at your local TSC or MTF to help you decide which option is best for you. TRICARE offers eligible beneficiaries three choices for their health care:

- **TRICARE Prime** — where MTFs are the principal source of health care.
- **TRICARE Standard** — a fee-for-service option (the old CHAMPUS program); and
- **TRICARE Extra** — a preferred provider option that saves money;

The main challenge for most beneficiaries is deciding which TRICARE option, **Prime**, **Extra** or **Standard**, is best for them. Active Duty personnel are enrolled in TRICARE Prime and pay no fees. Active duty family members pay no enrollment fees, but they must choose a TRICARE option and apply for enrollment in TRICARE Prime. ***There are no enrollment fees for active duty families in TRICARE Prime.***

All other eligible persons deciding not to enroll in TRICARE Prime may still be eligible for care in military medical facilities on a space available basis and maintain TRICARE Standard eligibility (formally CHAMPUS). You may also participate in TRICARE Extra by choosing a physician in the Extra network.

## GENERAL INFORMATION

1. **What are my health plan options available under TRICARE?**
   For eligible beneficiaries, the TRICARE program offers a triple-option health care plan.
   - TRICARE Prime is the managed care option that integrates military and civilian health care into a single delivery system. Beneficiaries who choose this option agree to a one-year enrollment. Enrollees selecting this option choose a Primary Care Manager (PCM) to provide or arrange for their health care needs.

- TRICARE Standard is a fee-for-service option that is the same as CHAMPUS. Beneficiaries using this option have the greatest choice of civilian physicians, but at a higher cost. The cost of having this choice includes a deductible, plus a percentage of subsequent charges, called co-payments or co-pays. Enrollment is not a requirement to participate.
- TRICARE Extra is similar to TRICARE Standard but offers discounts to patients when they use TRICARE network providers. This option allows beneficiaries to receive their care from civilian network providers at a reduced cost compared to TRICARE Standard. There are no claim forms to file -- just pay your reduced copay after satisfying the deductible. You may use a combination of the TRICARE Extra and Standard programs at any time, depending on whether you choose physicians inside or outside the network. There is no enrollment requirement for this program.

2. **Which option is the best choice for me if I don't live close to an MTF?**
If you are able to enroll in the TRICARE Prime program, this would be the most cost-efficient option for you. If there is not a Prime program serving your area, you can still save money by participating in the TRICARE Extra program by using a civilian network provider. TSCs have lists of TRICARE

Extra network physicians. If TRICARE Extra is not available in your area, you will have to utilize TRICARE Standard. Revisions are currently in the works for active duty families living in remote areas.

3. **Which is the best of the three TRICARE options for a retiree who lives in two different parts of the country?**
For a retiree with two residences, because of the new "Portability Rules" they will still have the triple option available and can choose the best option for themselves. The only change is that if they choose Prime they will be able to disenroll and reenroll twice in the same year as long as their second re-enrollment is in the original region. For those individuals desiring more flexibility they may want to elect to utilize either TRICARE Extra or Standard.

4. **What is my priority for care in the MTF?**
By law, priority for care at the MTF will be based on the following criteria:
- Active duty personnel
- Active duty family members enrolled in TRICARE Prime
- Retirees, Survivors and their family members enrolled in Prime
- Active duty family members not enrolled in Prime
- Retirees, Survivors and their family members not enrolled in Prime
- Non-enrolled persons eligible for military health care will be seen at military hospitals and clinics on a space-available basis.

5. **Is there a maximum that I may have to pay under the three TRICARE options?**
Under TRICARE Standard and Extra, active duty family members can be responsible for up to $1,000 and retirees for up to $7,500 per year in total out-of-pocket costs for covered medical services. Under Prime, the maximum out-of-pocket expenditure per year for covered medical services is $1,000 for active duty family members and $3,000 for retirees and

their families per enrollment year. Under the Point-of-Service (POS) option you pay 50 percent of the cost after a separate, somewhat higher deductible is met ($300 for single enrollment and $600 for family enrollment). There is no catastrophic cap for the Prime POS option.

## 4.4 TRICARE PRIME

1. **Should a family member covered by other comprehensive health insurance enroll in Prime?**

If a family member has other comprehensive health care insurance, TRICARE Prime enrollment is not encouraged. When other comprehensive health coverage is involved, TRICARE is automatically the secondary payer. It may be easier to coordinate benefits with other health insurance under TRICARE Extra and TRICARE Standard. Check with your TSC for further guidance.

2. **What should I do if I'm a Prime enrollee and get sick while traveling outside my region? What if the 800 number is busy and I can't make contact?**

You should contact your Primary Care Manager for instructions in a non-emergency situation. Authorization for care can also be obtained from the Health Care Finders. For non-urgent or non-emergency care you must first obtain authorization. If you see a physician without authorization for a non-emergency problem, you will still be covered for some of the costs incurred under the POS option. That option pays 50 percent of the cost after a separate, somewhat higher deductible is met ($300 for single enrollment and $600 for family enrollment).

### Active Duty

3. **I'm on active duty and stationed away from a military installation. What do I do for medical care, and do I have to pay?**

Currently, as an active duty member, you are covered for your health care needs through supplemental care funds; under no circumstance will you be required to pay for any health care you may need. While not available currently, policy changes are being worked to provide TRICARE Prime from civilian PCM in the local area for Geographically Separated Units (GSU).

### Enrollment

4. **Does the enrollment fee for TRICARE Prime have to be paid all at once, or can it be paid in installments?**

It is permissible to pay the Prime enrollment fee in quarterly installments. There is no additional administrative fee for quarterly payments.

5. **How can I enroll in TRICARE Prime?**

If you are on active duty you will be enrolled in TRICARE Prime automatically and assigned a Primary Care Manager. When Prime is fully implemented in your area, other categories of beneficiaries can enroll on a voluntary basis either by visiting or calling the local TRICARE Service Center and completing an enrollment application. E-4 and below families will be automatically enrolled in Prime in the near future.

6. **What is my priority for being offered enrollment in TRICARE Prime?**
Priority for enrollment is: 1) active duty will be automatically enrolled and receive most of their care in the MTF; 2) active duty family members (E-5 and above) may voluntarily enroll and will be primarily accommodated within the MTF; 3) retirees and their family members and survivors may voluntarily enroll.

7. **If I enroll in TRICARE Prime does that mean that my whole family has to enroll?**
Not all family members are required to enroll in TRICARE Prime. Depending on your specific situation and needs, it may be best, for example, for a spouse to be in TRICARE Prime, and a student son or daughter, to use Extra or Standard. Contact your TSC for advice.

8. **Is there a minimum enrollment period requirement for TRICARE Prime?**
Enrollment is for a 12-month period under TRICARE Prime. At the end of this initial consecutive 12-month enrollment period, you must choose to continue your enrollment in Prime or choose another option that best suits your situation. If you disenroll early for nonpayment of fees, or you request disenrollment without a move, you will be eligible to re-enroll in 12 months.

9. **If I choose to disenroll after I have enrolled in TRICARE Prime, what penalty is incurred? Can I get back into TRICARE Prime if I don't like the other options?**
If the enrollment fee was paid in one payment, you will not receive a refund. Enrollment is for 12 months, unless you move from the area or lose eligibility; if you disenroll early you are eligible to re-enroll in 12 months.

10. **Are there any deadlines or restrictions for enrolling in TRICARE Prime?**
Families and retirees may enroll in TRICARE Prime at any time. Please note that while enrollment for Prime is on a continuous basis, assignment to a Primary Care Manager in a military clinic, where treatment is free, is based on a first come, first served basis. However, MTF Commanders can determine whether your enrollment will be to a civilian Primary Care Manager or an MTF Primary Care Manager. Those enrolled to an MTF may be required to select a civilian Primary Care Manager at the time of re-enrollment because of changes in MTF capacity.

11. **Can my son or daughter, who is away from home at college, enroll in TRICARE Prime at his college if the option is available there?**
For active duty families your son or daughter may enroll in TRICARE Prime as an individual if the option is offered in his or her geographic area. Retiree's and their family members will have the option of split enrollments (enroll as a family in one region and pay one fee but be able to receive care for children in school in a different region) once all regions are up and fully functional.

12. **In the near future, I might want my children, who will be leaving for college, to switch from Prime to Standard. What is the process for this?**
Currently, when you enroll yourself or your family in Prime, there is a one-year commitment. If you know in advance that you will want to change programs, you will have the option not to re-enroll those persons at the end of the year. However, disenrollment is permissible

for a move. By not enrolling you will automatically be participating in TRICARE Standard.

13. **As a retiree enrolled in TRICARE Prime, does my enrollment transfer to the new region if I move?**

As a retiree you will be allowed to disenroll and re-enroll twice during the same year. The caveat is that you re-enroll to the original region (i.e. disenroll in region 1 and enroll to region 3 then disenroll in 3 and re-enroll back to region 1). You will be covered for emergency care under Prime from your original region while in route to the next region.

14. **If my family moves to a different region, are we (active duty) automatically assigned a new Primary Care Manager, or do we have to re-enroll?**

Enrollment in TRICARE Prime entails the assignment of a Primary Care Manager, enrollment in DEERS, and communication with the member on what enrollment in the TRICARE program means. For active duty members, enrollment is automatic. For active duty family members, enrollment in TRICARE Prime is voluntary.

Currently, if you move to a different region, you will have up to 30 days at the new site to enroll. Your old region will cover you for care until you enroll at the new region. Enrolled members will start a new 12-month enrollment period.

## 4.5 PRIMARY CARE PROVIDERS

1. **What is a Primary Care Manager (PCM)?**

A PCM is a medical professional, or a team of providers, in a military hospital or clinic, or in a civilian network, who will assume primary responsibility for providing, arranging and coordinating an enrollee's total health care. A physician designated as a PCM could be one who practices in General or Family Practice, Internal Medicine, Pediatrics and OB/GYN. Nurse Practitioners and Physician's Assistants who provide primary care services may be part of the PCM team.

2. **How can I get a listing of PCMs and other network providers?**

A listing of network providers (Provider Directory) in your area is available at your local TRICARE Service Center.

3. **If I select a civilian network PCM, can I still use a MTF for routine health care services?**

No, enrollees choosing a civilian PCM must be referred to the MTF for specialty and inpatient care by that PCM. An enrollee who has chosen a civilian Primary Care Manager may, however, return for pharmacy, laboratory, radiology and other ancillary care they may require.

4. **If I am already confident that I need to see a specialist, do I need to contact my PCM before I go? What will happen if I don't?**

For those enrolled in TRICARE Prime, it is always necessary to first consult your PCM for specialty care. If it is necessary for you to see a specialist, your PCM will help make an appointment for you. If you see a specialist on your own, without prior approval from your PCM you will be participating in Prime's Point-of-Service option and will be

responsible for 50 percent of the cost after the deductible ($300 for single enrollment and $600 for family enrollment) is met.

5. **My PCM refuses to provide a referral for services I believe I need. What do I do?**

The TRICARE Prime program has provisions for second opinions. If you feel that the diagnosis or treatment plan may not be correct, you can request that your PCM refer you out for a second opinion. Additionally, if you are dissatisfied with your PCM, you can request assignment to another PCM. If you are still not satisfied, you can file a complaint or grievance regarding the non-availability of service decision to the MTF Commander or Regional Lead Agent. Finally, you have the option of using the POS option under Prime.

## 4.6 SPECIAL BENEFITS

1. **How do we obtain emergency care under TRICARE?**

Any eligible beneficiary should access the nearest emergency room of any military or civilian hospital for true emergencies, regardless of which TRICARE option you use.

2. **Does the co-payment increase for the emergency room?**

There are no out-of-pocket costs for any care received at a military hospital, including emergency room care. The out-of-pocket costs for care received at a civilian emergency room for families of E-4 and below enrolled in Prime is $10. For families of E-5 and above and retirees and their families, the copay for an emergency room visit is $30. This single payment, $10 or $30, includes all emergency room services provided in conjunction with the visit. Regular deductibles and co-payments apply for those who remain in TRICARE Standard, or use TRICARE Extra.

3. **What is the function of the Nurse Advisor?**

Nurse advisors are available in most regions, by phone, to provide advice and assistance that will enhance patient decision making about their health care. They are available 24 hours a day, 7 days a week, and can discuss treatment alternatives, symptoms, and illness prevention or can advise whether a situation warrants immediate medical attention. Any TRICARE-eligible person can use the service of the nurse advisor.

4. **Will a pre-existing condition be a factor before being accepted into Prime?**

No. Pre-existing conditions will not disqualify you from enrolling in Prime.

## 4.7 TRICARE EXTRA & TRICARE STANDARD

1. **Can I go to any civilian hospital if I need non-emergency, inpatient care?**

Active duty family members, retirees and their family members, and survivors of deceased members who reside within an established "catchment area" of a MTF must first seek non-emergency inpatient care in that facility before they can seek that care under TRICARE Standard. If the care required is not available, patients will be provided with a

Non-availability Statement (DD Form 1251), which must be submitted when filing a TRICARE claim.

To use this program the beneficiary selects a civilian physician, hospital, or other authorized provider of care; establishes eligibility for TRICARE benefits using the requisite identification card; obtains the needed authorized care; then submits the claim benefits to the TRICARE contractor.

2. **If I am participating in TRICARE Standard, do I have to pay for medical care at a MTF?**

There aren't any out-of-pocket costs for outpatient care received at an MTF. However, it is important to remember that TRICARE Prime enrollees will receive priority for care at that MTF before non-enrolled beneficiaries. You will be seen on a space-available-basis only.

3. **What if my doctor does not participate in TRICARE?**

Participation by providers of care is entirely voluntary. If the provider will not participate in the program, the beneficiary can either find another who will, or use the nonparticipating provider with the understanding that the beneficiary will have to file his own claims and perhaps pay more than if he had used a participating provider. The beneficiary should check first to learn if the provider chosen will participate in TRICARE Standard. Participation means the doctor will provide the authorized services, submit the TRICARE claims, charge the beneficiary only his cost sharing portion of the charges, and accept the amount allowable from CHAMPUS as payment in full.

4. **I am participating in TRICARE Standard. Do I need to pay for my medical expenses up front, or will the doctor bill TRICARE directly?**

Under TRICARE Standard, depending upon your provider, you may be required to pay for your share of the medical treatment up front. If you go to a doctor who participates in the Extra network, your out-of-pocket costs will be less than with Standard and you will not have to file claims.

5. **How do I switch from TRICARE Standard to Extra and vice-versa? Can I do this at any time?**

As long as you are not enrolled in TRICARE Prime, you may switch between Standard and Extra at any time. You can switch by making the choice between any civilian doctor and a doctor within the Extra network.

## 4.8 PROGRAM FOR PERSONS WITH DISABILTIES (PFPWD)

1. **I have an eligible family member with special needs. How does TRICARE fit in with the Program for Persons with Disabilities (PFPWD), previously known as the Program for the Handicapped?**

The PFPWD is a financial assistance program for active duty dependents with severe physical disabilities or with moderate to severe mental retardation who cannot get specialized training or care through public resources. Active duty family members can take advantage of both TRICARE and the PFPWD programs concurrently. The exception is that authorized services provided in conjunction with the PFPWD qualifying condition cannot be furnished under the basic program as long as the qualifying condition exists and there is a PFPWD benefit authorization

outstanding. The PFPWD is used concurrently with TRICARE Prime, Extra or Standard. Authorization for benefits under PFPWD does not affect your enrollment in Prime. It does provide an additional financial option to explore when utilizing medical resources. When you are enrolled in Prime, you are assigned a PCM, who has the responsibility to authorize specialty care under the Prime program. Benefits not normally covered may be cost shared under the PFPWD.

Because of the cost associated with care for family members with special needs, most families will be encouraged to review all of the TRICARE options. Recognizing that the catastrophic cap under Extra and Standard is only $1,000, and all further cost are covered at 100% by the government, Prime may not be your best option. Further, most State and Federal Agencies cover some of these specialty services at little or no additional cost. Check with your regional TSC to see which option is the best for your particular family member. For personnel who are Medicare eligible due to a disability and are under the age of 65, they still retain their TRICARE eligibility.

a. Eligibility.

(1) Spouses and children of members who are serving on active duty for a period of more than 30 days are authorized special benefits from civilian sources if such spouses or children are moderately or severely retarded mentally or have a serious physical handicap. These special benefits shall only be provided with respect to the family member's mental retardation or physical handicap. This includes those who are moderately or severely retarded mentally and those who are seriously handicapped physically.

(2) In order to obtain benefits under the Program for the Handicapped, a plan for management of the handicapping condition, including estimated costs, must be reviewed and approved in advance. For benefits to be provided in the European area, applications are sent for approval to the Director, TRICARE Europe Support Office, Ramstein AFB, GE, APO-AE 09094-0310. For benefits in the United States, Canada, Mexico, South and Central America, and the pacific area, applications are sent to the appropriate TRICARE claims processor (consult your HBA). Email any question to: questions@ochampus.mil

b. Special benefits:

(1) Diagnosis,
(2) Inpatient, outpatient, and home treatment,
(3) Training, rehabilitation, and special education,
(4) Institutional care in private non-profit, public and state institutions and facilities and, when appropriate, transportation to and from such institutions and facilities; and
(5) Necessary services and supplies.

## 4.9 UNIFORMED SERVICES FAMILY HEALTH PLAN (USFHP)

The USHP offers a comprehensive package of major medical healthcare coverage plus the advantages of preventive care including annual physicals, mammograms, immunizations and well-baby care. Medically necessary care is covered by the plan - including coverage for prescription drugs. The USFHP is an alternative to TRICARE Prime. You have the option of enrolling in either program. USFHP is only available in seven areas of the country for:

- Eligible family members of active duty families
- Military retirees - even those over age 65
- Eligible family members of military retirees - even those over age 65
- Eligible family members of deceased active duty or retired service members

You must live in one of the seven areas to be eligible for the plan. To enroll, you must complete an application and submit it to the USFHP program of your choice. Enrollment is contingent on available space and you must reside in the service area of a USFHP program to enroll. Active Duty families can enroll at any time throughout the year and enroll for a one year period of time. Retirees and their family members can only enroll during open enrollment season which varies for each program. When you enroll in the USFHP, you make a one year commitment to receive your care from the plan - unless you move out of the area or your eligibility status changes. For informational about the USFHP, call the national office at 1-888-25U-SFHP (1-888-258-7347), or call the program office in your area.

1. **How does USFHP fit into TRICARE?**
   As an enrollee of the USFHP you are covered by TRICARE. The designated providers administer the USFHP through contracts awarded by the Department of Defense providing TRICARE Prime to all enrollees (including Medicare-eligible beneficiaries). Only active duty personnel are prohibited from enrolling in the USFHP. As a USFHP member you may transfer to other TRICARE areas, elect for split enrollment of family members between TRICARE contractors, or move to another TRICARE Prime contract area through portability without loss of enrollment. If you are a Medicare-eligible enrollee, you may only transfer or join other designated provider programs.

## 4.10 UNIFORMED SERVICES CONTINUED HEALTHCARE BENEFIT PLAN (USCHBP)

1. Separating members and their family members can elect temporary health coverage through USCHBP. This plan also covers pre-existing conditions (which is a condition that exists prior to insurer and does not require a waiting period or physical exam.)

2. Beneficiaries have 60 days to enroll in USCHBP, but the period of coverage must begin on the day after entitlement to a military health care plan ends (including TAMP coverage). Separating members are limited to 18 months coverage while unmarried emancipated children who are full-time students and un-remarried former spouses, 36 months coverage. Retirees are not eligible for this program.

3. CHCBP is not a part of the TRICARE Program; however, it functions under most of the rules and procedures of TRICARE Standard. As of 1998, the quarterly premium is $993 per individual former service member, emancipated children, and un-remarried former spouses, and $1996 per family. This premium must be paid upon enrollment.

4. For enrollment information contact: USCHBP Administrator, P.O. Box 1608, Rockville, MD 20849-1608 or call 1-800-809-6119.

## 4.11 NATIONAL MAIL ORDER PHARMACY

1. **What is the National Mail Order Pharmacy Program (NMOP)?**
The NMOP is DOD's new mail order service for maintenance prescriptions. Beneficiaries can receive free delivery to a home, temporary stateside address, or APO/FPO addresses. To be eligible for the NMOP, beneficiaries must be registered with DEERS. Beneficiary information in DEERS must be up-to-date and match the information submitted on the NMOP confidential patient profile registration form.

2. **Who is currently eligible for the NMOP?**
- all active duty members worldwide;
- all CHAMPUS/TRICARE-eligible beneficiaries under 65 (beneficiaries residing overseas must have an APO or FPO address);
- all Uniformed Services Treatment Facility (USTF) enrollees (including Medicare-eligibles);
- all base realignment and closure (BRAC) Medicare-eligible beneficiaries; and
- all Medicare-eligible beneficiaries enrolled in TRICARE Senior Prime. Future provisions may expand to include all Medicare-eligibles.

3. **I currently have access to a mail order program under TRICARE Prime. Is the NMOP the same program?**
No. It is an entirely different program that is not only region-wide, but also worldwide, under one contract with Merck-Medco Rx Services. Regarding current enrollees, the NMOP is only available to those enrolled in TRICARE Prime at an MTF. So, if you are enrolled at a MTF, and not through a Prime network, you are eligible to use the NMOP. The NMOP will be available to all beneficiaries now covered by Managed Care Support contractors (both enrolled and non-enrolled beneficiaries). These beneficiaries will be phased in upon completion of negotiations with the MCS contractor currently responsible for their regional mail order benefit.

4. **What medications are available through the NMOP?**
The NMOP is for prescriptions that you take on a regular basis, such as medication to reduce blood pressure or treat asthma, diabetes, or any long-term health condition.

5. **What if I have other health insurance with a prescription benefit?**
Any beneficiary who is in one of the eligible groups for the NMOP, but has other health insurance with a pharmacy benefit will be required to use the other available pharmacy benefit coverage first.

6. **How can I get more information about the NMOP?**
If you are in one of the eligible beneficiary groups, see your local MTF pharmacy for details, or call the Merck-Medco Member Services line at 1-800-903-4680. Outside the U.S., contact your long distance carrier for access. Both a short Program Registration Form and a Confidential Patient Profile Registration Form will need to be completed.

## 4.12 RESERVE AND NATIONAL GUARD COMPONENTS

1. **As a reservist when are my family members and I eligible for TRICARE?**
As a reservist, you and your family members are eligible for TRICARE when you become activated and are issued orders sending you to active

duty for a period of more than 30 consecutive days and when you retire from reserve status and are age 60.

2. **As an activated reservist how will I receive my health care?**
All activated reserve/guard members will be enrolled in TRICARE Prime and will receive all of their care in MTFs. If you are stationed in an area where there are no MTFs, you will receive your care from a civilian provider. Under no circumstance will you be responsible for any out-of-pocket costs.

3. **Will my family members need to choose between the three TRICARE options?**
This depends on the length of time for which your active duty orders have been issued. If you, the sponsor, have been issued orders for a period of more than 30 consecutive days, your eligible family members may choose to receive health care through the Military Health System (MHS). In the MHS your family member will have access to the benefits included in two TRICARE health plan options, TRICARE Standard (CHAMPUS), and, if available, TRICARE Extra. To help in the decision, an assessment of your family's health care needs and the health care delivery options for which they qualify will assist in them in choosing an option that best meets their health care and cost needs. If your have been issued orders for 179 days or more, your family members have the option to enroll in a third TRICARE option, TRICARE Prime, if available in your area.

## 4.13 MEDICARE

1. **I am disabled, under age 65. Can I enroll in TRICARE Prime?**
Yes. Beneficiaries eligible for Medicare on the basis of disability or end stage renal disease that are: (1) under age 65, and (2) enrolled in Medicare Part B, are eligible to enroll in Prime and have the enrollment fee waived. However, when these beneficiaries reach age 65, they must receive their health care through Medicare.

2. **Can Medicare-eligibles, over 65, enroll in Prime?**
In an effort to better serve the medical needs of all of our over 65 retirees, DoD has long supported a program that would allow dual-eligible beneficiaries to use their Medicare benefit at Military Treatment Facilities (MTFs). Congress recently passed legislation that allows DoD and the Health Care Financing Administration (HCFA-the government agency responsible for Medicare) to conduct a demonstration, called TRICARE Senior Prime, in selected areas.

If you do not live near one of these demonstration sites, you can continue to seek care in an MTF on a space-available basis; acquire prescriptions through military pharmacies, as well as a retail and mail order pharmacy program if you reside in a BRAC area; and use the Health Care Finders to assist in finding physicians in the TRICARE Extra network who will accept Medicare.

## 4.14 HEALTHCARE INFORMATION AND ASSISTANCE

1. Health Benefits Advisor (HBA). Information and counseling on entitlement to health benefits and assistance for filing claims may be obtained by contacting the HBA at Navy/Marine Corps, Army or Air Force installations.

2. TRICARE Service Centers (TSC). TSCs are staffed by health care professionals who are there to help beneficiaries get the service that they need. Such as:

- **Health Care Finders** make appointments and help find specialists when you need them. They also provide names of doctors participating in the TRICARE Extra network, and will help locate doctors who accept Medicare payments for services provided to beneficiaries age 65 and over.
- **Beneficiary Services Representatives** help explain the options available to you and assist in your choice of the program that suits you best. They can enroll you in TRICARE Prime, assist with the selection of a PCM, and help resolve any billing problems.
- **TRICARE Service Centers** also send beneficiaries information packages describing the features of each of the TRICARE options and what alternatives are available for each beneficiary category.

You may inquire by calling the nearest military hospital or clinic or by calling the telephone numbers below for each region where get information about TRICARE and your health care benefits.

| | | |
|---|---|---|
| Region 1<br>Maine, New Hampshire, Vermont, Massachusetts, Connecticut, Rhode Island, Delaware, Maryland, New Jersey, New York, Pennsylvania, the District of Columbia, Northern Virginia, and the northeast corner of West Virginia<br>1-888-999-5195 | Region 6<br>Oklahoma, Arkansas, western two thirds of Louisiana, Texas, excluding southwest corner.<br>1-800-406-2832 | Region 12 (Pacific)<br>Hawaii and Alaska<br>1-800-242-6788<br>Pacific and WESTPAC<br>1-888-777-8343 |
| Region 2<br>North Carolina and most of Virginia.<br>1-800-931-9501 | Central (Region 7/8)<br>New Mexico, Arizona excluding Yuma, Nevada and southwest corner of Texas, including El Paso, Colorado, Utah, Wyoming, Montana, Idaho excluding northern Idaho, North Dakota, South Dakota, Nebraska, Kansas, Minnesota, Iowa and Missouri<br>1-888-TRIWEST (874-9378) | Latin America<br>Panama, Central America, South America<br>1-888-777-8343 |
| Region 3<br>South Carolina, Georgia, and Florida excluding panhandle<br>1-800-444-5445 | Region 9<br>Southern California and Yuma, Arizona<br>1-800-242-6788 | Europe<br>Europe, Africa, Middle East, Azores and Iceland<br>1-888-777-8343 |
| Region 4<br>Florida panhandle, Alabama, Mississippi, Tennessee and eastern third of Louisiana | Region 10<br>Northern California<br>1-800-242-6788 | |

| | | |
|---|---|---|
| 1-800-444-5445 | | |
| Region 5<br>Michigan, Wisconsin, Illinois, Indiana, Ohio, Kentucky, and West Virginia excluding the northeast corner.<br>1-800-941-4501 | Region 11<br>Washington, Oregon, and northern Idaho<br>1-800-404-0110 | |

3. TRICARE Support Office (TSO), Aurora, CO 8OO45. The Health Resources Information Division of TSO maintains a computerized listing of many types of health facilities located in the United States, Puerto Rico, Mexico and Canada. The information maintained by most of these facilities includes location, costs and service provided.

A TRICARE beneficiary who has a question concerning a facility should get in touch with the Health Resources Information Division. This is particularly important when dealing with a long-term care situation, psychiatric and specialized treatment facilities, and facilities providing service to the physically handicapped and mentally retarded. Requests must include data on the age, sex, CHAMPUS case number if applicable, diagnosis, and/or description of the patient's condition, type of treatment needed and specific geographical area under consideration.

4. **If I have a grievance for services rendered under the TRICARE program, who can I contact?**

Any grievance should be reported to the MTF Commander or Lead Agent. Generally, the regional Managed Care Support contractor will be responsible for grievances for services rendered by civilian network providers under the TRICARE program. Contact the nearest TRICARE Service Center for more information.

5. Internet Resources. A wealth of information may also be found on the internet. Visit www.tricare.osd.mil for beneficiary information, questions, regional information, updates, etc.

## 4.15 FAMILY MEMBER DENTAL PLAN (FMDP)

The FMDP is offered to service members by the federal government. Monthly cost for the plan is $19.30 for family coverage, and $9.65 for a single dependent. However, once enrolled in the dental plan, the member is required to remain so for at least 24 months. Dental coverage is provided to family members of active duty in the United States, Canada, District of Columbia, Guam, Puerto Rico, and the US Virgin Islands (Continental United States or CONUS service area), all other countries, island masses and territorial waters (OCONUS). Implementation of the overseas extension takes effect in two phases: As of May 1, 1999, enrolled family members can receive care for covered services from OCONUS providers in "remote" OCONUS locations. Effective October 1, 1999, enrolled family members can receive dental care in "non-remote" OCONUS locations. Family members are eligible for the same benefits in both the CONUS and OCONUS service areas (although services may not be available or accessible in all OCONUS locations). Coverage and enrollment is automatically extended for TFMDP enrolled family members, and premiums remain the same.

For questions regarding specific coverage details, talk to your Health Benefits Advisor or call United Concordia's toll-free Customer Service Department Monday - Friday, 8:00am to 8:00pm ET at 1-800-866-8499 or visit them on the internet at www.ucci.com.

## CHAPTER 5 - CAREER REENLISTMENT OBJECTIVES (CREO)/RATING ENTRY FOR GENERAL APPRENTICES (REGA)

**5.1 BACKGROUND.** CREO was established as a framework for enlisted career force management and to provide guidelines for the operation of current and future Navy programs designed to meet those objectives. Accordingly, decisions made on applications requesting an incentive program (e.g., STAR, GUARD III, SCORE, etc.) are influenced by the CREO categories of the member's current rating. When counseling members on changing their rating/assignments based on reenlistment incentives or school guarantees, remember the chances of approval will, to an extent, depend on CREO. CREO is gender specific in order to better manage male and female inventories. REGA is the Navy's program to guide the general apprentice (GENDET) population into ratings where junior level vacancies exist. REGA policy applies to rating input through on-the-job training (OJT) and is intended to provide non-designated Seamen, Airmen and Firemen the greatest possible range of choices for rating entry. Every rating within the proper path of advancement will be available as an option unless there is a specific prerequisite or constraint on rating entry (i.e., rating not available to women, "A" school required, etc.). A periodic NAVADMIN titled "Rating Entry for General Apprentices (REGA) and Career Reenlistment Objective (CREO)" provides rating availability for non-designated strikers, advancement forecasts, trends for female manning requirements, CREO rating classifications and critical skills lists.

**5.2 CREO CATEGORIES.** Three categories are established within the CREO system. Categories 1 through 3 describe specific conditions of rate manning ranging from undermanned to overmanned.

1. Category 1 - Rate manning is less than 97 percent. Shortage of personnel in rate.

2. Category 2 - Rate manning is approximately correct (97 to 103 percent). Management is designed to stabilize at present levels.

3. Category 3 - Rate is in excess of 103 percent. Commanding officers are not authorized to reenlist personnel in category 3 rates without CNPC approval.

USNR personnel are encouraged to convert to ratings in category 1 or 2, return to drilling status, or request USN reenlistment from NPC-812, DSN 882-3208.

**5.3 CRITICAL SKILLS.** Undermanned skills within a rating. Considered to be in CREO Category 1 without regard to manning of the associated rating.

**5.4 CONVERSION.** Members in CREO category 3 rates will be encouraged to convert under the SCORE or Lateral Conversion programs to undermanned ratings (CREO category 1). Conversion request for personnel E6 and above will not normally be approved. Conversion is not normally approved until member is eligible for transfer.

**5.5 REGA DEFINITIONS**

1. Open Rating. Rating is available for all E3 personnel within their path of advancement via the Navy-wide advancement examination. Striker designation quotas will be determined by the Chief of Naval Personnel.

2. Closed Rating. Rating entry is not available for non-designated E3 personnel. Prerequisites or constraints to rating entry prohibit participation in the advancement examination ("A" school required).

3. Projected Advancement Opportunity. The projected percentage of personnel to be advanced to the next higher paygrade from among all those projected to take the advancement examination.

4. "A" School Required Rating. Candidates must complete "A" school to acquire an adequate level of professional expertise to function in these ratings.

## 5.6 SELECTED RESERVE ENLISTED CAREER MANAGEMENT OBJECTIVES (SELRES ECMO)

1. General. ECMO governs rating conversion and entry into ratings from apprenticeship rates for the Selected Reserves. Overmanning in certain rates and ratings causes advancement stagnation and restricts accessions while undermanning creates imbalances in other areas. The ECMO manages personnel inventory relative to manpower requirements. The Reenlistment Quality Control Program for enlisted NAVRES and the SELRES ECMO controls inventory by:

(a) Increasing manning in undermanned rates and ratings.

(b) Limiting manning in overmanned rates and ratings.

(c) Enhancing advancements for all ratings.

2. Policy. SELRES ECMO controls entry into ratings through advancement examination participation and rating conversion, and will be revised by ALNAVRESFOR messages as personnel inventory and manpower requirements change.

3. Definitions.

(a) ECMO Categories. The following four categories are used to determine eligibility for change of rating, participation in E4 advancement examinations, Reserve RESCORE-R and bonus eligibility:

(1) Rate manning. Divided into the following five categories. Percentages are determined by comparing the Enlisted Program Allowance to the onboard strength, by rating. ECMO categories are defined as follows:

(a) Category A - Critically Undermanned rate (less than 75 percent)

(b) Category B - Undermanned (greater than 75-100 percent)

(c) Category C - Desired Manning (greater than 100-125 percent)

(d) Category D - Overmanned (greater than 125-150 percent)

(e) Category E - Excessively Manned (greater than 150 percent)

(2) Advancement opportunities. Divided into three categories as follows:

(a) Category (1) - excellent
(b) Category (2) - good
(c) Category (3) - limited

(b) Critical NEC. "Critical" results from both undermanning and replacement requirements (i.e.: length of training and school quota availability). Members holding critical NECs, or component NECs of those listed in the ECMO ALNAVRESFOR, are considered Category "A" for change of rating purposes.

(c) Rate Manning. Ratio of personnel onboard to the Enlisted Programmed Authorization in a specific rate.

(d) Rating Entry General Apprenticeship (REGA). REGA controls the entry of apprenticeship rates into ratings where shortfalls exist. REGA determines eligibility for on-the-job training and participation in Navy-wide advancement examinations.

4. Conversions

(a) Counsel personnel in ECMO Categories "A" and "B" about the relative advantages and opportunities of a NAVRES career in their present rating. Conversions from Category "A" will not normally be authorized. Conversions from Category "C", "D", or "E" to a Category "A" or Category "B" rating is authorized. Change of rate or RESCORE-R conversions into categories "D" and "E" are not authorized.

(b) Counsel personnel in ECMO Category "C" about the limitations of a NAVRES career in their present rating and encourage them to request conversion into Category "A" ratings. Conversion to Category "B" ratings will depend upon current manning requirements at the time of the request. Conversion to Category "C" ratings will not normally approved.

(c) Counsel personnel holding of eligible for critical NECs about retaining eligibility or attaining a critical NEC. NAVPERS 18068F, section II, defines NEC eligibility and gives application procedures.

5. Restrictions. Ratings listed as requiring Class "A" school are restricted to entry by non-designated strikers. Participation in E4 advancement examination for ratings requiring Class "A" school requires NMPC (NPC 862), DSN 882-4541, approval by 15 January or 15 July for the February and August examinations, respectively. Requests not received in sufficient time to process by these dates will be considered for participation in the next advancement cycle.

## CHAPTER 6 - SELECTIVE REENLISTMENT BONUS (SRB) PROGRAM

### 6.1 OBJECTIVE

1. The SRB program is designed to increase the number of reenlistments of personnel serving in critical skills (ratings and/or NECs) experiencing insufficient retention levels to adequately sustain the career force. This chapter is intended as a guide and is not a source document to determine eligibility.

2. The SRB Program is one of our most effective management tools to influence retention in mission critical skills. Because the SRB budget is approved by Congress and changes each year, Navy must target bonuses where needed most. This does not mean that a skill receiving SRB is more important than a non-bonus skill. It means that those particular skills are experiencing more severe manning and retention problems, or are forecasted to experience these problems in the foreseeable future. As manning improves, SRB levels may be reduced or eliminated for some ratings and that bonus money applied to other ratings experiencing manning shortages.

### 6.2 ELIGIBILITY REQUIREMENTS

1. General

a. Have completed at least 21 months continuous active Naval service (excluding annual training (AT)), but not more than 14 years of active military service.

b. Be eligible to reenlist or extend for a minimum of 36-months (3-years)(to a maximum of 62-months (6-years)) in the Regular Navy, USN not USNR.

c. Be a petty officer (or a designated E-3 striker) in an SRB eligible rating or NEC.

d. Attain SRB eligibility prior to the effective date of deletion or reduction of the SRB award in a rating or NEC designated for deletion or reduction.

e. If discharged or released from active duty for more than 24 hours, reenlist in the Regular Navy within four years. This member would be referred to as a Navy Veteran (NAVET) and may be eligible for a Broken Service SRB.

f. Remain qualified for continuous service in the SRB bonus rate or NEC. Members are expected to serve the entire period of reenlistment in the bonus skill.

g. Members may receive only one Zone "A", one Zone "B", and one Zone "C" bonus, if applicable, during a career.

h. SRB is not paid for service in excess of 16 years of active duty.

i. Members are encouraged to reenlist as close to their EAOS as possible to maximize SRB award payment. All SRB reenlistments must take place within applicable eligibility reenlistment windows as detailed in the current SRB NAVADMIN and OPNAVINST 1160.6 series.

2. Zones

a. Zone "A"

(1) The member must have completed at least 21 months of continuous active naval service (excluding ACDUTRA), but not more than six years of total active military service, on the day preceding reenlistment or operative date of extension. The 21 months continuous active naval service need not immediately precede the reenlistment/extension.

(2) The term of reenlistment or extension of enlistment must be at least three years and when combined with prior active service, must yield a total of at least six years (72-months) or more of active service.

(3) A member who completes exactly six years of active military service at reenlistment or whose operative date of SRB qualifying extension is exactly on the six-year Zone Point at reenlistment is eligible for Zone "A" SRB. Only if there is no Zone "A" bonus or the member had previously received a Zone "A" bonus, is the member entitled to a Zone "B" bonus (provided all other Zone "B" eligibility criteria are met).

(4) Active duty in Naval Reserve components (including TAR, USNR, TEMAC duty, and ACDUTRA), as well as any other active military service (Army, Air Force, USMC, Coast Guard) may be included in computation of total active military service for the purpose of establishing Zone "A" SRB eligibility.

b. Zone "B"

(1) Must have completed six but not more than 10 years active military service immediately preceding the date of reenlistment or operative date of extension of enlistment.

(2) A member who completes exactly 10 years of active military service at reenlistment or whose operative date of SRB qualifying extension is exactly on the 10-year Zone Point at reenlistment is eligible for Zone "B" SRB. Only if there is no Zone "B" bonus or the member had previously received a Zone "B" bonus, is the member entitled to a Zone "C" bonus (provided all other Zone "C" eligibility criteria are met).

(3) The term of reenlistment or extension of enlistment must be at least three years and when combined with prior active service, must yield a total of at least 10-years (120-months) or more of active service.

(4) Active duty in Naval Reserve components (including TAR, USNR, TEMAC duty, and ACDUTRA), as well as any other active military service (Army, Air Force, USMC, Coast Guard) may be included in computation of total active military service for the purpose of establishing Zone "B" SRB eligibility.

c. Zone "C"

(1) Must have completed 10 but not more than 14-years of active military service on the date of reenlistment or operative date of SRB qualifying extension of enlistment.

(2) The term of reenlistment or extension of enlistment must be at least three years and when combined with prior active service, must yield a total of at least 14-years (168-months) or more of active service.

(3) Active duty in Naval Reserve components (including TAR, USNR, TEMAC duty, and ACDUTRA), as well as any other active military service (Army, Air Force, USMC, Coast Guard) may be included in computation of total active military service for the purpose of establishing Zone "C" SRB eligibility.

**6.3 SRB AND PUBLIC LAW.** The SRB program, because of the specific requirements in the governing Public Law and DOD instructions, has caused many changes in the Navy's incentive programs. All Retention Team members must become intimately familiar with the SRB eligibility requirements (OPNAVINST 1160.6 Series) and how they affect decisions in other programs (STAR, lateral conversion, OBLISERV, etc.).

## CHAPTER 7 - INCENTIVE PROGRAMS

### 7.1 SELECTIVE CONVERSION AND REENLISTMENT (SCORE) PROGRAM

1. Definition. The SCORE program offers the following career incentives to members who reenlist for conversion to critically undermanned ratings. (1) Assignment to an appropriate Class "A" or "C" school or Class "C" school package, (2) Advanced First Term Avionics (AFTA) training for the AT rating, (3) Possible advancement to petty officer third or second class or (4) Entitlement to Selective Reenlistment Bonus if otherwise eligible per OPNAVINST 1160.6 series.

2. Eligibility Requirements:

a. Be a petty officer first class, second class, third class, or in pay grade E-3 who has met the professional growth criteria for reenlistment as set forth in OPNAVINST 1160.5 series.

b. Be willing to reenlist for a period of four, five or six years. Actual obligated service is contingent upon the requirements of MILPERSMAN 1510-030 (AEF/ATF/NUC) or MILPERSMAN 1160-080 (5- year obligation). Reenlistment in ratings not requiring five or six year obligations must be for a minimum of four years.

c. Be serving in a rating in CREO group 2 or 3 as identified in OPNAVINST 1160.4 series (updated by current CREO/REGA NAVADMIN) and convert to a rating in CREO Group 1. Occasionally special circumstances exist that allow personnel to convert into ratings that are not in CREO Group 1. These ratings can be identified by contacting PERS-815.

d. Meet minimum eligibility requirements for entrance into the appropriate Class "A" School as set forth in NAVPERS 15909E, Enlisted Transfer Manual, Chapter 7.

e. Have demonstrated potential for conversion, sustained superior performance in present rating, and be recommended by the commanding officer for reenlistment.

f. Have no non-judicial punishment and no record of conviction by courts-martial or civil convictions (other than minor traffic violations) on the current enlistment (or within 48 months preceding the date of the application).

g. Have at least 21 months of continuous active naval service, but not more than 12 years of total active service.

h. Have not derived any previous benefits from the SCORE, STAR or RESCORE programs and have completed the obligated service requirements for other programs (e.g., AEF, ATF, Nuclear Power or other reenlistment/enlistment incentives).

i. Be within one year of EAOS, as extended. If a member is presently serving on an enlistment for which SRB was received, the member must be within nine months of EAOS, as extended, prior to requesting the SCORE Program.

j. Be within nine months of completing minimum activity tour and DOD tour requirements as defined in the ENLTRANSMAN.

k. Serve 24 months in rating

l. Be fit for full duty

3. Advantages of SCORE Program

a. The SCORE Program is structured to work with the SRB program:

(1) Allows the individual to change ratings prior to reenlistment which may qualify the member for SRB.

(2) Does not require obligated service prior to entrance into "A" school other than to complete the basic or A-1 phase which prevents loss of SRB monies due to possible remaining obligated service.

(3) Provides early reenlistment after conversion so members, if eligible, can receive SRB at the current award levels in effect, if any, on the date of SCORE authorization letter from Navy Personnel Command (NPC) or the date of reenlistment, whichever is higher.

b. Allows members to convert to ratings where advancement opportunities may improve, because of the need for additional personnel.

c. Guarantees a Class “A” and “C” school unless a “direct” SCORE conversion is authorized. If member is a “direct” SCORE conversion, no “A” school is authorized or guaranteed.

4. Factors to consider prior to SCORE reenlistment

a. Extending the member's enlistment beyond the required time to complete "A" school, which is not necessary, may reduce deserved SRB monies.

b. Conversions to NC, MA and LN are not authorized under the provisions of the SCORE program. Conversion to these ratings require authorization from the Enlisted Community Manger (ECM), DCNO, Code N132D14, commerical 703-614-0805 or DSN 224-0805.

c. Personnel who cannot meet the security clearance level (e.g., secret, top secret, etc.) for the desired rating are not eligible to reenlist under SCORE. Personnel who are awaiting approval for citizenship in the United States are not authorized to reenlist under the SCORE Program.

d. Automatic advancement is not guaranteed under the SCORE Program unless the school is listed in the Career Schools Listing (CSL), MILPERSMAN 1510-020.

e. If a SCORE guaranteed course of instruction has been canceled prior to a member attending the training, NPC will specify the appropriate alternative training, if available. Specific details on this issue will be provided by PERS-815. PERS-815 will also address the situation where an automatic advancement is guaranteed upon completion of a course of instruction that is subsequently canceled.

f. E-4 personnel reenlisting under the SCORE program are not constrained by high year tenure requirements as defined in the ENLTRANSMAN. Personnel must sign a NAVPERS 1070/613 (page 13) indicating that the term of reenlistment may exceed high year tenure restrictions; however, if the member does not advance to E-5 they will be discharged at their actual high year tenure date.

## 7.2 SELECTIVE TRAINING AND REENLISTMENT (STAR) PROGRAM

1. Definition. The STAR Program offers career designation to first term enlisted members who reenlist in programs that provide the following career incentives:

a. Guaranteed assignment to an appropriate Class "A" or "C" school.

b. Guaranteed advancement to petty officer second class upon

completion of a Class "C" school, or a Class "C" school package which is listed in the CSL (MILPERSMAN 1510-020), if otherwise eligible.

c. Guaranteed advancement to petty officer third class upon completion of Phase 1 of an Advance Electronics Field (AEF) Class "A" school.

d. Selective Reenlistment Bonus (SRB), if eligible.

2. Eligibility Requirements

a. Have an evaluation grade average of not less than 2.5 with no grade below 2.0 in the two years preceding application.

b. Be recommended by the commanding officer for career designation, having demonstrated above average career potential, and meet considerably higher standards for reenlistment than the minimum standards prescribed in MILPERSMAN 1160-030.

c. Be a petty officer second or third class in a first enlistment or designated E-3, and be eligible in all respects for reenlistment per OPNAVINST 1160.5 Series.

d. Nuclear personnel must have at least 21 months but not more than six years of continuous active naval service on date of reenlistment.

e. Non-nuclear personnel must have at least 21 months but not more than six years of continuous active naval service and not more than eight years of active military service.

f. Be willing to reenlist for a period of four, five or six years. Actual obligated service is contingent upon the requirements of MILPERSMAN 1510-030 (AEF/ATF/NUC) or MILPERSMAN 1160-080 (5-year obligation). Reenlistment in ratings not requiring five or six year obligations must be for a minimum of four years.

g. Meet the minimum test score requirements for entrance into the proper Class "A" school as prescribed in the ENLTRANSMAN, Navy Formal Schools Catalog. A waiver of minimum test scores may be requested from BUPERS for highly motivated members.

h. Have no record of conviction by courts-martial or non-judicial punishment during the 18 months preceding date of application.

3. Advantages of the STAR Program

a. Automatic advancement is guaranteed to E-4's under the Star Program provided the school is listed on the career schools listing and they are otherwise eligible for advancement under BUPERSINST 1430.16c. Members in pay grade E3 who attend AEF Program Class "A" school may be advanced to pay grade E4 upon successful completion of Phase I training.

b. If a STAR guaranteed course of instruction has been canceled prior to a member attending the training, BUPERS will provide alternate training, if available. Specific details on this issue should be solicited from PERS-815. Also, if automatic advancement is guaranteed with the training that has been canceled, PERS-815 will address this situation with details on alternative training.

4. Factors to Consider Prior to STAR Reenlistment

a. An early reenlistment under the STAR Program can obtain current SRB award levels that may be later reduced or taken off the eligibility list altogether. This situation can also be reversed, and award levels may be increased. Any decisions to reenlist early must be made by reenlistment

contracts, Page 13 entries, and other documents signed by the member. These shall be explained to ensure all aspects are understood completely. Further, slight variations in SRB award levels and the adverse impact of early reenlistment may not be germane when applied to the STAR program since the member may still be eligible for the maximum possible SRB award level. An early reenlistment under the STAR program may reduce the amount of SRB money members may be eligible for when reenlisting closer to EAOS. However, as a reminder to the member being counseled, SRB award levels are reviewed continually and changes in award levels may occur based upon needs of the Navy. Members reenlisting more than one year early under STAR will not be eligible for SRB if STAR is the only reason they are in the SRB window.

b. With the additional knowledge and experience of advanced training, advancement opportunities are enhanced.

## 7.3 GUARANTEED ASSIGNMENT RETENTION DETAILING PROGRAM (GUARD 2000)

1. Definition. The GUARD 2000 Program provides for two guaranteed assignments during a career. The first guaranteed assignment must be used on the first reenlistment. The second guaranteed assignment could be used at an individual's discretion anytime up to the commencement of the seventeenth year of active military service. GUARD 2000 encourages direct communication between eligible personnel and their detailers. All assignments must be to valid requirements and must be in accordance with the priorities established by the Manning Control Authorities.

2. Eligibility Requirements

a. All personnel E4 through E9 with less than 17 years active military service, and designated E3 personnel who have passed an E4 examination and met all other criteria for advancement. Member must be recommended for reenlistment by the commanding officer or officer in charge.

b. Member's eligibility for a guard assignment remains unless the member is in receipt of orders, being processed for, or has an effective fleet reserve transfer date.

c. Be within six months of EAOS as extended, except as discussed in ENLTRANSMAN, article 8.013 (includes Page 13 agreements for extension).

d. Be willing to reenlist for four or more years. Personnel may reenlist prior to any signed extension agreement of 24 months or less becoming operative; however, in so doing the member must agree to reenlist for a period equal to the unexecuted extension plus four years, up to a maximum total of six years. Inoperative extensions of six months or less may be disregarded.

e. Be eligible for duty requested in accordance with sea/shore or CONUS/OUTUS rotation pattern established in Chapters 3 and 4 of ENLTRANSMAN.

f. Member must have a consistent record of above average performance, must have no courts-martial, non-judicial punishment or involvement with civil authorities within 18 months of EAOS, and have no performance evaluation marks below 3.4 in the last two regular reports.

3. Limitations

a. Due to lead-time requirements for providing personnel reliefs, limitations are imposed on the GUARD 2000 Program. Personnel reenlisting for GUARD 2000 incentive prior to a signed extension becoming operative or prior to established PRD must have completed:

(1) Two years on board in order to terminate shore duty (Type 1) and reenlist for GUARD 2000 sea duty. Member must have completed two years on

board (Type 2) in order to be eligible for reenlistment incentive.

(2) In cases of priority manning (e.g., Recruit Company Commander, Recruiting, critical billet/NEC, etc.) termination of shore duty or split sea tour may not be possible.

(3) The DOD area tour (type duty 3, 4, 6, 7 and 5 where applicable).

b. Personnel meeting the above requirements will receive a GUARD 2000 assignment with a transfer date between five and seven months after receipt of the request to allow for orderly relief.

c. Personnel whose completion of the specified activity/area tour is more than nine months in the future may request a general assignment guarantee for execution at PRD (e.g., coast or general overseas area, etc.). As an alternative to the general assignment procedures above, personnel may extend enlistment to complete the specified activity tour in accordance with MILPERSMAN 1160-040 in order to move EAOS out to coincide with PST/NST to negotiate for a specific assignment guarantee.

d. GUARD 2000 is not normally approved for coast to coast moves.

## 7.4 ASSIGNMENT TO SCHOOL AS A REENLISTMENT INCENTIVE

1. Definition. The purpose of this program is to provide an incentive for reenlistments of four or more years by guaranteeing, under certain conditions, assignments to a specific school. If an individual has previously executed an Agreement to Extend Enlistment for a specific benefit, requests to reenlist with a guarantee of further training in lieu of allowing the extension to become operative will not normally be granted unless the reenlistment incurs at least two years service obligation beyond the original obligation as extended.

2. Eligibility Requirements

a. Must meet obligated service requirements and entrance requirements for appropriate school.

b. Must have a reasonable assurance that skills gained through training will be effectively utilized in order to justify the expenditure of training dollars.

c. Must have a consistent record of average performance. Evaluation marks must be 3.6 or above on the last three regular E7/8/9 evaluation reports, and 3.4 or above on E4/5/6 evaluations over the last two regular evaluation reports.

3. Consideration of requests will be based on the following factors:

a. Composite training. Does the member currently possess a critical skill? If so, future assignments may necessarily be based upon that skill. Further, unless the skill acquired through the training requested is compatible with the member's current skill, the additional training would not be justified.

b. Sea/shore rotation. Does the member's projected rotation provide for immediate utilization of the desired skill?

c. Pay grade vs. skill requirement. Is the member in a higher pay grade than that for which utilization of the desired skill is intended?

d. Members who are, or will become eligible for transfer to the

Fleet Reserve within the required OBLISERV period for training requested, must sign a Page 13 service record entry to remain on active duty for that period of time.

e. A careerist whose PRD is adjusted (curtailed) to equal EAOS, because of an election not to OBLISERV and/or advise intent to separate at EAOS, is not eligible for assignment to a school as a reenlistment incentive should that person later change their mind.

## 7.5 CHANGE IN RATE OR RATING

1. Definition. NPC desires that members serve in the rating for which they have the greatest aptitude and interest. Providing that changes in rating do not cause any undesirable effect on the overall distribution and advancement opportunity of career petty officers, change of rating may be approved in accordance with guidelines contained in MILPERSMAN 1440-010.

When a member expresses a desire to change their rating, it is important to ascertain the reasons why they want to take this course of action. With the help of Career Reenlistment Objectives (CREO), the counselor can point out the advantages/disadvantages of "conversion." When dealing with personnel in critically undermanned ratings, explaining the advantages of the current rating (e.g., bonus, advancements, training, etc.) may change the individual's desire to submit a request for conversion that normally would not be approved. To encourage and support those who seek conversion, it is highly recommended that the member be processed through their command's Professional Development Board.

2. Eligibility Requirements

a. Be an enlisted member of the regular Navy or Naval Reserve on active duty (including TARs). Members in the TAR program shall submit their requests to PERS-9 via Commanding Officer, Naval Reserve Personnel Center (Code 30), New Orleans, LA. 70149. TAR personnel must serve on board current duty station for a minimum of 18 months prior to submission.

b. Be a petty officer first class or below.

c. Have less than 12 years of active service.

d. Be serving in a rating in CREO Group 2 or 3 as identified in OPNAVINST 1160.4 series (updated by current CREO/REGA NAVADMIN) and convert to a rating in CREO Group 1. Occasionally special circumstances exist that allow personnel to convert into ratings that are not in CREO Group 1. These ratings can be identified by contacting PERS-815.

e. Not be in a CREO category 1 rate or possess a critical NEC.

f. Satisfy eligibility requirements for the rating requested (e.g., advancement requirements, security clearances, citizenship, etc.).

g. Be eligible in all respects for transfer. Minimum activity tour requirements for type duty are listed in ENLTRANSMAN.

h. Be recommended by the commanding officer.

i. If serving on an enlistment or extension of enlistment for which a SRB was paid, member cannot request conversion until within nine months of EAOS.

j. Must have served a minimum of 24 months in present rating.

k. Have no non-judicial punishment or convictions in civilian or military courts for past 18 months.

3. Means to Achieve Lateral Conversion

a. Change of rate/rating by command administrative action (e.g., SN to FN) may be done by the commanding officer at member's request. A greater need should exist in the desired apprenticeship, a valid billet must exist within the command, and the member must be qualified for the new apprenticeship. Commanding Officers are also authorized to designate personnel into the BM rating, which allows non-rated personnel the opportunity to gain designation into that rating without attending "A" school or participating in a navy-wide examination.

b. Via formal school training.

c. Direct conversion.

d. Via Navy-wide exam.

e. Via "in-service training."

f. Forced conversion.

g. Special cases.

4. Factors to Consider When Requesting Rating Change

a. A request for conversion must be for a rating in which the member is fully eligible, (e.g., BTB/ASVAB scores, security clearance, physical requirements, etc.). Waiver for BTB/ASVAB for highly motivated personnel will be considered.

b. A request for participation in a Navy-wide examination for a change of rating must be submitted in sufficient time to process prior to the desired examination date (90 days prior to the examination is the minimum time desired). Late requests/approvals are not valid reasons for members participating in substitute examinations.

c. Members who have become ineligible to serve in their present rating must submit a request with three rating conversion choices. A member not willing to obligate for the training required for the conversion to a requested choice may be faced with a forced conversion regardless. Once they are identified as ineligible to serve in their present rating, they are also ineligible for advancement in that rating.

## 7.6 APG/OSVET/RESCORE-R PROGRAM REQUIREMENTS

1. Background. Members enlisted under the Advance Paygrade (APG) and OSVET options hold a temporary rate until requirements for permanent rate have been completed. They have a maximum time limit of 36 months from date of enlistment to make their rate permanent. Members enlisting under RESCORE-R option have a maximum time limit of 18 months to complete the eligibility requirements to take the advancement in rate examination. Requirements are:

2. APG

a. All personnel courses required up to their paygrade (i.e. PN3, AD3, AD1, Seabee Combat Handbook).

b. All military courses required for their paygrade (i.e. SN, FN, AN, BMR, MRPO3, MRPO2, MRPO1).

c. All Personnel Advancement Requirements (PARS) required for

their rate (i.e. PN3, PN2, UT3, AD1).

d. All Naval Leadership Education and Training (NAVLEAD) and Petty Officer Indoctrination Courses required of their paygrade (i.e. E4, E5, E6).

e. Non-prior service personnel attend Advanced Paygrade Indoctrination Course within 12 months of accession. Echelon IV activities can authorize one year waivers. Waivers beyond two years must be referred to COMNAVAIRESFOR (N121)/COMNAVSURFRESFOR (N11), as appropriate. APG school is not required for any member who has not completed IADT in any branch of the service.

3. OSVET. Complete the professional and military courses, PARS and NAVLEAD for the temporary rate only. Petty Officer Indoctrination Course is required for petty officers.

4. RESCORE-R. This option is for Navy Veterans (NAVETS) who are in closed ratings and would otherwise be ineligible for enlistment. Program requirements:

a. Must be a NAVET with less than ten years qualifying service for retirement in paygrades E5 and E4, or a designated striker in paygrade E3 who meets the professional growth criteria for reenlistment.

b. Must be in a closed rating (no projected reservations for at least two years).

c. Must agree to a minimum four-year obligation from date of enlistment or affiliation.

d. Be within 24 months of separation/discharge from active duty.

e. Be assigned a "Rating Conversion" NEC upon enlistment.

f. Complete all advancement requirements for the requested rating within 18 months of enlistment or affiliation.

g. Must participate in the first two advancement in rate examinations following completion of all requirements necessary for advancement. Members approved for enlistment in the RESCORE-R Program may not participate for advancement in their previous rating. Participants must complete the change of rating within 36 months. Personnel requesting MA, IS, LN conversions must meet additional requirements specified in BUPERSINST 1001.39 series.

h. Ensure the member is assigned to a local billet, if available. If a vacancy does not exist, the member must be assigned to a local unit with an exact rate/rating/paygrade match.

i. Must hold a rate in SELRES ECMO Category "B" or "C" as published in an ALNAVRESFOR and in the Accession Plan.

j. A NAVET who holds a critical NEC per current ECMO ALNAVRESFOR is not eligible for RESCORE-R conversion.

k. Ratings that require an "A" school must have PERS-9 approval.

l. Must be eligible for the rating requested.

m. Must show potential for successful conversion through superior performance in previous rating. Must have a recommendation for reenlistment upon release from active duty.

n. Must not have more than on NJP within the last 18 months, nor a conviction by courts-martial within the past 48 months. Civil convictions (other than minor traffic violations) are also disqualifying.

o. RESCORE-R affiliates are not eligible for any bonus or incentive programs.

p. Personnel who fail to demonstrate satisfactory progress or fail to complete all requirements within the prescribed time frame shall be removed from "In-Service Training" and terminated from pay status. Terminated members are reverted to their previous rating. Commanding Officers shall notify PERS-9 and COMNAVRESFOR (N121) of terminations. Request removal of their In-Training NEC from NAVRESPERCEN (Code 22E).

q. COMNAVRESFOR will publish a current list of open and closed rates as part of the SELRES ECMO in ALNAVRESFORs.

## CHAPTER 8 - OVERSEAS ASSIGNMENT SUITABILITY SCREENING

### 8.1 BACKGROUND

1. One of the more costly aspects of Navy life, both in financial and human terms, is discovering after the fact that a particular Navy person or family member is not suitable for overseas duty. Each month, an average of two to three individuals (and/or families) are returned to CONUS due to unsuitability that could have been detected prior to departure. In addition numbers of marginally suitable people struggle through overseas tours creating hardship for themselves, service and support personnel, shipmates, and commanding officers. The impact on Navy careers and retention is clear: an overseas tour at the right time can benefit the Navy, the member and his or her family, and lead to a positive retention attitude. In addition, determination of a member's suitability for overseas assignment is fundamental to efficient and cost effective detailing procedures.

2. Overseas service is defined as military duty performed while assigned to a military installation or activity permanently based outside the 48 contiguous United States. Overseas service may be categorized as: Preferred Overseas Shore Duty (Sea/Shore code 6), Overseas Shore Duty (Sea/Shore code 3), Non-rotated Sea Duty (Sea/Shore code 4), and Neutral Duty (Sea/Shore code 5) and Double Sea Duty (Sea/Shore code 8).

### 8.2 SELECTION OF PERSONNEL FOR OVERSEAS SERVICE

1. Background. In order to assist Foreign Nationals in adjusting to the United States culture and language, it is Navy policy not to assign non-U.S. citizens overseas (Type duty 3, 6 and 7, less Hawaii, Alaska and Puerto Rico) during their first term of enlistment (initial four years).

2. General Screening Procedures. In determining suitability for overseas service, the Commanding Officer shall ascertain whether the member or dependents possess any attributes which would preclude their conducting themselves as worthy representatives of the United States in a foreign country. This determination must be based on a series of steps beginning with a detailer at COMNAVPERSCOM (NPC-40)/EPMAC nominating the member for overseas duty and ending with a message to COMNAVPERSCOM (NPC-40) from the CO indicating the suitability of the member and dependents for overseas duty. In the case of non-designated SN/AN/FN, the message shall be addressed to EPMAC (info COMNAVPERSCOM (NPC-40)). Besides scrutinizing the member's service records, the medical fitness of individuals and their dependents must be ascertained. In a service school environment, the training school command is responsible for scrutinizing the training records of personnel as well as interviewing them to determine their overall suitability for overseas duty. The following list of attributes are representative of a range of concerns which are crucial in a face-to-face interview with the member and his/her family.

a. Medical
b. Dental
c. Drug/Alcohol
d. Psychiatric
e. Performance
f. Disciplinary
g. Indebtedness
h. Attitudinal
i. Moral
j. Family Advocacy
k. Exceptional Family Member Program

**NOTE:** Overseas screening is a requirement of all transferring commands whether transfer is from CONUS to overseas or consecutive overseas tours from overseas (Sea/Shore) to overseas (Sea/Shore). For GUARD III requests, screening shall be completed prior to submission of GUARD III request.

## CHAPTER 9 - EDUCATION PROGRAMS

### 9.1 VOLUNTARY EDUCATION

The Navy's Voluntary Education Program provides active duty service members the opportunity to complete their high school education, earn an equivalency diploma, improve their academic skills or level of literacy, and enroll in vocational and technical schools. They can also receive college credit for military training and experience, take tests to earn college credits, and enroll in post secondary education through Navy College Programs that lead to associate's, bachelor's, and graduate degrees. Program guidance is found in OPNAVINST 1560.9 Series.

### 9.2 NAVY COLLEGE PROGRAM (NCP)

NCP provides our Sailors one-stop shopping to determine recommended college credit for Navy training courses and work experience, obtain academic counseling and advice in order to select and enroll in a college program of their choice either ashore or while deployed, and identify career related education degree programs. It focuses on helping Sailors to obtain a college degree while in the Navy, when they are ready and at their own pace.

NCP pulls together and enhances the current voluntary education programs under one umbrella. NCP centralizes all existing off-duty education programs, such as Servicemember’s Opportunity Colleges-Navy (SOCNAV), Navy College Program for Afloat College Education (NCPACE), Tuition Assistance (TA), Navy College Offices, Navy College Learning Centers and Defense Activity for Non-traditional Education Support (DANTES), under one easily accessible program. It also includes the new components: Navy College Center (NCC), Sailor/Marine American Council on Education Registry Transcript (SMART), and Rating Roadmaps.

**1. Servicemember’s Opportunity Colleges Navy (SOCNAV)**

a. A worldwide consortium consisting of over 80 regionally accredited colleges and universities that offer associate’s and bachelor’s degree programs that focus around the service member’s military occupation or any other area of interest. All undergraduate colleges offering courses or programs on a Navy installation or via NCPACE must be members of SOCNAV. All active duty and retired Navy personnel and their family members, members of other branches of service including the Coast Guard and their family members may enroll in SOCNAV colleges on Navy installations.

SOCNAV Institutions have agreed to:

b. Limit academic residency requirements for graduation (credits taken with the degree-granting institution, regardless of location or degree delivery method) to 25 percent or less of the total requirements for SOCNAV degrees.

c. Award credit appropriate to the curriculum for service schools and Navy rate and rating experience, based on the recommendations in the American Council on Education (ACE) Guide to the Evaluation of Educational Experiences in the Armed Services.

d. Award credit appropriate to the curriculum for nontraditional or other prior learning, from the results of one or more nationally recognized standardized tests (CLEP, DANTES SST, RCE, ASE), based on the recommendations in the ACE Guide to Educational Credit by Examination, in addition to other means the college may use to evaluate this learning.

e. Provide a SOCNAV Student Agreement (an official evaluation and a degree plan) on the standard form for each eligible SOCNAV student. The Official evaluation will include assessment of all previous learning, both formal and nontraditional, including tests, service schools, and Navy rate and rating experience.

f. Permit the student to complete the program under the terms of the Student Agreement, even after separation from active military service and even if the college's membership in a network is terminated.

g. Award a minimum of 45 percent of the credits needed to complete certain SOCNAV-4 bachelor's degrees assumes that credits awarded for service schools, military experience, and nationally recognized standardized tests will be within the limits recommended by the American Council on Education (ACE) in the Guide to the Evaluation of Educational Experience in the Armed Services and the Guide to Educational Credit by Examination.

**2. Navy College Program for Afloat College Education (NCPACE)**

a. NCPACE gives educational access to Fleet Sailors, including Marines; Sailors assigned to shore-based commands with sea duty UIC's and Sailors assigned to selected remote sites. Sailors can get fully funded instruction in both undergraduate and graduate courses from regionally accredited colleges and universities. The only cost to Sailors is the cost of books. NCPACE provides equity to Fleet Sailors by giving them educational opportunities comparable to those available to Sailors ashore. Courses aboard ship are taught through computer, video teleconferencing, and traditional classroom instruction. All undergraduate courses are from institutions with Servicemember's Opportunity College affiliation, so Sailors can transfer credit and complete degrees. NCPACE enables Sailors to initiate, continue, or complete a college degree program thereby enhancing both their personal and professional capabilities.

**3. Navy College Center (NCC)**

a. Something brand new in Navy voluntary education is the Navy College Center. The Center was developed to provide Sailors access and "one-stop shopping" for information on the Navy College Program and its components. Users can access this service by calling DSN 922-1828/the toll free number (1-877-253-7122) or via the web site (www.navycollege.navy.mil). It is an automated counseling center, opened seven days a week, 15 hours a day (0700-2200 EST) staffed by trained professionals. Sailors can access the center's web site anytime and anywhere. Sailors can speak with advisers via the toll-free

number. They can also e-mail the center at ncc@smtp.cnet.navy.mil with questions and expect a speedy reply.

**4. Navy College Office (NCO)**

a. Navy Campus Education Centers were renamed Navy College Offices 1 Oct 99. Navy College Offices are staffed by educational professionals and are located at installations around the world. These professionals counsel and advise Navy service members on all matters relating to Navy College Program, authorize tuition assistance, and administer all on-base education programs. Personnel should contact the nearest Navy College Office within 30 days of arrival at their duty station. For the Navy College Office nearest you, go to the following web site: www.navycollege.navy.mil.

(1) On-Base Programs - Colleges and universities teach classes on base at times (evenings, weekends) most convenient for service members. Courses are offered, often in accelerated terms, at the vocational/technical, associate, bachelors, and graduate level. Completed courses count for credit toward a college degree or vocational/technical certificate.

(2) High School Completion Program - Through Navy College Offices, a Non-high school graduate can earn a diploma or high school equivalency certificate while on active duty. High School completion courses are available both on base and off base during off-duty hours, with the Navy paying 100 percent of tuition costs.

**5. Tuition Assistance (TA)**

a. Tuition Assistance is the primary means of financial aid used by Sailors to pursue education during off-duty hours. TA enables Sailors to earn a high school diploma; a vocational-technical certificate; or an associate’s, bachelor or master’s degree. All regular active duty personnel, reservists on continuous active duty, reservists ordered to active duty for 120 days or more, and members of other Services and the Coast Guard who are operationally or administratively attached to a Navy installation, may receive Navy TA.

b. Financial assistance to attend educational institutions on an off-duty basis.

c. Current Navy policy allows both officer and enlisted personnel to receive tuition assistance in the following amount: 75% of tuition up to a maximum of $187.50 per semester hour with an overall cap of $3,500 per individual per fiscal year.

d. Officers incur a two-year OBLISERV for use of TA.

**6. Navy College Learning Center (NCLC)**

a. Navy College Learning Centers offer no-cost instruction

in English, math, and reading to Sailors who need or desire to refresh or enhance their learning skills. Instruction is provided through a facilitated, technology-delivered method at these centers. These courses can directly affect a Sailor's ability to succeed in college-level studies at academic institutions within the Navy College Program.

**7. Sailor/Marine American Council on Education Registry Transcript (SMART)**

a. SMART is an electronic transcript for each Sailor that is an academically accepted document, approved by American Council on Education (ACE), to validate military occupational experience and training with the corresponding American Council on Education (ACE) credit recommendation. SMART, available since 1 Oct 99, lists occupations held, Navy training courses completed with ACE credit recommendations, college-level exams completed, and other learning experiences. SMART will track Sailors' progress on the path to a degree. It will replace the DD295, which has been cumbersome to produce and difficult for the Sailor to obtain.

**8. Rating Roadmap**

a. Rating Roadmaps identify the college credit recommended for Navy training and on the job work experience across a Navy career for a specific rating. Assists a Sailor to identify the number of possible recommended credits from the American Council on Education (ACE) that could be earned for specific occupations. Rating Roadmaps will be placed in the CNET schoolhouses and are on line at the Navy College Center web site where Sailors, Career Counselors, Classifiers, Recruiters, prospective recruits and the interested public can obtain them.

## 9.3 NAVY NATIONAL APPRENTICESHIP PROGRAM (NNAP)

This program enables enlisted personnel to register in and complete an apprenticeship in a civilian trade as related to their Navy rating. It is provided in cooperation with the Bureau of Apprenticeship and Training of the U.S. Department of Labor.

## 9.4 DEFENSE ACTIVITY FOR NON-TRADITIONAL EDUCATION SUPPORT (DANTES)

The Defense Activity for Non-Traditional Education Support (DANTES) is a DoD activity that supports voluntary education programs of all the Services. DANTES administers selected testing programs, manages contracts for voluntary education services, supplies Navy College Offices worldwide with educational materials, monitors distance learning opportunities, and conducts training workshops for educational staff.

## 9.5 JOB-ORIENTED BASIC SKILLS (JOBS) PROGRAM

1. JOBS provides preparatory training of four to eight weeks for enlisted personnel to attend "A" School when:

a. "A" School cannot be authorized due to insufficient ASVAB scores, or

b. "A" School can be authorized but ASVAB scores are insufficient to attain a desired rating derived through a more technical "A" School with higher ASVAB score requirements.

c. To participate in this program you must be a U.S. citizen, at least 17 years old and meet the Navy's physical requirements, including drug/alcohol policies.

d. Eighty percent of quotas are utilized by MEPS for new recruits, the remaining 20% are utilized by fleet sailors.

e. For more information refer to OPNAVINST 1514.1 Series.

## 9.6 RESERVE EDUCATION BENEFITS AND PROGRAMS

1. Refer to Chapters 12 and 15 of this manual.

# Chapter 10 FLEET RESERVE AND RETIREMENT

## 10.1 FLEET RESERVE

1. **BACKGROUND.** The Fleet Reserve was established to provide an available reserve of former enlisted members of the Regular Navy or Naval Reserve who could be used without further training to fill billets requiring experienced personnel in the first stages of mobilization during an emergency or in time of war. Members of the Fleet Reserve may be ordered to active duty without their consent:

a. In time of war or national emergency declared by Congress and for six months thereafter.

b. In time of national emergency declared by the President.

c. When otherwise authorized by law.

In time of peace, any member of the Fleet Reserve may be required to perform not more than two months active duty for training during each four year period. Members of the Fleet Reserve are not, unless urgently required by particular circumstances, ordered to active duty until examined by a medical officer of the Navy or Naval Reserve and found physically qualified for active duty.

2. **DEFINITION**. Upon completion of 30 years combined active and inactive service, a member of the Fleet Reserve is transferred to either the Reserve or Regular Retired List. Upon placement on the retired list, a member may be advanced to the highest officer rank in which they served satisfactorily under officer appointment. (Retired pay will, in this case, be based on the grade held.)

3. **ELIGIBILITY**. Enlisted members of the Regular Navy or Naval Reserve are eligible for transfer to the Fleet Reserve upon completion of at least 20 years of creditable service in the Armed Forces, including:

a. Service as a cadet or midshipman.

b. "Constructive time" (any enlistment terminated within three months before the end of the term of enlistment under Title 10 USC 6330(d) prior to 31 December 1977).

c. Time creditable as active service for a completed minority enlistment.

d. Active Duty for Training after 9 August 1956.

e. Time not creditable toward transfer to the Fleet Reserve:

(1) Service in the Philippine Constabulary.

(2) Furlough without pay (FWOP).

(3) Creditable Inactive Service (CIS). Defined as inactive points earned through drill participation, correspondence course completion, and gratuitous points earned for each year of Inactive Reserve affiliation, up to a maximum of 60 points per qualifying year of Selected Reserve service. This total of points is divided by 360 (30 day month) to determine CI, which is added to the computed retired/retainer pay. E.G. A member is transferred to the Fleet Reserve after 20 years of active duty and 6 years in the Selected Reserve, accumulating 60 points per year for each year as a SELRES. The

member has 360 points which is divided by 360. This equals 1 year. The member's retired/retainer pay will be computed as if he/she had 21 years of active service.

(4) Inactive service on the Temporary Disability Retired List (TDRL).

(5) Time lost in excess of one day (24 hours) due to:

(a) Sickness due to misconduct on or after 17 June 1955.

(b) Arrest awaiting trial, during trial, during trial and imprisonment following trial (general courts-martial before 24 July 1956).

(c) Confinement after 23 July 1956 under sentence by any courts-martial as finally approved, to include confinement before, during and after trial (unless acquitted or sentence is set aside and charges are dismissed).

(d) Absence while in civil arrest, while in custody of civil authorities, unless acquitted or released without making restitution or reparations.

(e) Unauthorized absence (UA), absence without leave (AWOL), absence over leave (AOL), or desertion.

IT SHOULD BE EMPHASIZED THAT TRANSFER TO THE FLEET RESERVE PRIOR TO COMPLETION OF 30 YEARS ACTIVE SERVICE IS A PRIVILEGE AND IS NOT PROTECTED BY PUBLIC LAW! Transfer to the Fleet Reserve upon the completion of 20 years creditable service is a major feature in the attractiveness of a Naval career; however, the benefits accrued by remaining on active duty should be explained in depth to prospective Fleet Reservists.

4. **PROCEDURES**. The request to transfer to the Fleet Reserve must be initiated by the member the Diary Message Reporting System (DMRS). The request should reach COMNAVPERSCOM (PERS-82) not less than six months and not more than one year prior to the desired Fleet Reserve transfer date. The date requested may include an over-tour of up to six months to meet initial eligibility. If the member is serving in an overseas location, the transfer date will not be earlier than the date on which the DOD area tour is completed. A complete outline of the eligibility requirements for transfer to the Fleet Reserve is found in MILPERSMAN 1830-040.

Requested dates will always be the last day of the month, and may be deferred by CHNAVPERS if a critical shortage exists in the requesting member's rating or special skill area. Additionally, a request to change or cancel a Fleet Reserve transfer may not be approved. Fleet Reserve transfer should not be considered a "GUARD IV." If the member is bluffing, they may well find that the bluff can be called. Requests for either modification or cancellation of Fleet Reserve applications should be made by either message or letter, not by submitting a new NAVPERS 1830/1. Requests are submitted to PERS-82, with an information copy to EPMAC. All cancellation/modification requests should include the following:

a. Date requested or currently authorized, including date of request or authorization.

b. Reason for request.

c. Command endorsement, which should include comments about member's performance and any relief requirements.

d. If the request requires any waiver of administrative requirements,

complete documentation must be enclosed as required by ENLTRANSMAN Chapter 18.

e. When the request is made by letter, a copy of NAVPERS 1830/1 or NAVPERS 1830/2, as appropriate, must be included. If the request is made by message, reference the appropriate NAVPERS 1830/1 OR NAVPERS 1830/2. Normal processing time for a cancellation or modification of Fleet Reserve authorization is thirty days. DO NOT CONTACT PERS-82 EARLIER THAN AT LEAST THIRTY DAYS AFTER MAILING DATE OF REQUEST.

f. Waivers of the six month PRD extension exceeding initial 20 year eligibility are normally not approved.

g. CAUTION: Be sure you have given proper consideration to all factors before submitting your request to transfer.

5. **COUNSELING**. When counseling a member concerning his/her submission of a transfer request, encourage them to carefully consider their reason for submitting the request (that is, is this a rational or emotionally based decision?). Typically, if the decision is motivated by an emotional response to an existing or perceived situation (such as failure to advance, not getting orders of choice, etc.) and the request for transfer is approved by PERS-82, there is little chance of changing the request. If the decision is not emotionally driven, then the following should be considered in light of the request:

a. What will be the impact on retainer pay based upon the transfer date requested? Is the member approaching a time-in- service pay raise, fiscal year pay adjustment, etc.?

b. Does the transfer date coincide with end of school year, job openings, etc.?

Personnel under PCS orders on or after 1 October 1985 will be required to serve a minimum of two years on board (overseas assignments require members to meet DOD area tour prior to being eligible for transfer to the Fleet Reserve).

## 10.2 CONSTRUCTIVE SERVICE

1. **DEFINITION**. Constructive service (Constructive Time) is defined as service for which credit is given, although not actually performed. All constructive service is creditable as service for Fleet Reserve transfer. Some, but not all, constructive service is creditable as service for 30 years retirement. Constructive service enters into the computation of retainer pay as total active federal military service (TAFMS), but not as time for basic pay. Basic pay is based on actual time served on reserve or regular service. It should be noted that no constructive service can be accrued after 31 December 1977. All constructive service prior to 31 December 1977 may be utilized for Fleet Reserve eligibility computations.

2. **CREDITABLE PERIODS OF SERVICE**. The following types of constructive service are creditable for transfer to the Fleet Reserve:

a. Minority Enlistment. The Navy's policy was to accept MALES for enlistment at age 17. A completed minority enlistment or a minority enlistment which was terminated within three months of the expiration of enlistment is counted as four years of active service. No constructive service is credited for minority enlistment’s made after 31 March 1969.

b. Short-Term Enlistment. An enlistment which is terminated within 3 months of the expiration of enlistment. A short term enlistment is credited as a full enlistment less three months. No credit is given for short term enlistment’s after 31 December 1977.

c. Voluntary Extensions. Any extension of an enlistment (whether initial, minority, or other enlistment) which is served to within three months of the period the member agrees to serve is credited as the full term of enlistment plus the full period of the extension of enlistment. After 31 December 1977 credit is given only for time actually served with no constructive time credit.

d. Involuntary Extensions. When any enlistment is involuntarily extended for a specified period, credit is given on the same basis as short term enlistment or voluntary extensions. This applies only to involuntary extensions served to within three months of the specified period during the 15 March 1966 to 31 December 1977 time frame.

3. **EXCEPTIONS**. All constructive service is creditable toward 30 year retirement, except minority enlistment constructive service.

## 10.3 COMPUTATION OF RETAINER PAY

1. The Defense Finance Accounting Service (DFAS) Cleveland is responsible for computing a member's retainer pay. A member contemplating transfer to the Fleet Reserve can get a projected retainer pay computation by submitting a Pre-Retirement Pay Information Request (NAVCOMPTFORM 2274, S/N 0104-LF-702-2741) to DFAS Cleveland. You can compute the member's entitlement utilizing the formula: Basic Pay X .025 (2 1/2%) X years of total active federal service. Computation of TAFMS is discussed in paragraph three of this article.

2. There have been recent changes to retainer/retired pay laws that you must consider during computation.

a. Retired/retainer pay is "rounded down" to the next lower dollar (example: $755.99 is rounded to $755.00).

b. Active duty service is "rounded down" to the next lower month (example: 22 years, 3 months, and 27 days is rounded to 22 years and 3 months).

c. In no case will retainer or retired pay exceed 75% of the member's basic pay.

d. A service member cited for extraordinary heroism by the Secretary of the Navy may receive an increase of up to 10% in retainer/retired pay, provided that it does not cause retainer/retired pay to exceed 75% of basic pay.

e. Retainer pay for personnel entering the Navy on or after 8 September 1980 will be based on a "High Three" average of basic pay. This means that retired and retainer pay is calculated on the most favorable one-thirty-sixth of the total amount of monthly basic pay which the member received for any 36 months while on active duty. Formula is (TAFMS X .025 X high three average).

f. Retainer/retired pay for personnel entering the Navy on or after 1 August 1986 will be based on 2.5 times the years of creditable service minus one percentage point for each year less than 30 years times high three average. The new retired pay multipliers for those entering the Navy on or after 1 August 1986 are as follows:

20 years (2.5 x 20) -10 = 40%
21 years (2.5 x 21) - 9 = 43.5%
22 years (2.5 x 22) - 8 = 47%

23 years (2.5 x 23) - 7 = 50.5%
24 years (2.5 x 24) - 6 = 54%
25 years (2.5 x 25) - 5 = 57.5%
26 years (2.5 x 26) - 4 = 61%
27 years (2.5 x 27) - 3 = 64.5%
28 years (2.5 x 28) - 2 = 68%
29 years (2.5 x 29) - 1 = 71.5%
30 years (2.5 x 30) - 0 = 75%

After age 62 the retired pay multiplier is restored to 2.5 times the years of creditable service. For example, a member who retired at 20 years and receives 40 percent of basic pay would have the retired pay multiplier increased to 50 percent.

g. Disability Retired Pay is based either on the percentage of disability or by 2.5% of active service* (whichever is greater). If the member is entitled to Veteran's Administration Disability Compensation, he/she may elect to receive it but the disability retired pay from the Navy will be offset dollar-for-dollar in the amount the VA compensation received.

NOTE: Members entering service on or after 1 September 1980 will be paid based on the "High Three" method.

## 10.4 NON-DISABILITY RETIREMENT

1. **DEFINITION**. Any enlisted member of the Regular Navy who has completed at least 30 years of active federal service may be retired upon application. Unlike transfer to the Fleet Reserve, the 30 year retirement is a right which is guaranteed by law (Title 10 USC 6326). An enlisted member who has not served under a temporary appointment in Warrant or Commissioned grade will be retired in the enlisted paygrade in which the member is serving at the time of retirement. Enlisted personnel who have held temporary Warrant or Commissioned grade will be retired at the highest grade satisfactorily held under one of several public laws.

2. **APPLICATION**. Applications for retirement should be submitted to reach COMNAVPERSCOM between nine and 12 months prior to the requested retirement date. The only exception to this is to establish a retirement date prior to a Twilight Tour request (see ENLTRANSMAN, Chapter 13). Retirement orders are normally issued by COMNAVPERSCOM three to six months in advance of the scheduled date of retirement.

3. **ACCRUED LEAVE**. Accrued leave is compensatable in a lump-sum payment at retirement not to exceed a total of 60 days, including any leave the member has "sold back" since 10 February 1976. The member may elect to take leave either before or after reporting to the separating activity, instead of "sellback."

All active service (less lost time) as an enlisted member, warrant or commissioned officer, or active duty for training performed on or after 9 August 1956, or as an aviation cadet, in either the regular Navy, Marine Corps, Army, Air Force, Coast Guard, or the reserve component thereof, is creditable toward 30 year retirement. All constructive service accrued prior to 1 January 1978 except constructive service for minority enlistment is creditable toward a 30 year retirement.

Non-disability retirement for both officer and enlisted personnel is effected on the first day of the retirement month.

Transfer to the retired list is a permanent change of status and may be changed only by resignation, discharge by approval of the Secretary of the Navy, or as a result of sentence by courts-martial. Retired members may be

ordered to active duty in time of war or national emergency at the discretion of the Secretary of the Navy. The member may not be ordered to active duty under any other conditions without their consent. A member may not be ordered to active duty solely for the purpose of receiving medical treatment.

A retired member not on active duty is required to advise DFAS, Cleveland, OH, and the Commanding Officer, Naval Reserve Personnel Center, of any change in address. If a retired member desires to travel or reside outside the United States, they must report departure, expected duration of travel and forwarding addresses to the Commanding Officer, Naval Reserve Personnel Center. A retired member should also advise the appropriate United States Naval Attache of their presence if they intend to reside in the country, and while visiting a country they should call on a senior officer of the local military. This is intended to enable the Naval Attache to advise the retired member of local conditions regarding calls or visits.

Retired members are permitted to use their titles in connection with commercial enterprises. They are not permitted to use military titles in connection with public appearances overseas unless so authorized by the appropriate overseas commander.

## 10.5 NAVAL RESERVE RETIREMENT

1. **ELIGIBILITY FOR RETIREMENT**. The basic requirements for a member of the Naval Reserve to be eligible for retirement with pay are 60 years of age and completion of 20 years of qualifying service, with the last eight years of that qualifying service as a member of a reserve component; and, not be entitled to retirement with pay under any provision of the law. During the period 5 October 1994 through 30 September 0001, the last 8-year requirement is reduced to six years. There is no requirement for continuous service. The 20-year requirement has been reduced to 15 years for certain SELRES who are involuntarily separated from drill pay status under the Reserve Transition Benefit program.

2. **ELIGIBILITY TO EARN RETIREMENT POINTS**. A reserve member's classification determines eligibility to participate for retirement points:

a. Reservists may earn retirement points if they are:

(1) Members on active duty
(2) Members of the USNR-R
(3) Members of the USNR-S1

b. Reservists may not earn retirement points if they are:

(1) Members of the USNR-S2
(2) Members of the Retired List or in the Retired Reserve not on active duty
(3) Members on the Temporary Disability Retired List

3. **YEARS OF QUALIFYING SERVICE**. Years of qualifying service are based upon retirement points credited during anniversary years. The initial anniversary year for each Naval Reservist is defined as starting the day of reserve enlistment or the day of acceptance and oath of office of current reserve commission to a date 365 days later (366 days in a leap year). Once established, the anniversary year does not change unless the member has a break in reserve service of more than 24 hours. When there is a break in reserve service, the date of reentry is the member's new anniversary date. Transfer to the USNR-RET, USNR-S2, or discharge from an enlisted reserve status on the day preceding the date of acceptance of a reserve commission does not constitute a break in reserve membership for the purpose of

establishing the anniversary year. It is important every reservist be aware of their anniversary year because retirement points earned in one anniversary year are, by law, not transferable to any other anniversary year. A member must earn a minimum of 50 points in an anniversary year for the year to be a qualifying year for retirement. Years of qualifying service are calculated as of the end of each anniversary year.

a. In an anniversary year in which fewer than 50 points are credited, the earned points are added to the cumulative retirement point total, but that anniversary year is not a qualifying year.

b. An exception to the 50 point rule is authorized when retirement points are prorated before the end of an anniversary year due to a transfer to an inactive status (USNR-S2 or USNR-RET), or upon discharge without reenlistment within 24 hours, or upon change of component (reserve to regular).

4. **EARNING RETIREMENT POINTS**. Retirement points may be earned in any one or a combination of the following methods:

a. Active Participation. One point is credited for each day of active duty or annual training (AT), including travel time performed under orders.

b. Inactive Participation

(1) 15 gratuitous retirement points are awarded during each complete anniversary year.

(2) One point is credited for each pay or non-pay drill attended with a maximum of two drills per day.

(3) Points are credited upon satisfactory completion of authorized correspondence courses. The point credit varies with the course completed.

(4) A maximum of 75 retirement points for inactive participation including gratuitous points may be credited in an anniversary year. Points earned for active duty and AT/ADT is added to the 75-point limitation.

(5) A member may not receive more than 365 retirement points (or 366 in a leap year) in any one anniversary year.

c. Retirement points are credited via RSTARS. Reserve Activities will input drill participation into the RSTARS system and local unit records.

5. **NOTIFICATION OF ELIGIBILITY (NOE) FOR RETIRED PAY**

a. 10 U.S.C. 1331 requires each member who completes the requirements for eligibility for retired pay to be notified in writing within one year after the member has completed the service. This includes all of the eligibility requirements except for having attained age 60.

b. 10 U.S.C. 14006 provides after being so notified, a member's eligibility for retired pay may not be denied or revoked on the basis of any error, miscalculation, or misinformation in the administration determination of years of service performed unless it resulted directly from fraud or misrepresentation of the member concerned. While eligibility may not be revoked, the number of years of creditable service upon which retired pay is computed may be adjusted to correct any error, miscalculation, or misinformation in the administrative determination. When such a correction is made, the member is entitled to retired pay based on the corrected retired pay.

c. An application for the Reserve Component Survivor Benefit Plan (RC-

SBP) will be included in the NOE package.

d. An eligibility for SGLI letter will be included in the NOE package.

6. **TRANSFER TO THE RETIRED RESERVE (WITHOUT PAY)**

a. Qualified reservists will forward a letter to NAVRESPERSCEN (Code N221) via the unit commanding officer ant the Naval reserve activity or command holding the member's service record. Reservists who are not members of a reserve unit will submit their applications directly to NAVRESPERSCEN (Code N221). Requests should be submitted not earlier than 12 months and not later than six months prior to the requested date. Personnel will not be transferred to the Retired Reserve (without pay) without written authorization from the NAVRESPERSCEN and a NOE.

b. A copy of the NOE should be enclosed with the application. If the NOE has not been received or cannot be located, a certified copy of the most current NAVPERS 1822/1, Statement of Years of Qualifying Service; NRPC 1070/61, Record of Military Service for Naval Reserve Retirement; or, NRPC 1070/124 (BACK), Annual Statement of Service History (formerly Historical Summary Sheet for enlisted only) should be provided.

c. The reserve activity or service record holder's endorsement will verify the member has completed their 20 years of qualifying service. For enlisted members, all points earned during the current enlistment, up to date of submission of the request, should be recorded by anniversary year on the endorsement is a certified copy of the most current NAVPERS 1822/1, NRPC 1070/61, or NRPC 1070/124 (BACK) is not enclosed with the request.

d. Privileges

(1) Identification Card. Retired Reservists (without pay) are entitled to a DD 2 (RES) ID card. Cards may be obtained by submitting DD Form 1172, Application for Uniformed Services Identification Card/DEERS Enrollment, together with a copy of retirement orders, to the Commanding Officer, NAVRESPERSCEN (Code 41).

(2) Wearing of the Uniform. Retired personnel, not on active duty, are entitled to wear the prescribed uniform of the grade or rate in which retired when the wearing of the uniform is considered to be appropriate. In general, the uniform may be worn for ceremonies or at official functions when the dignity of the occasion and good taste indicates the propriety of the uniform. Retired personnel, not on active duty, residing or visiting in a foreign country may not wear the uniform except when attending, by formal invitation, ceremonies or social functions at which the uniform is required by invitation, regulations or customs of the country. Authority to wear the uniform includes periods while traveling to and from the ceremony, provided such travel in uniform can be completed on the day of the ceremony.

(3) Use of Military Title. Retired personnel may use their military titles subject to certain restrictions and the exercise of good judgement. Considerable discretion should be shown by a member in permitting the use of their name and military title to endorse any commercial enterprise so as not to indicate in any way the Navy Department approves the enterprise, and especially to avoid an endorsement or contract which will bring discredit to the Navy. USNR(RET) will be used by all reserve members retired for service, age, or physical disability.

(4) Correspondence Courses. Retired personnel are eligible to apply for naval correspondence courses; however, retirement points will not be earned. Retired officers with requisite qualifications may enroll in the graduate level correspondence course "National Security Management" offered by the National Defense University.

(5) Additional Benefits. Retired members (without pay) are eligible for:

(a) Space available transportation
(b) Use of exchange and MWR facilities
(c) Limited use of commissary
(d) SGLI

7. **TRANSFER TO THE NAVAL RESERVE RETIRED LIST (WITH PAY).** SELRES must apply for transfer to the Retired List (with pay). It is not an automatic process.

a. Eligibility. In order to transfer to the Retired List, a reservist must:

(1) Be 60 years of age or older.
(2) Complete requirements for issuance of NOE.
(3) Submit an application package to NAVRESPERSCEN (Code 25).

b. Application procedures:

(1) NAVRESPERSCEN (Code N221) sends application packages to eligible personnel approximately nine months prior to their 60th birthday. If an individual does not receive the application package eight months prior to turning age 60, the member must contact NAVRESPERSCEN (Code N221), in writing or by the phone (800-535-2699), to request it.

(2) Members must complete the application and send it to Commanding Officer, NAVRESPERSCEN (Code N221), New Orleans, LA, 70149-7825, within 30 days of receipt.

c. The effective date of retired pay is the date of initial eligibility (
attainment of age 60 or completion of the specific service requirement, whichever occurs later) or a subsequent date elected by the applicant. The Uniform Retirement Date Act, 5 U.S.C. 831, does not apply to application if the applicant's initial date of eligibility is after 12 August 1968.

d. The formula for computing retired pay is: P divided by 360, times .025, times B, equals monthly retired pay. "P" denotes total number of retirement points and "B" denotes applicable basic pay of the grade in which retired. Years of service for pay purposes are computed from Pay Entry Base Date to date of initial eligibility for retired pay (date of discharge if a former member).

e. High Three Averaging. Per 10 U.S.C. 1407, members who initially entered military service after 7 September 1980 have their retired pay computed on the basis of a high-three year average formula. These members receive the same entitlement for each year of service creditable for retirement, but the basic pay amount used in the retirement with pay formula (paragraph d, above) is an average of the amount of base pay the member would have received during the last three years prior to becoming eligible to receive retirement pay had they been on active duty.

f. Privileges. When in receipt of retired pay, reservists on the Naval Reserve retired List are eligible for the benefits as those retired without pay as well as:

(1) Health Care. Retired members in receipt of retired pay; former members of the Naval reserve, who prior to discharge met the service requirements for retirement pay under 10 U.S.C. 1331 and are receiving retired

pay from the Navy; and, dependents and survivors or retired and former members are eligible for health care. Dependents and survivors include spouses and unremarried widows/widowers, unmarried children under age 21 ( and those under 23 if enrolled full time in college, and those incapable of self support because of a mental or physical incapacity which existed prior to their 21st birthday). For the purpose of health care at uniformed services medical facilities only, this also includes parents and parents-in-law who are dependent on a retired or former member for over one half of their support and reside in the member's household, as well as surviving parents and parents-in-law who met such requirements at the time of the member's death. A retired member and spouse cease to be eligible for civilian health care under the military Security Hospital Insurance Plan. Individuals who cannot qualify for the Social Security Hospital Insurance Plan will continue to be eligible for civilian health care under the military plan by providing a Notice of Disallowance from Social Security Administration to certify they are not entitled to Medicare Part A.

(2) Unlimited Use of Commissary and Exchange Privileges.

8. **OBLIGATIONS**

a. Recall. Retired Reservists are liable for involuntary recall to active duty in time of war, or national emergency declared by Congress, or when otherwise authorized by law. Members may also be recalled to active duty in a retired status, subject to their consent, at the discretion of the Secretary of the Navy.

b. Mailing Address. Retired Reservists must keep NAVRESPERSCEN (Code N33) advised of their current address (800-535-2699). Changes of permanent mailing address will also be reported to DFAS Center Cleveland, if receiving retired pay (800-621-1080).

c. Travel and Residence Overseas. Retired Reservists not on active duty who desire to travel or reside outside the United States for a period in excess of 30 days must report their departure, expected duration of travel or residence, countries to be visited, and forwarding address to the Commanding Officer, NAVRESPERSCEN (Code N33), New Orleans, LA, 70149-7800 and DFAS Center Cleveland.

d. Employment Restrictions. Reservists not on active duty may accept employment in any civil branch of the public service of the United States, or may be employed in civilian professions or occupations including the practice of such professions or occupations before or in connection with any department of the Federal Government of the United States. However, civil employment and compensation with any foreign government or any concern controlled in whole or in part by a group of governments (including the United States) is subject to the approval of the Secretary of the Navy and Secretary of State. Members and former members of the Naval Reserve in receipt of retired pay are exempt from the dual compensation aspect of the Dual Employment Act of 1964, 5 U.S.C. 3101-3105. Social Security and Civil Service retirement pay benefits may be received concurrently with retirement pay. Neither pension nor disability compensation benefits from Department of Veteran Affairs may be received concurrently with retired pay. Retired pay may be waived in part or in whole to receive pension or disability compensation from the Department of Veterans Affairs.

9. **ADDITIONAL INFORMATION**

a. Upon retirement, the last number of an officer's designator is changed to nine.

b. Longevity for pay purposes continues to accrue while a member of the Retired reserve (without pay), but only until retired pay has been granted.

c. Commanding Officers will provide a retirement ceremony for all members upon transfer to the Retired Reserve or Retired List. Ceremonies will be conducted unless specifically requested otherwise by the individual concerned. The ceremony should be designed to express the Navy's appreciation for the many years of faithful and honorable service the member devoted to their country. Additional guidance may be obtained from MILPERSMAN 1800-010.

# CHAPTER 11 - SURVIVOR BENEFITS

## 11.1 DEATH GRATUITY

1. Background. A lump sum payment called Death Gratuity is made to eligible survivors immediately upon death of a service member. It is designed to assist the family until other regular monthly payments start. The payment is a lump sum amount of $6,000.00.

2. Survivor Entitlement. Service members must be on active duty, active duty for training, inactive duty training or traveling enroute to or from such duty when death occurs, or die within 120 days after discharge or release from active duty of a service-connected cause as determined by the Veterans Administration.

3. Eligible Survivors

a. Widow/widower.

b. Children (equal shares).

c. Parents, "persons in loco parentis," or brothers and sisters when designated by the member on the Dependency Application/Record of Emergency Data (NAVPERS 1070/602).

(1) Parents in equal shares.

(2) Member's brothers and sisters in equal shares.

4. The DD93, Record of Emergency Data (page 2), and Part II of the Dependency Application/Record of Emergency Data (page 2), NAVPERS 1070/602, provides immediate access to information essential for casualty reporting, notification of next of kin, and determination of beneficiaries. Part II is the official document utilized by the Navy when the following determinations are required:

a. Person(s) to be notified in case of emergency or death.

b. Person(s) to receive the death gratuity.

c. Person(s) to receive unpaid pay and allowances (arrears of pay).

d. Dependents of member to receive allotment of pay if member is missing or unable to transmit funds.

e. Commercial insurance companies to be notified in case of death.

f. Whether member has completed an SGLI election form.

5. The NAVPERS 1070/602 or DD Form 93 must be verified by the member upon transfer, changes in dependency or prior to deployments or unaccompanied tours.

## 11.2 SERVICEMEMBER'S GROUP LIFE INSURANCE (SGLI)

1. Each member serving on active duty, performing active duty for training, or performing inactive duty training is eligible to be insured under SGLI up to a maximum of $200,000 (while on active duty and 120 days after separation).

2. The cost of SGLI for members on active duty, active duty for training, or inactive duty training is $.80 per month for each $10,000 coverage. The maximum coverage is $200,000 in increments of $10,000.

3. To elect reduced coverage, cancellation of coverage or change of beneficiary, a member must complete, in their own handwriting, Section I of the SGLI Election and Certificate (SGLV-8286 (Rev. Apr 96)). When members elect a reduction or cancellation, they shall be counseled as to the effect of this action and an appropriate entry placed in their service records.

## 11.3 VETERANS GROUP LIFE INSURANCE (VGLI)

1. Background. VGLI was created by Public Law 93-289 and became effective on 1 August 1974. VGLI is a 5-year renewable term policy that has no cash, loan, paid-up, or extended value and earns no dividend.

2. Eligibility. Members on active duty who are entitled to full-time coverage and who have SGLI in force at the time of separation or release from active duty are automatically eligible for VGLI in the same amounts as the SGLI held at the time of separation or release. Application and payment of the first premium must be made within 120 days of separation and should be sent to:

Office of Servicemember's Group Life Insurance (OSGLI)
213 Washington Street
Newark, NJ 07102

NOTE: (1) If application is not made within 120 day period, application may be made within one year after separation provided evidence of good health is supplied.

(2) Automatic coverage under SGLI expires on the 120th day after separation.

3. VGLI Cost

a. Members 29 and under $1.20 per month for each $10,000 of coverage
b. Members 30-34 $2 per month for each $10,000 of coverage
c. Members 35-39 $2.60 per month for each $10,000 of coverage
d. Members 40-44 $3.40 per month for each $10,000 of coverage
e. Members 45-49 $4.40 per month for each $10,000 of coverage
f. Members 50-54 $6.50 per month for each $10,000 of coverage
g. Members 55-59 $8.80 per month for each $10,000 of coverage
h. Members 60-64 $11.50 per month for each $10,000 of coverage
i. Members 65-69 $15 per month for each $10.000 of coverage
j. Members 70-74 $22 per month for each $10,000 of coverage
k. Members 75 and over $45 per month for each $10,000 of coverage

NOTE: In each case the maximum coverage is $200,000 in increments of $10,000.

4. An individual can only have SGLI or VGLI. The maximum amount of coverage cannot exceed $200,000.

## 11.4 DEPENDENCY AND INDEMNITY COMPENSATION (DIC)

1. Definition. DIC provides partial compensation to surviving dependents for the loss of financial support sustained as a result of the veteran's service-connected death.

2. Eligible Dependents

a. Widow/widower. Must have been married for one year or more, or for any period of time if a child was born of or before the marriage.

b. Children. Under the age of 18; in some cases (attending VA approved schools) up to age 23.

c. Parents. According to income.

3. Eligibility Criteria

a. Death of service member or veteran must have been service connected.

b. Service connected causes include:

(1) Disease or injury incurred or aggravated in the line of duty while on active duty or active duty for training.

(2) An injury incurred or aggravated in line of duty while on inactive duty training.

(3) A compensable disability under laws administered by the VA.

c. Payment to Widow/Widower

(1) Monthly amount **$881** (effective January 2000).

(2) Payment stops when widow/widower remarries or dies, but may resume if subsequent marriage ends in death or divorce.

d. Payments to Children

(1) Following children with surviving parent are entitled to DIC:

(a) Each child under 18.

(b) Each helpless child over 18.

(c) Each child 18-23, if in school.

NOTE: Dependents' Educational Assistance may be elected instead, if eligible. While on summer vacation from school, children 18-23 are entitled to normal DIC payments.

(2) Children with no surviving parent are entitled to DIC:

(a) Total compensation determined by number of children.

(b) Additional compensation provided for each helpless child over 18.

(c) Dependents Educational Assistance may be selected, if eligible.

e. Payments to Parents. Rates vary according to: number of parents, amount of their individual or combined income and whether or not they live together.

**11.5 SOCIAL SECURITY**

1. Background. Title IV of the Servicemen's and Veteran's Benefit Act, Public Law 881, 84th Congress, provides wage credits for active military

service toward Social Security benefits. Under this act, on or after 1 January 1957, all members of the Armed Services performing active duty for training come under the contributory coverage provisions of the Social Security System. Retired members are entitled to both full retired/retainer pay and the full social security pension they have earned under this act. However, retired military members who combine their military service with civil service to qualify for a Civil Service retirement will lose a portion of their military retirement pay.

2. Eligibility. For the member of the Armed Forces and his or her dependents to be eligible for Social Security benefits if the contributor is disabled, retires or dies, he or she must have credit for a certain number of work periods. Benefits in varying amounts are payable if the contributor is fully insured, currently insured, or meets the requirements for disability benefits.

a. Fully Insured. No one can be fully insured who has credit for less than 1 1/2 years of work; a person who has credit for 10 years can be sure that he or she will be fully insured for life. The amount of payment will depend on the contributor's average earnings over the period stated by law.

| If a contributor dies or when his/her age is: | He will be fully insured if he/she has credit for: |
|---|---|
| 28 or younger | 1 1/2 years |
| 30 | 2 years |
| 32 | 2 1/2 years |
| 34 | 3 years |
| 36 | 3 1/2 years |
| 38, and so on | 4 years |

b. Currently Insured. Certain benefits are paid to survivors if a contributor is currently insured when he or she dies. To be currently insured, a contributor must have Social Security credits for at least 1 1/2 years of work within the three year period prior to death. Using this format, a first-term service member 30 years old who had never worked under Social Security coverage before enlisting would be currently insured when he had completed 18 months of his enlistment.

c. Disability Benefits. For a member of the Armed Forces and dependents to be eligible for benefits should the member become disabled, they must: (1) be fully insured and have credits for five years of work in the 10 year period before disability if the member is 31 years of age or older; (2) have credit under Social Security for one-half the time between the age 21 and the age at which he becomes disabled if he is between the ages of 24 and 31; (3) have credit for 1 1/2 years of work in the three years before becoming disabled if the disability starts before he is 24 years old.

3. Types of Cash Benefits. The following chart shows the principal types of payments and the insured status needed for each. It covers not only young service members, but all participants in Social Security.

TYPES OF CASH BENEFITS

| Disability | If |
|---|---|
| Monthly payments to member as a disabled contributor and to his wife and children | Member is fully insured and meets the requirements described for "Disability Benefits" |
| Member's child who becomes | Parent receives retirement or |

| | |
|---|---|
| disabled before 22 and who continues to be disabled | disability benefits, if the parent was fully insured or currently insured at death |
| Survivors | If member is |
| Monthly payments to member's children | Either fully or currently insured |
| Widow (regardless of age) if she is caring for member's child who is under 16 (or disabled) and the child is entitled to benefits | Either fully or currently insured |
| Widow 60 or over, or disabled widow 50 or older | Fully insured |
| Dependent widower 60 or over or disabled dependent widower 50 or over | Fully insured |
| Divorced wife at 62 or over, or surviving divorced wife 50 or older if the marriage lasted 20 years or more | Fully insured |
| Children may be eligible for social security benefits based on a grandparent's earnings if the natural parents are disabled or dead and if the grandchildren are living with and are supported by the grandparents | Either fully or currently insured |

In addition to monthly benefits, a lump-sum payment may be made after a contributor's death.

To find the average annual earnings, a member may obtain a copy of "Your New Social Security and Medicare Fact Sheet (latest edition), which is prepared by the Bureau of National Affairs, Inc., Washington, DC 20037.

4. When to Visit or Write a Social Security Office

a. If a worker in the family dies (within six months to prevent loss of benefits).

b. If a worker in the family becomes disabled.

c. Three months before retirement.

d. At least every three years to request earnings and benefit statement.

**11.6 SURVIVOR BENEFIT PLAN (SBP)**

1. Definition. SBP was enacted 21 September 1972 to provide benefits to survivors of retired and retirement-eligible military personnel. The program has been greatly improved since its enactment through numerous legislative amendments. Active duty military personnel who have completed 20 or more years of service are covered by the plan at no cost while on active duty. Upon transfer to the Fleet Reserve or Retired List, SBP coverage is

automatically extended to cover all eligible dependents unless the member specifically declines coverage, with the written concurrence of his or her spouse, prior to date of transfer or retirement. Prior to the passing of The National Defense Authorization Act for the Fiscal 1998, the decision to participate or not participate in SBP was irrevocable. Now, non-participation is irrevocable. Those who enroll in SBP may terminate participation in the plan (with their spouse's concurrence) between the 25th and 36th month of receiving retired pay.

2. Coverage Available

a. Retiring members may designate beneficiaries to receive SBP benefits from any one of the following categories:

(1) Spouse or former spouse only.

(2) Children only.

(3) Spouse and children.

(4) Former spouse and children.

(5) Persons with an insurable interest.

b. SBP annuities are based upon a percentage of a member's "base amount" elected at time of enrollment. The base amount can be any amount between a minimum of $300 and full gross retired pay.

(1) Surviving spouse or former spouse beneficiaries receive 55 percent of a member's elected "base amount" until age 62, when benefits are reduced to 35 percent of the base amount. Benefits continue for the life of the surviving spouse or former spouse or until remarriage.

(2) Child beneficiaries receive 55 percent of the base amount until age 18 or, if a full-time student, until age 22. A child who becomes incapable of self-support under age 18, or under age 22 while a full-time student, may receive a 55 percent SBP payment for life. If a retiree has more than one eligible child beneficiary, the SBP annuity is divided equally among them. If children are covered in connection with a former spouse election, coverage is limited to only those children acquired during the marriage between the member and the former spouse. Children covered in connection with spouse or former spouse elections receive benefits only if the surviving spouse or former spouse dies or otherwise becomes ineligible to receive the benefit.

(3) Insurable interest beneficiaries may be designated only by unmarried members who have no more than one dependent child; they may be an only child or any relative more closely related than a cousin or a person who has a financial interest in the continued life of the member. Insurable interest annuities are 55 percent of the member's base amount for life. All SBP annuities increase at the same rate and at the same time as military retired pay.

c. Costs (premiums)

(1) SBP premiums are paid in the form of reductions in retired pay and are therefore excluded from taxable income. Premiums for spouse or former spouse coverage are calculated as 6.5 percent of the member's base amount. However, members who entered a uniformed service prior to 1 March 1990 may have their premiums calculated under the following formula if it is to their advantage: 2.5% of first ***$484 (threshold amount)** of base amount, plus 10% of the remaining base amount. (*Amount increases at same time and

rate as COLA for active duty military pay, 1 January yearly). After retirement, premiums increase at the same time and by the same rate as cost-of-living adjustments to retired pay. Premiums and benefits always remain in the same proportion to retired pay. Premium reductions in retired pay are suspended during any period in a participant's life when there is no eligible beneficiary.

(2) Premium rates for child coverage vary depending upon the age difference between the member and the youngest child. Normally, premiums are less than 1% of the base amount for child-only coverage and less than 1/10th of 1% for child coverage in connection with spouse coverage.

3. Change in Dependency Status. Retiring members must be advised that they are required to inform the Defense Finance and Accounting Service (DFAS), Cleveland Center, of any change in their dependency status. The DFAS will advise members of how changes in their dependency status impact on their SBP elections at the time of reporting.

4. Counseling. Enrollment in SBP is one of the most difficult decisions a retiring member faces. Usually, life insurance or an investment plan is considered as an alternative. Studies by unbiased experts conclude that, for all but a few exceptions, the level of benefits provided by SBP cannot be provided by any alternative program. The three basic advantages of SBP over alternatives are the non-taxability of the SBP premium, the protection against inflation, and a government subsidy of benefits of more than 40%.

As a counselor, you will find it useful to familiarize yourself with the different types of life insurance policies and investment programs retiring members might be considering. For most retirees, life insurance and investment programs may serve as valuable additions to SBP in their estate planning, but not as alternatives.

The SBP Desktop Counselor Guide and computer software are invaluable tools when counseling on SBP. They are available through your supply channels (see Appendix D) and are downloadable from BUPERS Access.

**11.7 RESERVE COMPONENT SURVIVOR BENEFIT PLAN (RC-SBP)**

1. Background. The RC-SBP was established by Public Law 95-397 to provide an annuity to eligible beneficiaries of reservists who have qualified for retired pay at age 60. An RC-SBP information booklet containing an option election certificate is forwarded via certified mail as part of the member's NOE package. Members will have 90 days from the date of receipt to file an election. The original Option Election Certificate must be forwarded to NAVRESPERSCEN (Code 41) within 90 days.

Members participating in basic RC-SBP at the maximum level for a spouse or former spouse may purchase additional coverage, referred to as the Supplemental Survivor Benefit Plan (SSBP). This can increase their survivor's post age 62 benefits to one of four different levels: 40, 45, 50 or 55 percent of retired pay. Participation in SSBP is totally voluntary and requires an affirmative election by the member. To increase the survivor's post age 62 annuity from 35 percent to 40, 45, 50 or 55 percent; a member must purchase 1, 2, 3, or 4 units of SSBP coverage.

Members who do not make an RCSBP election, or who elect Option A, will be covered automatically under the SBP (Public Law 92-425 signed 21 September 1972) at the maximum level, unless, prior to eligibility for retired pay, a choice is made to be covered for a lesser amount or to have no coverage whatsoever with spousal consent.

SELRES eligible to make an election under SBP who desire other than the automatic coverage or who have eligible minor children, should complete and mail a DD 1883 to NAVRESPERSCEN (Code 25) prior to the date of initial eligibility for retired pay. This date is normally the member's 60th birthday; however, where eligibility for retired pay is attained after age 60, care should be taken to ensure the election is made in advance of the eligibility date.

Any requests for clarification or additional information for SBP at age 60 may be referred to DFAS, Retired Pay Department, 1240 East 9th Street, Cleveland, OH, 44199; or the Bureau of Naval Personnel (Pers 662), 2 Navy Annex, Washington, DC, 20370-5334.

2. Qualifications

a. Must have 20 qualifying years of service for retirement

b. Must make election within 90 days of receiving NOE for Retired Pay at age 60

c. The three RC-SBP options which must be elected when the NOE is received are:

(1) Option A - decline RC-SBP. Defer enrollment action until eligible for SBP at age 60.

(2) Option B - elect annuity to begin upon death or the member's age 60, whichever occurs later.

(3) Option C - elect annuity to begin upon death or the member's death, regardless of age.

d. Premiums are not paid until retired pay commences at age 60. Costs are same as for SBP, plus an additional actuarial charge to pay for coverage during period prior to age 60.

e. NRPC provides each reservist an RC-SBP instruction booklet with actuarial cost tables along with NOE for retired pay.

f. If reservist declines RC-SBP, survivors will NOT be entitled to benefits if reservist dies before age 60.

g. Beneficiary eligibility criteria is the same that applies to SBP.

**11.8 MISCELLANEOUS ENTITLEMENTS**

1. Unpaid Pay and Allowances

a. Unused leave.
b. Remaining SRB payments.
c. Savings deposits.

2. Military Burial Allowance

a. Service members who die on active duty are entitled to:
(1) Preparation
(2) Encasement
(3) Transportation of remains
(4) Burial in a private or national cemetery

b. In addition, the following amounts may be allowed toward burial

expenses incurred by the next of kin:

(1) An amount not to exceed $3,100 if internment is made in a private cemetery.

(2) $2,000 if the remains are consigned to a funeral director prior to burial in a national cemetery (includes burial at sea).

(3) $110 if remains are consigned directly to a national cemetery (includes burial at sea).

(4) Paid on contractual basis for local area of burial.

3. Transportation of dependents and household effects.

4. Commissary, exchange and entitlements for eligible dependents.

5. Armed Forces Retirement Home

a. The Armed Forces Retirement Home (AFRH) is home to approximately 1,500 distinguished patriots who secured our nation's freedom through service and sacrifice. For the majority of these residents, AFRH is their only home and family. Many residents have made their final "life choice" in deciding AFRH will be there home.

b. The AFRH was established by the Armed Forces Retirement Home Act of 1991. The intent of the Act, was to unify two previously separate entities, the U. S. Naval Home (USNH) in Gulfport, MS, and the U. S. Soldiers' and Airmen's Home (USSAH) in Washington, DC, into one independent federal agency.

c. The Act states that the purpose of the AFRH is to "...provide...a residence and related services for certain retired and former members of the Armed Forces." The Act defines those services as "...the overall health care needs of the residents in a high quality and cost-effective manner, including on-site, primary care, medical care, and a continuum of long-term care services."

d. The USNH was authorized by Congress in 1811 to provide a permanent home for Sailors and Marines who were injured or infirmed. The USSAH was established by Congress in 1851 to provide a permanent home for Army, and later, Air Force personnel who were injured or infirmed.

e. You may be eligible to become a resident of the AFRH if at least 50 percent of your active duty service was enlisted service, you were discharged or released from service in the Armed Forces under honorable conditions, and you fall into one of the following categories:

(1) You are a retiree with 20 or more years of active-duty service, are at least 60 years of age.

(2) You are a veteran unable to earn a livelihood due to service-connected disability incurred in the line of duty in the Armed Forces.

(3) You are a veterans who served in a war theater during a time of war declared by Congress or were eligible for hostile fire pay and the Retirement Home Board determines the retiree to be incapable of earning a livelihood because of injuries, disease, or disability.

(4) You were a person who served in a women's component of the Armed Forces prior to 1948.

f. Coast Guard veterans who had service during wartime while the Coast Guard was operated as part of the Navy are also eligible for admission to the AFRH under the same criteria as above.

g. The AFRH operates on the proceeds from a trust fund that is fed by active duty fines and forfeitures, a monthly pay deduction assessed against all active duty enlisted personnel, and monthly fees paid by residents. The AFRH also seeks sources for additional income to the trust fund. One of these additional sources is gifts and contributions from outside parties, including charitable allotments. If you would like to help the AFRH, please complete the attached allotment form and send it to DFAS-CL. These good folks can use your help.

h. If you are interested in obtaining more information about the AFRH, write to the Director, United States Naval Home, 1800 Beach Drive Gulfport, MS 39507-1597, or call (1-800-332-3527) or by e-mail at http//www.afrh.com.

**11.9 PHONE CONTACTS.** For further information on any of the Survivor Benefits listed in this chapter, contact NPC-621 at DSN 882-4293 or commercial (901) 874-4293.

## CHAPTER 12 - NAVAL RESERVE

### 12.1 NAVAL RESERVE PROGRAM

1. Definition. The Naval Reserve is designed as a pool of trained personnel assets that may be mobilized to augment active Naval forces in the event of war, national emergency, or at other times as national security requires.

The Naval Reserve is an integral part of the Navy's operating force. All personnel separating from the Navy at their EAOS (Honorable) must be made aware of the Naval Reserve Program; and, along with those reservists serving on active duty, be made aware of the vital role they play in the "ONE NAVY". The following list identifies the extent of Naval Reserve involvement in the Navy's total force:

| | | |
|---|---|---|
| Fleet Support Airlift | People/Hardware | 100% |
| Inshore Undersea Warfare | People/Hardware | 100% |
| Naval Embarked Advisory Teams | People | 100% |
| Adversary Support | Flight Hours | 100% |
| Naval Control of Shipping | People | 99% |
| Cargo Handling | People/Hardware | 93% |
| Military Sealift | People | 90% |
| Construction Battalions | People/Hardware | 65% |
| Intelligence | People | 53% |
| CSAR/SPECWAR HELO | People/Hardware | 43% |
| Fleet Hospital | People/Hardware | 40% |

2. LANTFLT and PACFLT Career Information Teams (CARITs). Personnel being separated from active duty are required to attend a Naval Reserve Career Information Presentation within 120 days of their projected release date. The LANTFLT/PACFLT CARITs are responsible for coordination and presentation of Naval Reserve information through formal presentations throughout the east and west coasts. OPNAVINST 1900.1(Series) provides additional guidance. Information regarding the scheduling of formal pre-separation briefings may be obtained through the appropriate office as indicated:

| East Coast | West Coast |
|---|---|
| Atlantic Fleet<br>Career Information Team<br>SIGNET Bank Building, Suite 335<br>870 North Military Highway<br>Norfolk, VA 23502-3692<br>Phone: Comm 804-464-8016<br>DSN 680-8016<br>800-336-8673 | Pacific Fleet<br>Career Information Team<br>COMNAVAIRPAC (Code 024)<br>Naval Air Station, North Island<br>San Diego, CA 92135-5100<br>Phone: Comm 619-545-2727<br>DSN 735-2727<br>800-732-2015 |

**12.2 ORGANIZATION.** The Naval Reserve is under the command of the Commander, Naval Reserve Force with headquarters at 4400 Dauphine Street, New Orleans, LA, 70146-5000. The Reserve Force Retention Team is N111B and the Reserve Education Benefits Section is N122E. Both departments can be reached at 800-621-8853.

Assisting in the administration and training of Naval Reservists are: Commander, Naval Surface Reserve Force and Commander, Naval Air Reserve Force. Additional information about the Naval Reserve Force can be found on the internet at: http://www.navy.mil/navresfor/.

**12.3 MILITARY SERVICE OBLIGATION.** Beginning 1 June 1984 all persons entering military service incurred an eight-year obligation. The total military obligation can be accomplished through various combinations in length of active/inactive service. Any part of such service that is not active duty, or active duty for training, shall be performed in a reserve component. Naval Reservists assigned to reserve units obligate themselves for:

1. At Least 85% attendance at regularly scheduled drills.

2. Performance of annual training (12-17 days) each year.

3. Meeting annual physical qualifications.

Additional information and requirements may be found in BUPERSINST 1001.39 series and COMNAVRESFORINST 1001.5 series.

**12.4 BENEFITS**

1. Pay. Reservists assigned to a drill pay billet receive one day's basic pay for each drill satisfactorily performed. The minimum period for a drill for pay purposes is four continuous hours. Reservists perform two drill periods a day totaling four drill periods during a drill weekend. Some programs, such as Naval Reserve Force ships, Special Boat Units and aviation squadrons offer opportunities to perform additional paid drills. Full pay and allowances (except VHA) are earned during Annual Training (AT) performed in a pay status. Members under duty in a flying status involving operational or training flights (DIFOT) orders may also earn Aviation Career Incentive Pay during both drill and AT periods. Also, other hazardous duty pay (diving, demolition, etc.) may be earned during AT. Information on types of drills may be found in BUPERSINST 1001.39 series.

a. Computation of Drill Pay. Drill pay is computed on the basis of the member's pay grade and length of service. The monthly basic pay, as applicable, is divided by 30 to provide the daily pay a member receives for each drill completed. The training category of the member determines the number of authorized drills for which a member may be paid during the fiscal year.

b. Computation of Annual Training (AT) Pay. AT pay is computed on the basis of the member's paygrade and length of service. The basic pay,BAH, COMRATS/BAS, as applicable, are divided by 30 to provide the daily pay a

member receives for each day of AT performed.

2. Affiliation Bonus. Individuals in certain ratings in the Selected Reserve who have completed their term of obligated service and have no remaining mandatory drilling obligation at the time of affiliation may be eligible for an affiliation bonus. Affiliation bonuses provide incentive for personnel who have been released from active duty, with some military service obligation remaining, to affiliate with the Selected Reserve for the remainder of their military service obligation. Additional information concerning the affiliation bonus is available in BUPERSINST 1001.39 series.

3. Reenlistment Bonus. Certain ratings within the Selected Reserve may be eligible for reenlistment incentives while assigned to a Reserve Unit. Reenlistment incentives may be offered in ratings where critical shortages exist in the Selected Reserve. Additional information concerning the reenlistment incentive program is available in BUPERSINST 1001.39 series.

4. Uniforms

a. Enlisted personnel below paygrade E-7. Initial clothing issue must be retained throughout the member's period of obligated service. Those who reenlist and affiliate with a Reserve unit more than 90 days after discharge are entitled to a new issue of clothing if the prior issue is no longer serviceable. Additionally, unserviceable clothing items may be exchanged for new on a one-for-one basis while assigned to a Naval Reserve unit.

b. Chief Petty Officers are eligible to receive a periodic uniform maintenance allowance.

5. Advancement.

a. Regular Navy personnel with remaining obligated service who are transferred to the Naval Reserve to complete their obligation and other Reserve personnel, upon release from active duty, retain their time in rate if they affiliate with a drilling unit within 1 year of release from active duty.

b. Advancement may also be approved for personnel who were selected for advancement as a result of a Navywide Advancement Examination completed while on active duty, but separated prior to actual advancement. In this instance, the individual must affiliate with a Naval Reserve drilling unit within six months of date of release from active duty and request advancement determination form the Chief of Naval Personnel.

c. Continued advancement is the same as active duty, with examinations for E-4 through E-6 in February and August, and for E-7 in February. Selection boards for E-7, and E8/9 are held jointly with Regular Navy boards. Advancement requirements can be found in Section 3, BUPERSINST 1430.16 (Manual of Advancement).

6. Education and Training. Affiliation with a Reserve unit will allow the member to maintain proficiency in rate, broaden skills and expand leadership abilities acquired during active service. Members participating with the Ready Reserve are also eligible to attend formal courses of instruction (service schools) and complete Navy correspondence courses. A few of the educational benefits and opportunities available to Naval Reservists are listed below.

a. Montgomery GI Bill-Selected Reserve (MGIB-SR) was established on 1 July 1985, providing monetary educational benefits for individuals who incur a six year Selected Reserve obligation, and maintain satisfactory participation. The maximum entitlement is 36 months of full time educational benefit months or its equivalent based on three quarter, half, or one quarter

time. For further information contact Commander, Naval Reserve Force (N122E) at 800-621-8853.

b. Defense Activity for Non-Traditional Education Support (DANTES) testing programs, such as CLEP, DSSTs, high school graduation, college and graduate entrance examinations, professional certifications, academic and career guidance assessments, and military evaluations are available to Naval Reservists, whether in drilling unit or in the IRR. Alternatives for degree completion through SOCNAV, Independent Study and External Degree programs are also available.

c. Department of Veterans Affairs (DVA) Work Study permits eligible MGIB-SR students to perform MGIB-SR services at DoD/National Guard/Coast Guard facilities or Naval Reserve Activities. Prevailing payment is equal to the State and federal minimum wage, whichever is higher, but pay is non-taxable.

d. SELRES Specialized Training Assistance (STIPEND) Programs for Health Professionals is sponsored by COMNAVRESFOR for applicants who will be or are commissioned officers as a physician or nurse in critical specialties. Entitlement is paid the same as those participating in the Armed Forces Health Professions Scholarship Program and if eligible, may simultaneously collect MGIB-SR.

e. Reserve Allied Medical Program (RAMP) is opened to drilling HM or DTs in the permanent paygrade of E1 through E6. Tuition, books, fees, and equipment/clothing cost required by the college are paid directly to the college. Upon successful completion of the school, HM/DTs are assigned a certain critical skill NEC. Students may collect MGIB-SR benefits simultaneously, if eligible. The Health Science Education Training Command controls the open NECs. HSETC may be reached at 301-295-2375/2378 or DSN 295-2375/2378.

7. Base/Recreational/Theater Facilities. Use of recreation/base facilities are available upon approval of the base commanding officer.

a. Exchange Privileges. Authorization has been granted for unlimited use of any military exchange for participating members of the Naval Reserve. Dependents may utilize the exchange on the member's behalf providing the dependent presents a valid DD1173-1, DOD Guard and Reserve Family Member Identification Card, or a NAVPERS 5512/7, Naval Reserve Forces Dependent Identification Card.

b. Commissary Privileges. Unlimited availability to both the Reserve member and dependents during AT periods. AT periods must be over 72 hours in duration. Entitlement is based on participation in the Ready Reserve. A member must earn 50 or more retirement points during a calendar year to be eligible for 24 commissary visits. The Commissary Privilege Card (CPC) will be issued on a calendar year basis with the qualifying year beginning 1 January and expiring on 31 December of the calendar year for which the entitlement is issued. E.G. Between 1 January 1995 and 31 December 1995, the Reservist acquires 50 points. The member is subsequently issued a CPC for 24 days of commissary privileges in the following calendar year.

8. Medical Care. Available if illness or injury occurs during authorized drills or active duty for training and during travel to and from active duty for training site. Additional information on medical care may be found in SECNAVINST 1770.3.

9. Travel. Space available travel on government aircraft (except MAC) may be authorized when not in a duty status. Travel is limited to continental United States, Alaska, Hawaii, Guam and Puerto Rico. Travel must be completed

in uniform; member must present ID card and Authorization of Reserve Status for Travel Eligibility (DD 1853). See OPNAVINST 4630.25 for additional information.

10. Servicemember's Group Life Insurance. Effective 1 December 1992, full-time coverage, 365 days a year, in the maximum amount of $200,000, is provided those personnel serving in the Naval Reserve (pay or non-pay) who are assigned to a unit in which they will be scheduled to perform at least 12 drills and may be required to perform active duty for training. The cost for $200,000 coverage is $16.00.

11. Retirement. Must earn a minimum of 50 retirement points each anniversary year to qualify for retirement with pay at age 60.

12. Reserve Component - Survivor Benefit Program (RC-SBP). Public Law 95-397 of 1978 established the Reserve Component - Survivor Benefit Program to provide retirement eligible reservists an opportunity to select guaranteed protection for their survivors. (See para 12.6 of this chapter for information on this program.)

## 12.5 RETIREMENT

1. Eligibility. Members of the Naval Reserve may qualify for retirement pay by completing 20 years of "qualifying service," providing the last six years of qualifying service were accomplished in a Reserve component; however, Reserve Transition members only need six years vice eight. Qualified Reservists are eligible, upon application, to commence receiving retirement pay and other benefits upon reaching age 60.

2. Qualifying Service. Current directives require that a Naval Reservist must earn a minimum of 50 retirement points in an anniversary year to be credited with a year of qualifying service for retirement purposes.

3. Anniversary Year. Naval Reservists who were members of the Naval Reserve on 30 June 1949 and have served continuously without a break in service of over 24 hours have an anniversary year extending 1 July to 30 June. After 1 July 1949, an anniversary year is defined as the date of entry into the Naval Reserve to a date 365 days in the future provided there is no break in service of over 24 hours. After a break of more than 24 hours, the re-entry date into Naval Reserve starts a new anniversary year.

4. Retirement Points Earned

a. Active Points

(1) Active Training/Active Duty for Training (AT/ADT). One point for each day of active duty or AT/ADT (including constructive travel time) served.

b. Inactive Points

(1) Drills. One point for each authorized drill attended (pay or non-pay status).

(2) Correspondence Courses. Varying point credit for completion of approved correspondence courses.

(3) Gratuitous Points. A maximum of 15 membership points credited for completion of membership in an active status reserve component during an anniversary year (except Standby Reserve (S2)).

c. Annual Retirement Statement

(1) Commanding Officer, Naval Reserve Personnel Center, will issue retirement point statements to reservists annually. Each reservist should receive their statement approximately five months after each anniversary date.

NOTE: No more than 75 INACTIVE POINTS per anniversary year can be credited for retirement pay computation purposes. The 75 inactive points are combined with all ACTIVE POINTS earned per anniversary year (maximum 365/366) to be used in retirement pay computations.

5. Retirement Pay Computations. The following procedure is used in computing retired pay:

a. Total all points earned during a "qualifying year" of Naval Reserve service. (Maximum INACTIVE POINTS creditable is 75, plus all ACTIVE POINTS earned).

b. Divide the grand total by 360. Carry division to three decimal points and round off to two decimal points.

c. Multiply this figure by two and one-half percent (.025). Carry the multiplication to five decimal points and round off to four decimal points.

d. The monthly basic pay applicable to the member based on member's paygrade and length of service will be multiplied by the figure obtained in step 5.c above to obtain the retirement pay.

e. The formula may be set up as follows:

$$\frac{\text{Total Points}}{360} \times .025 \times \text{*Basic Pay} = \text{Retired Pay}$$

* Basic Pay is changed to HIGH 3 average if entered Service after 7 Sep 80

NOTE: Retired pay benefits must be requested by the member in writing. The process is NOT AUTOMATIC. Refer to para 12.8 for application procedures.

## 12.6 RESERVE COMPONENT-SURVIVOR BENEFITS PROGRAM (RC-SBP)

1. Eligibility. To be eligible to enroll under RC-SBP, a member of the Naval Reserve must have completed 20 qualifying years of federal service (combined active and inactive) and be in receipt of the "Notification of Eligibility for Retired Pay at Age 60" (NOE). A RC-SBP instruction booklet containing an "Option Election Certificate" is provided to the member with the NOE.

2. Summary. It is vitally important that the member understand that coverage under RC-SBP is not effective until the completed "Option Election Certificate" is RECEIVED by the Naval Reserve Personnel Center. A completed election certificate held at the local command or in the service record DOES NOT SERVE as a valid option election.

The information concerning RC-SBP is technical in nature and is not easily understood. Personnel may need additional counseling before making a final election that will affect their survivors. This program and the survivor annuities are, in a non-technical and non-legal sense, a part of estate planning. Certain states require that the annuity to the survivor be included for estate tax purposes. The laws concerning estates and estate planning vary. It is recommended that advice be sought from licensed agencies who deal with estate planning.

**12.7 BENEFITS AND PRIVILEGES OF NAVAL RESERVISTS RETIRED WITH PAY**

1. Retired List. Retired pay benefits must be requested by the member in writing; the process is NOT AUTOMATIC. Retired pay may commence on the effective date of retirement. This is normally the first day of the month following the month in which age 60 has been reached and when 20 or more years of qualifying service have been acquired. However, when age 60 has been reached first, the effective date will normally be the first day of the month following the date of initial eligibility (the date on which service requirements are met). A later date may be requested if the applicant desires.

2. Application. Personnel must submit the following documents to the Naval Reserve Personnel Center in duplicate:

a. DD Form 108M, Application for Retired Pay
b. NAVPERS 1800/2, Questionnaire for Retired Pay
c. IRS Form W-4

3. Identification Card. Members of the Retired Reserve (with pay) are entitled to an identification card (DD 2N (Blue)). Dependents are entitled to a Dependent Identification Card (DD Form 1173).

4. Use of Military Title. Permitted to use military title in connection with commercial enterprises in accordance with MILPERSMAN 1800-040.

5. Base Facilities. Privileged to use Armed Forces base facilities subject to availability of space, facilities and capabilities of each activity as determined by the Commanding Officer.

6. Medical Benefits. Retirees and dependents are entitled to medical care under the Uniformed Services Health Benefits Program.

7. Use of DOD Aircraft

a. Travel within CONUS, Alaska, Hawaii, Guam and Puerto Rico on DOD aircraft: space available to unaccompanied retirees in possession of DD Form 2N (Gray/Blue) Armed Forces ID card. This travel DOES NOT include dependents.

b. Travel between CONUS and Overseas on DOD aircraft; space available to retirees and their dependents when accompanied by their sponsor.

c. Travel between Overseas areas on DOD aircraft; space available to retirees and their dependents when accompanied by their sponsor.

NOTE: Travel for retirees and their dependents will not be authorized for personal gain or in connection with business enterprise or employment, or to establish a home overseas or in the United States.

8. Exchange and Commissary Privileges. Military retirees and their dependents are entitled to full use of exchange and commissary.

**12.8 BENEFITS AND PRIVILEGES OF NAVAL RESERVISTS RETIRED WITHOUT PAY.** Members who have completed 20 qualifying years of service but have not reached age 60 are entitled to the following:

1. Identification Card. Entitled to DD Form 2N (Red) for identification purpose only.

2. Uniform. Entitled to wear prescribed uniform on appropriate occasions.

3. Use of Military Title. Permitted to use military title in connection with commercial enterprises in accordance with MILPERSMAN 1800-040.

4. Base Facilities. Use of recreational facilities and service clubs on a space available basis.

5. Servicemember's Group Life Insurance (SGLI). Eligible for coverage until 61st birthday or in receipt of retired pay for $200,000 maximum coverage (lesser amounts of coverage are available).

6. Air Travel. Members are eligible for space available transportation on DOD owned or controlled aircraft within CONUS, Alaska, Hawaii, Guam and Puerto Rico, upon presentation of DD 2N (Red) and Notification of Eligibility for Retired Pay at age 60 (NOE). Members are encouraged to travel in civilian clothing.

7. Correspondence Courses. Retired personnel are eligible to apply for Naval Correspondence Courses.

8. Commissary and Exchange Privileges. The Retired Reservist (without pay) and their eligible family members are entitled to 24 Commissary visits and unlimited Exchange privileges.

## 12.9 FORMER MEMBERS

1. A former member is a Naval Reservist who, after 20 or more qualifying years, is discharged from Naval service.

2. At age 60, the former member is eligible to apply for retired pay. The former member and dependents are eligible to receive a Dependents Identification Card (DD Form 1173) and are not considered retirees.

3. The former member and dependents are also entitled to:

a. Uniformed services and civilian health benefits.

b. Commissary, exchange and theater use.

c. Retired pay.

d. Possible Survivor Benefit Plan (SBP) participation.

4. The retired pay for a former member is based upon the longevity the member had accrued at the time of discharge and the pay scale in effect at the time of application for retired pay.

## 12.10 TRAINING AND ADMINISTRATION OF RESERVE (TAR) PROGRAM

1. The TAR program was established to provide support at Naval Reserve activities functioning to train, administer and maintain the readiness of the Naval Reserve. Enlisted TAR personnel are eligible for all benefits and privileges available to regular Navy personnel with the exception of the Selective Reenlistment Bonus (SRB) program.

2. Non-designated, non-rated personnel may be authorized recall.

3. Additional details on the TAR program are contained in Chapter 22 of the Enlisted Transfer Manual and COMNAVRESFORINST 1100.3 (NAVRESCRUITMAN), Section V, Chapter 5.

## 12.11 PHONE CONTACTS

COMNAVRESFOR Career Information and Education Benefits: 800-621-8853
COMNAVRESFOR Reserve Transition Benefits (RTB): 800-437-0382
DFAS-Cleveland Reserve Pay: 800-255-0974
Naval Reserve Personnel Center for IRR, RC-SBP, Personnel Changes, Retirements: 800-535-2699

## CHAPTER 13 - FAMILY COUNSELING

**13.1 Background.** The importance of the Navy family as a unit of the Navy team has been well established. Research has shown that morale, job performance, attrition/retention and unit readiness are directly linked to the well-being of the Navy family. Increasing numbers of dual-military career Navy families (both active duty Navy, or a spouse in another service) and numbers of married Navy members in general have greatly increased and expanded the requirements of the retention team in providing information and assistance to Navy members and their families in planning their Navy career.

**13.2 Married Members (Both on active duty):**

1. When working with an individual to sort out the pros and cons of the next duty station, reenlistment, a Navy career, etc., an important element must be considered: What does the spouse consider reasonable for the family unit?

2. If the spouse is another service member and under your counseling jurisdiction, the advantages start to stack up:

a. With both members available, working on orders for both of them to the same area will be easier (not easy, just easier). Some situations to consider are:

(1) Are both eligible for sea duty or shore duty?

(2) If one is eligible for shore and the other for sea, are there billets for both in the same area?

(3) Are their tour lengths the same? If not, can arrangements be made to lengthen or shorten one to comply with the other?

(4) Have both members included their spouse's name, rate and SSN on Enlisted Duty Preference (NAVPERS 1306/63).

b. You must ensure each individual understands the Navy cannot guarantee duty assignments together, but every effort will be made to provide this convenience.

3. If both are service members but are in different ratings, other problems will occur:

a. Sea/shore rotation may be different.

b. Where sea or shore billets exist for the female they may not be for the male, which may preclude assignment together. (This also can be true for individuals in the same rating.)

4. Should either the husband or the wife not be under your cognizance, contact the career counselor for that individual and work together on orders, reenlistment, etc. (A joint reenlistment ceremony, with both commands present, can serve as a retention aid by itself.)

5. When the couple feels that being in the service together has too many problems for them to accept or adjust to, you have an excellent chance to point out the advantages of one continuing their career and the other joining the Reserves so that the period already served can be used towards a reasonable retirement, and provide, in the short term, a more stable environment. (See Chapter 12 of this manual for information regarding the

Naval Reserve.)

**13.3 The Navy Spouse.** As discussed in Chapter 2 of this manual, the spouse should attend as many interviews as possible so he/she has all the facts on command programs and situations, career programs and opportunities, his/her benefits as a spouse, and the mission of the member's command and the Navy. In order to retain a member, we must be sensitive to the family's needs.

1. The career counselor should maintain close liaison with the unit's command ombudsman and the wives club. Working together, these people can establish programs/ideas for the members of the command and their families.

2. Coordinate with all personnel involved so all areas which must be discussed are covered, but try to avoid redundancy.

a. The commanding officer (or the CO's representative) should provide general information on the command's mission and programs.

b. The career counselor should provide general information on the retention team. A date should be established for the first interview so you can prepare the interview accordingly. (Note: If the spouse does not attend the first interview, discuss his/her absence with the member to determine what the member's feeling is on the spouse coming to the interviews.) Encourage spouse participation.

c. The division officer can provide information on the chain-of-command, the duties the new member will be assigned to, and introduce him/her to the leading CPO/LPO and division career counselor.

d. The sponsor should be the first contact from the command and is responsible for providing the family with the following (MILPERSMAN 1740-010 refers):

(1) A welcome aboard package to include:

(a) Maps of the area.

(b) Brochure on command's mission and programs.

(c) Types of uniforms normally worn during each season.

(d) Housing and transportation cost and location/general idea of cost-of-living for the area.

(e) Complete list of family service offices, with building numbers, telephone numbers, and person to contact in each office.

(f) Exchange and commissary hours, locations, rules and regulations.

(2) Meet the new member upon arrival at the command and ensure immediate lodging needs have been fulfilled.

(3) Assist the member when checking in and ensure that member has met with the appropriate people in the command.

3. Personal Recognition. Anytime a member is receiving recognition for job well done, advancement, reenlistment or receiving an award make certain the family has been given a personal invitation. This will provide the member with deserved recognition and make the family feel a definite part of the command and the Navy.

4. Activities. Command sponsored activities should include participation by all members of the command and their dependents.

## 13.4 Family Service Centers (FSCs)

1. The Command Career Counselor, in addition to the Command Master/Senior/Chief and Command Ombudsman should maintain active liaison with the FSC. The FSC can serve as the focal point for coordinating the command's existing family support and assistance programs.

2. The FSC will be able to provide information and referral on a full range of available family-related resources, service organizations, and programs, both Navy and civilian, while providing directly many selected services. FSCs provide coordination with family related resources, service organizations and programs external and internal to the Navy which include but are not limited to:

| | |
|---|---|
| American Red Cross | Navy Sponsor Program |
| Chamber of Commerce | United Services Organization |
| Navy League | Volunteer Programs |
| Navy Relief Society | Wives Clubs |
| Family Ombudsman Program | Family Information School |
| Family Advocacy Program | Public Affairs Office |

b. The FSC will provide, assist, co-locate with, or provide information about:

(1) Personal and Family Enrichment programs.
(2) Financial Counseling and Education.
(3) Child care information/services.
(4) Relocation information/services.
(5) Emergency services/assistance.
(6) Special needs family information.
(7) Child and spouse abuse.
(8) Retired personnel information.
(9) Welcome Aboard packages.
(10) Hospitality kits.
(11) Wifeline Publications.
(12) Sponsor Program guidance/assistance.

## CHAPTER 14 - TRANSITION ASSISTANCE MANAGEMENT PROGRAM (TAMP)

**14.1 BACKGROUND.** The Transition Assistance Management Program (TAMP) assists separating or retiring members, and their spouses, as they transition from military to civilian life. Public Laws 101-510, 102-484, and OPNAVINST 1900.2 mandate that preseparation counseling interviews (at least 90 days prior to separation), employment assistance, and overseas relocation assistance will be provided for all separatees. Command Career Counselors conduct, document, and provide the TAMP Manager at the local Family Service Center with results of the preseparation counseling interview. Family Service Centers (FSCs) provide employment and relocation assistance and coordinate the delivery of the Transition Assistance Program (TAP) Workshop.

The Transition Assistance Management Program can compliment the command's retention efforts. Personnel who attend preseparation briefs and the TAP Workshops well in advance of their actual separation date may ultimately decide to continue a Naval career.

The Command Career Counselor is a vital partner in the transition process and must maintain a close liaison with the TAMP Manager located at the local Family Service Center. The TAMP Manager is an invaluable referral resource for all transitioning Sailors to use.

**14.2 DOCUMENTATION.** The preseparation counseling interview should be conducted 6-9 months prior to the anticipated separation or retirement date. Spouses should be encouraged to participate in the interview process. The interview must be completed no less than 90 days prior to separation, as required by Public Law 101-510. The interview will be documented on the Preseparation Counseling Checklist (DD Form 2648) with one copy given to each service member, one copy retained by the Command Career Counselor, one copy forwarded to the TAMP Manager at the local Family Service Center, and the original document filed in the service member's local service record. The interview will include the availability of general transition services listed below (a matrix listing transition services/benefits and eligibility is available at the end of the chapter):

1. Individual Transition Plan (ITP). Assistance is provided to create and execute a detailed Individual Transition Plan. A sample Individual Transition Plan Package is provided at 14.8. The plan should include, but not be limited to, the following:

a. The service member's (and spouse's) post-military employment, education, training, and/or other objectives.

b. Specific transition services, involuntary separation benefits, and other available counseling or services needed to help achieve their objectives.

c. Location and points of contact for installation or community agencies which deliver TAMP services and benefits.

d. When the services will be delivered.

2. Personal effects of a career change such as stress, personal identity change and impact on family members.

3. Employment assistance, including:

a. Explanation of DD form 2586, "Verification of Military Experience and Training." Service members should receive this form 120-180 days prior to their separation or retirement date.

b. Department of Labor Transition Assistance Program (TAP) Seminar and other available Service or installation-sponsored transition seminars.

c. Defense Outplacement Referral System (DORS). DORS is a mini-resume registry and referral system developed to provide employers with easy access to Defense personnel and their spouses who are seeking civilian employment.

d. Public and Community Service (PACS). Registry to help place members in public/community service related jobs. Although accepting employment is optional, registration in PACS is mandatory for members taking early retirement, and recommended for all other separating/retiring personnel.

e. Transition Bulletin Board (TBB). TBB is an electronic bulletin board listing job opportunities and related information.

f. Federal employment opportunities.

g. State employment agency services and/or Interstate Job Bank.

h. One-time hiring preference in Non-Appropriated Fund Instrumentality (NAFI) jobs for VSI, SSB, and Involuntary Separatees/Retirees.

4. Relocation Assistance, including:

a. Excess leave and Permissive Temporary Duty (PTDY)

b. Travel and transportation allowances - one-year storage of household goods and home of selection move for VSI, SSB, and Involuntary Separatees/Retirees.

c. Continued use of military family housing for up to 180 days on a space available basis (subject to Status of Forces Agreements overseas) for VSI, SSB, and Involuntary Separatees/Retirees.

d. Extended commissary and exchange privileges for a period of 2 years (subject to Status of Forces Agreements overseas) for VSI, SSB, and Involuntary Separatees/Retirees.

e. Department of Defense Dependents Schools (DODDS) extensions (subject to Status of Forces Agreements), providing each child has completed the 11th grade by the service member's date of separation for VSI, SSB, and Involuntary Separatees/ Retirees.

5. Education and Training Assistance, including:

a. Education benefits such as Montgomery GI Bill and Veteran's Educational Assistance Program (VEAP).

b. Teacher and Teacher Aide Certification Program.

c. Job Training Partnership Act (JTPA) for VSI, SSB, and Involuntary Separatees/Retirees.

d. Additional education or training options.

6. Health and Life Insurance Benefits:

a. 60- or 120-day extended military medical and dental benefits for VSI, SSB, and Involuntary Separatees/Retirees.

b. Option to purchase 18-month conversion health insurance, and Department of Veterans Affairs (VA) care. Service members should also be made aware that dental insurance under the DELTA Dental Plan does not carry over

after separation.

c. Concurrent pre-existing condition coverage with purchase of conversion health insurance for VSI, SSB, and Involuntary Separatees/Retirees.

d. Veteran's Group Life Insurance.

7. Finances.

a. Financial management assistance including financial counseling, unemployment compensation, VA loans, and other government grants and loans.

b. Separation pay for VSI, SSB, and Involuntary Separatees/Retirees.

c. Unemployment compensation upon release from active duty.

d. Other financial assistance (VA loans, SBA Loans, and other government grants and loans).

8. Reserve Affiliation/Priority for VSI, SSB, and Involuntary Separatees/Retirees.

9. Disabled veterans benefits, including the Disabled Transition Assistance Program and VA disability benefits.

**14.3 PROCEDURES.** Commanding Officers are responsible for ensuring all separating and retiring members receive preseparation counseling as mandated by Public Law 101-510. The Command Career Counselor should serve as the command's Transition Officer. To assist in the transition process, a variety of referral resources are available for the command's Transition Officer to use. The primary source of information and referral will be the Transition Assistance Management Program (TAMP) Manager, normally located at the nearest Family Service Center (FSC). Other sources include the Naval Reserve Career Information Teams (CARIT), Retired Activities Officers (RAOs), Spouse Employment Assistance Program (SEAP) managers, chaplains, medical/dental personnel, state employment personnel, etc.

1. Transition Assistance Program (TAP). Although the member may choose whether or not to attend, it is required that all separating and retiring service members be afforded the opportunity to attend the Department of Labor (DoL) TAP workshop.

a. TAP is a three to five day workshop developed by the Departments of Labor and Defense to assist members in their transition. One day is devoted to discuss military/Navy-unique transitional topics.

b. Host commands with TAP seminars will coordinate logistics and program offerings to support tenant commands as well. Maximum publicity for information and counseling service opportunities is needed to ensure widest possible attendance.

2. Command Career Counselor Duties.

a. Ensure each separating and retiring member receives a Preseparation interview. Ideally this should occur at least nine months prior to separation or retirement. Interview the member no later than 90 days prior to separation and assist the service member with the development of their own Individual Transition Plan. Every separating service member should receive a personal copy of The Preseparation Guide (NAVPERS 15616) during the preseparation interview. This publication is available through the stock system at no cost to the command. The stock number for the Preseparation Guide (NAVPERS 15616) is: 0500-LP-010-1690.

b. Conduct the preseparation interview 6-9 months prior to the anticipated separation date. Public Law 101-510 requires that all interviews be complted no later than 90 days prior to the actual separation date. Document Preseparation Interview on DD Form 2648 and forward the original form to the Personnel Office/PSD for placement in the member's service record (this form will be retained in the permanent record which is forwarded to the Naval Records Center, St Louis, MO). Forward a copy of all completed DD Form 2648 forms to the TAMP Manger at the local Family Service Center no later than the 5th day of each month.

c. Refer the service member to the proper sources of information to enable them to acquire the knowledge and skills required to make a smooth transition into the civilian workforce.

d. Issue the Verification of Military Experience and Training document (DD Form 2586) to the service member. This document is automatically queued for mailing to the Command Career Counselor by the Defense Manpower Data Center (DMDC) 180 days prior to the separation or retirement date. Normal processing can take from 4-6 weeks. If the CCC does not receive the form 120 days prior to anticipated date of discharge, fill out and fax the attached request form to COMNAVPERSCOM (NPC-662) at (901) 874-2689/2688/2630. (DSN 882-). Questions or comments for NPC-662 should be directed to the Navy TAMP Headquarters staff at (901) 874-4376 (DSN: 882).

**14.4 <u>RESERVE TRANSITION BENEFITS (RTB).</u>**

1. Background. The Reserve Transition Benefits (RTB) Program was initiated and approved by the Defense Authorization Acts of Fiscal Year 1993 and modified in 1994 to assist SELRES involuntarily separated between 23 October 1992 and 30 September 1999 because of force reduction. Commander, Naval Reserve Force (N12), 800-437-0382, approves and manages the RTB Program.

2. RTB eligibility:

a. Satisfactory participation in the SELRES.

b. Separation is due to an involuntary program authorization for:

(1) Billet loss or unit disestablishment

(2) Requested but were denied reenlistment

(3) High Year Tenure

(4) Reservists involuntarily separated from active duty

(5) SELRES O6 line officers identified as Elimination for Active Service Board (EASB) selectees

(6) Promotion attrition due to failure to promote or were promoted out of billet, including billet tenure transfers

(7) Age 60/62 limitations

c. Four RTB categories are:

(1) Category A - less than six years of qualifying service. If a SELRES is eligible for MGIB-SR or Chapter 30 education assistance under the Navy Sea College or GENDET (2YO) programs, they will retain and remain eligible up to the ten year delimiting date, and keep their DANTES testing benefits until the member is no longer a Naval Reservist. Commissary, exchange and MWR privileges will be retained for two years.

(2) Category B - six years but less than 15 years of qualifying service. In addition to Category A benefits, may be eligible to receive separation pay.

(3) Category C - 15 years but less than 20 years of qualifying service. Retain MGIB-SR and DANTES benefits, as well as benefits of the Retired Reserve without pay. May be eligible to receive an immediate annuity for five years or on year, depending upon when member was involuntarily separated or until member reaches age 60. The last six years in a Reserve component vice eight years is needed. Annuity does not effect the amount of, or eligibility for, retired pay at age 60.

(4) Category D - SELRES who have completed 20 or more years of qualifying service. Members must serve the last 8 or 6 years in a Reserve Component to be eligible for retirement per 10 U.S.C., 12731. Continue to retain MGIB-SR benefits, if eligible for the remainder of their 10-year delimiting date. Full retirement benefits at age 60. Eligible for "gray area" benefits (exchange, commissary, MWR, limited Space A travel, RC-SBP, and Red ID Card as Retired Reserve eligible for pay at age 60 (not yet 60 with NOE).

d. Members who are not yet involuntarily separated and are advanced/promoted will keep their selectee status. If promotion/advancement would result in the member's retention in the SELRES, RTB is cancelled. Members may not decline promotion or advancement.

e. Members with approved or pending RTB applications will not perform Annual Training, Inactive Duty Travel, or Additional Drills. Aviation officers will be placed in a Duty Involving Flying Denied status.

f. Advanced Pay Grade (APG) or RESCORE-R members whose rate is not permanent by the effective date of their involuntary separation will be reverted back to their lower permanent pay grade. Benefits will be calculated using permanent pay grades.

**14.5 TAMP MANAGERS LISTING.**

This list was prepared to assist Command Career Counselors in contacting local TAMP MANAGERS for information and assistance. All Command Career Counselors are encouraged to contact these key personnel for current information, policy changes and advice to better help and serve those sailors and dependents transitioning to civilian life.

FAMILY SERVICE CENTER BAHRAIN
PSC 451 BOX 95
FPO AE 09834-2800
DSN: 318-439-4046
Commercial: 011-973-72-4046
Email: ekladyoe@bahrain.navy.mil

TAMP MANAGER
NAVAL AIR WEAPONS STATION
ATTN CODE 864000D
1 ADMINISTRATION CIRCLE
CHINA LAKE CA 93555-6001
DSN: 437-0966
Commercial: (619) 927-1545
Email: joan.telles@imdgw.chinalake.navy.mil

TAMP MANAGER
BLDG 737
ATTN CODE 13000
NAVAL AIR STATION
LEMOORE CA 93246-5001
DSN: 949-4042
Commercial: (209) 998-4042
Email: dshaw@fsc.lemoore.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER
CODE N11
1280 LEAHY ROAD
MONTEREY CA 93940-5000
DSN: 878-3060/3141
Commercial: (408) 656-3060/3141

TAMP MANAGER
FAMILY SERVICE CENTER
ATTN CODE 93
NAVAL AIR STATION NORTH ISLAND
SAN DIEGO CA 92135-5100
DSN: 735-6071
Commercial: (619) 545-6071

TAMP MANAGER
NAVAL SUBMARINE BASE
BLDG 212 ATTN CODE 07
140 SYLVESTER ROAD
SAN DIEGO CA 92106-3521
DSN: 553-7505
Commercial: (619) 553-7505

TAMP MANAGER
NAVAL AIR WEAPONS STATION
ATTN CODE 8F0000E
521 WEST 9TH STREET
POINT MUGU CA 93042-5001
DSN: 351-1022
Commercial: (805) 989-1022
Email: savaged@mugu.navy.mil

TAMP MANAGER
NAVAL CONSTRUCTION BATTALION CENTER
BLDG 1156
1000 23RD AVENUE
PORT HUENEME CA 93043-4301
DSN: 551-9243
Commercial: (805) 982-9243
Email: mjowens@cbcph.navy.mil

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
3005 CORBINA ALLEY SUITE 1
ATTN CODE N12
SAN DIEGO CA 92136-5190
DSN: 526-9874
Commercial: (619) 556-9874

TAMP MANAGER
FAMILY SERVICE CENTER
NAVAL SUBMARINE BASE NEW LONDON
BOX 93
GROTON CT 06349-5093
DSN: 694-4948
Commercial: (860) 694-4948
Email: lachapellem@subasenlon.com

TAMP MANAGER
FAMILY SERVICE CENTER GUANTANAMO BAY
PSC 1005 BOX 25
FPO AE 09593-1000
DSN: 564-4141
Commercial: 011-53-99-4141/4153
Email: N14A@gtmo.net

TAMP MANAGER
FAMILY SERVICE CENTER
NAVAL STATION ANACOSTIA
BLDG 150
2701 SOUTH CAPITOL STREET SW
WASHINGTON DC 20374-5003
DSN: 288-0646
Commercial: (202) 433-0646
Email: ajenkins@nsw.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER LONDON
PSC 821 BOX 59
FPO AE 09421-0059
Commercial: 011-44-1895-61-65042
Email: williams@mailex.cnauk.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER
BLDG 199 BOX 184
CECIL FIELD FL 32215-0184
DSN: 860-5239
Commercial: (904) 778-5239
Email: cf600@mail.cecil.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER
BOX 136
NAVAL AIR STATION, BLDG 876
JACKSONVILLE FL 32212-5000
DSN: 942-2766
Commercial: (904)-772-2766
Email: obarton@nasjax.mil

TAMP MANAGER
FAMILY SERVICE CENTER
NAVAL AIR STATION
PO BOX 9037
KEY WEST FL 35040
DSN: 483-4408/4409/4410/4411/4412
Commercial: (305) 293-4408/4409/4410/4411/4412
Email: keywest2@ibm.net

TAMP MANAGER
NAVAL STATION
PO BOX 280042
MAYPORT FL 32228-0042
DSN: 960-7081
Commercial: (904) 270-7081

TAMP MANAGER
NAVAL TRAINING CENTER
1871 GRACE HOPPER AVE
ORLANDO FL 32813-8306
DSN: 791-4828
Commercial: (407) 646-4828
Email: NTC-ORL.064@SMTP.cnet.navy.mil

TAMP MANAGER
FAMILY TRANSITION OFFICE
6703 W HIGHWAY 98
PANAMA CITY FL 23407-7001
DSN: 436-5510
Commercial: (904) 235-5510

TAMP MANAGER
ATTN CODE 00I00
190 RADFORD BLVD
NAVAL AIR STATION, BLDG 625
PENSACOLA FL  32508-5217
DSN:  922-5990
Commercial:  (850) 452-5990
Email:  nasp.00i15@netpmsa.cnet.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER, BLDG 3025
NAVAL AIR STATION WHITING FIELD
MILTON FL  32570-6013
DSN:  868-7177
Commercial:  (850) 623-7177

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL SUBMARINE BASE  CIDE QL11
1063 USS TENNESSEE AVENUE
KINGS BAY GA 31457-2606
DSN:  573-4513
Commercial:  (912) 673-4513

TAMP MANAGER
NAVAL AIR STATION ATLANTA
ATTN CODE 16
1000 HALSEY AVENUE
MARIETTA GA 30060-5099
DSN:  925-6062
Commercial:  (770) 919-6062
Email:  patterso@cnrf.nola.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER GUAM
PSC 455 BOX 157
FPO AP 96540-1157
DSN:  344-2987
Commercial:  011-671-344-9859/9860/9861/9862/9863/9865

TAMP MANAGER
FAMILY SERVICE CENTER
BOX 9 ATTN CODE 00H3
NAVAL STATION
PEARL HARBOR HI  96860-6000
DSN:  315-474-4222
Commercial: (808) 474-4222
Email:  u00h3@pearlharbor.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER KEFLAVIK
PSC 1003 BOX 45
FPO AE  09728-0345
DSN:  450-4401
Commercial:  011-354-425-4401

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL TRAINING CENTER
BLDG 42
2601A PAUL JONES STREET
GREAT LAKES IL  60088-5001
DSN:  792-0714
Commercial:  (888) 231-0714

TAMP MANAGER
ATTN CODE 01K
US NAVAL SUPPORT ACTIVITY
GAETA ITALY
PSC 811  BOX FSC
FPO AE  09609-1001
DSN:  625-7818/7819
Commercial:  011-39-77-170-9818/9819
Email:  bankstok@nsanaples.navy.mil

TAMP MANAGER
US NAVAL SUPPORT ACTIVITY
NAPLES ITALY
PSC 810 BOX 53
FPO AE  09619-1053
DSN:  314-625-4427
Commercial:  011-39-81-724-4427

TAMP MANAGER
FAMILY SERVICE CENTER ATSUGI
NAVAL AIR FACILITY
PSC 477  BOX 32
FPO AP  96306-1232
DSN:  264-3628
Commercial:  011-81-3117-64-3628
Email:  JCHavens@emh.atsugi.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER SASEBO
ATTN CODE 100
PSC 476 BOX 62
FPO AP 96349-1100
DSN:  315-252-3604/3603
Commercial:  011-81-956-24-6111 EXT 3604/3603/3201
Email:  kimmie27@hotmail.com

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
COMPLEACT YOKOSUKA JAPAN
PSC 473 BOX 116
FPO AP 96349-1100
DSN:  243-9623
Commercial:  011-81-311-743-9623
Email:  c200t@cfay-emh.yoko.mms.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER
NAVAL SUPPORT ACTIVITY
2300 GENERAL MYER AVE
NEW ORLEANS LA 70142-5007
DSN: 678-2290
Commercial: (504) 678-2290

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
400 FOXTROT AVENUE
NAVAL AIR STATION
BRUNSWICK ME 04011
DSN: 476-2273
Commercial: (207) 921-2273
Email: pinion@nasb.navy.mil

TAMP MANAGER
US NAVAL ACADEMY
348 KINKAID ROAD
ANNAPOLIS MD 21402-5073
DSN: 281-2641
Commercial: (410) 293-2641
Email: howard@artic.nadn.navy.mil

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
FORT GEORGE G MEADE MD 20755-5290
DSN: 923-6783
Commercial: (301) 677-6783
Email: TAP1@erols.com

TAMP MANAGER
NAVAL AIR STATION
21993 BUNDY ROAD NASFS
PATUXENT RIVER MD 20670-5409
DSN: 757-1862
Commercial: (301) 342-1862

TAMP MANAGER
ATTN CODE 13
NAVAL CONSTRUCTION BATTALION CENTER
5200 CBC 2ND STREET
GULFPORT MS 39501-5000
DSN: 868-3000
Commercial: (228) 871-3000
Email: jaremley@cbcgulf.navfac.navy.mil

TAMP MANAGER
NAVAL AIR STATION
1155 ROSENBAUM AVE SUITE 13
MERIDIAN MS 39309-5003
DSN: 637-2360/2358
Commercial: (601) 679-2360/2358

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL STATION PASCAGOULA
SR MALL #1466
GAUTIER MS 39553
DSN: 358-4281
Commercial: (228) 497-4281

TAMP MANAGER
NAVAL AIR STATION
4755 PASTURE ROAD
FALLON NV 98496-5000
DSN: 890-3332
Commercial: (702) 426-3332
Email: cochranb@web-cmp.com

TAMP MANAGER
NAVAL WEAPONS STATION EARLE
201 HIGHWAY 34 SOUTH
COLTS NECK NJ 07722-5011
DSN: 449-2585
Commercial: (732) 866-2585
Email: pzaleski@earle.navy.mil

TAMP MANAGER
NAVAL AIR ENGINEERING STATION
BLDG 488 ATTN CODE 80D3
HWY 547 BLDG 488-2
LAKEHURST NJ 08733
DSN: 624-1249
Commercial: (732) 323-1249
Email: boykinjd@lakehurst.navy.mil

TAMP MANAGER
TRANSITION RESOURCE CENTER
NAVAL ADMINISTRATIVE UNIT
277 WASHINGTON STREET
SARATOGA SPRINGS NY 12866
DSN: None
Commercial: (518) 583-4539
Email: fsc4@ix.netcom.com

TAMP MANAGER
BLDG 167/TAMP
NAVAL AIR STATION JOINT RESERVE BASE
WILLOW GROVE PA 19090-5010
DSN: 991-6033/6061
Commercial: (215) 443-6033/6061

TAMP MANAGER
US NAVAL STATION ROOSEVELT ROAD
PSC 1008 BOX 3591
FPO AA 34051-3500
DSN: 831-3369/3397
Commercial: (787) 865-3369/3397
Email: njcv1@navtap.navy.mil

TAMP MANAGER
NAVAL EDUCATION AND TRAINING CENTER
1260 PEARY STREET
NEWPORT RI  02841-1629
DSN:  948-2283
Commercial:  (401) 841-2283
Email:  mary.corriveau@smtp.cnet.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER LA MADDALENA
US NAVAL SUPPORT ACTIVITY
PSC 810 BOX 1795
FPO AE  09612-0057
DSN:  314-623-8205
Commercial:  011-39-789-79-8205
Email:  irish@nuragica.it

TAMP MANAGER
FAMILY SERVICE CENTER SIGONELLA
PSC 824 BOX 2650
FPO AE  09627-2650
DSN:  314-624-4291/4292/4293
Commercial:  011-39-95-56-4291/4292/4293
Email:  viszmeg@blc-sun.sicily.navy.mil

TAMP MANAGER
NAV WEAPONS STA CHARLESTON
1005 JEFFERSON AVENUE
GOOSE CREEK SC  29445
DSN:  794-7480
Commercial:  (803) 764-7480

TAMP MANAGER
FAMILY SERVICE CENTER ROTA
US NAVAL STATION
PSC 819 BOX 57
FPO AE  09645-5500
DSN:  314-727-3232
Commercial:  011-34-56-82-3232
Email:  vcoleman@navsta.rota.navy.mil

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL SUPPORT ACTIVITY MID-SOUTH
TRANSITION ASSISTANCE CENTER
BLDG S239  WING 9
7800 3RD AVENUE
MILLINGTON TN  38054-5000
DSN:  882-5376
Commercial:  (901) 874-5376
Email:  ricardo.bullock@smtp.cnet.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER
NAVAL AIR STATION
11001 D STREET  SUITE 143
CORPUS CHRISTI TX  78419-5021
DSN:  861-2861
Commercial:  (512) 961-2861

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAS FORT WORTH JBR
3175 VANDENBERT AVENUE
FORT WORTH  TX  76127-3175
DSN:  739-5537
Commercial:  (817) 782-5537

TAMP MANAGER
FAMILY SERVICE CENTER
ATTN CODE N9
2370 HWY 361
INGLESIDE TX  78362
DSN:  776-4551
Commercial:  (512) 776-4551
Email:  jerry_trapp@smtpgate.nsi.navy.mil

TAMP MANAGER
FAMILY SERVICE CENTER
NAVAL AIR STATION
726 ROSENDAHL STREET
KINGSVILLE TX  78363-5110
DSN:  956-6325
Commercial:  (512) 516-6325
Email:  fsc00ill@intcomm.net

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
CODE 01F
132Dd NW BLVD SUITE 100
CHESAPEAKE VA  23322-4094
DSN:  654-1336 X 8770
Commercial:
Email:  gbudd@nsganw.navy.mil

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAV SURFACE WARFARE CTR DAHGREN DIV
17320 DAHLGREN ROAD
DAHLGREN VA  224488-5000
DSN:  249-1839
Commercial:  (540) 653-1839
Email:  lanich@nswc.navy.mil

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL AMPHIBIOUS BASE LITTLE CREEK
1450 D STREET
NORFOLK VA 23521-2231
DSN: 680-7563
Commercial: (757) 464-7563

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
7928 14TH STREET SUITE 102
NORFOLK VA 23505-1094
DSN:
Commercial: (757) 444-9101
Email: nfscnorf@norfolk.navy.mil

TAMP MANAGER
BLDG 531
NAVAL AIR STATION OCEANA
5th STREET AND E AVE
VIRGINIA BEACH VA 23460-5120
DSN: 433-9675
Commercial: (757) 433-9675
Email: admin@nfscoceana.com

TAMP MANAGER
POST OFFICE DRAWER 160
NAVAL WEAPONS STATION
YORKTOWN VA 23691-0160
DSN: 953-4606
Commercial: (757) 887-4606

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL SUBMARINE BASE BANGOR
ATTN CODE 008
2901 BARBEL STREET
SILVERDALE WA 98315-2901
DSN: 744-4115
Commercial: (360) 396-4115
Email: kay.simpkins@subase.nsb.navy.mil

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
PUGET SOUND NAVAL SHIPYARD
ATTN CODE 8089-14
1400 FARRAGUT AVENUE
BREMERTON WA 98314
DSN: 439-5113
Commercial: (360) 476-5113

TAMP MANAGER
NAVY FAMILY SERVICE CENTER
NAVAL STATION EVERETT
13910 45TH AVE NE SUITE 857
EVERETT WA 98207-5001
DSN: 727-3367
Commercial: (425) 304-3367
Email: andersonkm@everett.navy.mil

TAMP MANAGER
NAVAL AIR STATION WHIDBEY ISLAND
260 WEST PIONEER WAY
OAK HARBOR WA 98278-2500
DSN: 820-6813
Commercial: (360) 257-6813
Email: grahamm@naswi.navy.mil

## 14.6 TRANSITION ASSISTANCE AND RELATED DIRECTIVES REFERENCE GUIDE.

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| 1 | DODINST 1332.20 | 26FEB82 | Minimum Service in Grade for Nondisability (Voluntary) Retirement | |
| 2 | SECNAVINST 1412.8 | 26FEB82 | Regulations to Govern the Promotion and Continuation of Limited Duty Officers (LDOS) and Chief Warrant Officer (CWOS) Serving on Active Duty in the U. S. Navy | |
| 3 | SECNAVINST 1910.4A | 27DEC83 | Enlisted Administrative Separations | |
| 4 | OPNAVINST 11101.13H | 4AUG84 | Assignment and Utilization of Navy-Managed Military Family Housing (MFH) | |
| 5 | NMPCINST 1900.1B | 11SEP86 | Preparation of DD Form 214 | |
| 6 | OPNAVINST 1160.6A | 28MAY87 | Enlisted Bonus Programs | |
| 7 | OPNAVINST 4630.25B | 11JUN87 | Air Transportation Eligibility | |
| 8 | OPNAVINST 1160.5B | 4JAN88 | Reenlistment Quality Control Program | |
| 9 | DOD Issuance | 01DEC88 | Personnel Policy for Nonappropriated Fund Instrumentalities (NAFIS) | |
| 10 | OPNAVINST 1900.1C | 13DEC88 | Naval Reserve Pre-Separation Counseling of Active Duty Personnel | |
| 11 | BUPERSINST 1001.39 | 21JUN89 | Management of Naval Service | |
| 12 | SECNAVINST 1811.3M | 15NOV89 | Voluntary Retirement and Transfer to the Fleet Reserve | |
| 13 | SECNAVINST 1820.2 | 27NOV89 | Voluntary Retirement of Members of the Naval and Marine Corps Reserve | |
| 14 | OPNAVINST 1780.3 | 29MAY90 | Federally Legislated Educational Benefits Programs | |
| 15 | NAVOP 093/90 | CNO Washington DC 271237ZOCT90 | Officer Selective Early Retirement | |
| 16 | ALNAV 165/90 | CNO Washington DC 271408ZOCT90 | Notice of Convening FY-91 Selective Early Retirement Boards | (41) |
| 17 | NAVADMIN 032/90 | CNO Washington DC 271507ZOCT90 | Selective Early Retirement (SER) | (15) and (16) |
| 18 | NAVADMIN 040/90 | CNO Washington DC 132216ZNOV90 | Personnel Programs In FY-91 Appropriations and Authorizations | |
| 19 | SECNAVINST 1420.1A | 8JAN91 | Promotion and Selective Early Retirement of Commissioned Officers on the Active Duty Lists of the Navy and Marine Corps | |
| 20 | SECNAVINST 1754.6 | 14FEB91 | Relocation Assistance Programs for Department of the Navy Military Personnel | |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| 21 | NAVADMIN 042/91 | CNO Washington DC 1611711ZAPR91 | Voluntary Early Retirement Requests | MILPERSMAN 1810-020 (Submission of Retirement Requests) |
| 22 | NAVOP 008/91 | CNO Washington DC 161931ZAPR91 | Officer Selective Early Retirement | |
| 23 | ALNAV 045/91 | SECNAV Washington DC 171430ZAPR91 | Notice of Convening FY-92 Selective Early Retirement Boards | U. S. Title 10 Article 611B and 638 and (19) |
| 24 | NAVADMIN 043/91 | CNO Washington DC 182212ZAPR91 | Selective Early Retirement (SER) | (22) and (23) |
| 25 | BUPERSINST 1616.9 | 15MAY91 | Enlisted Evaluation Manual | |
| 26 | NAVADMIN 063/91 | CNO Washington DC 221936ZMAY91 | Increase in Maximum Amount of Servicemember's Group Life Insurance | |
| 27 | Assistant Secretary of Defense Memorandum (FMP) | 7June91 | DOD Memo which provided implementation instruction for transition benefits and services | |
| 28 | DODINST 1332.29 | 20JUN91 | Separation Pay Eligibility | |
| 29 | NAVADMIN 086/91 | CNO Washington DC 032228ZJUL91 | Transition Benefits for Separating Personnel | (18) and (27) |
| 30 | BUPERSINST 1430.16D | 10JUL91 | Advancement Manual | |
| 31 | | PDTATAC 111950ZJUL91 | Map Item 39-10, Per Diem and Transportation Allowance Committee (PDTATAC) Correction to JD91018: Member, Dependents, HHG Shipment Allowances of Members Involuntarily Separated | |
| 32 | NAVADMIN 087/91 | CNO Washington DC 121942ZJUL91 | Separation Pay Entitlement | (28), (42), and DODPM |
| 33 | NAVADMIN 095/91 | CNO Washington DC 260059ZJUL91 | Implementation of Permanent Transition Service | Public Law 101-510, MILPERSMAN 1910-804 (Forwarding Health Care Records of Separating Members), (10), (18), (20), and (29) |
| 34 | NAVADMIN 100/91 | CNO Washington DC 292054ZJUL91 | Transition Benefits for Involuntary Separated Personnel | |
| 35 | NAVADMIN 101/91 | CNO Washington DC 292308ZJUL91 | Transition Assistance (TA) Benefits and Services for Separating Personnel - TA ID Card Issuance for Involuntary Separatees | (29) |
| 36 | NAVADMIN 102/91 | CNO Washington DC 292309ZJUL91 | Transition Assistance (TA) Benefits and Services for Separating Personnel - LV, TDY Travel and HHG Transportation | (29), (31), and MILPERSMAN 1050-120 (Separation Leave) and 1320-210 (Permissive TEMADD for House Hunting) |
| 37 | NAVADMIN 103/91 | CNO Washington DC 292310ZJUL91 | Transition Assistance (TA) Benefits and Services for Separating Personnel - | (11) and (29) |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | | Affiliation with Naval Reserve/BUPERSINST 1001.39 Interim Change No. 1 | |
| 38 | NAVADMIN 104/91 | CNO Washington DC 292311ZJUL91 | Transition Assistance (TA) Benefits and Services for Separating Personnel - Military Family Housing (MFH) | (4) and (29) |
| 39 | NAVADMIN 105/91 | CNO Washington DC 292312ZJUL91 | Transition Assistance (TA) Benefits and Services for Separating Personnel - Montgomery GI Bill Enrollment for Involuntary Separated Servicemembers | DMRSMAN, SDSPROMAN, PAYPERSMAN, (14) and (29), |
| 40 | NAVADMIN 106/91 | CNO Washington DC 292313ZJUL91 | Transition Assistance (TA) Benefits and Services for Separating Personnel - Employment Preference | (9) and (29) |
| 41 | NAVADMIN 107/91 | CNO Washington DC 292314ZJUL91 | Transition Assistance (TA) Benefits and Services for Separation Personnel - Commissary and Exchange Benefits | (29) |
| 42 | SECNAVINST 1900.7G | Secretary of the Navy 30 July 1991 | Separation Pay for Involuntary Separation from Active Duty | |
| 43 | Memorandum for Secretaries of the Military Departments, Chairman of the Joint Chiefs of Staff, Under Secretaries of Defense, General Counsel, Inspector General, Director, Operational Test and Evaluation, Assistants to the Secretary of Defense, Director, Administration and Management, Directors of the Defense Agencies | Assistant Secretary of Defense 30 July 1991 | Policy Guidance for Retroactive General Transition Services and Involuntary Separation Benefits | |
| 44 | NAVADMIN 108/91 | CNO Washington DC 051909ZAUG91 | Separation Pay Entitlement | (8), (28), and (42) |
| 45 | Military Pay Advisory 77/91 | DFAS Washington DC 120900ZAUG91 | Montgomery GI Bill for Involuntary Separations | |
| 46 | LANTADMIN 007/91 | CINCLANTFLT Norfolk VA 261800ZAUG91 | Transition Benefits | (29), (33), (34), (35), (36), (37), (38), (39), (40), (41), (44), and (43) |
| 47 | | CHNAVPERS 300001AUG91 | Retroactive Implementation of Transition Benefits for Personnel Separated Between 1 OCT 90 - 1 OCT 91 | |
| 48 | NAVADMIN 121/91 | CNO Washington DC 111339ZSEP91 | Documentation Required for Enrollment of an Involuntarily Separated Members Dependent in DODDS High Schools | (29) |
| 49 | NAVADMIN 125/91 | CNO Washington DC 191513ZSEP91 | Montgomery GI Bill - Additional Guidance for Involuntary Separations and Procedural/Legislative Changes | DMRSMAN, and SDSPROMAN, (14), and (39) |
| 50 | NAVADMIN 126/91 | CNO Washington DC | Transition Assistance (TA) ID Card | |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | 233313ZSEP91 | Issuance for Involuntary Separatees | |
| 51 | | CCDG TWO 242320ZSEP91 | Transition Assistance Management Programs (TAMP) | (29), (33), (34), (35), (36), (37), (38), (39), (40), (41), (44), (46), (48), (49), and (50) |
| 52 | ALNAV 110/91 | SECNAV Washington DC 031731ZOCT91 | | |
| 53 | | BUPERS Washington DC 071610ZOCT91 | Modifies TAMP Policy to Include Newborns | |
| 54 | ALNAV 120/91 | SECNAV Washington DC 171723ZOCT91 | Modification to Notice of Convening FY-92 Selective Early Retirement Boards (SERB) | MILPERSMAN 1420-010 and (23) |
| 55 | NAVADMIN 157/91 | CNO Washington DC 131932ZNOV91 | Obligated Service Requirements for Advancement and for Transfer to Fleet Reserve/Retired Reserve | (12), (13), and (30) |
| 56 | NAVADMIN 002/92 | CNO Washington DC 101556ZJAN92 | Transfer to Fleet Reserve Prior to Completion of Time-In-Grade/Requirement Accompanying Advancement to E-7, E-8, and E-9 | MILPERSMAN 1830-040 (Transfer to the Fleet Reserve), (1) and (12) |
| 57 | ALNAV 005/92 | SECNAV Washington DC 101938ZJAN92 | Voluntary Separation Incentive (VSI) /Special Separation Benefit (SSB) | Public Law 102-190 (National Defense Authorization Act for FY92) |
| 58 | NAVADMIN 004/92 | CNO Washington DC 131854ZJAN92 | Implementation of Voluntary Separation Incentive (VSI) and /Special Separation Benefit (SSB) Programs | Public Law 102-90 (National Defense Authorization Acto for FY92), DMRSMAN (Section 12), (6), (29), and (42) |
| 59 | Assistant Secretary of Defense Memorandum (FMP) | 17JAN92 | Clarifies ID Card Issuance Policy for Involuntary Separatees Under Transition | |
| 60 | NAVOP 006/92 | CNO Washington DC 212336ZFEB92 | Manpower and Personnel Policy Changes | |
| 61 | LANTADMIN 02/92 | CINCLANTFLT NORFOLK VA 231414ZJAN92 | Voluntary Separation Incentive (VSI) and Special Separation (SSB) | (58) |
| 62 | NAVADMIN 021/92 | CNO Washington DC 252345ZFEB92 | Centralized Reservation of First Term Reenlistments Via /Enlisted Navy Career Options for Reenlistment (ENCORE) | DMRSMAN, MILPERSMAN, and (60) |
| 63 | NAVADMIN 026/92 | CNO Washington DC 290249ZFEB92 | Implementation of Voluntary Separation Incentive (VSI) and Special Separation (SSB) Programs | Public Law 102-190 (National Defense Authorization Acto for FY92), DMRSMAN, (6), (35), (50), and (58) |
| 64 | NAVADMIN 027/92 | CNO Washington DC 022347ZFEB92 | ID Card Issuance for Involuntary Separatees Under Transition Assistance Management Program (TAMP) | (35), (50), (53), and (59) |
| 65 | NAVADMIN 029/92 | CNO Washington | FY 92 E8 and E9 Advancements | (60) |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | DC 052321ZMAR92 | | |
| 66 | NAVADMIN 030/92 | CNO Washington DC 130032ZMAR92 | Voluntary Early Release of Enlisted Personnel | MILPERSMAN and (60) |
| 67 | NAVADMIN 036/92 | CNO Washington DC 240116ZMAR92 | Enlisted Selective Early Retirement Board (ESERB) | (60) |
| 68 | Assistant Secretary of the Navy Memorandum | 26MAR92 | Extended Transition Assistance Benefits to Certain Categories of Retirees | |
| 69 | | ALDODACT 280014ZMAR92 | Preexisting Medical Condition Health Insurance Coverage for Transition Health Benefit Beneficiaries | |
| 70 | | CINCLANTFLT Pearl Harbor HI 312246ZMAR92 | Enlisted Navy Career Options for Reenlistment (ENCORE) | (62) |
| 71 | | CNSL Norfolk VA 081540ZAPR92 | Map Item 7-92 Transportation Entitlements Under VSI/SSB Program | |
| 72 | NAVADMIN 045/92 | CNO Washington DC 092122ZAPR92 | Reduction in Enlisted High Year Tenure (HYT) Service Limits | (3), (8), (30), and (60) |
| 73 | NAVADMIN 046/92 | CNO Washington DC 101737ZAPR92 | Montgomery GI Bill (MGIB) Options Associated With Early Out Procedures | (14) and (60) |
| 74 | NAVADMIN 050/92 | CNO Washington DC 102213ZAPR92 | Implementation of Voluntary Separation Incentive (VSI) and Special Separation (SSB) Programs | Public Law 102-190 (National Defense Authorization Act for FY92), DMRSMAN (Section 12), JFTR Vol 1, Chap 5, Para U5130, (6), (35), (50), (58), and (60) |
| 75 | NAVADMIN 055/92 | CNO Washington DC 161938ZAPR92 | ENCORE Implementation | (62) |
| 76 | ALDODACT 92/07 | SECDEF 301442ZAPR92 | Preexisting Medical Condition Health Insurance Coverage for Transition Health Benefit Beneficiaries | Public Law 101-510 Involuntary Separations, Public Law 102-190 National Defense Authorization Acto for FY92) and (69) |
| 77 | NAVADMIN 062/92 | CNO Washington DC 302247ZAPR92 | ENCORE Status/Implementation Procedures | (62) and (75) |
| 78 | NAVADMIN 064/92 | CNO Washington DC 081847ZMAY92 | ENCORE Sitrep | (62), (75), and (77) |
| 79 | NAVADMIN 066/92 | CNO Washington DC 131910ZMAY92 | Transition Assistance Benefits Eligibility | (29), (36), (38), (40) and (68) |
| 80 | NAVADMIN 079/92 | CNO Washington DC 042015ZJUN92 | Warrant Officer Management Act (WOMA) | Title 10 USC 571-583, (2), (51) and (60) |
| 81 | NAVADMIN 080/92 | CNO Washington DC 052256ZJUN92 | Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Programs | Public Law 102-190 (National Defense Authorization Acto for FY92), DMRSMAN (Section 12), JFTR Vol 1, Chap 5, Para U5130, |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | | | (6), (35), (50), (58), (63), and (74) |
| 82 | Department of the Secretary of Defense Memorandum Change to DOD Directive 1327.5 | 6JUL92 | Leave and Liberty | |
| 83 | NAVADMIN 099/92 | CNO Washington DC 141623ZJUL92 | Selective Reenlistment Bonus (SRB) | MILPERSMAN , ENLTRANSMAN, (6), (62), and (79) |
| 84 | NAVADMIN 105/92 | CNO Washington DC 211428ZJUL92 | Delegation of Administrative Separation Authority for Enlisted Personnel (Reissues NAVOP 013/87 (Delegation of ADSEP Authority for Enlisted Personnel) | |
| 85 | NAVADMIN 109/92 | CNO Washington DC 231744ZJUL92 | Transition Permissive Temporary Duty (PTDY) Authorization for Residence and Job Hunting | JFTR, Enlisted Transfer Manual, MILPERSMAN, (7), and (82) |
| 86 | NAVADMIN 112/92 | CNO Washington DC 241302ZJUL92 | Preexisting Medical Condition Health Insurance Coverage for Transition Health Benefit Beneficiaries | (47) and (76) |
| 87 | NAVADMIN 116/92 | CNO Washington DC 281534ZJUL92 | Enlisted Selective Early Retirement Board (ESERB) | (60) and (67) |
| 88 | NAVADMIN 117/92 | CNO Washington DC 291539ZJUL92 | Verification of Military Experience and Training Document DD Form 2586 | |
| 89 | NAVADMIN 132/92 | CNO Washington DC 211400ZAUG92 | Rating Entry for General Apprenticeships (REGA) and Career Reenlistment Objectives (CREO) | |
| 90 | NAVADMIN 152/92 | CNO Washington DC 292316ZSEP92 | Implementation of FY-93 Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) | Public Law 102-190 (National Defense Authorization Act for FY92), DMRSMAN (Section 12), JFTR Vol 1, Chap 5, Para U5130, (35), (42), (50), (63), and (85) |
| 91 | NAVADMIN 159/92 | CNO Washington DC 022101ZOCT92 | Implementation of Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Programs | Public Law 102-190 (National Defense Authorization Acto for FY92), DMRSMAN, Section 12, (35), (42), (50), (63), and (85) |
| 92 | NAVADMIN 166/92 | CNO Washington DC 141141OCT92 | Tuition Assistance Program | |
| 93 | NAVADMIN 173/92 | CNO Washington DC 291900ZOCT92 | HIV Screening Prior to Separation from Military Service | |
| 94 | NAVADMIN 182/92 | CNO Washington DC 062030ZNOV92 | Selective Reenlistment Bonus (SRB) | |
| 95 | NAVADMIN 184/92 | CNO Washington DC 092320ZNOV92 | Implementation of Enlisted Voluntary Separation Incentive (VSI) and Special | |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | | Separation Benefit (SSB) | |
| 96 | NAVADMIN 186/91 | CNO Washington DC 122233ZNOV92 | Detailing of First-Term Sailors | |
| 97 | NAVADMIN 189/92 | CNO Washington DC 181752ZNOV92 | Implementation of Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Programs | Public Law 102-190 (National Defense Authorization Acto for FY92), DMRSMAN, Section 12, (35), (42), (50), (85), and (91) |
| 98 | NAVADMIN 191/92 | CNO Washington DC 202035ZNOV92 | Servicemens Group Life Insurance (SGLI), Veterans Group Life Insurance (VGLI) and Dependency and Indemnity Compensation (DIC) Program Changes | |
| 99 | NAVADMIN 199/92 | CNO Washington DC 021424ZDEC92 | Montgomery GI Bill (MGIB) Legislative Changes | Public Law 102-568 and (14) |
| 100 | NAVADMIN 202/92 | CNO Washington DC 091421ZDEC92 | Tuition Assistance for Officers | |
| 101 | NAVADMIN 208/92 | CNO Washington DC 231345ZDEC92 | Implementation of New Separation Codes | (5) and (35) |
| 102 | NAVADMIN 211/92 | CNO Washington DC 241755ZDEC92 | FY-93 Phase III Enlisted Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Program | Public Law 102-190 (National Defense Authorization Act for FY92), Public Law 102-484 (National Defense Authorization Act for FY93), DMRSMAN, Section 12, (42), (90), and (97) |
| 103 | NAVADMIN 212/92 | 292221ZDEC92 | FY-93 Phase III Enlisted Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Program (Cancels NAVADMIN 211/92) | Public Law 102-190 (National Defense Authorization Act for FY92), Public Law 102-484 (National Defense Authorization Act for FY93), DMRSMAN, Section 12, (42), (90), (97), and (102) |
| 104 | NAVADMIN 001/93 | CNO Washington DC 061641ZJAN93 | VSI-SSB Participants Now Have the Opportunity to Enroll in the Montgomery GI Bill | Public Law 102-484 (National Defense Authorization Act for FY93), (14), SDSPROMAN, DMRSMAN, and PAYPERSMAN |
| 105 | NAVADMIN 002/93 | CNO Washington DC 071630ZJAN93 | Officer Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Programs | (97) |
| 106 | NAVADMIN 004/93 | CNO Washington DC 111400ZJAN93 | Separation Physical Examination Processing | MANMED Chapter 15, Enlisted Transfer Manual, Officer Transfer Manual, Public Law 102-190 Section 638 (Selective Early |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | | | Retirement (OSERB) Flexibility Authority) and (93) |
| 107 | NAVADMIN 011/93 | CNO Washington DC 222028ZJAN93 | Transition Assistance Management Program (TAMP) | Public Law 102-484 (National Defense Authorization Act for FY93), Public Law 101-510 Involuntary Separations, Section 1142, (29), (33), and (88) |
| 108 | NAVADMIN 015/93 | CNO Washington DC 280106ZJAN93 | FY-93 Enlisted Voluntary Early Out Program | MILPERSMAN and (14) |
| 109 | NAVADMIN 019/93 | CNO Washington DC 292043ZJAN93 | Job Search Videotapes and Materials for Transition Assistance Management Program (TAMP) | |
| 110 | ALNAV 019/93 | SECNAV Washington DC 041637ZFEB93 | Policy on Homosexual Administration Separation | |
| 111 | LANTADMIN 008/93 | CINCLANTFLT 182301ZFEB93 | LANTFLT Retention Update First Quarter FY93 | (94), (95), (96), (98), (99), (100), (101), (103), (104), (106), (107), (108), (109) |
| 112 | NAVADMIN 026/93 | CNO Washington DC 230013ZFEB93 | Homosexual Administrative Separations | MILPERSMAN, SECNAVINST 1910.4A (Enlisted ADSEPS), NMPCINST 1910.1D (ADSEP Procedures, (84) and (110) |
| 113 | NAVADMIN 029/93 | CNO Washington DC 242010ZFEB93 | Selective Reenlistment Bonus (SRB) Program | |
| 114 | | COMNAVBASE Charleston SC 041857ZMAR93 | Transition Assistance Management Program (TAMP) Career Counselors | Public Law 101-510, Section 1102 and (107) |
| 115 | NAVADMIN 035/93 | CNO Washington DC 032021ZMAR93 | High Year Tenure (HYT) Fleet Reserve Request | MILPERSMAN 1910-102 (Separation of Enlisted Personnel by Reason of Changes in Obligated Service) and (72) |
| 116 | NAVADMIN 037/93 | CNO Washington DC 180032ZMAR93 | Reemphasizes Importance of SGLI | |
| 117 | NAVADMIN 046/93 | CNO Washington DC 180032ZMAR93 | Servicemens Group Life Insurance (SGLI) | MILPERSMAN 1741-020 (Processing and Distribution of SGLI 8286) , (98) and (116) |
| 118 | NAVADMIN 053/93 | CNO Washington DC 262035ZMAR93 | Enlisted Selective Early Retirement Board (ESERB) | MILPERSMAN 1830-040 (Transfer to the Fleet Reserve), (25), (30), (60), and (72) |
| 119 | NAVADMIN 061/93 | CNO Washington DC 161845ZAPR93 | FY-94 Enlisted Voluntary Separation Incentive (VSI) | Public Law 102-190 (National Defense Authorization Act for |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| | | | | FY92), Public Law 102-484 (National Defense Authorization Act for FY93), DMRSMAN, Section 12, and (6) |
| 120 | Military Pay Advisory 32/93 | DFAS -Cleveland Center Cleveland OH 131605ZAPR93 | Voluntary Separation Incentive (VSI) Reserve Offset Procedures | DODPM (Interim Change 4-93) |
| 121 | NAVADMIN 063/93 | CNO Washington DC 192350ZAPR93 | Rating Entry for General Apprentices (REGA) and Career Reenlistment Objectives (CREO) | |
| 122 | LANTADMIN 015/93 | CINCLANTFLT Norfolk VA 291801ZAPR93 | LANTFLT Retention Update Second Quarter FY93 | ENLTRANSMAN, (10), (112), (113), (115), (118), (119), and (121) |
| 123 | NAVADMIN 078/93 | CNO Washington DC 302224ZAPR93 | FY-94 Active Duty List Officer Voluntary Separation Incentive (VSI) and Special Separation Benefit (SSB) Programs | Public Law 102-190 (National Defense Authorization Act for FY92), Public Law 102-484 (National Defense Authorization Act for FY93), DMRSMAN, Section 12, (42) and (100) |
| 124 | OPNAVINST 1900.2 | 30 August 1993 | Transition Assistance Management Program | |
| 125 | DODINST 1332.35 | 09 December 1993 | Transition Assistance for Military Personnel | Public Law 101-510 (National Defense Authorization Act for FY91), Public Law 102-190 (National Defense Authorization Act for FY92), (124), MILPERSMAN |
| 126 | DODINST 1332.36 | 14 February 1994 | PreSeparation Counseling For Military Personnel | Public Law 101-510 (National Defense Authorization Act for FY91), Public Law 102-484 (National Defense Authorization Act for FY92), (124), (125), |
| 127 | NAVADMIN 160/94 | CNO Washington DC 061839Z SEP94 | Manpower and Personnel Update | Extended transition benefit eligibility contained in (124) from 01Oct95 to 01Oct99. (125) |
| 128 | NAVADMIN 078/95 | CNO Washington DC 072357ZAPR95 | Permissive Temporary Duty (PTDY) | (85), MILPERSMAN, (124) |

| ITEM | DOCUMENT TYPE | DATE/DTG | SUBJECT | RELATED ITEMS |
|---|---|---|---|---|
| 129 | NAVADMIN 139/95 | CNO Washington DC 240003ZJUN 95 | Transition Benefits Eligibility | (124), (125), (126), (127) |

**14.7 FAX REQUEST FOR VMET DOCUMENT (DD FORM 2586).**

# FAX TRANSMISSION

| | | | |
|---|---|---|---|
| **To:** | COMNAVPERSCOM (NPC-662) | **Date:** | _____ |
| **Fax #:** | 901-874-2689/2688/2630<br>(DSN 882-2689/2688/2630) | **Pages:** | One |
| **From:** | _____ | | |
| **Phone:** | _____ | | |
| **Subject:** | Request for Verification of Military Experience and Training Document<br>(DD Form 2586) | | |

---

I am separating or retiring from the military within 120 and have not received a copy of my Verification of Military Experience and Training document (DD Form 2586). Please initiate an ad hoc request based on the following information.

Social Security Number: _____

Full Name: _____

Grade or Rating: _____

Date of Separation or Retirement: _____

Mail this document to:

(street) _____

(City, State) _____

(Zip + 4) _____

**14.8 SAMPLE INDIVIDUAL TRANSITION PLAN.**

# *WHAT IS AN ITP?*

An ***I***ndividual ***T***ransition ***P***lan (ITP) is a written plan designed to meet your particular goals for professional (and personal) development. ITP's are a method of systematically planning for training and experience in order to develop the specific skills and knowledge you will need to prepare for change or, in the case of a pre-retiree the TIP can be a method for a different type of systematic plan. Rather that haphazardly chancing time and money on what may or may not be a useful experience, the ITP provides you the opportunity to set objectives and plan experiences which will support these objectives.

Your ITP will be used to plan training and related developmental experiences (details, special projects OJT, etc). An ITP is a living document which can be altered or changed anytime they can changes from year to year, and their prime purpose is to help their users - to help them set reasonable goals, assess their particular strengths, and chart where they can best contribute and grow. The ITP also accommodates the uniqueness of each user. It is an opportunity to design the future.

# INDIVIDUAL TRANSITION PLAN (ITP) PACKAGE FOR:

_____

## PRIVACY ACT STATEMENT

**1. LEGAL AUTHORITY:** The authority for soliciting and maintaining this information is found in 5 USC Sec. 301, in addition to 10 USC 6161 and 10 USC 2774 as added by Public Law 92-451.

**2. PRINCIPAL PURPOSE:** The information you provide will help the Command Career Counselor and FSC Transition Specialist to assist you and your family member(s) in planning your transition to the civilian sector.

**3. ROUTINE USES:** The information collected on this form by the Command Career Counselor and FSC Transition Specialist will be used as a chronological consultation sheet to provide aid and insight for future counseling sessions, to monitor the progress achieved, and to prepare periodic statistical reports on the transition case load of the Command Career Counselor and FSC Transition Assistance Management Plan (TAMP) offices. In addition to using the information you give us for the "principal purpose" given above, your information may be used for one or more of the "routine uses" listed in the Federal Register notice for this system, including the blanket routine uses that are applicable to all Navy Privacy Act systems of record.

**4. OTHER DISCLOSURE OF YOUR INFORMATION:** In addition to using the information you give the Command Career Counselor and FSC Transition Specialist "principal purpose" and "routine uses" given above, your information may be disclosed in certain other situations as permitted by exemptions of the Privacy Act. These could include disclosures to a Commanding Officer and other DoD officials in connection with certain security clearances, personnel reliability programs, law enforcement programs, and family abuse situations.

**5. DISCLOSURE IS VOLUNTARY:** You need not disclose any information to us; however, failure to provide this information may result in inadequate facts and hinder or prevent the Command Career Counselor, FSC and TAMP staff from being able to assist you.

* * * * * * * * * * * * * * * * * * * * * * * * * * * * * *

I have read and understand the above IMPORTANT INFORMATION and PRIVACY ACT STATEMENT and the uses of the information that I have voluntarily provided. The contents of the PRIVACY ACT STATEMENT have been explained to me. I further understand that TAMP program volunteer staff may have access to TAMP records for clerical/administrative purposes, and I hereby give permission for this.

| | |
|---|---|
| _____ | _____ |
| **DATE** | **SIGNATURE** |
| _____ | _____ |
| **DATE** | **WITNESS** |

# LONG RANGE CAREER DEVELOPMENT PLAN

| | | | |
|---|---|---|---|
| ***Goal Number:*** | | | |
| ***Brief Statement Describing Your Long Range Goal:*** | | | ***Date for Completion:*** |
| ***Objectives*** | ***Formal Training: (cite best information available)*** | | ***Alternative Training: (cite best information available)*** |
| ***Employee Signature:*** | ***Date:*** | ***Mentor/Coach Signature:*** | ***Date:*** |

# MEDIUM RANGE CAREER DEVELOPMENT PLAN

| | | | |
|---|---|---|---|
| ***Goal Number:*** | | | |
| ***Brief Statement Describing Your Medium Range Goal:*** | | | ***Date for Completion:*** |
| ***Objectives*** | ***Formal Training: (cite best information available)*** | | ***Alternative Training: (cite best information available)*** |
| ***Employee Signature:*** | ***Date:*** | ***Mentor/Coach Signature:*** | ***Date:*** |

# SHORT RANGE CAREER DEVELOPMENT PLAN (within 1 Year)

| | | | |
|---|---|---|---|
| ***Goal Number:*** | | | |
| ***Brief Statement Describing Your Short Range Goal:*** | | | ***Date for Completion:*** |
| ***Objectives (Knowledge, skills, or ability needed to meet your goal)*** | ***Formal Training: (Course title, location, dates)*** | | ***Alternative Training: (OJT, self-study, correspondence courses, etc)*** |
| ***Employee Signature:*** | ***Date:*** | ***Mentor/Coach Signature:*** | ***Date:*** |

# INDIVIDUAL GROWTH / WELLNESS PLANNING FORM

| | | |
|---|---|---|
| ***Goal Number:*** | | |
| ***Objective (What do I need to achieve? How will I know I have achieved by objective? By what date?)*** | | |
| ***Action Steps***<br>***(What will I do to achieve my objectives?)*** | ***Measure of Progress***<br>***(How will I know I'm making progress toward achieving my objective?)*** | ***Review Dates***<br>***(When will I review my progress toward the achievement of my objective?)*** |
| ***Potential Obstacles or Problems***<br>***(What might interfere with my taking action and achieving my objective, and how can I plan to deal with this?)*** | ***Sources of Help***<br>***(Who or what will assist me in taking action and achieving my objective?)*** | |

# TYPES OF TRAINING

Often we think of training only in terms of formal training courses. People learn in many ways, and often people learn better if their training includes a variety of learning experiences. Listed below are the major types of training. Your ITP will probably be a combination of all of them.

## **OJT** (On-the-Job-Training)

●Seek new duties on your job to promote new learning. For example, a special project might not be a part of your regular job but you could ask that it be assigned to you.
●Initiating ideas or functions
●Cross training/job shadowing

## Academic Training

●Colleges/Universities (consider CLEP for credit)
●OPM/BUPERS Training Department
●Correspondence Courses
●Short term classes

## **Self Development** (self learning)

Often a very good method to pick up a technical body of knowledge. Especially useful if you have a mentor - someone already with specific knowledge who can outline a program of reading and assignments and then check your progress.
●Readings
●A/V tapes
●Lectures
●Speaking Engagements/ToastMasters
●Volunteer Experiences
●Physical fitness
●Conferences/Meetings
●Membership in a professional association in your career field. (At your local library consult the Encyclopedia of Associations, with over 20,000 listings).

# Professional Growth / Wellness Planning form

| | | |
|---|---|---|
| ***Goal Number:*** | | |
| ***Objective (What do I need to achieve? How will I know I have achieved by objective? By what date?)*** | | |
| ***Action Steps***<br>***(What will I do to achieve my objectives?)*** | ***Measure of Progress***<br>***(How will I know I'm making progress toward achieving my objective?)*** | ***Review Dates***<br>***(When will I review my progress toward the achievement of my objective?)*** |

| | |
|---|---|
| ***Potential Obstacles or Problems***<br>***(What might interfere with my taking action and achieving my objective, and how can I plan to deal with this?)*** | ***Sources of Help***<br>***(Who or what will assist me in taking action and achieving my objective?)*** |

# *INDIVIDUAL TRANSITION PLAN*

## Outcome for User

- SENSE OF DIRECTION
- FOCUS ON LONG TERM CAREER OBJECTIVE(S)
  - IDENTIFY STEPS TOWARD ACHIEVING OBJECTIVE(S)
- TIME LINE
  - SHORT TIME LINE
  - LONG TIME LINE
- LEARN TO RESEARCH
  - INFORMATIONAL INTERVIEW
  - LIBRARY
  - VOLUNTEER IN CAREER AREA OF INTEREST
  - BOOKSTORES
- SELECTION OF MENTOR/COACH

## *BENEFITS FOR USER*

- OPPORTUNITY FOR PERSONAL AND PROFESSIONAL GROWTH
- BREAK PARADIGMS
- TAKE CONTROL OF YOUR LIFE BY BEING PRO-ACTIVE

# TRANSITION PLAN RESOURCES

| | BENEFITS AND SERVICES | RESPONSIBILITY |
|---|---|---|
| 1. | Preseparation Counseling | CCC |
| 2. | Educational Assistance Benefits | CAMPUS/CCC/CARIT/VA |
| 3. | Affiliation with Selected Reserves | CARIT/RESREC |
| 4. | Member Job Search Programs | FSC/TAP/CARIT/NPS |
| 5. | Job Search for Spouse | FSC/TAP/NPS |
| 6. | Relocation Assitance | FSC/CARIT |
| 7. | Medical/Dental Coverage | CARIT/FSC/MED |
| 8. | Effects of Career Change | FSC/CARIT |
| 9. | Financial Planning | FSC/NMCRS/CARIT |
| 10. | Compensation Entitlement for Medically Separated | MED/VA/NPS/CARIT |
| 11. | Documentation of counseling | CCC |

CARIT - Career Information Team
CCC - Command Career Counselor
FSC - Family Service Center
MED - Medical
NMCRS - Navy and Marine Corps Relief Society
NPS - Non-profit Service Organization (NCOA, TROA, AARP, DVA, etc)
RESREC - Reserve Recruiter
TAP - Transition Assistance Program
VA - U.S. Department of Veterans Affairs

# PRESEPARATION COUNSELING WORKSHEET FOR:

_____

Date: _____ Date of Separation: _____ Counselor: _____

| SUBJECT COMPLETED | RESOURCE AND SCHEDULE INFORMATION |
|---|---|
| Personal Goals & Appraisals | |
| Career Choices | |
| Employment Objectives | |
| TAP Job Search | |
| Computer Aides (TBB/AJB/DORS/PACS) | |
| Resume Writing/SF 171 Preparation Procedures | |
| Interviewing Skills | |
| Relocation Assistance | |
| Education & Training Information | |
| Financial Counseling | |
| Medical Benefits, Health & Life Insurance, CHAMPUS Supplements | |
| Veteran Benefits | |
| Separation/Retirement Benefits | |
| Stress Counseling | |
| Other Needs | |
| Other Concerns | |

**COUNSELOR'S NOTES**

_____

_____

ADDITIONAL REMARKS

_____

_____

**14.9 VETERANS' BENEFITS TIMETABLE**

# VETERANS' BENEFITS TIMETABLE

| *Time* | *Benefits* | *Where To Apply* |
|---|---|---|
| 90 Days | Reemployment | Former Employer |
| Limited Time | Unemployment Compensation: The amount of benefit and payment period varies among states. Apply soon after separation. | State Employment Service |
| 120 Days Or Up To One Year If Totally Disabled | Insurance: Servicemen's Group Life Insurance may be converted to Veterans' Group Life Insurance. | Office of SGLI, 213 Washington St., Newark NJ 07102 |
| Two Years (from date of notice of VA disability rating) | Disability Insurance: Life Insurance (up to $10,000) is available for veterans with service-connected disabilities. Veterans who are totally disabled may apply for a waiver of premiums on these policies. | Any VA Office |
| 10 Years From Release | Education: Educational assistance depends upon period of service. | Any VA Office |
| 12 Years (generally from date of discharge) | Vocational Rehabilitation: For disabled vets, VA will pay tuition and fees, and the cost of books, tools and other program expenses as well as provide a monthly living allowance. Upon completion of the vocational rehabilitation program, VA will assist in finding employment. | Any VA Office |
| No Time Limit | GI Home Loans: VA will guarantee a loan for the purchase of a home, farm with a residence, manufactured home or condominium. | Any VA Office |

## CHAPTER 15 - VETERANS BENEFITS

### 15.1 FEDERAL CIVIL SERVICE EMPLOYMENT

1. The Dual Compensation Act (PL 88-448) governs the employment of retired military personnel in federal civilian jobs and the employment of government workers in more than one federal job.

2. Under the Veterans' Education and Employment Assistance Act of 1976 (PL 94-502), individuals entering the military service after 14 October 1976 will not receive veterans preference unless they become disabled during, or as a result of, military service. With few exceptions, such as serving in a combat area, veterans preference in Government employment has been eliminated for peacetime military service.

3. Certain veterans with military service prior to 15 October 1976 who pass examinations for civil service employment receive five to a maximum of ten additional credit points on top of the overall exam score. Applicants are selected for employment from those with the higher numerical ratings on the civil service examinations. The extra points are a decided advantage to the veteran.

4. Information concerning federal jobs and examinations, including veterans' preference, may be obtained by writing to the Office of Personnel Management. A listing of the Federal Job Information Centers may be obtained by writing the Office of Personnel Management, Federal Job Information Center, 1900 E Street NW, Washington, DC 20415.

5. Reference : NAVSO P-1778 (REV 3-88) STK NUMBER 0515-LP-133-3051

### 15.2 JOB FINDING ASSISTANCE

1. The Public Employment Service is a network of over 1900 local offices across the country. The principle task is to assist job seekers in finding employment, with no charge for the service. The Employment Service gives veterans priority in referrals to suitable jobs and training; disabled veterans have preference over all other applicants. Veterans who are not ready for work can receive job training, counseling and work aptitude testing. They can also obtain information on careers, skill training and the types of jobs available in the local area. Each office has a Veterans' Employment representative who is ready to assist veterans with special employment problems or questions.

2. The addresses of local offices can be obtained from any post office, from the state employment agency at the state capital, or from the telephone book listed under U.S. Government.

### 15.3 REEMPLOYMENT RIGHTS

1. The veteran may be entitled to reemployment in a position held prior to his service in the Armed Forces or to a job with like seniority, status and pay.

2. Additional information on reemployment rights is contained in NMPCINST 1571.1, Addendum One to the Enlisted Transfer Manual, and VA IS-1 Fact Sheet.

### 15.4 UNEMPLOYMENT COMPENSATION

1. Under the Ex-Servicemen's Unemployment Compensation Act of 1958, the veteran may be entitled to unemployment compensation if he is unable to find a job after he returns to civilian life. Although this Act was enacted by

Federal statute, each state has implemented the law insofar as it pertains to the state's residents. Therefore, the amounts of benefits vary from state to state.

2. Veterans must comply with requirements of state unemployment compensation laws to be eligible for unemployment pay benefits. Application should be where the veteran is residing at the time.

**15.5 SMALL BUSINESS LOANS**

1. The Small Business Administration (SBA) has a number of programs designed to help foster and encourage small business enterprise, including businesses owned or operated by veterans. SBA also assists veterans to become the owners of their own small businesses.

2. SBA makes most loans under its Loan Guaranty Program. The money is advanced by the bank or other lending institution, with SBA guaranteeing up to 90% of the total amount.

3. Information on any of SBA's programs is available from any of its national network of about 100 field offices.

**15.6 GI LOANS**

1. Home Loans

a. Purpose

(1) To buy a home.

(2) To buy a residential unit in condominium projects.

(3) To build a home.

(4) To repair, alter or improve a home.

(5) To refinance an existing home loan.

(6) To buy a manufactured home with or without a lot.

(7) To buy and improve a manufactured home lot on which to place a unit owned and resided in by the veteran.

(8) To improve a home through installation of a solar heating and/or cooling system or other weatherization improvements.

(9) To purchase and improve simultaneously a home with energy conserving measures.

(10) To refinance a manufactured home loan in order to acquire a lot.

(11) To simultaneously purchase and improve a home.

b. Eligibility

(1) World War II. Be on active duty on or after 16 September 1940 and prior to 26 July 1957; be discharged or separated under other than dishonorable conditions; and have at least 90 days total active service, unless discharged earlier for service connected disability.

(2) Peacetime Period. Veterans whose only active duty

service occurred after 25 July 1947 and prior to 27 June 1950 and who served for a period of 181 days or more and were discharged or released under conditions other than dishonorable conditions or released for a service connected disability.

(3) Korean Conflict. Be discharged or separated under other than dishonorable conditions; be on active duty at any time on or after 27 June 1950 and prior to 1 February 1955; and have at least 90 days total service, unless discharged earlier for a service connected disability.

(4) Post-Korean and Vietnam Era. Veterans who served on active duty for 181 continuous days or more, any part of which occurred after 31 January 1955, and who were discharged or released under conditions other than dishonorable, or were discharged or released from active duty after such date for a service connected disability. Service personnel who have served at least 181 continuous days in active duty status, even though not discharged, while their service continues without a break, are also entitled.

(5) Persian Gulf War Period. Veterans or reservists called to active duty, who served on active duty for 90 continuous days or more, any part of which occurred after 2 August 1990. They must have been discharged or released under conditions other than dishonorable, or were discharged or released from active duty after such date for a service-connected disability. Service personnel who have served at least 90 continuous days in active duty status, even though not discharged, while their service continues without a break, are also entitled.

c. Entitlement

(1) Guaranty. Loan entitlement is no longer subject to an expiration date. The maximum entitlement available to an eligible veteran is $45,000. Veterans may use up to $20,000 for the purchase of manufactured home and/or lot.

(2) Spouses Entitlement. Unmarried surviving spouses of service personnel who served in World War II, Korean Conflict, Post-Korean period, Vietnam era and Persian Gulf War period and who died as a result of service-connected disabilities, and spouses of service personnel on active duty who are officially listed as missing in action or prisoners of war and have been in such status for more than 90 days, are eligible for G.I. loans to acquire a home.

(3) Loan Maximums. There are no established loan maximums. However, no loan may exceed the reasonable value of the property as determined by the VA.

2. Farm and Rural Housing Loans

a. Eligible veterans have preference for loans provided by the Farmers Home Administration (FHA) to buy, improve, or operate farms.

b. Information may be obtained from FHA, U.S. Department of Agriculture, Washington, DC 20250, or apply at your local FHA offices. Their addresses can be found in the telephone directory under County Government.

## 15.7 DEPARTMENT OF VETERANS AFFAIRS

1. Montgomery GI Bill (MGIB)

a. Eligibility. Members must enter active duty other than active duty for training for the first time on or after 1 July 1985. If service is terminated in the Armed Forces for reasons of being a minor, for an erroneous

enlistment/induction, or for having a defective enlistment agreement, that time period is not considered as part of an individual's initial obligated period of active duty. Members who subsequently reenter the Armed Forces after being discharged for one of the reasons above, can enroll in the MGIB.

(1) Members must serve on active duty for a period of:

(a) At least two years if on a less than three year obligation.

(b) At least three years if on a three year or longer obligation.

(c) At least two years followed by four years of satisfactory participation in any of the Armed Forces Selected Reserve components (2x4). Affiliation with a Reserve Unit must occur within one year of release from active duty.

(2) The active duty requirement is not applicable to a member who is discharged or released from active duty for:

(a) Service connected disability, pre-existing medical condition, hardship or reduction in authorized strength as determined by the Secretary of the Navy; or

(b) Convenience of the Government after 20 months of active duty for a two year obligation; or,

(c) Convenience of the Government after 30 months of active duty for a three year or greater obligation.

(3) The four-year SELRES requirement is not applicable to a member if, during the SELRES service, the member is discharged or released for hardship, service-connected disability, pre-existing medical condition, or reduction in authorized strength as determined by the Secretary of the Navy.

(4) U. S. Naval Academy (USNA) graduates and Naval Reserve Officer Training Corps (NROTC) scholarship graduates who were commissioned after 31 December 1976 are not eligible to enroll in the MGIB except if released from active duty under the Voluntary Separation Initiative (VSI), Special Separation Benefit (SSB) or certain involuntary separations (IVS). This restriction does not apply to U. S. Merchant Marine Academy graduates.

(5) Members cannot use the same period of service to qualify for the MGIB and MGIB-SR.

(6) Members must earn a high school diploma, an equivalency certificate or complete 12 semester hours of college prior to completing their initial obligated period of active duty.

(a) Members who enter the Navy without a high school diploma or equivalency certificate must have their educational level updated when they complete high school.

(b) A high school equivalency certificate may be earned through any state-accredited program including: test-based equivalency diploma (i.e. GED, CHSPE), high school certificate of attendance, adult education diploma, correspondence school diploma, occupational program certificate, or home study diploma.

(c) Members who were on active duty 2 August 1990 and whose first period of active obligated service was completed on or before 28

October 1994, had until 28 October 1994 to complete their high school diploma or equivalency. Members whose first period of active obligated service extended beyond 28 October 1994 will still have until the expiration of their initial term of active duty to earn their high school equivalency requirements.

(7) The Character of Service for members separated from the Navy must be HONORABLE. (NOTE: This does not include a general discharge under honorable conditions.)

(8) For the purpose of determining active duty requirements for the MGIB, the term "active duty" does not include:

(a) Service as a midshipman at the Naval Academy or any other military service academy.

(b) Service as an officer or enlisted member of the Naval Reserve, where active duty consists solely of initial active duty for training (IADT), active duty for training (ADT) or annual training (AT).

(c) Service as a Sea and Air Mariner (SAM), NROTC participants who did not graduate, or any other naval reservists who were recalled to active duty for less than 24 months.

b. Enrollment. Members are enrolled automatically in the MGIB unless they disenroll. DD Form 2366 is used for this purpose. If a member wants to disenroll, they must make a decision within the first two weeks of active duty. A one time opportunity to either remain enrolled or disenroll, will be provided within the first two weeks. BDCP personnel will be offered the MGIB upon arrival at Officer Candidate School.

(1) If a member elects to disenroll, there will be no opportunity to enroll at a later date.

(2) Members enrolled agree to a $100/month pay reduction during their first 12 full months of active duty. This reduction cannot be suspended or stopped as long as the member is entitled to pay.

(3) Any reduction in pay for the MGIB is not refundable.

(4) A second opportunity existed for members who initially disenrolled before 30 June 1988. Members were allowed to enroll during an MGIB "open period" from 1 December 1988 through 30 June 1989 if they:

(a) First took the oath of enlistment or office, or first came on active duty sometime during the period 1 July 1985 through 30 June 1988; and,

(b) Remained on continuous active duty through 1 December 1988 without a break in service.

c. Benefits. The present basic educational assistance benefit for full-time attendance is:

(1) $436.00/month for less than a three year obligation; or,

(2) $536.00/month for more than a three year or longer obligation.

(3) $536.00/month for 36 months for members who initially obligated for two years active service but served continuously for more than two years.

(4) Benefit payments are prorated equally for 3/4, 1/2 and 1/4 time in class.

(5) Benefit rate increases will be indexed to the Consumer Price Index for each 12 month period covering 1 July - 30 June. All enrolled members will receive these increases automatically.

(6) Correspondence courses are reimbursed at a rate of 55 percent of course cost. Entitlement is charged at the rate of one month for each $536.00 paid.

(7) Flight training, including solo flight hours, is authorized for individuals who have a private pilots license and who meet the medical requirements for a commercial pilot's license. Flight school courses must be approved by the Federal Aviation Administration and the State Approving Agency.

(a) Benefits for flight training will be the lesser of the amount of assistance authorized or 60 percent of the established charges for tuition and fees.

(b) Entitlement is charged at a rate of one month for each $536.00 that is paid.

(8) Service members discharged for a service-connected disability, pre-existing medical condition, hardship or reduction in authorized strength as determined by the Secretary of the Navy who do not meet the minimum time-in-service requirements are entitled to one month of basic educational assistance for each full month of active duty served, up to a maximum of 36 months. For example, a member discharged for a hardship with 14 months and 20 days active service is entitled to 14 months of benefits.

(9) Service members who were enrolled in the MGIB and separated for hardship, disability or reduction-in-force with no more than 12 months of active service, and who later return to active duty, will be allowed to combine the two periods as if they were continuous.

(10) The full 36 months of basic educational assistance is available to service members discharged for the Convenience of the Government only if the member completes a minimum of 20 months of active duty on an initial obligated period of less than three years, or a minimum of 30 months of active duty on an initial obligated period of three years or more.

(11) Personnel may qualify for benefits under both the active duty and the Selected Reserve MGIB programs for different periods of service. However, the total amount of benefits paid from a combination of all DVA programs cannot exceed 48 months.

d. Use of Benefits. The MGIB may be utilized for programs in colleges, universities, technical or business schools, residence courses in non-college degree schools, correspondence courses, work-study, apprenticeship, on-the-job training, cooperative programs, refresher, remedial and deficiency courses, and tutorial assistance. Payment for apprenticeship, on-the-job training and cooperative programs is authorized only for veterans separated from active duty. Programs not authorized under the MGIB include elementary or secondary courses. Flight training, including solo flight hours, is authorized temporarily from 30 September 1990 through 30 September 1994. Further legislation is necessary to extend this benefit. The DVA has sole responsibility for determination of approved programs of education.

(1) In-service members may utilize their MGIB entitlement

while on active duty if they:

(a) Have paid the required $1200.

(b) Completed two years of active duty.

(c) Completed the requirements of a high school diploma or equivalency certificate, or 12 semester hours of college.

(2) Participants in the Medical Enlisted Commissioning Program (MECP), College Degree Program (CDP) and Enlisted Commissioning Program (ECP) may draw MGIB benefits if they enrolled and have met the active duty service requirement prior to starting the program, and they retain eligibility upon completion of the program if benefits still remain.

(3) Nuclear Power Officer Candidate (NUPOC), Baccalaureate Degree Completion Program (BDCP), Civil Engineer Corps (CEC) and Health Services Collegiate Program (HSCP) participants are considered to be on active duty and are eligible to enroll in the MGIB. However, they must satisfy the requirements for in-service use before benefits can be received. MGIB eligibility is retained after program completion.

(4) Reserve Officers Training Corps (ROTC) students with prior active enlisted service are discharged for the Convenience of the Government prior to commencing an ROTC program. Those who were enrolled in the MGIB must ensure all eligibility requirements were met prior to discharge, including active duty service to draw benefits for that period of service. Once commissioned, ROTC scholarship students forfeit further eligibility to MGIB benefits. Students who received educational assistance but did not graduate from ROTC retain eligibility. Commissioned non-scholarship ROTC graduates also retain MGIB eligibility.

(5) Broadened Opportunity for Officer Selection and Training (BOOST) students usually do not meet the minimum time-in-service requirements for MGIB eligibility due to early discharge upon successful completion of BOOST school. However, attendance at BOOST is considered active duty for MGIB purposes. Students, who do not complete BOOST, retain their eligibility for MGIB benefits. Students who graduate from BOOST, are discharged for Convenience of the Government from enlisted service prior to acceptance into the USNA or an NROTC program. The minimum time-in-service requirement must be met for MGIB eligibility. All BOOST students are required to complete the Statement of Understanding, (Figure 1-1) at recruit training.

(6) MGIB benefits may not be utilized during attendance at the USNA. Midshipmen commissioned as officers after graduating from the USNA or any other service academy, (except for the Merchant Marine Academy), forfeit any previous eligibility for MGIB benefits. Midshipmen, who do not receive their commission from the USNA, retain eligibility for MGIB benefits. Students who did not meet time-in-service requirements and who did not complete the USNA or Naval Academy Prep School, but return immediately to active duty, can combine their second period of active duty to meet MGIB active duty service requirements.

(7) Naval Postgraduate School (NAVPGSCOL) students may not use MGIB benefits.

(8) School of Medicine, Uniformed Services University of the Health Sciences (USUHS) students may be eligible for MGIB benefits. Enlisted personnel who previously elected the MGIB, must complete all eligibility requirements, including time-in-service, prior to commissioning to retain eligibility for the MGIB.

(9) Armed Forces Health Professions Scholarship Program (AFHPSP) students may become eligible for MGIB benefits. Enlisted students, who have elected the MGIB, must complete all requirements, including time-in-service, prior to commissioning to retain eligibility for the MGIB. Non-prior service students must be counseled on the advantages of MGIB enrollment and on disenrollment procedures. Navy Active Duty Delay Specialists (NADDS) remain on inactive duty and perform Active Duty for Training (AT/ADT) and are not eligible for the MGIB. If recalled to active duty for 24 months or more, NADDS then become eligible for MGIB benefits and must be counseled on both the advantages of the MGIB, as well as given the opportunity to disenroll from the program.

(10) Naval Aviation Cadet Program (NAVCAD) students are discharged for the Convenience of the Government when commissioned and must complete all requirements, including time-in-service, to retain their MGIB benefits.

e. Delimiting Date. The delimiting date for using MGIB benefits is 10 years from the date of the member's last discharge or release from active duty. The 10-year delimiting date may be extended if the member was prevented from going to school during this period (e.g., disability, held by a foreign government, or missing-in-action).

(1) If the veteran's character of service at the time of discharge or release from active duty is NOT honorable, but is later upgraded to honorable, the 10 year period begins on the date the discharge was upgraded.

(2) If eligibility is based on two years active duty plus four years SELRES, the veteran's eligibility will end the LATER of:

(a) 10 years from release from active duty; or,

(b) 10 years from completion of the four year SELRES obligation.

f. Survivor Benefit. A benefit will be paid to survivors if a member dies while on active duty or within one year of separation from active duty for service-connected causes. The survivor benefit will equal the amount that was reduced from the member's pay (less any educational benefit that was already used) to the person(s) first listed below who are alive on the date of the member's death:

(1) The beneficiary or beneficiaries designated on the Servicemember's Group Life Insurance (SGLI) election form.

(2) The surviving spouse.

(3) The surviving child or children in equal shares.

(4) The surviving parent or parents in equal shares.

(5) If none of the above survive the member, no benefit will be paid.

2. Montgomery GI Bill – Selected Reserve (MGIB-SR)

a. Eligibility. Both officer and enlisted members of the Selected Reserve (SELRES), who obligate for six years and participate satisfactorily in required reserve drills are eligible for MGIB-SR benefits. To qualify for the MGIB-SR, members:

(1) Must enlist, reenlist, or extend drill obligation in the SELRES for a period of not less than six years on or after 1 July 1985, and must participate satisfactorily in the SELRES during that time.

(2) Must have earned a high school diploma or its equivalency prior to completing Initial Active Duty for Training (IADT). Recruits who are scheduled to complete IADT in two phases, known as "split (or alternate) trainers", must complete the requirements of a high school diploma or equivalency, prior to completion of the second phase of training.

(3) Must complete required IADT under prescribed regulations. Personnel who have received a high school diploma or equivalency are considered to have completed IADT after the first portion of their training plan. For example, members who completed basic training and are awaiting orders for further assignment ("A" school, Split Trainers) are considered to have completed IADT for purposes of qualifying for the MGIB-SR. There is no required IADT for members accessed under the Advanced Pay Grade (APG) program.

(a) Those who do not complete high school or do not achieve a high school equivalency certificate are not eligible for the MGIB-SR. If high school requirements are obtained later, personnel must execute a new six-year obligation either by reenlisting or, extending current enlistment or drilling obligations for the number of months needed to make a six-year obligation.

(b) Those receiving financial assistance for a NROTC scholarship are <u>not</u> eligible for MGIB-SR benefits.

(c) Members may qualify for benefits under both the active duty MGIB and the MGIB-SR. However, serving in the SELRES as a "2x4" or any program which establishes eligibility for the active duty MGIB, makes members ineligible for MGIB-SR benefits until such time as they meet MGIB requirements. By combining two or more programs, a maximum total of 48 months can be received. For example, a two year active duty veteran enlists in the Naval Reserve to drill for a period of four years to establish active duty MGIB benefits (36 months). After the four year obligation is completed, the member can reenlist for six years to establish MGIB-SR benefits for 12 months. This gives the member a maximum of 48 months.

b. Benefits. The present basic educational assistance benefits are:

(1) $255.00/month - full time training.

(2) $191.00/month - three quarter time training.

(3) $127.00/month - half time training.

(4) $63.75/month - less than half time training.

(5) The maximum educational assistance is 36 months. Increases in benefits are tied to the consumer price index.

(6) Educational assistance is available for attendance at an institution of higher education (i.e., college, university) as approved by the Department of Veterans Affairs (based on a six-year obligation prior to 1 October 1990).

(7) Members who agree to a six-year SELRES obligation on or after 1 October 1990, may pursue the same program of education authorized under the active duty MGIB, (detailed in chapter 1), including technical,

vocational, masters and doctoral programs. Members who obtain MGIB-SR eligibility before 1 October 1990 may not use benefits for graduate level education unless they agree to a subsequent six-year SELRES obligation.

c. Use of Benefits. Eligible members may draw MGIB-SR benefits only while meeting drilling requirements satisfactorily, except if separated for a disability, (not the result of willful misconduct) or, if involuntarily separated for Reserve Transition Benefits (RTB).

(1) If benefits are combined with another veterans educational benefit program, the total number of months of benefits cannot exceed 48 months.

(2) Members eligible for the active duty MGIB based upon two years active duty followed by four years in the SELRES, cannot establish concurrent eligibility for the MGIB-SR.

(3) Members receiving either enlistment bonus installments or educational assistance as a guarantee from a previous enlistment (i.e., Sea and Air Mariner Program Enlistment Bonus (EB) or Educational Assistance (EA) program, Reserve Allied Medical Program (RAMP)) may receive concurrent benefits under the MGIB-SR.

3. Navy College Fund (NCF)

a. Eligibility. The Navy College Fund (NCF) was implemented on 1 January 1990 to recruit qualified high school graduates into "critical or hard-to-fill" ratings. Qualifying recruits receive Montgomery GI Bill benefits as well as an additional "kicker". The Bureau of Naval Personnel (Pers-23) determines which Navy ratings qualify for the NCF. To qualify for NCF benefits members must:

(1) Qualify for training in a selected Navy rating as a non-prior service enlistee.

(2) Enter active duty on or after 21 November 1989.

(3) Graduate from High School - no equivalency accepted.

(4) Achieve an AFQT score of 50 or higher.

(5) Be 17-22 years of age

(6) Agree to serve on active duty for a minimum of three or four years.

(7) Receive no enlistment bonus.

(8) Receive an HONORABLE discharge upon separation for the qualifying enlistment. (Note: This does not include a general discharge under honorable conditions.)

(9) Enroll in the basic MGIB program and agree to a $1200 pay reduction. Members who lose entitlement or disenroll from the MGIB also lose all kicker benefits.

b. Benefits. Members are entitled to the basic MGIB rate plus the "kicker". Kicker amounts are subject to Navy policy. Members discharged from active duty for a service-connected disability, pre-existing medical condition, reduction in authorized strength as determined by the Secretary of the Navy, or for hardship, before completing 36 months of active duty, are entitled to one month of basic MGIB educational benefits and one month of

"kicker" benefits for each month served on active duty. Only full months of benefits will be paid. For example, if a member is discharged with 15 months and 20 days of active service, they is entitled to 15 months of basic MGIB and 15 months of kicker benefits.

(1) Members will receive 36 months of basic MGIB educational assistance with a reduced kicker if they are discharged for the Convenience of the Government (COG) with 30 months or more of active duty.

(2) Members separated with a COG discharge with less than 30 months, will lose both the basic MGIB and "kicker" benefits. However, if the member affiliates for four years with the SELRES within one year of separation AND has 24 or more months of active service, then the full basic MGIB benefit with a reduced kicker is restored.

(3) Since NCF is part of the MGIB, the benefits will be paid for the same programs approved by the DVA for MGIB participants.

4. Navy Sea College Program (NSCP)

a. Eligibility. The Navy Sea College Program (NSCP) was established in 1986 to provide an additional educational benefit (or "kicker") to attract high quality recruits into "hard to fill or critical ratings". NSCP eligibles were required to enlist for a total of eight years: two years active duty, four years in the Naval Reserve, and two years in the Individual Ready Reserve (IRR). This program was terminated to new accessions on 1 October 1988. To qualify for NSCP benefits members must:

(1) Be a non-prior service enlistee.

(2) Have entered active duty between 1 October 1986 through 30 September 1988.

(3) Have a high school diploma. (no equivalency certificate).

(4) Have achieved an AFQT score of 65 or higher.

(5) Have enlisted between the ages of 17 to 22.

(6) Be a United States citizen.

(7) Serve on active duty for a period of two years followed by four years in the SELRES as an Individual Mobilization Augmentee (IMA). The SELRES obligation was solely based on affiliation and performance of at least 12 days annual training (AT) each fiscal year.

(8) Received an HONORABLE separation from active duty. (This does not include a general discharge under honorable conditions.)

(9) Enrolled in and contributed to the MGIB. The MGIB enrollment form, DD Form 2366, must have been completed with the statement "NSCP Participant" marked in Block 4. Members, who lost entitlement or disenrolled from the MGIB, also lost all kicker benefits.

b. Service Obligation. Members must contact their local Naval Reserve Activity and identify themselves as NSCP participants within 30 days of separation from active duty. The member is identified as a "zero-drill" Individual Mobilization Augmentee (IMA), placed in a training and retirement category (TRC) "B" when affiliated and required to perform annual training (AT) of at least 12 days each fiscal year.

(1) The member may affiliate with the SELRES in a drilling unit (TRC "A"). SELRES participation is contingent upon the member meeting Naval Reserve affiliation criteria (for example, body fat standards and HIV). Members who do not qualify for affiliation in the Naval Reserve may request a waiver from the Bureau of Naval Personnel (Pers-9).

(2) Members must notify their affiliated Naval Reserve Activity immediately of any change in medical status, home address, or telephone number.

(3) A member who elects to drill (TRC "A") and subsequently is unsatisfactory in drill participation, is not terminated from the SELRES but is transferred back as an IMA (TRC "B" to complete any remaining SELRES obligation. If the four-year SELRES obligation is satisfactorily completed and the member later becomes unsatisfactory in drill participation, process the member for separation. Kicker benefits are not lost.

(4) Upon completion of the four year SELRES obligation, the member is either affiliated as TRC "A" (if accession criteria were met) or is transferred to the Individual Ready Reserve (IRR) to complete the remainder of the required military service obligation.

(5) The kicker is contingent upon the satisfactory completion of the SELRES obligation. Failure to meet and maintain SELRES affiliation criteria and to perform required AT would result in:

(a) Immediate termination of additional educational assistance benefits;

(b) A reduction of the basic educational benefit to the MGIB rate based solely on two years active duty; and,

(c) Possible involuntary recall to active duty under Title 10, United States Code, Section 270(b) for up to 45 days.

(d) If the member reenlists as USN or extends on active duty without affiliating in the SELRES, provided the member continuously serves three years or more, the member will lose the kicker but will be paid at the three-year or greater MGIB rate.

c. Benefits. Basic educational assistance (MGIB):

(1) $536.00/month for 36 months based on two years active duty followed by four years in the SELRES. Starting 1 October 1993, this applies if a member continues on active duty for 12 months or longer with no further service in the SELRES.

(2) $436.00/month for 36 months based on an initial obligation of two years with no further extension of active duty, no further service in the SELRES, or the SELRES affiliation is terminated.

(3) Members separated for the Convenience of the Government (COG) after 20 months of active service who affiliate with the SELRES will be entitled to the three year or greater basic MGIB rate of $536.00 with a reduced kicker for 36 months.

(4) Members separated for COG with less than 20 months active duty are not entitled to any basic MGIB benefit or kicker.

(5) Members separated for a service-connected disability, hardship, reduction-in-force, or a pre-existing medical condition who do not meet the minimum time-in-service requirements are entitled to one month of

basic educational assistance for each month of active duty served, up to a maximum of 36 months, at the 3 year MGIB rate with the kicker benefit.

(6) If the four year SELRES affiliation occurs within one year of separation, then the basic MGIB rate will be paid at the 3 year rate plus the kicker for 36 months.

(7) The kickers are:

(a) An $8,000, $10,000 or $14,000 increase to the basic MGIB rate.

(b) Reduced for service members discharged early from active duty for COG with at least 20 months of active duty.

(8) NSCP participants are not eligible for MGIB-SR (Chapter 106) benefits because the current period of service establishes eligibility for active duty MGIB benefits. Upon completion of the current four-year SELRES obligation, the member may be eligible to reenlist for a six-year obligation in a TRC "A" drilling unit in exchange for 12 months of MGIB-SR benefits.

5. Voluntary Separation Incentives/Special Separation Benefits (VSI/SSB) MGIB Enrollment

a. Eligibility. Effective 5 December 1991, VSI/SSB participants were granted the opportunity to enroll in the MGIB program. To qualify for MGIB benefits members must:

(1) Member must have been on active duty 5 December 1991.

(2) Be separated with a VSI/SSB qualifying Separation Program Designator (SPD) code on or after 5 December 1991 with an HONORABLE Discharge.

(3) Categories of VSI/SSB members eligible for MGIB enrollment are those who:

(a) Initially disenrolled from the MGIB upon entering active duty. (on or after 1 July 1985).

(b) Entered active duty during the Veterans Educational Assistance Program (VEAP) era. (1 January 1977 through 30 June 1985).

(c) Initially entered active duty prior to 1 January 1977 and did not meet the eligibility conversion from the Vietnam Era GI Bill (VEGIB) to the MGIB.

(d) Do not have any benefit entitlements (e.g., are Naval Academy or Naval Reserve Officer Training Corps graduates).

(4) Categories of members who are not eligible for enrollment upon separation:

(a) Vietnam Era participants that were converted to the MGIB on 1 January 1990 (chapter 7) or were initially enrolled or were enrolled during the "Open Period" on or after 1 July 1985. These members are already enrolled in the MGIB. They are not to be processed under the guidelines of VSI/SSB for MGIB purposes.

(b) Members separated under the Temporary Early Retirement Authority (TERA) are not eligible for enrollment in the MGIB.

b. Items for Consideration. Members who elect the MGIB do not become entitled to MGIB benefits until separated from active duty. The DVA will not pay "in-service" MGIB benefits. For members enrolled in VEAP, their benefit eligibility stops the day of separation or when VEAP contributions are processed for refund.

(1) Enrollment in the MGIB is irrevocable and monies are not refundable.

(2) Members are entitled to one month of full-time benefits at the three-year or greater rate for each month served on active duty, up to 36 months.

(3) Members, who received benefits under VEAP or VEGIB and are converting to the MGIB, cannot exceed 48 months of total entitlement. This is the maximum amount of benefit months combined under two or more federally legislated education programs. For example, a member who used 12 months of VEAP or VEGIB will have 36 months of MGIB (12 + 36 does not exceed 48). A member who used 23 months of VEAP or VEGIB will have 25 months of MGIB (23 + 25 = 48).

(4) Before applying for benefits, members must complete the requirement for a secondary school diploma (i.e. High School), its equivalency, or 12 credit hours leading to a college degree.

(5) Application for MGIB benefits is made directly to the educational/training institution that the member is attending using VA Form 22-1990. Submit a copy of the member's DD Form 214, NAVCOMPT 2277, and DD Form 2366 with application. The DVA may pay retroactive benefits for up to 12 months.

6. Involuntary Separations (IVS) MGIB Enrollment

a. Eligibility. Certain members involuntarily separated between 3 February 1991 through 30 September 1999 may enroll in the MGIB. To qualify for MGIB benefits members must:

(1) Have been on active duty 30 September 1990.

(2) Be involuntarily separated with a qualifying Separation Program Designator (SPD) code on or after 3 February 1991 and have an HONORABLE Discharge. (Members separated with a general discharge under honorable conditions are NOT eligible).

(3) IVS members eligible for MGIB enrollment are those in the following categories (1-4):

(a) Initially disenrolled from the MGIB when first entered active duty on or after 1 July 1985; or, initially enrolled in the MGIB but did not meet the minimum time-in-service requirements.

(b) Entered active duty during the VEAP era (1 January 1977 through 30 June 1985).

(c) Initially entered active duty prior to 1 January 1977 and do not meet the eligibility conversion from the Vietnam Era GI Bill (VEGIB) to the MGIB.

(d) Did not have any other educational benefits (e.g. Naval Academy or Naval Reserve Officer Training Corps graduates).

(4) Members who are not eligible for MGIB enrollment upon separation:

(a) Vietnam Era participants who converted to the MGIB on 1 January 1990 (chapter 7), and initially enrolled or were enrolled during the "Open Period" on or after 1 July 1985 (chapter 1). These require NO ACTION as they are already enrolled in the MGIB. They are NOT to be processed under the guidelines of IVS for MGIB purposes.

(b) Members who separate under the Temporary Early Retirement Authority (TERA).

b. Items for Consideration

(1) Members electing the MGIB do not become entitled to MGIB benefits until separated from active duty. The DVA will not pay "in-service" benefits. For members enrolled in VEAP, their benefit eligibility stops the day of separation or when VEAP monies are processed for refund.

(2) Enrollment in the MGIB is irrevocable and monies paid for the MGIB are not refundable.

(3) Members are entitled to one month of full-time benefits at the three-year or greater rate for each month served on active duty, up to 36 months.

(4) Members who received benefits under VEAP or VEGIB and are converting to the MGIB, cannot exceed 48 months of total entitlement. This is the maximum amount of benefit months combined under two or more federally legislated education programs. For example, a member who used 10 months of VEAP or VEGIB will have 36 months of MGIB (10 + 36 does not exceed 48). A member who used 20 months of VEAP or VEGIB will have 28 months of MGIB (20 + 28 = 48).

(5) Before applying for and receiving MGIB benefits, members must complete the requirement for a secondary school diploma (i.e. High School), its equivalency or 12 credit hours leading to a college degree.

(6) Application for MGIB benefits is made directly to the educational/ training institution the member is attending using VA Form 22-1990. A copy of DD Form 214, NAVCOMPT 2277, and DD Form 2366 should also be submitted. The DVA may pay retroactive benefits for up to 12 months.

(7) Separated members, who believe they might have been eligible but were not enrolled in the MGIB, must contact the MGIB Customer Service Team at the Bureau of Naval Personnel (Pers-602) for determination of their status.

7. Vietnam Era Conversion to MGIB

a. Eligibility. Opportunity to draw educational benefits from the Vietnam Era GI Bill ended on 31 December 1989. On 1 January 1990 eligible Vietnam Era members were converted automatically from the Vietnam Era GI Bill to the Montgomery GI Bill.

(1) As of 31 December 1989, a member had to have remaining entitlement for educational assistance under the Vietnam Era GI Bill (VEGIB).

(2) Members must have been on active duty anytime between 19 October 1984 and 1 July 1985 and serve continuously from that date to:

(a) 30 June 1988; or

(b) 30 June 1987 followed by four years in the Selected Reserve. (To qualify for benefits under this section, a member must have affiliated with the SELRES within one year of separation from active duty.)

(3) Members must have completed the requirements for a high school diploma or equivalency certification prior to 31 December 1989. Equivalency certification could be any state-accredited program: test-based equivalency diploma (i.e., GED, CHSPE), high school certificate of attendance, adult education diploma, correspondence school diploma, occupational program certificate, or home study diploma. Twelve semester hours of college could be substituted for the high school completion requirement.

(4) The character of service for members separated from the Navy must be HONORABLE. (This does not include a general discharge under honorable conditions.)

(5) NROTC scholarship and USNA graduates commissioned on or after 1 January 1977 are not eligible for the conversion.

b. Benefits. On 1 January 1990, eligible members were converted automatically from the VEGIB to the MGIB. The maximum amount of educational assistance that can be converted to the MGIB is 36 months. If an individual previously used VEGIB benefits, the combined amount of benefits under both the VEGIB and the MGIB cannot exceed 48 months. For example, if a member used 20 VEGIB months, the amount converted to the MGIB is 28 months.

(1) The amount and number of months of educational assistance under the MGIB is related directly to remaining entitlement from the VEGIB.

(a) The enhanced rate is equal to the basic MGIB rate plus one-half of the VEGIB allowance applicable to individuals on 31 December 1989. If an individual gained or lost a dependent while receiving the enhanced rate, benefits will be adjusted to reflect the correct amount payable based on the new number of dependents.

(b) The number of months for which the enhanced rate is payable may not be more than the months of entitlement the individual had remaining under the Vietnam Era GI Bill (VEGIB) as of 31 December 1989, or 36 months, whichever is less.

(2) If an individual has incurred more than two changes of program and has been denied further benefits under the VEGIB, the member can request another program change under the MGIB.

(3) If an individual has used all 45 months of entitlement under the VEGIB prior to 1 January 1990, there is no remaining entitlement to convert to the MGIB.

(4) A service member discharged for a service-connected disability, pre-existing medical condition, hardship or reduction in authorized strength as determined by the Secretary of the Navy, is entitled to one month of educational assistance for each full month of active duty served after 30 June 1985. For example, a member discharged with 20 months and 15 days after 30 June 1985 is entitled to convert 20 months of benefits.

(5) A service member discharged for the Convenience of the Government (COG) is eligible for benefits only if the member completes not less than 30 months of active duty after 30 June 1985. An individual who meets this requirement is entitled to a maximum of 36 months of benefits.

(6) Active duty eligibles may use their benefits "in-service".

(7) Application for benefits, whether in-service or post-service, is made through the DVA liaison or the financial aid office at the educational institution to be attended by completing VA Form 22-1990. These forms will be processed by the appropriate DVA Regional Office as listed in Chapter 1.

c. Delimiting Date. For the most part, the delimiting date is 10 years from the date of the member's last discharge or release from active duty. The 10 year delimiting date may be extended if the member was prevented from enrolling in any educational program during this period (e.g., disability, held by a foreign government, missing-in-action).

(1) If the veteran's character of service at the time of discharge or release from active duty is not honorable, but is later upgraded to honorable, the 10 year period begins on the date the discharge was upgraded.

8. Veterans' Educational Assistance Program (VEAP)

a. Eligibility. The Veterans' Educational Assistance Program (VEAP) was a voluntary contributory education benefit plan available to those service members who entered active duty on or after 1 January 1977 through 30 June 1985. No new enrollments are possible in VEAP. However, members who had participated at any time in the program during the above period can withdraw or reenter the program as long as they are on active duty. To establish eligibility for VEAP, members must have:

(1) Entered active duty between 1 January 1977 and 30 June 1985.

(2) Not entered the Navy under a delayed entry program:

(a) If members entered prior to 1 January 1977, and as a result of such enlistment or assignment, commenced active duty after 1 January 1977 but before 2 January 1978. These members are considered Vietnam Era enrollees.

(b) If members entered prior to 1 July 1985, and as a result of such enlistment or assignment, initially entered active duty on or after 1 July 1985. These members qualify for MGIB enrollment.

(3) Initially enrolled in the VEAP on or before 30 June 1985 or during the open period from 28 October 1986 through 31 March 1987. VEAP was terminated on 1 April 1987. No new enrollments have been allowed since that time.

(4) Must have initially enrolled by:

(a) Contributing to VEAP either by allotment or lump sum payment.

(b) Participating in VEAP even if contributions were suspended.

(c) Disenrolling from VEAP, resulting in a refund of contributions.

(d) Initiating a VEAP allotment authorization through

the local disbursing office by 30 June 1985 or during the VEAP "open period", 28 October 1986 through 31 March 1987.

(5) In reference to eligibility for VEAP, the terms "active duty" and "active naval service" do not include any period in which an individual:

(a) Was assigned full time to a civilian institution for a course of study that was comparable to courses offered to civilians (i.e. Nuclear Power Officer Candidate, Civil Engineer Corps and Baccalaureate Degree Completion Program).

(b) Served as a midshipman at the U. S. Naval Academy (USNA). Note: Time served at "BOOST" and the "Naval Academy Prep School" does count.

(c) Was assigned to the Naval Reserve Officers Training Corps (NROTC).

(d) Served as a member of the Naval Reserve, including SELRES personnel, whose active duty consisted solely of initial active duty for training (IADT) or active duty for training (AT/ADT).

c. Enrollment. Service members may contribute by allotment between $25 and $100 per month (in multiples of $5) up to a maximum contribution of $2700 or $100 for each month of active duty, whichever is less. Once an individual has contributed the maximum $2700, no further contributions have to be made unless the member's contributions were refunded. Once the member begins to draw benefits, additional monies cannot be contributed to the fund to replace what has been drawn.

(1) Once a member has enrolled in VEAP, their account remains open, even if the member has zero dollars ($0) in it. The account is never closed, except by the 10-year delimiting date, provided all eligibility requirements are met. The only exception is converting to the MGIB via an involuntary separation or a special voluntary separation. Details are provided in chapters five and six of this manual. Service members may contribute by lump sum payment in addition to or instead of monthly allotment deductions. Lump sum contributions can be made at any time while on active duty, providing time-in-service requirements are met. If there is broken service involved, members may re-contribute only if they are on active duty.

(2) A single lump sum payment must meet the dual requirements of 12 continuous months participation and a minimum of $300 ($25 per month for 12 months). A lesser lump sum payment can be accepted if it meets the two minimum requirements when taken with other contributions the service member may have made or may agree to make. For example:

(a) If a member previously contributed by allotment for seven months, then a lump sum payment must be designated for an additional five months, immediately preceding or succeeding the allotments already made in order to satisfy the 12-month requirement.

(b) If a member has completed the first obligated period of active duty and plans to draw in-service VEAP benefits, a lump sum payment of $300 (designated at $100/month) could be made and an allotment started to show intent to meet the 12-month requirement. If this were done, benefits could be drawn in-service even while allotment deductions were being taken monthly.

(3) A lump sum payment will be treated as a series of monthly allotments made at one time in increments between $25 and $100 evenly

divisible by $5. Amounts must be specified by the participant. If no designation is made, the lump sum contribution will be distributed at $100 per month.

(4) Before a final decision can be reached on how much to contribute by lump sum payment and what time must be covered, the following questions must be asked:

(a) How much of a monthly benefit would the member need ($225, $300)?

(b) How many months of schooling does the member want to be able to cover?

(5) The following examples illustrate the types of considerations that should be made in arriving at lump sum designations:

(a) If an individual has an educational goal which requires enrollment in a 13-month technical program (and that is the only schooling anticipated), then it would be better for the individual to contribute $1,300 designated as $100/month over a period of 13 months which would yield the maximum benefit payment of $300/month based on full-time training.

(b) If an individual who has completed a minimum 36 months of active duty, has only $1,800 available for a lump sum payment, and anticipates completing a 4-year college program, monthly payments could be drawn over 36 months (to match the four year college program). The individual would then designate the lump sum payment at $50/month for 36 months (total $1,800), and would receive monthly benefit payments of $150 based on full-time training.

(c) An individual who has completed a four-year tour of active duty contemplates enlisting in the Selected Reserve. The member has $1,800 for a lump sum payment and wants to take a four-year program. If the individual designates the lump sum payment at $100/month and then affiliates in the Naval Reserve, he or she would collect $300/month for 18 months under VEAP and $190/month for 30 months under the Selected Reserve Montgomery GI Bill (MGIB-SR). Combining two or more programs cannot exceed the total of 48 months of benefits. MGIB-SR details are listed in chapter 2.

(6) The total contribution (monthly allotment deductions plus lump sum payment) is capped at $100 for each month of active service or $2700, whichever is less.

(7) Processing a lump sum payment takes approximately 60-90 days. Service members being discharged who wish to enroll in school immediately, should be counseled accordingly.

d. Redesignation. The member can re-designate contributions made previously, either by allotment or lump sum payment, at any time while on active duty. The purpose of redesignating a VEAP account is to increase monthly contribution amounts (resulting in larger monthly benefits) for a shorter period.

(1) For example, if a participant contributed $75/month for 36 months (total of $2,700), that amount could be changed to reflect 27 months at $100/month. Since monthly benefit payments are made by the DVA based on the amount of monthly contributions, the change from $75/month to $100/month would result in an increase in benefits from $225/month to $300/month (based on full-time schooling) over a shorter period of time, 27 months vice 36 months.

e. Benefits. The Navy matches the service member's contribution on a $2 for $1 basis. The service member's maximum contribution is $2700 and the Navy's maximum contribution is $5400, equaling $8100. The maximum monthly benefit payment an individual may draw is $300 for full-time schooling based on a $100/month contribution.

(1) VEAP benefits may be used for DVA approved public or private elementary, business or high school, vocational, community college, college or university, professional, scientific or technical institutions, any institution which furnishes education at the secondary school level or above, correspondence courses, work-study, apprenticeship training, on-the-job training, cooperative programs, refresher courses, remedial courses, and tutoring. Payment for apprenticeship, on-the-job training and cooperative programs is approved only for veterans released from active duty. Further information on authorized education programs can be obtained from the DVA.

(2) The dollar amount of monthly VEAP benefits for full time enrollment in an approved program is determined by dividing the individual's total fund (contributions plus Navy matching funds) by the total number of months the individual contributed to the fund (or 36, whichever number is less). One month of entitlement is credited for each month the participant contributed up to the maximum of 36 months. Although contributions can be made for as many as 108 months, entitlement cannot exceed 36 months of full-time training. Monthly benefits for less than full-time enrollment is computed as a prorated amount based on full-time monthly rates.

(3) The DVA pays benefits based on full-time, three-quarter-time, half-time or one-quarter-time enrollment, and use of benefits is charged accordingly. For example, if the individual is enrolled in school on a half-time basis and is entitled to $300/month for full-time study, $225 for 3/4 time study, $150.00 for 1/2 time study and $75.00 for 1/4 time study.

(4) The DVA will pay benefits to veterans continuously during a break in training, not to exceed a full calendar month. Active duty members using in-service benefits are not entitled to benefit payments during breaks between terms.

(5) Correspondence courses are reimbursed 100 percent. Payment is made quarterly based on the number of lessons completed and the per lesson cost.

(6) Apprenticeship and on-the-job training benefit rates are:

(a) 75 percent of the monthly benefit for the first six months.

(b) 55 percent of the monthly benefit for the second six months.

(c) 35 percent of the monthly benefit for each of the months following the first 12 months.

(7) Cooperative training is paid at a rate of 80 percent of the monthly benefit, payable to the individual. Charge to entitlement is also 80 percent.

(8) Tutorial assistance is available for up to $100 per month for 12 months and entitlement is charged only for payments in excess of $600.

(9) High school completion benefits can be drawn as follows:

(a) The member requests a monthly benefit. In this case the member's entitlement is charged; or,

(b) The member requests payment for actual tuition and fees only. In this case the member's entitlement is not charged; i.e. the VEAP fund is not reduced.

f. Suspension of Participation. A member who suspends participation is one who stops contributing to the fund temporarily or permanently. A service member may suspend participation for any reason after 12 consecutive months of contributing by stopping the VEAP allotment. A service member may suspend participation without having completed 12 consecutive months of contributions by reason of personal hardship or financial stress (if supported by the Commanding Officer) or by discharge or release from active duty. Suspension from the program because of hardship will not break the 12 consecutive months of contributory participation.

g. Resumption of contributions. A service member who suspends participation may resume contributions at a later time while on active duty, even if broken service is involved. If the member does not resume contributions at a later time, the member retains eligibility to receive matching Navy funds only for contributions made prior to suspending participation.

h. Disenrollment. A service member who disenrolls from VEAP is one who terminates participation and requests a refund of unused personal contributions. Such action results in a refund of member's contributions (excluding Navy's matching fund share). The decision to take a refund does not disqualify a member from future participation in VEAP. A service member may disenroll for any reason after contributing for 12 consecutive months. VEAP participants will be automatically disenrolled from the VEAP (and any unused portion of their monies refunded) if discharged or released from active service under dishonorable conditions.

i. Re-enrollment. Following disenrollment, an active duty member may enroll again; however, a new 12-month contributory period begins at the time of re-enrollment. The member may make a monthly allotment or a lump sum payment to replace amounts previously refunded. The maximum total contribution remains $2700.

j. Refund Procedures. Only the balance of an individual's personal contributions will be refunded. No interest is included.

(1) Whenever a refund is made (disenrollment), any unused contributions by the Navy will be returned to the Navy.

(2) Upon the death of a participant, survivors can receive the participant's unused contributions. This will be paid to the living person or persons first listed below:

(a) The beneficiary or beneficiaries designated by the member in their Servicemen's Group Life Insurance policy.

(b) The surviving spouse.

(c) The surviving child or children in equal shares.

(d) The surviving parent or parents in equal shares.

(e) If none of the above apply, the unused VEAP monies

will be paid to the member's estate. To claim a refund, a letter must be submitted to the DVA accompanied by DD Form 1300 (for death on active duty) or a certified death certificate, for death (if not on active duty).

(3) If on active duty participants must initiate requests for disenrollment and a refund through their commanding officer and disbursing officer to the DVA by completing VA Form 4-5281.

k. Delimiting Date. Veterans have 10 years after the last date of separation from active duty to use VEAP benefits. At the end of the 10-year date, the veteran is automatically disenrolled and any unused portion of his or her contributions will be refunded. If a member later returns to active duty for 90 days or longer within the initial 10 years, a new 10 year delimiting date will be established when he or she separates from active duty. For example, a VEAP participant, who is released from active duty on 31 May 1981, but returns to active duty on 17 November 1988, will have the original delimiting date cancelled. The new 10-year delimiting date will be computed when the member leaves active duty the second time.

l. Use of Benefits.

(1) In-service. Active duty members may utilize their VEAP benefits in-service if they have completed their first obligated period of active duty or six years of active duty, whichever is less. (Note: A "Convenience of the Government discharge" for immediate reenlistment does not satisfy this requirement); and,

(a) Have made a minimum of three months of contributions while continuing allotments; or,

(b) Are pursuing an elementary or high school program during the last six months of the first enlistment.

(c) Participants in various Navy education Programs:

1. Enlisted Education Advancement Program (EEAP), Enlisted Commissioning Program (ECP) and Nuclear Power Officer Candidates (NUPOC) participants may draw VEAP benefits provided they satisfy the eligibility criteria for in-service use of VEAP benefits.

2. Naval Reserve Officers Training Corps (NROTC) students with prior active service may be eligible for VEAP benefits if they satisfied VEAP eligibility criteria and were enrolled in VEAP before joining NROTC.

3. United States Naval Academy (USNA) midshipmen who previously participated in the VEAP may use VEAP benefits only after they graduate from the academy.

4. Naval Postgraduate School (NAVPGSCOL) students are not eligible for VEAP benefits while they attend NAVPGSCOL.

(2) Veterans. Navy veterans may utilize VEAP benefits for DVA approved education programs. An "eligible veteran" is anyone who:

(a) Entered active military service from 1 January 1977 through 30 June 1985 (unless Delayed Entry Program in 1976) and was discharged or released under conditions other than dishonorable; and,

(b) Was not eligible for benefits; and,

(c) While on active duty, enrolled in and contributed

to VEAP, and did not subsequently disenroll and receive a refund; and,

(d) Served on active duty for a continuous period of more than:

1. 180 days (if entry into service was on or before 7 September 1980 for enlisted members or 16 October 1981 for officers); or,

2. 24 months or the full period for which the member was called or ordered to active duty (whichever is less) if entry into service was after 7 September 1980 (enlisted) or 16 October 1981 (officer); or,

(e) Was discharged or released from active duty by reason of hardship, disability, or early-out stated in Title 10, United States Code, Section 1171; or

(f) Was discharged or released from active duty with a service-connected disability which the DVA has determined to be compensable.

8. Other Educational Benefits Programs. This chapter reviews various educational benefits that are solely paid for, managed and operated by the Department of Veterans Affairs (DVA): Vocational Rehabilitation, Survivors' and Dependents' Education, Work-Study Allowance, and the Reserve Stipend Award. These programs are included in this manual for information purposes only. For applications regarding these programs, contact the DVA at 1-800-827-1000.

a. Vocational Rehabilitation. If a veteran has a service-connected disability which commenced on or after 16 September 1940, was discharged with other than a Dishonorable Discharge, and is entitled to 10% or more disability compensation from the DVA, they may be eligible for benefits under Title 38, U.S.C., Chapter 31.

(1) The DVA assesses whether or not a veteran can overcome an impairment and thus become independent and obtain employment which is consistent with their abilities, physical capabilities and aptitudes.

(2) Disabled veterans usually receive assistance for up to 48 months of full-time training at a college-level institution, trade, business or technical school, on-the-job training, farm or apprenticeship training, or combination of training programs. In some cases, the DVA may approve more than 48 months of assistance.

b. Survivors' and Dependents Education.

(1) Paid to spouse and children of:

(a) Veterans who died or were totally disabled as a result of active service.

(b) Veterans who died from any cause while rated permanently and totally disabled from service-connected causes.

(c) Service members who are missing in action or captured in line of duty.

(d) Service members who were detained or interred by a foreign government.

(2) Benefits are provided as monthly payments for full-time

enrollment up to 45 months at DVA approved institutions.

(3) Work-Study Allowance. Students must be enrolled full-time or 3/4 time in a DVA approved school under the MGIB, MGIB-SR, VEAP, Vocational Rehabilitation or Survivors' and Dependents' Education programs.

(a) The DVA will pay the same rate as the Federal hourly minimum wage or the applicable State minimum wage, whichever is greater. Income is not taxed by the federal government.

(b) Total number of work-study hours cannot exceed 25 times the number of weeks in a student's enrollment period. For example, school term is 16 weeks. The student may work 25 hours per week for 16 weeks. Students may work during or between courses.

(c) Work-study must be VA-related (e.g. DVA Regional Offices, DVA Medical Centers, DVA Offices of the National Cemetery System).

(d) MGIB-SR participants may be assigned to Department of Defense facilities, Reserve Centers, and other armed forces activities to provide services relating to the administration of the Chapter 106 program.

c. Reserve Member Stipend Award.

(1) Eligibility

(a) Must be a U. S. citizen, a member of the Selected Reserve and eligible for the MGIB-SR, and score above the 50th percentile on the Armed Forces Qualification test.

(b) Must be accepted for enrollment or enrolled full-time in a professionally accredited nursing, occupational therapy, or a physical therapy program - not a diploma degree nursing or a post-baccalaureate degree program in occupational or physical therapy.

(c) Must obligate to work for two years in a VA Medical Center.

(2) Selection criteria is based on academic performance, career goals and the recommendation of the Reserve Unit Commanding Officer.

(3) Benefits

(a) Monthly stipend of $400 while enrolled full-time.

(b) Stipend free from federal taxation.

(c) May receive MGIB-SR, MGIB or VEAP benefits concurrently with the stipend.

(4) Deadline Date. Applications are available in March each year by contacting:

Department of Veterans Affairs
Reserve Member Stipend Program (143B)
810 Vermont Avenue N.W.
Washington, DC 20420
(202) 535-7528

## CHAPTER 16 - ADVANCEMENTS

### 16.1 MANUALS AND DIRECTIVES PERTINENT TO THE ADVANCEMENT OF ENLISTED PERSONNEL

1. Manual of Advancement (BUPERSINST 1430.16) covers eligibility requirements, multiple computation, examination procedures and special circumstances.

2. The Manual of Navy Enlisted Manpower and Personnel Classifications and Occupational Standards (NAVPERS 18068) consists of two sections:

a. Section I. This section of the manual contains occupational standards which express the Navy's requirements for enlisted skills as determined by manpower management. They form the basis for what personnel are trained in, and advanced and distributed upon. These requirements are categorized as follows:

(1) Navy Standards express the minimum skills required of enlisted personnel which are not specifically rating oriented. They are universal to all rates and ratings except as noted.

(2) Occupational Standards define enlisted tasks required of, and within, specified occupational entities (rates and ratings). They are minimum standards which represent the lowest level of skill required to function effectively at a given level of responsibility to fulfill Navy needs.

b. Section II. This section of the manual contains Navy Enlisted Classifications (NECs) which identify skills requiring more specific identification than is provided by rates and ratings and which are not rating-wide requirements. The contents of this manual are of importance to all enlisted personnel and to every command in which enlisted personnel serve because they prescribe enlisted skill requirements.

3. Bibliography for Advancement Study (NAVEDTRA 10052)

a. Lists recommended courses and reading materials for advancement.

b. Bibliography sheets

(1) Occupational Standards
(2) Naval Standards

4. List of Training Manuals and Correspondence Courses (NAVEDTRA 10061).

a. Contains a brief overview of each training course available to Naval personnel.

b. Used in conjunction with NAVEDTRA 10052.

5. BUPERS Notices

a. BUPERS Notice 1418 and NAVADMINS publish changes in eligibility requirements and examination dates.

b. BUPERS Notice 1440 publishes changes in enlisted rating structure.

### 16.2 REQUIREMENTS FOR ADVANCEMENT

1. Commanding Officer's Recommendation

a. Required for every advancement.

b. Once given, it is effective until:

(1) Advanced
(2) Withdrawn by the CO. Withdrawal of advancement recommendations is accomplished via paragraph 819.2 of BUPERSINST 1430.16D.

Note 1: The recommendation of the Commanding Officer is the most important requirement to be met in the enlisted advancement system and must be documented on the evaluation. Members should be recommended for advancement in rate only when they are fully qualified in all respects to hold the higher rate to which advancement is to be affected. Advancement should not be made for the purpose of reward for faithful or extended service or because the minimum service requirements have been fulfilled. The decision of the CO to recommend an individual for advancement is valid when transferred to another command.

2. Performance Mark Average (PMA)

a. Minimum PMA for E-4 through E-6 advancement eligibility is 2.60.

3. Path of Advancement. Designated personnel must be in the proper path of advancement, that is, the path from Recruit to Master Chief Petty Officer as stipulated in NAVPERS 18068, or have approval from BUPERS to take an examination in another rating (path). Non-designated personnel may participate in an examination outside their normal path of advancement provided the rating is classified as an "OPEN RATING" on the current CREO/REGA NAVADMIN. Ratings classified as “A” School or NPC approval required requires receipt of approval prior to examination participation. The normal path from apprenticeship (general rate) to a rating is:

Apprenticeships

| General Rate | Occupational Fields |
|---|---|
| Airman | 5-6-7-16-17-23-24 |
| Constructionman | 12 |
| Dentalman | 13 |
| Fireman | 3-4 |
| Hospitalman | 13 |
| Seaman | 1-2-4-8-9-10-11-14-15-16-17 18-20-21-22 |

Occupational Fields

| Field | Title | Rating |
|---|---|---|
| 1 | General Seamanship | BM,SM |
| 2 | Ship Operations | OS,QM |
| 3 | Marine Engineering | BT,EM,EN,GS,IC,MM |
| 4 | Ship Maintenance | HT,ML,MR,IM,OM,PM, EM |
| 5 | Aviation Maintenance/Weapons | PR,AE,AV,AT,AD,AZ, AO,AM |
| 6 | Aviation Ground Support | AB,AS |
| 7 | Air Traffic Control | AC |
| 8 | Weapons Control | ET,FT,FC |
| 9 | Ordnance Systems | GM,MN,MT,TM,WT |
| 10 | Sensor Operations | EW,OT,ST |
| 11 | Data Systems | DP,DS |
| 12 | Construction | BU,CE,CM,EA,EO,SW,UT |
| 13 | Health Care | DT,HM |
| 14 | Administration | LN,NC,PN,PC,YN |

| | | |
|---|---|---|
| 15 | Logistics | AK,DK,MS,SH,SK |
| 16 | Media | DM,JO,LI,PH |
| 17 | Musician | MU |
| 18 | Master-at-Arms | MA |
| 19 | Cryptology | CT |
| 20 | Communications | RM |
| 21 | Intelligence | IS |
| 22 | Meteorology | AG |
| 23 | Aviation Sensor Operations | AW |

4. Non-Resident Training Courses (NRTCs): Per NAVADMIN 025/00, completion of NRTCs is not required for exam participation by “rated” Sailors.

5. Service School (if required). Service record entry (Page 4).

6. Time in Rate

a. Minimum time in rate requirements:

| PAYGRADE | SIPG (TIME-IN-RATE) |
|---|---|
| E-1 to E-2 | 9 months in paygrade E-1 |
| E-2 to E-3 | 9 months in paygrade E-2 |
| E-3 to E-4 | 6 months in paygrade E-3 |
| E-4 to E-5 | 12 months in paygrade E-4 |
| E-5 to E-6 | 36 months in paygrade E-5 |
| E-6 to E-7 | 36 months in paygrade E-6 |
| E-7 to E-8 | 36 months in paygrade E-7 |
| E-8 to E-9 | 36 months in paygrade E-8 |

b. Time in Rate (TIR) Eligibility Date. This is the date from which service in paygrade is computed to determine eligibility for advancement to the next higher paygrade, and to provide service in paygrade credit for multiple point computation.

(1) Members who are advanced in rate under the provisions of any regular or special advancement program or members entering into initial active duty on or after 1 January 1982, will be assigned a TIR date in accordance with the following schedule.

| ADVANCED OR ENTRY PAYGRADE | DURING THE PERIOD | ASSIGN TIR DATE |
|---|---|---|
| E1 | Any period | Date of entry in Navy, or date reduced in rate. |
| E2 | Any period | 1st day of month in which advanced or entry into active duty. |
| E3 | 1st thru 16th of month | Same as E2. |
| | 17th thru end of month | 1st day of month following month in which advanced or entry into active duty (refer to paragraph 807.b of BUPERSINST 1430.16 for effective date of advancement). |
| E4-E6 | 1 January thru 30 June | 1 January, commencement of advancement cycle. |
| | 1 July thru 31 December | 1 July, commencement of advancement cycle. |
| E7 | 1 September thru 31 August following year | 1 September, commencement of advancement cycle. |
| E8-E9 | 1 July thru 30 June following year | 1 July, commencement of advancement cycle. |

Note: Time in Rate and effective date is established as date of reduction in rate for all reductions in rates to all paygrades.

(2) For determining TIR dates for members advanced prior to 1 January 1982 and for NAVETS and OSVETS, see Chap 3 of BUPERSINST 1430.16.

c. Terminal Eligibility Date (TED). Date to which Service in Paygrade (SIPG) and Total Active Federal Military Service (TAFMS) is computed.

| EXAM OR NOMINATION MONTH | ADVANCEMENT TO | TED |
|---|---|---|
| January | E7 | 1 January of next year |
| (Example: member participates in JAN 99 CPO examination, TED is 01 JAN 00) | | |
| March | E4 thru E6 | 1 July of same year |
| September | E4 thru E6 | 1 January of next year |
| November | E8 and E9 | 1 October of next year |
| (Example: member is validated in NOV 98 for MAR 99 selection board, TED is 01 OCT 99) | | |

d. Completion of Leadership Training Continuum (LTC) for paygrades E-5/6/7 respectively is required.

e. Limiting Date. Last date on which an individual may be advanced for passing the examination. Reference BUPERSNOTE 1418.

(1) 31 December for the March exam (for E4 thru E6).
(2) 30 June for the September exam (for E4 thru E6).
(3) For E7 thru E9, check BUPERSNOTE 1418.

f. Successful completion of performance test required by rating.

g. Accelerated advancement of class “A” school graduates (MILPERSMAN 1430-010).

(1) Upon graduation, advanced to E3 for ranking as the number one “A” school student of the class.

(2) Advanced to E4 upon:

(a) Recommendation by the Commanding Officer.
(b) Completing Petty Officer Indoctrination Course.
(c) Period of observation by the Commanding Officer for no less than four months and be advanced prior to ten months from graduation.
(d) 12-month extension (for personnel enlisted in a five-year program, and an additional 12 months extension must be executed to accept accelerated advancement due to the top ten percent of the “A" school class).

(3) Commanding Officer certifies eligibility by an evaluation of his/her on-the-job performance.

7. Physical Requirements

a. NAVPERS 18068 contains all special physical requirements in addition to those required for initial enlistment for strikers considering a particular rate/rating.

b. Personnel who exceed the weight/body fat requirements of OPNAVINST 6110.1 may participate for advancement if otherwise qualified. Commanding Officers may withhold frocking of selectees who exceed the weight/body fat requirements and who have failed to show progress (including important aspects of motivation, interest and effort) in meeting them. Selectees who exceed weight/body fat requirements may not be advanced without

prior approval of NPC-601E.

8. Navy-Wide Examination. Advancement to E-4 through E-7 requires successful completion of the Navy-wide examination. Quota limitations for each rating often preclude all those who passed the exam from being advanced.

9. E7/8/9 Selection Boards. The selection board is convened by the Chief of Naval Personnel (CNP) and is held at Navy Personnel Command (NPC), Millington, TN. Enlisted Community Managers (ECMs) all make input to the boards. Each year a precept is prepared which outlines the selection process and gives guidance and general information to the board (i.e. general selection criteria, equal opportunity, etc). The board is given the freedom within the guidelines of the precept to establish its own internal working thereby ensuring the dynamic nature of the selection process. The board establishes internal ground rules and minimum selection criteria which is used in screening the records of candidates. The rules/criteria are applied equally to each candidate within a rating. Application of the rules may vary from rating to rating based upon the needs of the Navy (for example, sea duty or lack of it, supervisory opportunities, schooling available, rotation patterns, etc).

10. Multiple Computation. Multiple varies with paygrade. BUPERSINST 1430.16 provides guidance in this area.

## CHAPTER 17 - COMMISSIONING PROGRAMS

The Navy Programs Application Due Date Matrix is provided at 17-A-1 to assist with the timing of your command's various application package preparations.

### 17.1 NAVAL RESERVE OFFICER PROGRAMS

1. Background. There are eight programs which lead to a commission in the U.S. Naval Reserve for enlisted members who possess a baccalaureate or higher degree:

a. Unrestricted Line Appointment Program (Designators 1105, 1165, 1175, 1185 and 1195).

b. Nuclear Propulsion Officer Candidate Program (Designators 1165 and 1175).

c. Aviation Officer Candidate School Program (Designators 1305 and 1375).

d. Navy JAG Corps Direct Appointment Program (Designator 2505).

e. Chaplain Corps Direct Appointment Program (Designator 4105).

f. Civil Engineer Corps Direct Appointment Program (Designator 4105).

g. Nuclear Power Instructor and Naval Reactor Engineer Direct Appointment Program (Designator 1105 and 1105I).

h. Restricted Line appointment program (Designators 1615, 1815, 1635, 1525 and 3105).

### 17.2 NAVAL ACADEMY PROGRAM

1. Background. The Naval Academy offers an outstanding opportunity for qualified members to embark on careers as officers in the United States Navy or Marine Corps. Midshipmen receive approximately one-half of an Ensign's base pay per month, plus tuition, room and board. Upon graduation, they receive a bachelor of science degree, in one of 18 majors, and a commission in the Regular Navy or Marine Corps. Personnel selected to attend the Academy are designated
as Midshipman, USNR.

2. Eligibility Requirements

a. Be a U.S. citizen.

b. Be of good moral character.

c. Be at least 17 years of age and have not passed the 22nd birthday as of 1 July of the entering year.

d. Be unmarried, not pregnant and have no legal obligation to support a child, children or other individual.

e. To be eligible for a Secretary of the Navy nomination, member must be in the Naval service for one full year (Pay Entry Base Date prior to 1 July of the entering year). This is a statutory requirement and cannot be

waived. This requirement should not deter members from applying to other available nomination sources if not eligible for this type of nomination.

f. If offered an appointment, have at least 24 months of active obligated service as of 1 July of the entering year. Extensions of enlistments and/or active duty agreements may be excluded for periods of less than 1 year.

g. Meet the physical requirements in accordance with the Manual of the Medical Department (MANMED).

h. Be recommended by the commanding officer.

## 17.3 BROADENED OPPORTUNITY FOR OFFICER SELECTION AND TRAINING (BOOST) PROGRAM

1. Background. The Navy is engaged in a vigorous effort to ensure upward mobility opportunities are available to persons who have demonstrated qualities necessary for careers as Navy officers, but whose past academic performance does not qualify them for immediate selection into an officer accession program. As part of this effort, the Navy developed the BOOST program, a tailored curriculum to prepare selected individuals to be more competitive for entrance into NROTC and the Naval Academy. The BOOST Program provides counseling, physical fitness, and general military training from a military staff while civilian educators teach the academic curriculum. In general, eligibility is based on motivation, performance and desire to complete follow-on officer training programs.

2. Eligibility Requirements

a. Be a citizen of the United States.

b. Be an enlisted member on active duty in the Navy or Naval Reserve.

c. Be highly motivated to become a commissioned officer and have potential for development of qualifications if given suitable educational opportunity.

d. Have 36 months of active obligated service as of 1 June of the year BOOST training commences, or agree to extend enlistment or active duty agreement for the 36 months period. If nominated for appointment to Naval Academy or NROTC, agree to a minimum of 36 months active obligated service.

e. Prospective NROTC Scholarship Program candidates shall not have reached their 21st birthday on 31 March of the year entering BOOST training. Candidates with active service in the Armed Forces prior to entering BOOST training may be granted a waiver on a month for month basis up to a maximum of 36 months.

f. To qualify for entrance into the Naval Academy, upon completion of BOOST, a candidate shall be unmarried, have no dependents and not have passed their 21st birthday on 1 July of the year entering the BOOST training.

g. Be at least 17 years of age. Age requirement for BOOST is contingent upon eligibility for one or more of the related officer procurement programs. Age waivers will not be granted.

h. Meet physical requirements for officer candidates prescribed in the Manual of the Medical Department.

i. Have no record of conviction by courts-martial or by civil courts

for other than minor traffic violations. Applicants must not have been in violation of Article 15, UCMJ, for two years preceding application for BOOST training.

j. Meet high standards of personal conduct, character, patriotism, sense of duty and financial responsibility.

k. Possess a high school diploma/GED certificate.

l. Have taken the SAT or ACT within the 12 months preceding the application deadline. Minimum acceptable scores are SAT: 390 verbal/460 math, ACT: 19 verbal/21 math or as specified in current OPNAVINST 1500. Waivers may be granted only in accordance with OPNAVNOTE 1500.

m. Be recommended by the commanding officer.

## 17.4 ACTIVE DUTY CHIEF WARRANT OFFICER (CWO) PROGRAM

1. Background. The CWO Program, along with the Limited Duty Officer (LDO) Program, are considered to be the primary enlisted to officer programs sponsored by the Navy that do not require a college education. The active-duty CWO program provides an opportunity for selected senior enlisted personnel to receive appointments as CWOs for the performance of duties in the technical field indicated by their former enlisted rating group.

a. CWOs are technical officer specialists who perform duties which:

(1) Require extensive knowledge of a specific occupational field.

(2) Are technically oriented.

(3) Are repetitive in nature.

(4) Are not significantly affected by advancement in rank and therefore amenable to successive tours of duty.

b. The CWO provides technical expertise at a relatively stable grade level in the officer structure. Consequently, development of CWOs will emphasize increasing their technical competence within their warrant specialties.

2. General Eligibility Requirements

a. Be a citizen of the United States.

b. Be serving as an E7, E8, or E9 (includes frocked CPOs) on active duty in the Regular Navy or Naval Reserve (including TAR) at the time of application.

c. Have completed at a least 12 but not more than 24 years active duty as of 1 October of the year in which application is made. For E-9 personnel applying for CWO3, service shall be computed from the time-in-rate eligibility date for advancement to MCPO.

d. Be a high school graduate or possess the service-accepted equivalent as prescribed by current directives.

e. Have no record of conviction by courts-martial, no non-judicial punishment, and have no conviction by a civil court for any offense other than minor, non-repetitive traffic violations for the two-year period immediately preceding 1 October of the year in which application is made.

f. Meet the required physical standards for appointment to CWO as prescribed by the Manual of the Medical Department, Chapter 15.

g. Be of good moral character.

h. Be recommended by the commanding officer.

i. Students enrolled in the Enlisted Commissioning Program (ECP) are not eligible to apply for the CWO program.

3. Application, Limitations and Requirements

a. Eligible candidates must submit a written application for appointment as a CWO2 or CWO3, as appropriate.

b. Candidates serving in pay grades E7 and E8 with at least 12 but not more than 16 years of naval service should apply for both the Active-duty CWO program and the Active-duty LDO program in the same calendar year, but only one category for each program may be requested.

c. The designators for which application is made shall be listed in the order of preference. A candidate may apply for appointment in not more than two CWO designators for which he or she considers himself or herself qualified. Individuals are encouraged to check enclosure (1) to NMPCINST 1131.1 for the normal path of advancement to CWO status.

d. Personnel serving in humanitarian/hardship (HUMS) or limited duty (LIMDU) assignments shall not be permitted to accept their commissions until the special situation is resolved. In the event an individual is assigned to HUMS or LIMDU on the effective date of commissioning, the commanding officer shall hold the commission in abeyance and shall notify NMPC **(NPC-811)** by message of the attending circumstances.

4. Appointed Grade The appointment of each selected physically-qualified candidate will be in the grade of CWO2 (permanent) in the Regular Navy. Those selectees serving in pay grade E-9 who have completed two years in grade, will be appointed in the grade of CWO3 (permanent) in the Regular Navy.

## 17.5 ACTIVE DUTY LIMITED DUTY OFFICER (LDO) PROGRAM

1. Background. The active-duty LDO Program provides an opportunity for selected CWOs and senior enlisted personnel to receive appointments to grades of Ensign or LTJG. Enlisted personnel will be appointed to the grade of Ensign. CWO applicants will be appointed to the grade of LTJG, for the performance of duties in the broad occupational field indicated by their former CWO designator or enlisted rating group.

a. LDOs are technically oriented officers who perform duties which: (1) are limited to specific occupational fields, (2) require authority and responsibility greater than that normally expected of a CWO, (3) require strong technical managerial skills, and (4) are outside the normal development pattern for unrestricted line (URL), restricted line (RL), and staff corps officers or for which no URL, RL or staff corps officers are available.

2. General Eligibility Requirements

a. Be a citizen of the United States.

b. Be serving on active duty in the Regular Navy or Naval Reserve

(including TAR) at the time of application and if selected, must remain on active duty until the appointment is tendered. (Enlisted personnel in the TAR program who are selected for appointment to LDO will have their TAR designation administratively removed prior to appointment.)

c. Be a high school graduate or possess the service- accepted equivalent as prescribed by current directive.

d. Have no record of conviction by courts-martial, no non-judicial punishment, and no conviction by a civil court for any offense other than minor, non-repetitive traffic violations, for the two-year period immediately preceding 1 October of the year in which application is made.

e. Meet the requisite physical standards for appointment to LDO as prescribed by the Manual of the Medical Department, Chapter 15.

f. Be of good moral character

g. Be recommended for appointment by the commanding officer.

3. Chief Warrant Officer Eligibility. In addition to the requirements specified above, CWO applicants for the active-duty LDO Program must meet the following requirements:

a. Be serving as a CWO on 1 October of the year in which application is made.

b. Have completed at least two years service as a CWO immediately preceding 1 October of the year in which application is made. Such service shall be computed from the initial date of rank of CWO2.

4. Enlisted Eligibility. In addition to the requirements specified above enlisted applicants for the active-duty LDO Program must also meet the following requirements:

a. Be serving as a petty officer first class, chief or senior chief petty officer on 16 January of the year in which application is made. Applicants serving as a petty officer first class must have served in that grade for at least one year as of 1 October of the year in which application is made. Such service shall be computed from the time-in-rate date for advancement to petty officer first class.

b. Have completed at least eight but not more than 16 years of active duty as of 1 October of the year in which application is made.

**17.6 ENLISTED COMMISSIONING PROGRAM (ECP).** The ECP is an undergraduate education program that provides an excellent opportunity for outstanding active duty enlisted personnel in the Navy or Naval Reserve, who have previous college credit, to earn a commission in the Unrestricted Line (URL) or Civil Engineer Corps (CEC). Selectees will be ordered to a Naval Reserve Officers Training Corps (NROTC) host university on a Permanent Change of Station (PCS) basis. Basic ECP candidates will attend the Naval Science Institute (NSI) enroute to their host universities for an intensive seven-week academic and physical training program. Nuclear Option and CEC Option candidates do not attend NSI but will attend Officer Candidate School (OCS) after graduation. For more information on eligibility requirements see OPNAVNOTE 1530.

**17.7 MEDICAL ENLISTED COMMISSIONING PROGRAM (MECP).** The MECP is a continuing education program which provides an excellent opportunity for career motivated active duty enlisted personnel to earn a degree in Nursing and an active-duty

commission in the Navy Nurse Corps. For more information and eligibility requirements see NAVMILPERSCOMINST 1131.4.

**17.8 NAVAL RESERVE OFFICER TRAINING CORPS (NROTC) Program.** This program, founded in 1926, was established to educate and train qualified men and women for service as commissioned officers in the unrestricted line Naval Reserve or Marine Corps Reserve. As the largest single source of Navy and Marine Corps officers, the NROTC Scholarship Program fills a vital need in preparing mature young men and women for leadership and management positions. It offers several types of scholarships based on a competitive selection process that considers many factors. For more information, contact Commander, Navy Recruiting Command, Code 314, 801 North Randolph Street, Arlington, VA 22203-9933 or call 1-800-USA-NAVY or 1-703-696-5356/4581. Application must be received no earlier than 1 March and no later than 1 December of each calendar year.

**17.9 SEAMAN TO ADMIRAL Program**

1. Background. The Seaman to Admiral Program (STA) is applicable to enlisted personnel of the Regular Navy and Naval reserve on active duty (including TAR personnel). Selected applicants will be appointed as permanent ensigns in the U. S. Naval Reserve after successful completion of OCS in Pensacola, FL. They will then be assigned to warfare community specific training as appropriate. Community assignment will be based on the needs of the Navy, individual qualifications, aptitude, experience and preference. For more background information, see the program's current NAVADMIN.

2. Eligibility Requirements.

a. Have a superb record as well as strong academic potential and be recommended by their Commanding Officer.

b. Be a U. S. citizen.

c. Be serving on active duty in the U. S. Navy or Naval Reserve, including the TAR Program, at the time of application and remain on active duty until commissioned.

d. Be selected for or serving in pay grade E4 or above with at least four years of continuous active duty as of 30 September in the application year.

e. Have scored a passing grade on the most recent E-5 advancement exam. E-4 applicants who have passed but not advanced (PNA'd) the most recent E-5 advancement exam must submit a copy of their exam results with their application package.

f. Be at least 22 and have not reached their 27th birthday by 30 September in the application year. No waivers will be granted. The 27-year age limit is in place to ensure that those selected will have time to complete their baccalaureate degree, attend OCS and be commissioned prior to reaching their 31st birthday.

g. Have competitive scores on the SAT or ACT. Although no minimum score is required, SAT scores greater than 1000 (Math and Verbal composite) or ACT scores greater than 45 (Math and English) will enhance the potential for selection in the assigned colleges and universities. SAT and ACT scores may not be more than two years old at time of submission of STA application.

h. Officer Aptitude Rating Exams (OAR) are **NO LONGER** required.

i. Be physically qualified for appointment in the URL per physical standards outlined in the Manual of the Medical Department (Chapter 15).

j. Meet Physical Readiness Test and height/weight standards at time of application and through appointment.

k. Be a high school or GED graduate.

l. Have no record of conviction by court-martial, NJP or civil court for any offense other than minor traffic violations for two years as of 1 July of the application year. "Driving Under the Influence" violations are not considered minor traffic violations for this program and are disqualifying.

m. Be of good moral character and of unquestioned loyalty to the United States, as determined by interview and investigation.

n. Not be serving as students in other Officer Accession Programs.

o. Selectees in Humanitarian/Hardship (HUMS) or Limited Duty (LIMDU) assignment will not be transferred to NROTC units or commissioned until the special situation is completely resolved.

3. All eligible candidates must submit a signed, typed application using the format in the most current NAVADMIN. Mail application to: Commander, Navy Personnel Command, Code NPC-811, 5720 Integrity Drive, BLDG C-1, Millington, TN 38055-0811. Contact the Navy Personnel Command **(NPC-811)** for complete program details at COMM: 901-874-3170 or DSN: 882-3170.

## NAVY PROGRAMS APPLICATION DUE DATE MATRIX

| **PROGRAM** | 1&2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|---|
| SEAMAN TO ADMIRAL | FEB | MAR | APR | APR | MAY | MAY | JUN | JUL | NPC 811D3 |
| ECP | May | JUL | AUG | AUG | SEP | SEP | OCT | NOV | CNET |
| BOOST | JUN | AUG | SEP | SEP | OCT | OCT | NOV | DEC | CNET |
| NROTC 4 YR | JUN | AUG | SEP | N/A | OCT | OCT | NOV | DEC | CNET |
| MECP | JUL | SEP | OCT | OCT | NOV | NOV | DEC | JAN | NPC 811D |
| NAVAL ACADEMY | AUG | OCT | NOV | NOV | DEC | JAN | JAN | FEB | USNA |
| LDO/CWO | SEP | NOV | DEC | MAY | JUN | JUN | JUL | AUG | NPC 811D |
| NROTC 2 YR | SEP | NOV | DEC | DEC | JAN | FEB | FEB | MAR | CNET |

- - - -

NAVY CAREER COUSELOR INFORMATION SYSTEM

# CIPM 99 User Guide Ver 1.0

Document No. CIPM 99 UG-01
Naval Education & Training Professional Development
Center (NETPDTC) Unit
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## Preface

CIPM 99 (Career Information Program Management System 99) Help describes the procedures for processing information using the CIPM 99 computer program providing the means to input, correct, verify and report on personnel data collected.

Tangible results of using CIPM for personnel data collection are:

- Reduction in the redundant recording of previously captured information
- Reduction in the manpower intensive effort associated with maintaining information
- Improvement in the accuracy and timeliness of reporting career information
- Provision of standardized reporting capabilities

## License

Ref: (a) SECNAVINST 5870.5

The NETPDTC Unit Corpus (Naval Education & Training Professional Development Center Unit, 250 Lexington Blvd Suite 259, Naval Air Station, Corpus Christi, Texas 78419-5041) application development office in cooperation with Navy Retention Team (Cmdr Blatzer, Bureau of Personnel, PERS 206 #2 Navy Annex, Washington, DC 20370) is a mission support function developed the Career Information Program Management (CIPM) computer program for CNATRA (Chief of Naval Air Training, 250 Lexington Blvd, Corpus Christi, TX 78418-5041). Paragraph 4.a of reference (a) states: "Copyright protection is not available for works prepared by employees of the U.S. Government as part of their official duties." Therefore, there is no license required to use our program. You can install, use and distribute it without copyright infringements.

## Disclaimer

The staff of NETPDTC has taken due care in preparing this program and documentation. However, NETPDTC makes no representations or warranties as to the design, capability, or suitability for use of the program, or that the functions contained in the program will be error free, or that the operation of the program will be uninterrupted, or that the program will satisfy customer's requirements.

## Security

The Career Information Program Management System will not be used to process classified data but may contain data protected under the Privacy Act per 5 U.S.C. 301. However, data access and functional security must be closely controlled to ensure data and system operational integrity. A detailed description of all threats and vulnerabilities as well as protective counter-measures should be included in the appropriate ADP Security Plan as defined by OPNAVINST 5239.1. This manual and the software it supports are provided by the NETPDTC DET CORPUS for use by U. S. government agencies and should not be copied or disseminated outside the government without prior written approval from the NETPDTC.

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## Introduction

Welcome to CIPM 99 (Career Information Program Management System 99 Version 1.0), the latest U.S. Navy Career Counselors office automation tool from NETPDTC Unit Corpus [1] under the direction of the U.S. Navy Retention Team[2]. CIPM 99 offers the fastest, easiest way to produce professional Windows-based Career Counselor worksheets and reports.

CIPM 99 is a full-featured office automation tool for automating U.S. Navy Career Counselor's office procedures. CIPM 99 simplifies the process of creating and maintaining member's Career Counselor Records, preparing for Professional Development Boards, Enlisted Personnel Actions, ASVAB Worksheets, Selective Reenlistment Bonus Worksheets, a host of general reports (e.g. High Year Tenure, 12-month outlooks, monthly statistics…) and the other daily operations of U.S. Navy Career Counselors.

CIPM 99 is an MS Windows[3] based version of the CIPM 95 program, an earlier NETPDTC MS DOS based version. CIPM 99 computer program is developed, distributed and supported by NETPDTC UNIT CORPUS. CIPM 99 is backward compatible with CIPM 95, CIPM 1.0 and 3.0, 97(Beta), 2000. All the CIPM 95/97 and most CIPM 3.0/2000 functionality has been included in CIPM 99.

As with other NETPDTC products, CIPM 99 is **Year 2000 compliant** and will run on the newer operating systems (**IT-21 ready**). CIPM 99 is designed for the newer PC hardware, e.g. Pentium II/III and software platforms, e.g. **Windows NT and Windows 95/98**. Other CIPM related documents that are available are:

- CIPM 99 Installation Guide, Document No. CIPM 99 IG-01. This document contains complete information about installing the CIPM 99 computer program, starting the program, configuring CIPM for your local command.
- CIPM 99 Appendix A, Document No. CIPM 99 AP-01. This document is a complete reference for all CIPM 99 data field definitions.

## Application Security

CIPM 99 has been designed to operate either in a **single user** (one workstation) or network/**multi-user** environment. A security system has been added to limit access to the information. For **multiple counselor environments**, each counselor can access only members in his division, his department or his UIC depending on the access level assigned by the System Administrator. Counselors are automatically assigned to members within his division. The SYSADMIN can broaden the counselor access to include his department or UIC. Additionally, individual members can be assigned to any counselor explicitly, by the SYSADMIN and thus allow the assigned counselor access to all members that he has been assigned. (See Counselors ( ) p. 3-9 for more information on security.)

---

[1] Naval Education & Training Professional Development Center Unit, 250 Lexington Blvd Suite 259, Naval Air Station, Corpus Christi, Texas 78419-5041

[2] Bureau of Personnel, PERS 206 #2 Navy Annex, Washington, DC 20370

[3] Microsoft© Windows 95/98/NT

## Tickler System

A more comprehensive interview management or tickler system has been included. Nine interviews (Reporting on board, Annual Update, Retention Interview, Incentive Programs, 12th Yr. Careerist, 17th Yr. Careerist, Pre-Retirement/Separation, TAP, and Transition Interviews) for each member can be managed with minimal data entry. The system produces all the reports and worksheets necessary to manage a good interview system. You can easily customize these interview worksheets for your local command. (See Interviews, p. 4-66 for more information.)

## ASVAB Worksheets

The ASVAB worksheets are combined with the CREO (Career Reenlistment Opportunities) database to produce a custom career opportunity list for any member. This list ranks the ratings according to the ratings that the individual is most qualified for and for which the Navy has the most demand.

Since the CREO changes approximately semiannually you must update the your CREO data to ensure the most accurate ASVAB Worksheets. This version of CIPM 99 comes with November 1998 CREO data. (See ASVAB Worksheets, p. 4-64 for more information for more information.)

## Career Counselor Records

CIPM 99 provides a easy to use screen for the creation and maintenance of Career Counselor records (NAVPERS 1160/11 forms). The screen contains the only the data elements needed to update member's career counselor data and print the 1160/11 form, all from the same screen. (See NAVPERS 1160 Form, p. 4-50 for more information.)

## Enlisted Personnel Actions

The Enlisted Personnel Action form (NAVPERS 1306/7) are created and printed using a newly added function making the preparation of this document. CIPM 99 will pre-fill in the form with CIPM data. You fill in the remaining fields and edit other fields as needed. Once you verify the data, CIPM will print the completed form, ready for the appropriate signatures. (See NAVPERS 1306/7 Form, p. 4-54 for more information.)

## Professional Development Boards

CIPM 99 can track up to 6-Professional Development Boards (PDB) for each member with 12-different predefined PDB categories. Additionally, you can create your own categories. It will calculate the interview dates for the three frequently used categories: 6-month, Onboard and E3 Advancements.

You can schedule, print PDB Profile Sheets and document the board's results. (See PDB Profile Sheet, p. 4-59 for more information.)

## Reports and Queries

The General Report function has been improved to make creating special data queries much more user friendly. Reports are selected from a list, as in earlier CIPM versions. You now have two record selection/sorting options: **Quick Query** and **Advanced Query**. The Quick Query is a simple to use but powerful record selection tool. The Advanced Query is a SQL (Standard Query Language) interface for more complex queries. (See General Reports, p. 4-74 for more information.)

## Import/Export

CIPM 99 can now read your PC EDVR and RSTARS downloaded data directly into CIPM 99, reducing the data entry time and improving the data accuracy. Additionally, you can import member's data created by older versions of CIPM (1.0, 3.0, 95, 97 and 2000) into CIPM 99.

You can export CIPM 99 data to other CIPM 99 sites using the built-in CIPM 99 Export function. (See Importing Records ( ), p.3-20 , Importing EDVR ( ) p. 3-26, Importing CIPM 2000 Records ( ) p. 3-28 and Exporting Members ( ) p. 3-29 for more information.)

## Windows Standards

This product conforms to the MS Windows Application design recommendations in all human interfaces including menu bars, forms, controls and reports. CIPM 99 uses a graphical user interface and object orientated programming to ensure a highly visual and intuitive product based on solid software engineering principles. Window style dialogue screens and controls help reduce the learning time and provide a powerful user interface.

## CIPM 99 Requirements

You can run CIPM 99 on Windows 95/98 or Windows NT 3.51 (or higher) workstation or over a network. The following are the recommended requirements for running CIPM 99 in different environments:

**Windows 95**:

- An IBM-compatible computer with a Pentium II 100MHz processor (or higher).
- A mouse
- 32 MB RAM
- 50 MB of hard disk space
- A VGA or higher-resolution monitor with at least 2-megbytes of display RAM is highly recommended, especially for good quality report previewing.

**Windows 98:**

- An IBM-compatible computer with a Pentium II 100 MHz processor (or higher).
- A mouse
- 32 MB RAM

- 50 MB of hard disk space
- A VGA or higher-resolution monitor with at least 2-megbytes of display RAM is highly recommended, especially for good quality report previewing.

**Networks:**

- Microsoft Windows 95/98
- Microsoft Windows NT
- Microsoft LAN Manager
- Other Windows-compatible network software, including Novell NetWare.

## Document Conventions

This book uses the following typographic conventions.

| Example | Convention |
|---|---|
| | A hand and skull and crossbones icon set indicates additional cautionary information of great importance. |
| | A pencil icon indicates short cuts and helpful hints. |
| Backup – Copy Data to Diskette | A star besides a section heading indicates that the information applies only to the System Administrator. |
| | A pencil icon indicates noteworthy information about a topic. |
| ***Inputs\Commanders*** <br> ***Delete*** | Bold italicized words denote either a menu selection sequence or a form control. |
| Press the RETURN key. <br> Press CTRL+ALT+F1. | Capitalized words denote the names of keys on the keyboard. A plus sign (+) indicates a combination of keys. |
| **single user environment** | Bold font words are defined terms the first time they occur in text. |

## Assistance and Problem Reporting

Recommendations for changes or corrections to this manual/Help file or the accompanying software are freely solicited and should be forwarded to:

Naval Education & Training Professional
Development Center (NETPDTC) Unit
John Carter/Nianlin Gu

250 Lexington Blvd Suite 259
Naval Air Station
Corpus Christi, Texas 78419-5041
(361) 961-2073 or (DSN) 861-2073

## Internet Support

For the latest CIPM 99 program, documentation, Help and data, as well as, technical bulletins connect to either NETPDTC at:

http://www.cnet.navy.mil/netpdtc/prodrt.htm

or NCCM (SW) Mike Doyle, Jr.of CINCLANTFLT[4], CIPM 99 WEB page at the Retention Center On Line site:

http://www.cnsl.spear.navy.mil/retcen

[4] Commander in Chief Atlantic Fleet, Code N143C, 1562 Mitscher Ave, Suite 250, Norfolk, VA 23551-2487, Phone DSN 836-7780 or COMM (757)836-7780

# **Chapter 1** Getting Started

After the program has been installed on your Window's desktop, you can start CIPM 99 by double clicking on the CIPM 99 desktop shortcut. (See CIPM 99 Installation Guide for shortcut creation information.) CIPM 99 will start and display the CIPM 99 LOGON dialogue box shown below:

**Figure 1 Logon Screen**

Select your User Id from the drop down list labeled ***Please Select Your User ID***. For first time users, select **SYSADMIN**. To locate your name in the User Id list, use the down arrow to scroll down and click on your ID. Optionally, type the first few letters of your ID and CIPM will locate the ID with the nearest match. For example, to look for **SYSADMIN**, type ***SY*** and **SYSADMIN** will be highlighted. Press **ENTER** to select.

Enter your password in the ***Please Enter Your Password***: text box, and press ***ENTER***. For first time SYSADMIN users, enter the password, ***SYSADMIN*** (NOTE: Be sure and change this password later).

Click ***OK*** to continue with the Logon procedure. Otherwise, click ***Cancel*** and you will be returned to your Window's Desktop.

Click ***OK*** to acknowledge the successful logon, when the message "***Login OK !!, Welcome to CIPM***" appears.

> You have three tries to enter the password correctly. The password is not case sensitive. After the third try failure, CIPM will abort the Logon and return you to the Windows Desktop.

After successfully logging into CIPM 99, a User Identification screen will be displayed. Your organization, office, name and phone number will be displayed. If not, the installation procedures were not completed and the **SYSADMIN ID** will be set to **NAS PENSACOLA**, with **Emergency Services** office, **Nianlin Gu** as counselor name and phone number, **525-2073**.

You should change the SYSADMIN counselor user's record to your local System Administrator's name, phone number, office and certainly, the password, as soon as possible. For help in properly installing and configuring CIPM 99, see CIPM 99 Installation Guide, Document No. CIPM 99 IG-01.

After you configure your installation, your name and organization will be displayed as shown below:

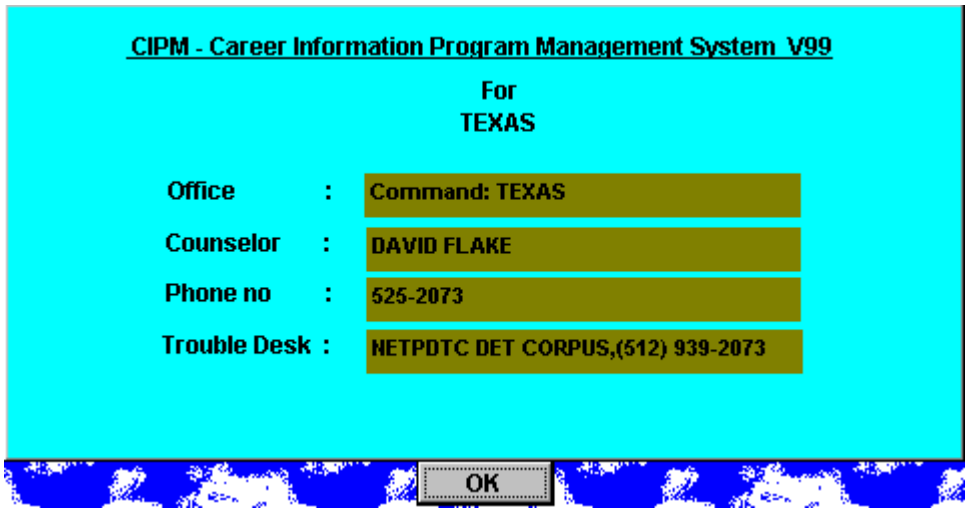



**Figure 2 User Information Screen**

Click *OK* and Page 1 of 2 Privacy Act Statement Screens will be display as:

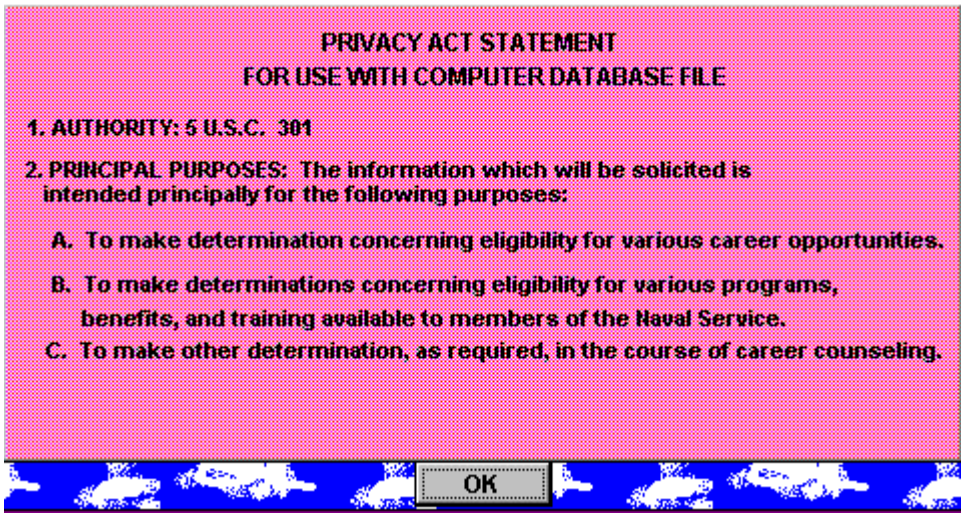



**Figure 3 Privacy Act Screen – Page 1**

To continue with the CIPM 99 start up click *OK* and Page 2 of 2 Privacy Act screens will appear as shown below:

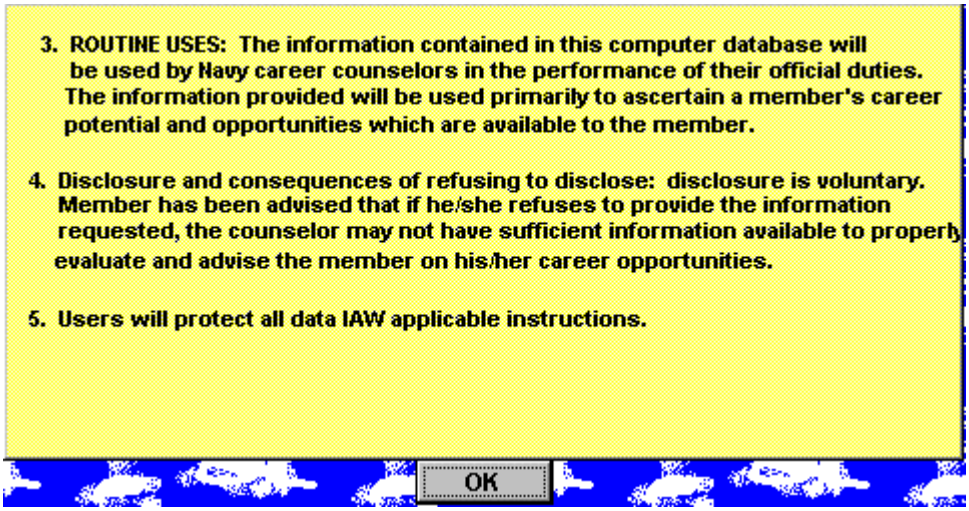



**Figure 4 Privacy Act Screen – Page 2**

Click *OK*. This completes the Startup. Next you should familiarize yourself with the CIPM Desktop.

## Desktop

After successfully starting CIPM 99, the CIPM 99 Desktop will be displayed, as shown below. The CIPM 99 Desktop is consists of a background picture of clouds, menu bar, heading, and footing and help button.

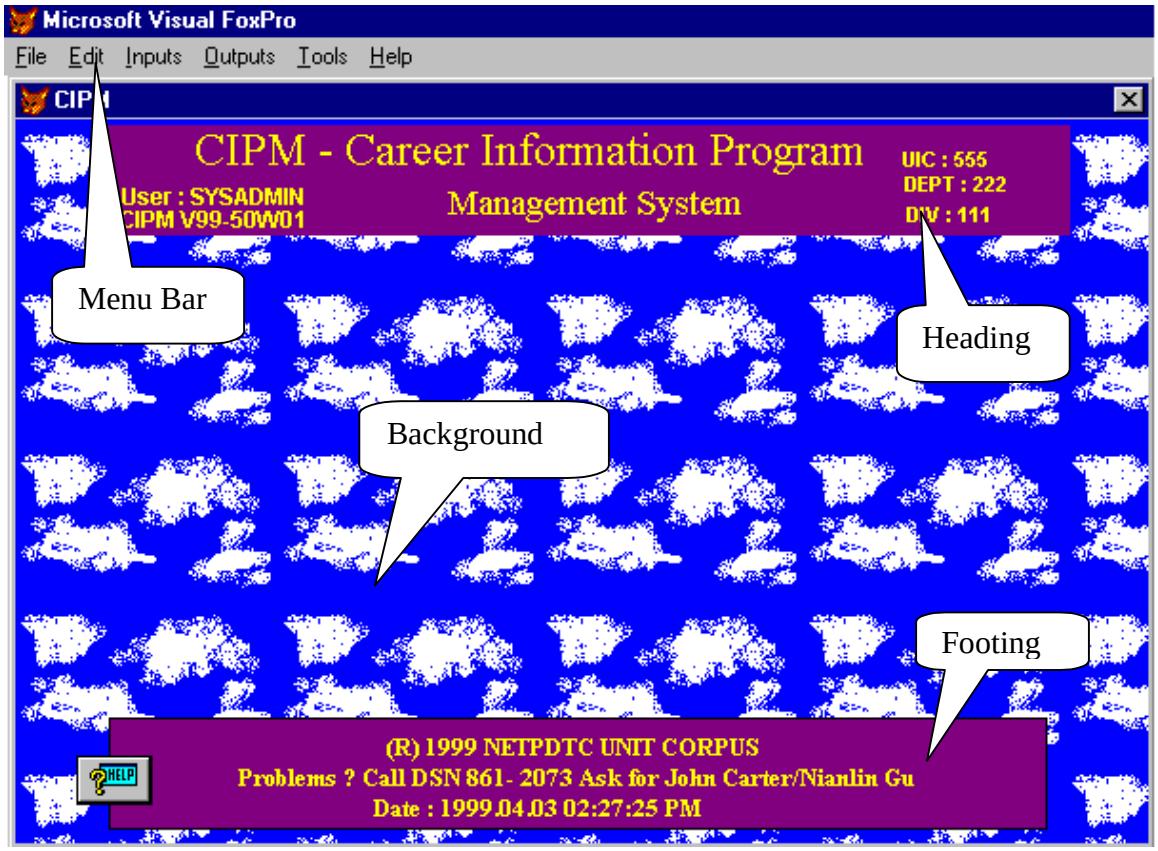



**Figure 5 Desktop**

### *Menu Bar*

The CIPM **Menu Bar** is the horizontal area along the top of the CIPM desk used to access CIPM functions. The menu bar consisting of six labels**: *File, Edit, Inputs, Outputs, Tools*** and ***Help***. CIPM 99 functions are organized into logical groupings. For example, all input screens are grouped together under the menu bar labeled Inputs. For example, to add new members one would click the menu bar ***Inputs*** and then the menu item ***Add Records***, as shown below:

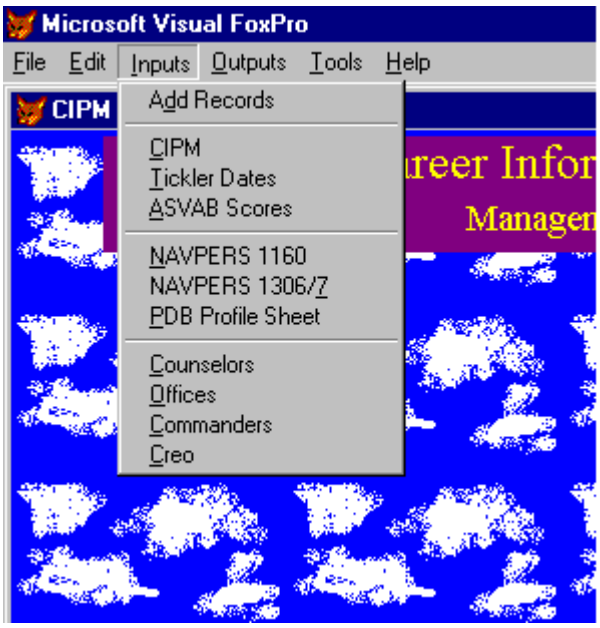



**Figure 6 Menu Items Sample**

The following tables list the CIPM Menu Bar labels (bold italics, like ***File***) and their menu items (numbered, bold, italics, like ***1) Backup Data to Floppy...***), keyboard shortcut (upper case, like **CTRL+Z**) and the menu description. Menu items followed by an ellipse (…) indicate a screen will be displayed soliciting more information.

**Table 1 CIPM Menu Titles & Menu Items-Short Cuts-Description**

| Menu Item | Keyboard Shortcut | Description |
|---|---|---|
| **File** | | File, print and Exit options. |
| ***1) Backup Data to Floppy...*** | | Compress and copy all CIPM 99 data onto a diskette. |
| ***2) Restore Data from Floppy…*** | | Uncompress and copy all CIPM 99 diskette data to your hard drive. |
| ***3) Print Preview*** | | Display a file on the screen. |
| ***4) Print Setup…*** | | Changes the page layout and printer settings |
| ***5) Print…*** | CTRL+P | Print selected file. |
| ***6) Rebuild all Index Files*** | | Reconstruct broken lines between databases and indexes. |
| ***7) Integrity Self Test…*** | | Perform Built-in self test. |
| ***8) Master Reset…*** | | Initialize CIPM 99 to a post installation state. |
| ***9) Exit*** | | Quit CIPM 99 |
| **Edit** | ALT-E | Text editing and development tools |
| ***1) Undo*** | CTRL+Z | Undoes the last command or action |
| ***2) Redo*** | CTRL+R | Repeats the last command or action |
| ***3) Cut*** | CTRL+X | Removes the selection and places it onto the Clipboard |

| Menu Item | Keyboard Shortcut | Description |
|---|---|---|
| ***4) Copy*** | CTRL+C | Copies the selection onto the Clipboard |
| ***5) Paste*** | CTRL+V | Pastes the contents of the Clipboard |
| ***6) Clear*** | | Removes the selection and does not place it onto the Clipboard |
| ***7) Select All*** | CTRL+A | Selects all text or items in the current window |
| ***8) Find*** | CTRL+F | Searches for specified text |
| ***9) Replace*** | CTRL+L | Replaces specified text with different text |
| **Inputs** | | |
| ***1) Add Records*** | | Create new CIPM member's records |
| ***2) CIPM*** | | Browse/ edit/ delete members records |
| ***3) Tickler Dates*** | | Browse/ edit/ delete Tickler Dates |
| ***4) ASVAB Scores*** | | Browse/ edit/ delete ASVAB Scores |
| ***5) NAVPERS 1160*** | | Print/Edit NAVPERS 1160 forms |
| ***6) NAVPERS 1306/7*** | | Print/Edit NAVPERS 1306/7 forms |
| ***7) PDB Profile Sheet*** | | Print/Edit PDB Profile Sheets |
| ***8) Counselors*** | | Add/Browse/ edit/ delete Counselors |
| ***9) Offices*** | | Add/Browse/ edit/ delete Offices |
| ***10) Commanders*** | | Add/Browse/ edit/ delete Commanders |
| ***11) CREO*** | | Add/Browse/ edit/ delete CREO |
| **Outputs** | | |
| ***1) ASVAB Worksheets*** | | Prepares ASVAB Worksheets for members |
| ***2) Interviews*** | | Interview preparation function |
| ***3) SRB Worksheets*** | | Prepares SRB Worksheets for members |
| ***4) General Reports*** | | Prepares reports |
| **Tools** | | |
| ***1) Change Password*** | | Displays the current user's change password screen |
| ***2) Archive Members*** | | Moves member's records to history |
| ***3) Unarchive Members*** | | Activates historical member's records |
| ***4) Import Members*** | | Loads foreign data into CIPM 99 |
| ***5) Import EDVR*** | | Loads EDVR data into CIPM 99 |
| ***6) Import 2000*** | | Loads CIPM 2000 data into CIPM 99 |
| ***7) Export Members*** | | Prepares a diskette of member's data for shipment |
| **Help** | | |
| ***1) CIPM Contents*** | ALT+H | Online Help by Topic |
| ***2) CIPM Search for Help*** | | Online Help by Index |
| ***3) Technical Support*** | | Phone number for technical support |
| ***4) System Information*** | | System environment information |
| ***5) About CIPM*** | | Application environment information |

### *Desktop Heading*

The desktop heading is located in the upper center of the CIPM 99 desktop and is always present, similar to the one below:

**Figure 7 Desktop Heading**

The left side contains the current logged on user id (***User: SYSADMIN***) and the current CIPM 99 Version (***CIPM V99-50W01***). The right side contains the user's office codes for UIC, Department and Division ***(UIC: 555, DEPT: 222, DIV: 111***).

### *Desktop Footing*

The desktop footing (See example below) contains information about the development agency: the agency's name ***(® 1999 NETPDTC CORPUS***), Help Desk phone number (***Problems? Call DSN 861-2074***), and Help Desk point of contacts (***John Carter/Nianlin Gu***). Additionally, the desktop footing contains the session's startup date and time (***Date: 1999.04.03 02:52:48 PM***).

**Figure 8 Desktop Footing**

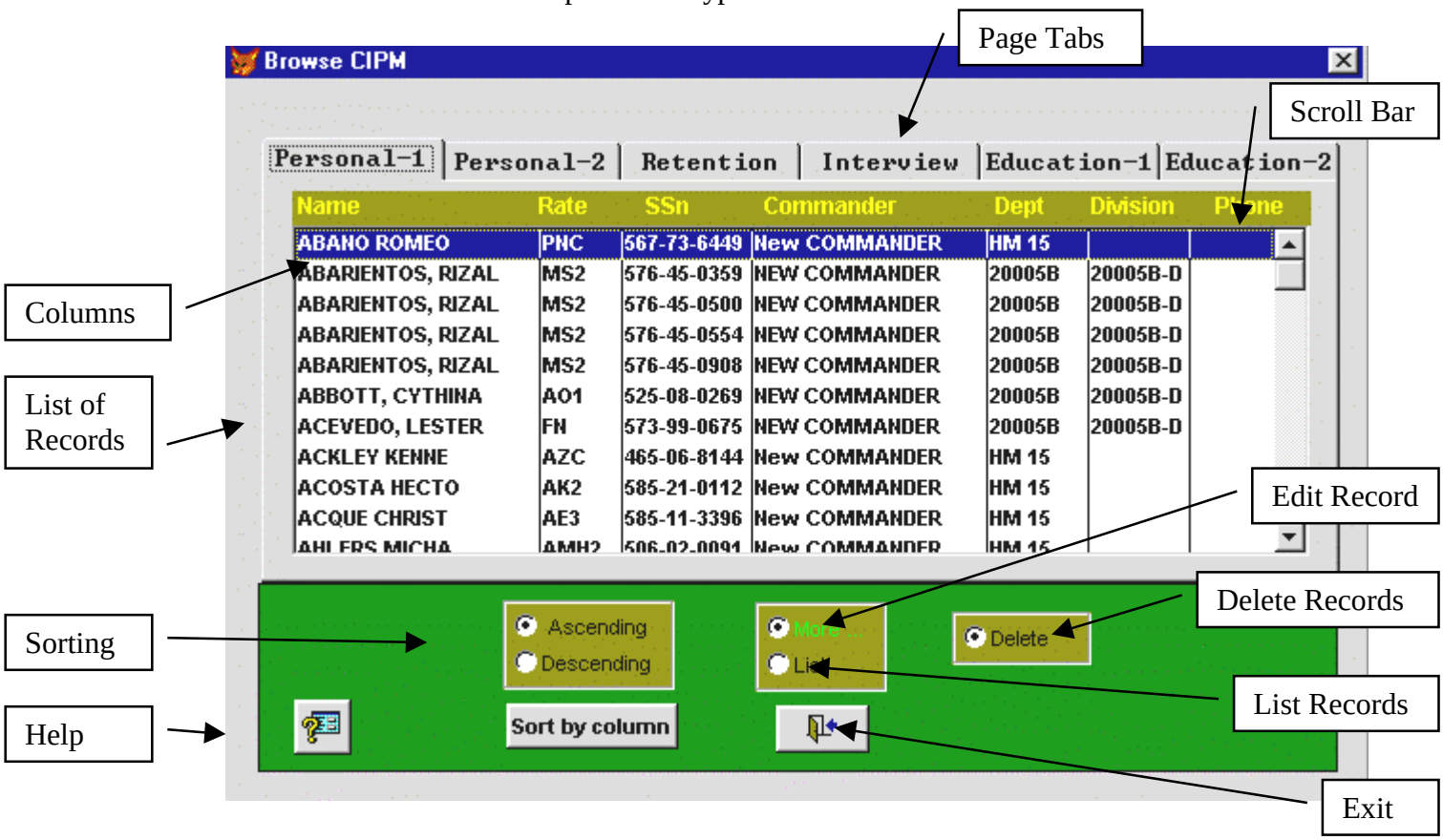
## Navigating CIPM

CIPM functions are accessible through the Menu Bar (See section Menu Bar above). CIPM functions start when the user clicks on the menu item, e.g. *Rebuild Indexes* needs no other information, so the function begins executing immediately after the menu item is clicked. Other functions require additional information, e.g. preparing interviews. In order to prepare for interviews, CIPM needs to know the interview preparation month and year of the interviews, the types of interviews and which reports to print. CIPM loads typical values for all the fields. However, you can override any data value.

CIPM uses three types of screens: Browse Form, Edit Form, Process Form and Help Screen. The Browse Form displays a list of records. The Edit Form displays a single record. The Process Form displays editable settings for selecting, sorting and printing groups of records. Each screen type has common features and controls described below.

### *Browse Form*

The Browse Form is a screen that presents a list of records from one of the CIPM data types: (Members, Counselors, Offices, Commanders and Archive). The CIPM Browse Screen shown below represents a typical Browse Form:




**Columns** A view of seven common data elements for each record. Each page presents different data elements.

**Delete Records** The *Delete* button will display "Are you sure?" deletion question. If answered Yes, CIPM will delete all selected records.

**More…** The *More…* button will open an edit screen of the current selected record. Simply, highlight a record to edit and click *More…* button.

**Exit**

The ***Exit*** button closes the screen without further action and returns control to a parent screen or menu bar.

**Help**

The ***Help*** button opens a screen containing additional information.

**List Records** The *List* button will create a printer list or browse list of selected records. The button presents a choice of outputs: Printer or Browse to display the list of selected records. Select one to continue. Otherwise, click outside the list.

**Page Tabs** *Page Tabs* change the data view of a data type. Each page contains different data elements. To change the data view, click one of the *Page Tabs* and a different view of the data will be shown.

**Scroll Bar** *Scroll bar* is an object that allows the user to bring into view other items is a list. To scroll through a list either (1) mouse click along the scroll bar area or scroll bar arrows or (2) click and drag the scroll button up and down the scroll bar, bringing the desired records into view.

**Tip**

Keyboard keys can also be used to scroll through a list: HOME, END, AND PAGE UP, PAGE DOWN, UP ARROW, DOWN ARROW, LEFT ARROW, AND RIGHT ARROW keys.

**Sorting** *Sorting* will display the listed data ordered by one of the columns data fields either in ascending or descending order. Normally, the data is displayed sorted in ascending by the first column data field. To sort the data, click either the *Ascending* or *Descending* choices. Next, click the *Sort by column* button and select from the list of data fields.

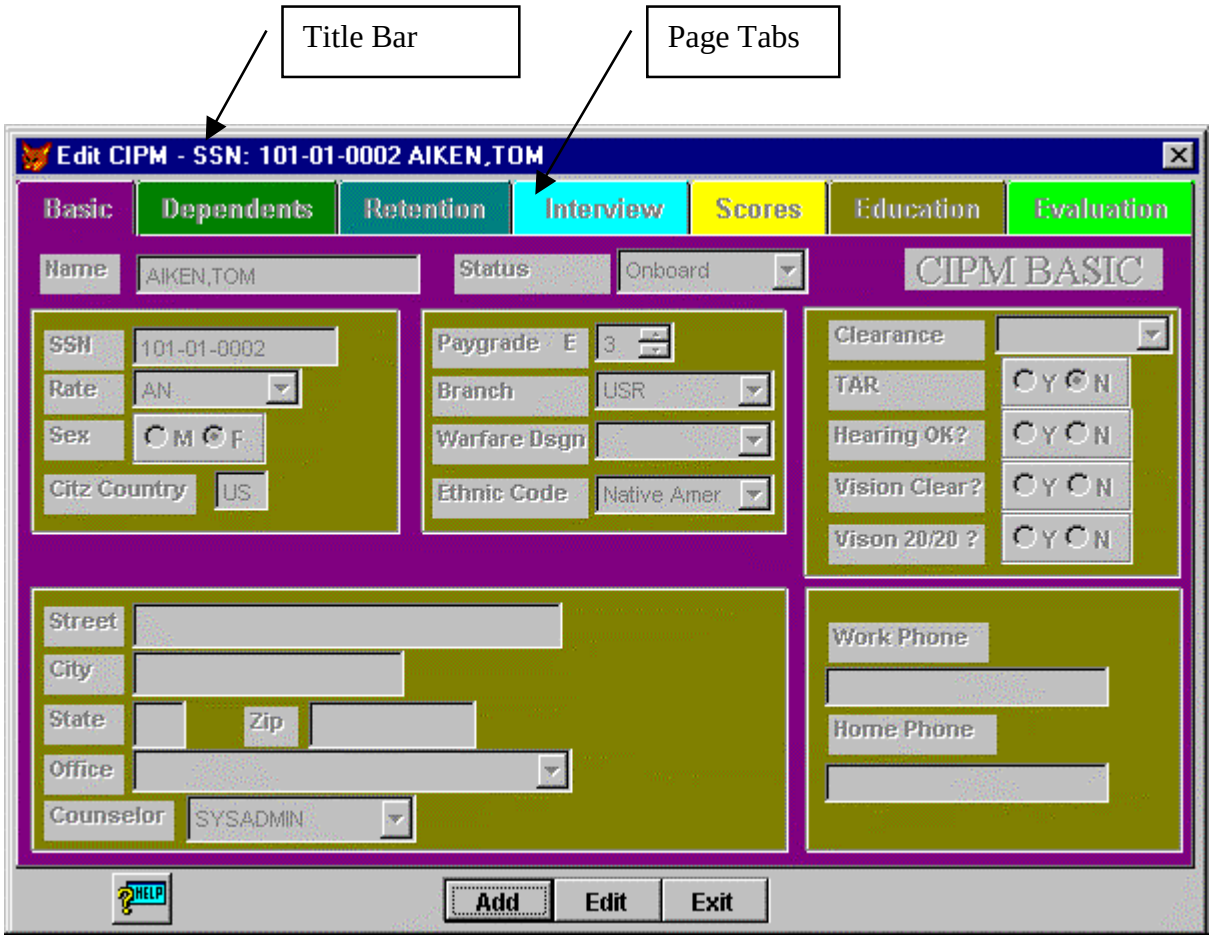
**Note**

The list of data fields is the same as the column headings and is different for each page.

**Figure 9 Typical Browse Screen**

### *Edit Form*

The Edit Form is a screen that presents one record with editable detailed fielding of the CIPM data types: (Members, Counselors, Offices, Commanders and Archive). The CIPM Edit Screen shown below represents a typical Edit Form:




**Add** The ***Add*** button will open the data fields with either default values or blanks. When clicked, the ***Add*** button will be re-labeled, ***Save***, the ***Edit*** button will be re-labeled, ***Revert***, and the ***Exit*** button will be disabled.

**Edit** The *Edit* button will open data fields for editing. When clicked, the ***Edit*** button will be re-labeled, ***Revert***, the ***Add*** button will be re-labeled, ***Save***, and the ***Exit*** button will be disabled.

> Some fields are only editable while adding a new record and are not changeable while editing a record. For example, you can change a member's SSN when you first add the member's record. However, once the record is successfully saved, you can NOT change the SSN.

**Exit** The ***Exit*** button closes the screen without further action and returns control to a parent screen or menu bar. The ***Exit*** button will be disabled while adding or editing a record.

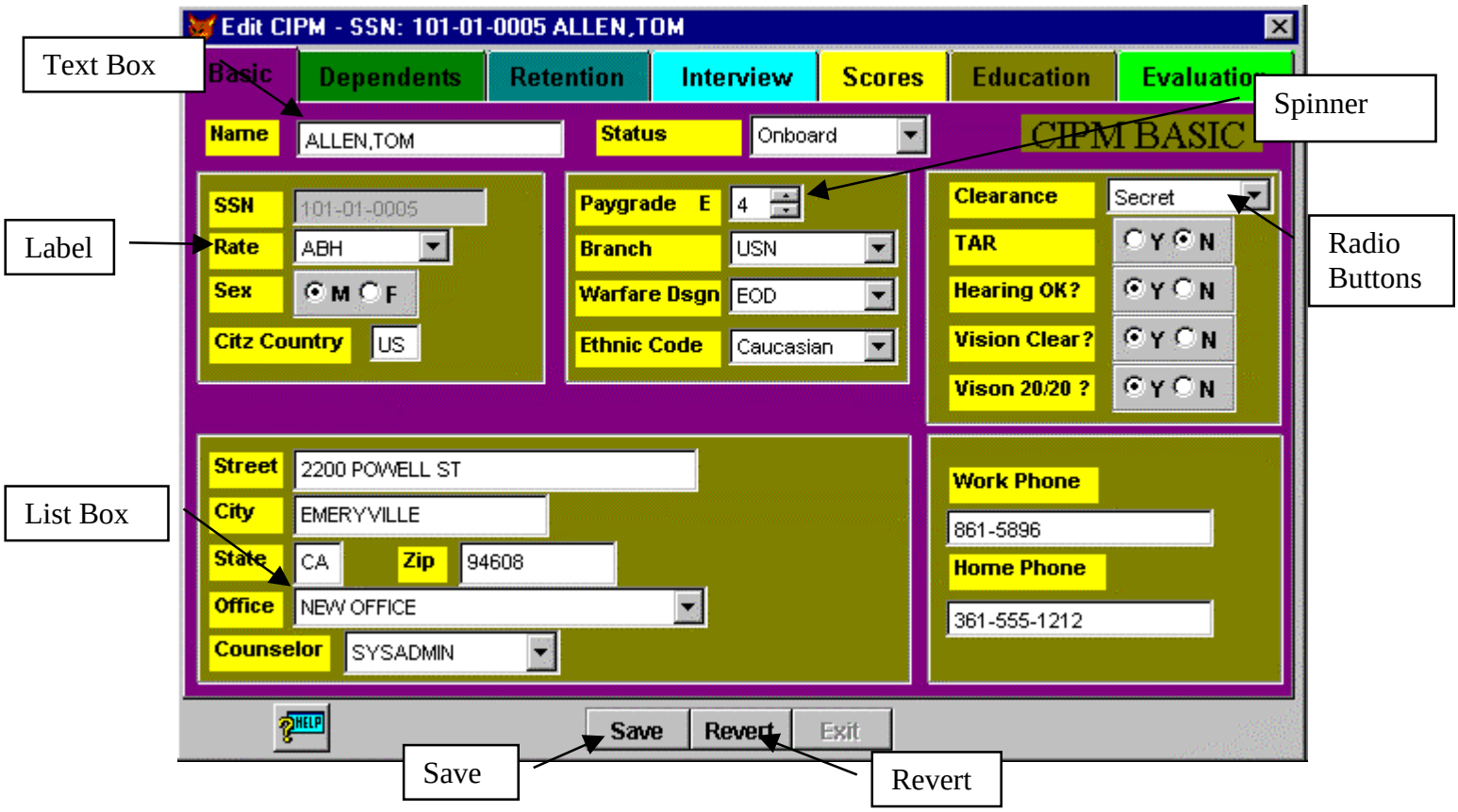
**Help** The ***Help*** button opens a screen containing additional information.

**Page Tabs** *Page Tabs* change the data view of a data type. Each page contains different data elements. To change the data view, click one of the *Page Tabs* and a different view of the data will be shown.

**Title Bar** The name and SSN of the selected member.

**Figure 10 Typical Edit Screen – View Mode**

Initially the *Edit* screen data fields are only viewable, not alterable, i.e. the fields are disabled and appear dim. To add a new record, click *Add*. To change a field, click *Edit*. The following is an example of an editable screen.




**Help** The ***Help*** button opens a screen containing additional information.

**Label** A short name/description for the data adjacent data field. Usually, the label is placed to the left or above the data field.

**List Box** A list box displays a list of items from which you can select one or more items. To view the list click on the List Box's down arrow icon.

**Radio Buttons** A vertical or horizontal list of options. You may select only one.

**Revert** The ***Revert*** button discards all changes and restores the record back to its pre-edit condition.

**Save** The ***Save*** button copies all the screen data to the master database making a permanent record of all the changes.

**Spinner** The Spinner allows you to increment or decrement numbers either by typing the numbers or clicking the UP or DOWN arrow keys.

**Text Box** Text Boxes are white rectangular areas on the screen where data can be added or edited. All standard editing features, such as cut, copy, and paste, are available in the text box.

**Figure 11 Typical Edit Screen – Edit/Add Mode**

### *Process Form*

Process forms are screens that solicit specific information needed to perform a function. A counselor will fill in the form and CIPM will output a report or perform a function. For example, the CIPM function to calculate reenlistment bonuses uses the process form, *SRB Worksheet*, shown below:

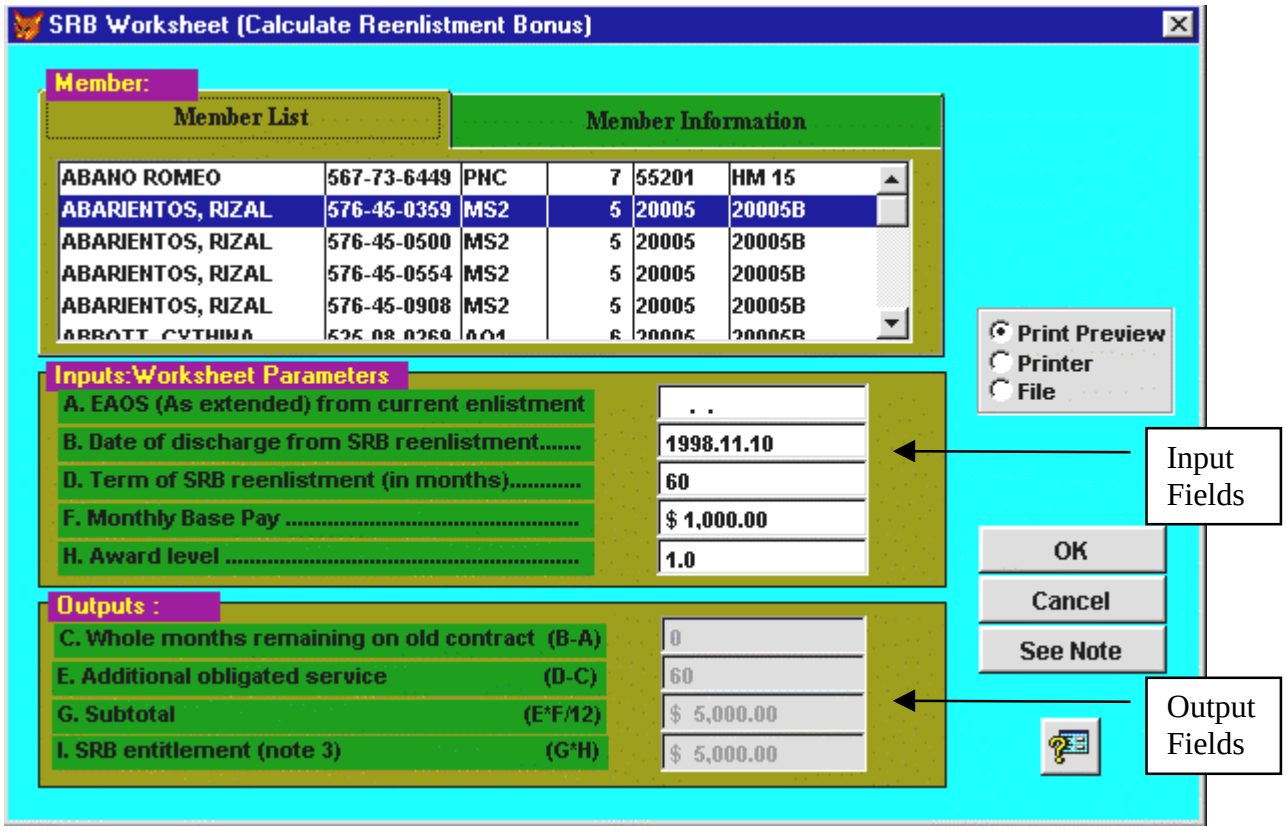


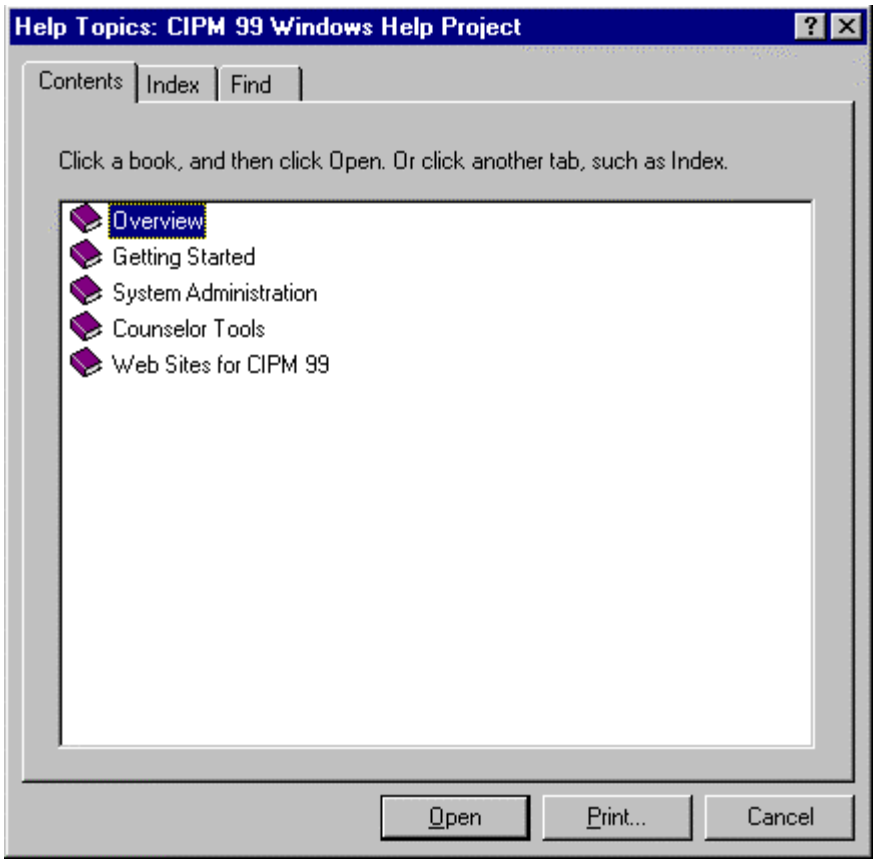

**Figure 12 Typical Process Screen**

To calculate a bonus, the counselor selects a member from the member's list. CIPM will fill in the form with information from the member's record. The other fields are set to defaulted values. The counselors can adjust/change the Input Field data. Then click *OK* to start the calculations.

### *Help Screen*

The Help screen provides three methods to access online CIPM 99 information: by book title, by topic index, by word search.

To access the Help Screen, select, ***Help\CIPM Search for Help on…*** from the Menu Bar and the Help Screen will be displayed as:




Click the page tab to select the access method: Contents (Book Titles), Index (Topics) or Find (word search). To view a book, click the **Contents** tab, highlight a book title and click ***Open***. To find a topic, select either the **Index** or **Find** tab and follow the directions on the screen. To **print** a Book or Topic, select the book title or topic and click the ***Print*** button. To close the Help Screen, click the ***Cancel*** button.

## Introduction/Overview

For first time uses CIPM 99 will start a Configuration Wizard that will walk you through the configuration process. Also, you can start the Wizard from the CIPM 99 menu bar (See Master Reset ( ), p. 3-5.) This chapter describes the configuration process. You can perform the configuration manually by following these procedures.

After installing CIPM and before you can start using CIPM in your every day business you must configure CIPM for your environment. Also, you must select one counselor to be the *System Administrator* for CIPM, who will be referred to as, *SYSADMIN*. This person will be responsible for performing certain maintenance functions like adding new counselors, performing file maintenance, setting security levels, etc…

Each CIPM 99 site must have at least (1) one office record, (2) one commander record and (3) one counselor record designated as the System Administrator. The installed CIPM 99 has a default office, office command and system administrator. You should change the office name, command's name and system administrator's name for your local installation. As you add more counselors and members you should add more offices and commanders.

Follow the checklist below in the order presented to configure CIPM for your local environment:

- ❑ Identify one counselor as the CIPM System Administrator (SYSADMIN).
- ❑ Change the one installed Office record to match your local SYSADMIN office information.
- ❑ Change the installed Commander record to match your SYSADMIN office's CO name.
- ❑ Change the Counselor's record to match the SYSADMIN counselor's information.

The following sections describe in detail how to configure the CIPM for your local environment.

## Office Configuration

Change the office information in the default Office record. From the toolbar menu click *Inputs\Offices* and the Office Browse Screen will be displayed (See Figure 21 Offices - Browse Screen, p. 3-14)

Initially, only one office, Emergency Services will be displayed. Select Emergency Services Office and click *More…* and the Office Edit Screen will be displayed (See Figure 22 Office - Edit Screen, p. 3-15).

Click *Edit* to change the record. Change the UIC, Department, Division and Office name to your local the System Administrator's UIC, department, division and

office. Save your changes by clicking *Save*. The Office Edit Screen will be removed and the Office Browse screen will be displayed. Click *Exit* button to close the screen.

## Commander's Name

Next change the Commander's Name to the name of the System Administrator's office commander's name. From the menu toolbar click *Inputs/Commanders* and the Commander Browse screen will be displayed (See Figure 23 Commanders - Browse Screen, p. 3-12).

> Initially, only the default commander, **Tim Stempton** will be displayed.

Select TIM STEMPTON, NAS PENSACOLA entry and click *More…* and the Commander Edit screen will be displayed (See Figure 24 Commander - Edit Screen, p.3-15).

Click *Edit* to change the record. Change the Commander's Name and Activity name to match the System Administrator's. Save your changes by clicking *Save*. The Commander Edit screen will be removed and the Commander Browse screen will be displayed. Click on the Browse Commander screen's *Exit* button.

### *System Administrator*

Finally, change the System Administrator's name and office to the counselor's name and office that will be the system administrator. This person is responsible for performing certain maintenance functions, like adding new counselors, performing file maintenance, setting security levels, etc… One of these administrators, Counselor Id SYSADMIN, must always be present in the Counselor file. You will not be able to delete this person nor change its security options, although you will be able to change name, office location and rate.

To configure the SYSADMIN, from the menu toolbar click *Inputs/Counselors* and the Counselor Browse screen will be displayed (See Figure 19 Counselor - Browse Screen, p. 3-11)

> Initially, only the default counselor, **SYSADMIN,** will be displayed.

Select the SYSADMIN ID entry and click *More…* and the Counselor Edit screen will be displayed (See Figure 20 Counselor - Edit Screen, p. 3-12).

Click *Edit* to change the record. Type your First and Last names, Rate, Phone, and PRD (Projected Rotation Date in YYYY.MM.DD format) over the default values.

Optionally, type in a new Password. Make sure you remember the new password. The next time you start CIPM 99 you will be required to enter the new password or you will not be able to start up CIPM 99. Save your changes by clicking *Save*. The Counselor

Edit screen will be removed and the Counselor Browse screen will be displayed. Click on the Counselors Browse screen's *Exit* button.

> You can not change the **Access Level** nor the **Counselor ID** in the **SYSADMIN** counselor's record.

This concludes the CIPM 99 configuration. If you have data from another computer system you may be able to import the members and counselors directly into CIPM 99, thus reducing the amount of data entry necessary to load the CIPM databases. (See Sections Importing , p. 3-22 and Importing EDVR, p. 3-26).

## Introduction/Overview

Every CIPM 99 installation must have at least one person designated as the system administrator. This person or persons are responsible for performing certain maintenance functions like adding new counselors, performing file maintenance, setting security levels, etc… One of these administrators, counselor id SYSADMIN, must always be present in the Counselor file. You will not be able to delete this person nor change its security options, all though you will be able to change his name, office location and rate. This chapter describes the System Administrator's functions.

CIPM 99 functions are divided into User and System Administrator functions. These functions are accessible through menu bar options. All CIPM 99 users have access to all User functions. Only uses with SYSADMIN privileges have access to the System Administrator functions. Below is a list of User and System Administrator functions:

**Table 2 SysAdmin and Counselor Functions**

| FUNCTION | USER | SYS-ADMIN |
|---|---|---|
| • Backup – copy data to diskette | | ✓ |
| • Restore – copy data from diskette | | ✓ |
| • Rebuild Index | | ✓ |
| • System Integrity Test | | ✓ |
| • Exit | ✓ | |
| • Input – Add Records | ✓ | |
| • Input – CIPM | ✓ | |
| • Input – Tickler Dates | ✓ | |
| • Input – ASVAB Scores | ✓ | |
| • Input – NAVPERS 1160 | ✓ | |
| • Input – PDB Profile Sheet | ✓ | |
| • Input –Counselors | | ✓ |
| • Input –Offices | | ✓ |
| • Input –Commanders | | ✓ |
| • Input –CREO | | ✓ |
| • Outputs – ASVAB Worksheets | ✓ | |
| • Outputs – Interviews | ✓ | |

| FUNCTION | USER | SYS-ADMIN |
|---|---|---|
| • Outputs – SRB Worksheets | ✓ | |
| • Outputs – General Reports | ✓ | |
| • Tools – Change Password | ✓ | |
| • Tools – Archive Members | | ✓ |
| • Tools – Unarchive Members | | ✓ |
| • Tools – Import Members | | ✓ |
| • Tools – Import EDVR | | ✓ |
| • Tools – Export Members | | ✓ |
| • Help – CIPM Contents | ✓ | |
| • Help – CIPM Search for Help | ✓ | |
| • Help – Technical Support | ✓ | |
| • Help – System Information | ✓ | |
| • Help – About CIPM | ✓ | |

All System Administration functions require that you have exclusive use of the CIPM data before you can use the functions, i.e. no other user can be logged into CIPM 99. In a single user environment, you can always access these functions, i.e. if your have installed CIPM 99 on your workstation and you have not shared the data. In a multi-user environment, you must wait until all other users are logged off CIPM 99 before you can perform these functions.

## Backup – Copy Data to Diskette ( )

You should backup your data at least weekly and perhaps even daily. As SYSADMIN, you are responsible for backing up the data. CIPM provides a Backup function that will build a compressed file of your data, prep your diskette and copy the compressed file onto your diskette.

You DO need to backup your data, if your data is on your workstation's hard drive and you only have a 3.5" floppy disk drive. You do NOT have to backup your data, if (1) your CIPM data resides on a network drive and your network administrator backs up your data every night or, (2) you have and use another type of backup media (e.g. a tape drive or removable disk drive) to back up your data.

Before you start the Backup function, procure ten (10) formatted 1.44MB 3.5" diskettes and label five diskettes "***CIPM 99 Daily Backup for Monday***", "…Tuesday" through "…Friday", i.e. one for each day of your workweek. Label the remaining five diskettes with the next 5-months, e.g. "***CIPM 99 Monthly Backup for Jan 99***", "…Feb 99" through "…May 99". Rotate the usage of the Daily Backup diskettes. Once a month, make a monthly backup diskette. Store the Monthly Backup offsite and **DO NOT REUSE** it.

To start the Backup, locate a formatted diskette and insert it into your workstation's floppy drive A. If the diskette contains any files, be sure and check with the file owner before using the diskette, because this Backup Function will erase all the files from the diskette before it copies your data. From the menu bar select, *File\Backup Data to Floppy…* and the Data Backup Screen will be displayed as:

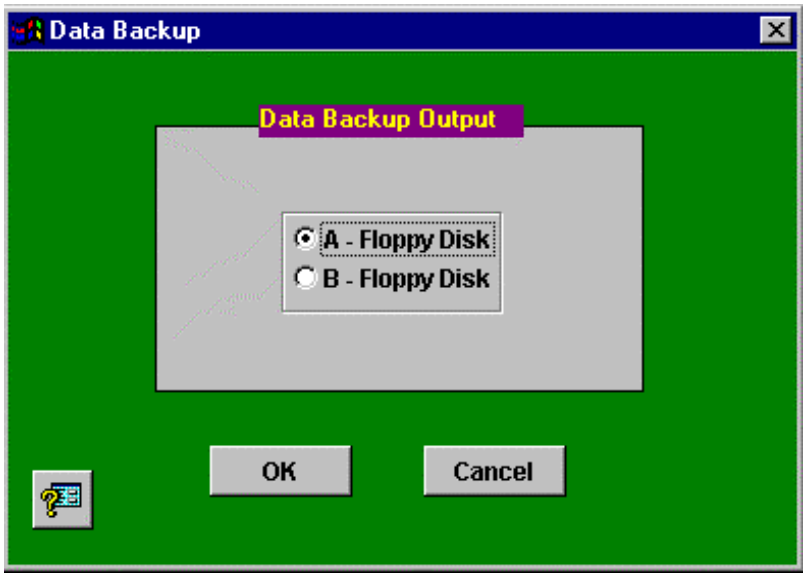



**Figure 13 Backup Data Screen**

Click on the *Ok* button to continue. Otherwise, click on *Cancel*. CIPM will run an MS DOS batch file, *BACKUP.BAT* and will build a Pkzip© compressed file, *CIPM99.ZIP* that includes all the database files located in the *CIPM99\DATA* folder. Once built, the floppy diskette will be erase.

Press *Y* and then the *Enter* key, when asked, "*All files in directory will be deleted! Are you sure (Y/N)?*" The compress file will be copied to the diskette and a directory will be displayed as:

***Directory of A:***
***CIPM99.ZIP 277,198 10-06-98 2:02a CIPM99.ZIP***

Remove the diskette and label the diskette with today's date. To clear the MS DOS screen, press any key to continue. An Information Message will displayed the number of member records backed up. Click *OK* to acknowledge. The Backup Screen will be displayed. Click on *Cancel* to return to the CIPM Desktop Clouds.

You should erase all data from the diskette, since this will provide the freest space for your Backup data.

## Restore – Copy Data From Diskette ( )

On rare occasions you will need to restore your CIPM 99 data from your Backup Diskette. For example, your hard drive fails and you can not recover your data. Replace the hard drive, reinstall CIPM 99 from the CD-ROM and then run the Restore function using your Backup data. You will be running CIPM 99 with data that is as current as your last Backup.

To start the Restore, locate your latest CIPM 99 Backup diskette (See Section Backup – Copy Data to Diskette, p. 3-2) and insert it into your workstation's floppy drive A. From the menu bar select, *File\Restore Data From Floppy…* and the Data Restore Screen will be displayed as:

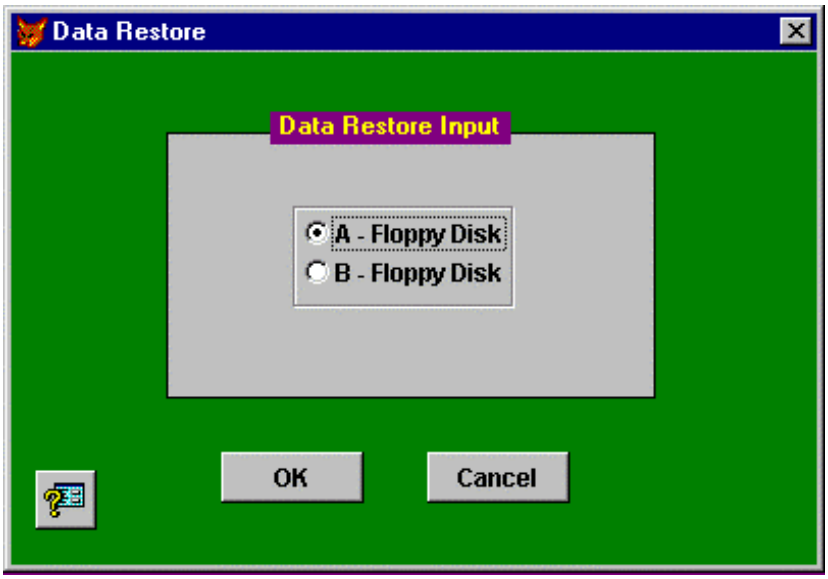



**Figure 14 Restore Data Screen**

Click on the *Ok* button to continue. Otherwise, click on *Cancel*. CIPM will run an MS DOS batch file, *RESTORE.BAT*, that will decompress the *CIPM99.ZIP* file with the Pkzip© decompression program into the *CIPM99\DATA* folder.

After clicking OK, press any key to continue when the DOS screen "*Please press 'a' to restore all files. Press any key to continue . . .*" Press *A*, when the following message appears:

> ***Searching ZIP: A:CIPM99.ZIP***
> ***PKUNZIP: (W18) Warning! data/WORKFL.DBF already exists. Overwrite (y/n/a/r)?a***

After all the files have been restored, the data index tables will be rebuilt. Reindexing progress messages will be displayed during the process. A Reindex Message Box will be displayed upon completion of the rebuilt. Click *Ok* to acknowledge the message. A Data Restore message will be displayed indicating how many members were restored. Click *Ok* to acknowledge the message.

Remove the diskette. The Restore Screen will be displayed. Click on *Cancel* to return to the CIPM Desktop Clouds.

## Rebuild Index ( )

Occasionally, you will need to rebuild the CIPM 99 table indexes. We recommend that you rebuild them at least once a week. This maintenance function will reconstruct any corrupted index and improve your access time.

To start the Rebuild, select, ***File\Rebuild all Index Files…*** from the menu bar. Progress messages will be displayed as the program rebuilds the indexes. Click ***OK*** when the Rebuild completion message is displayed.

## System Integrity Test ( )

If you have a serious data corruption problem (due to power failure or hardware failure), you may be able to recover your data using the System Integrity Test (SIT). You can periodically run the SIT to verify the integrity of your CIPM 99 member's data. This maintenance function will verify that each member has a complete set of data records. If not, SIT will create the missing records. If a member has duplicate records, SIT will remove them. If any correction were made, SIT will provide you with an Error Report for you records. The report is a detailed journal of all problems and correction encountered by SIT. If no problems were found, no Error Report will be created.

> **WARNING:** If you suspect that your data is corrupted, be sure to back up your data, if you do not have a recent backup. Once SIT has corrected the data, the changes are permanent; i.e. there is no un-correct function.

To start the SIT, select ***File\Integrity Self Test…*** from the menu bar. Click ***OK*** when the Event completion message is displayed. Click ***OK*** when the ASVAB completion message is displayed.

Acknowledge any error messages by clicking ***OK***. Also, click ***Yes***, if asked to print an Error Report. A screen preview of the report will be displayed. Click on the ***Printer*** icon to print the report. Click on the ***Exit*** icon to exit the report Preview.

## Master Reset ( )

The Master Reset function will start the Configuration Wizard. The Wizard will present a sequence of screens that present specific questions about your CIPM 99 installation. Once you answer the questions, the Wizard will complete your CIPM 99 configuration.

> **WARNING: Do NOT proceed!** This function will restore your CIPM 99 database to a post-installation state, i.e. all the member data; all but one counselor (SYSADMIN), all but one office and all but one commander will be permanently deleted. No recovery is possible. If your database is corrupted beyond repair, this function will reset the database.

To Reset the Database, select File/Master Reset… from the menu bar and a warning message will be displayed. Click ***OK*** to continue. Otherwise, click ***Cancel*** and your data will be restored. After continuing the Configuration Wizard will display the first screen as:

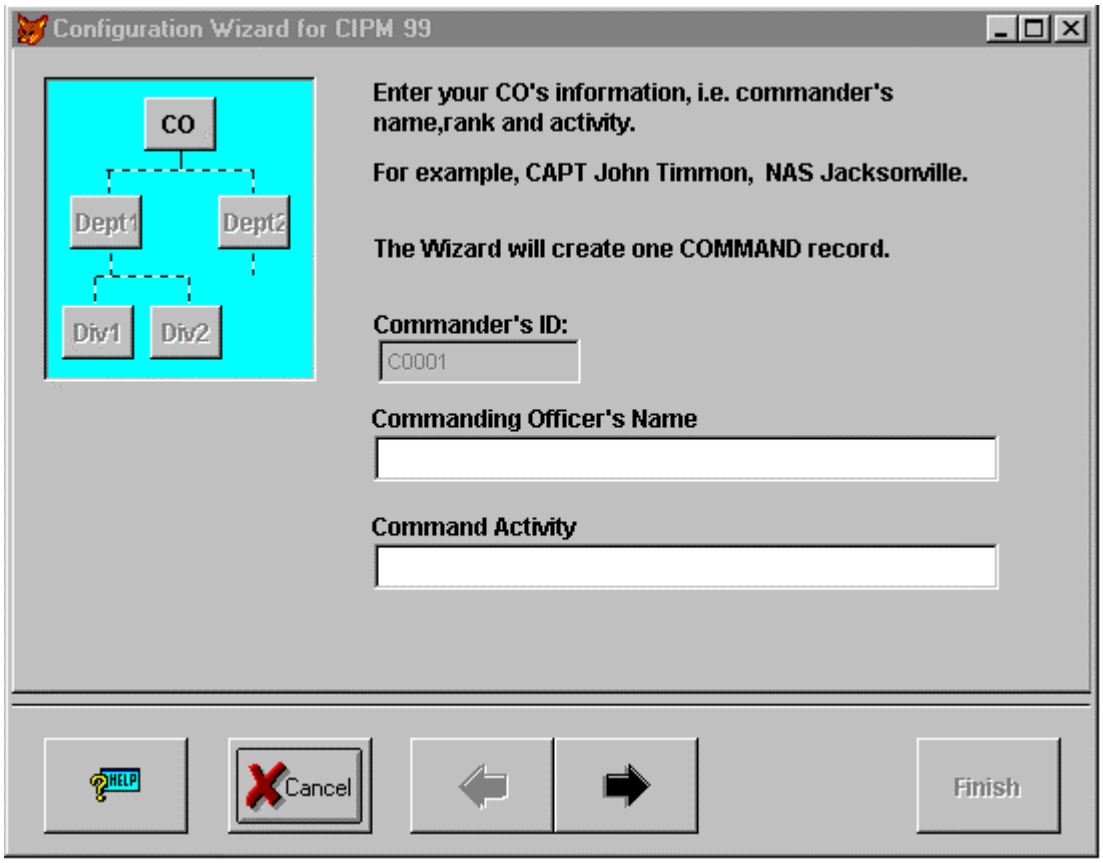



**Figure 15 Page 1 Configuration Wizard - Commander's Record**

| Data Label | Content |
|---|---|
| **Arrow Right/Arrow Left** | Moves to the next screen. Forward or Backwards. |
| **Cancel** | Restores the data back to the pre-Wizard state. |
| **Command Activity** | Name of the commanding officer's activity. For Example, NAS Jacksonville. Note: (1) You must enter a non-blank command name to proceed. (2) If your commander is responsible for more than one activity, enter the activity with the largest number of personnel. After the Wizard is completed, use CIPM 99's *Add Office* function to add the remaining activities that your CO is responsible for. |
| **Commanding Officer's Name** | Enter your commanding officer's rank and name. For example, *CAPT John Smith*. Note you must enter a non-blank name to proceed. |
| **Finish** | Start the actual re-configuring process. Once this has been started, the process can not be reversed or interrupted. |

The Master Reset Configuration Wizard Page 2 screen is shown below. Enter the CCC's (Command Career Counselor) UIC, Department and Division, as needed, to define the CCC's organization.

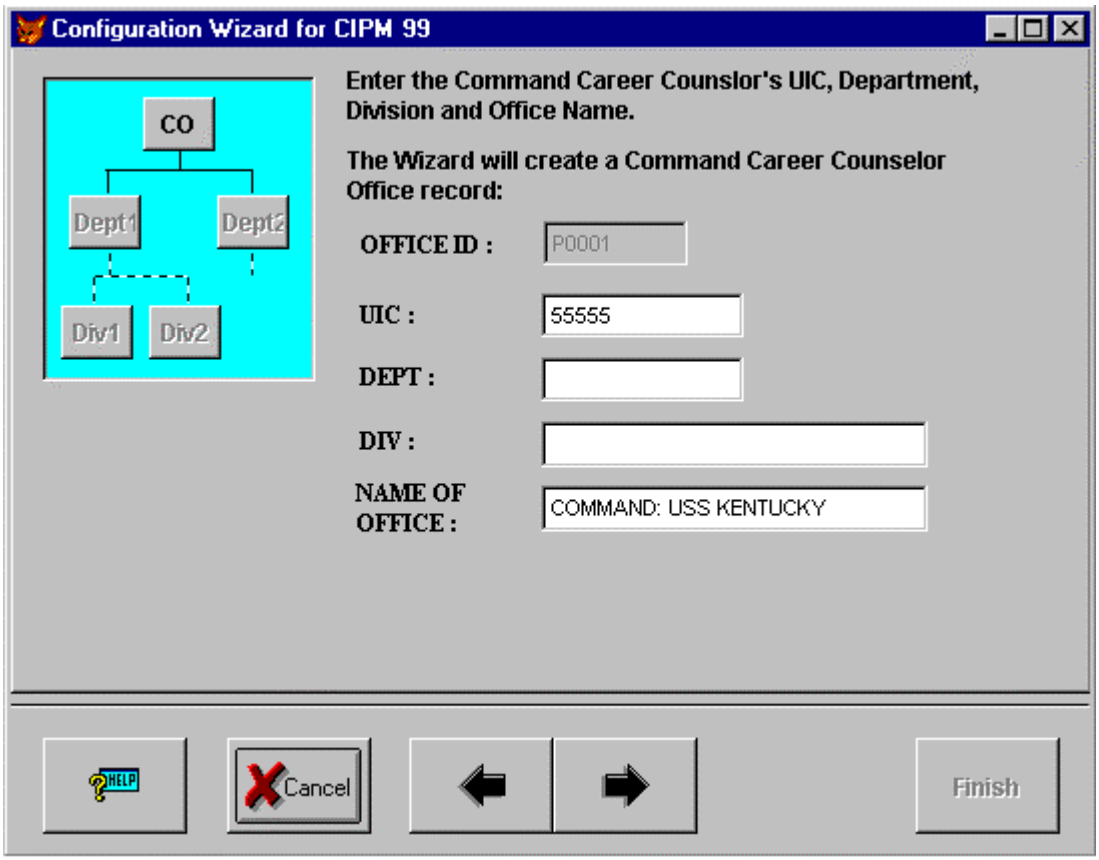



**Figure 16 Page 2 Configuration Wizard - Office Record**

| Data Label | Content |
|---|---|
| **DEPT:** | Department Name of the CCC's activity. Max 8-characters. Optional. NOTE: If the highest level of responsibility for your CCC is a Department, then enter a non-blank department name. Otherwise, leave blank. |
| **DIV:** | Division Name of the CCC's activity. Max 5-characters. Optional. NOTE: If the highest level of responsibility for your CCC's is a Division, then enter a non-blank division name. Otherwise, leave blank. |
| **OFFICE ID:** | CIPM 99's internal name for this office. View only. Can not be changed by the user. |
| **OFFICES:** | UIC code of the CCC's activity. Max 30-characters. |
| **UIC:** | UIC code of the commander's activity. Max 5-characters. Note: (1) You must enter a UIC to proceed. (2) If your CCC's is responsible for more than one UIC, enter the UIC with the largest number of personnel. After the Wizard is completed, use CIPM 99 Add Office function to add the remaining activities that your CCC's is responsible for. |

The Master Reset Configuration Wizard Page 3 screen is shown below. Enter the CCC's (Command Career Counselor) name, rate, work phone number and PRD. Optionally, you can change the SYSADMIN's password.

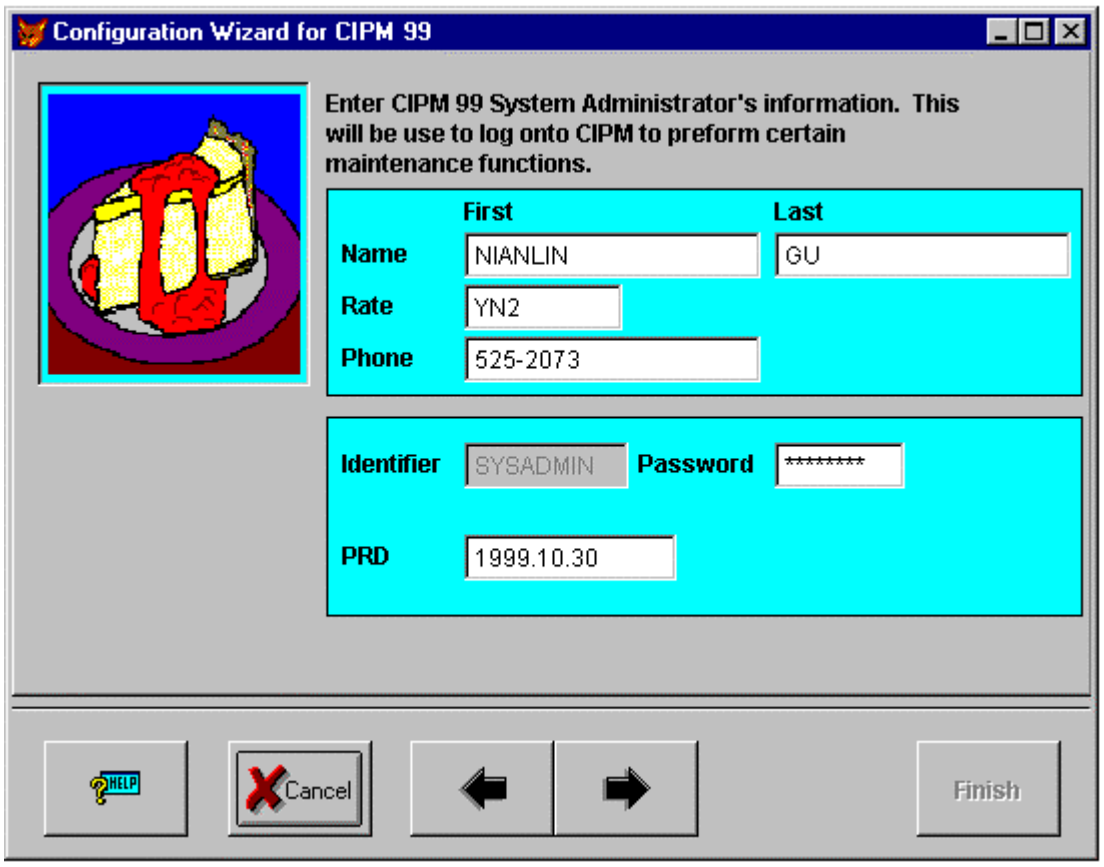



**Figure 17 Page 3 Configuration Wizard - Counselor's Record**

| Data Label | Content |
|---|---|
| **Identifier** | Counselor's (User's) identifier, e.g. SYSADMIN. Max 8-character. Other counselor's can be added later. This one must be present. |
| **First Name:** | Counselor's First name, e.g. John. Max 20-characters. |
| **Last Name:** | Counselor's Last name, e.g. Perez. Max 20-characters. |
| **Offices:** | Name of the counselor's office. |
| **Password:** | User's password. Max 8-characters. |
| **Phone:** | Counselor's work phone. Max 20-characters. |
| **PRD:** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter date as YYYY/MM/DD format. Otherwise, leave blank. |
| **Rate** | Career counselor's Rate. Max 10-characters. Either enter the Rate or pick one from the drop down list. |

The Master Reset Configuration Wizard Page 4 screen is shown below. If you have data from one of these sources you can import that data at this time.

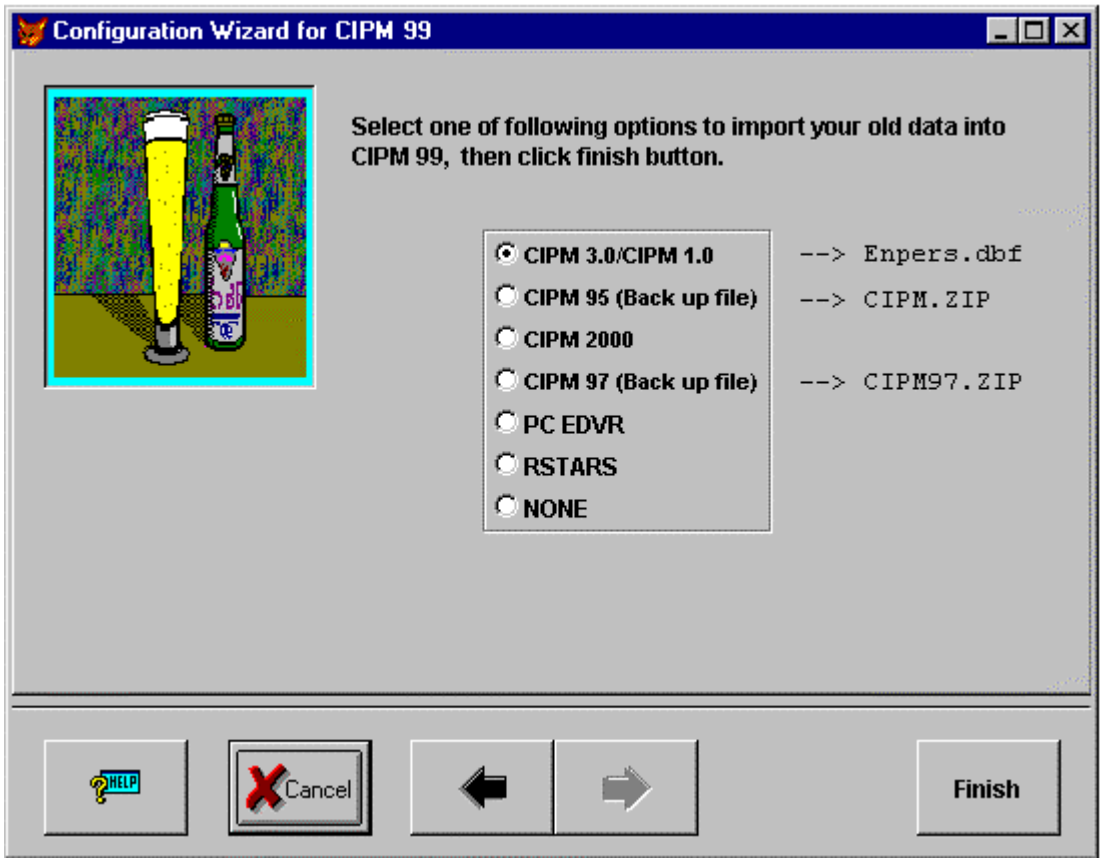



**Figure 18 Page 4 Configuration Wizard - Counselor's Record**

**To start the Import:**

Select the data source (CIPM 3.0/CIPM 1.0, CIPM 95….) form the list. Click ***Finished*** and follow the screen directions. Otherwise, to skip the Import for now (**NOTE**: You can import later), click ***NONE*** and click ***Finish***. Weather you import or not, your old data will be replaced with your new Wizard data.

For additional information on importing data into CIPM 99 see Importing Records ( ) p. 3-20, Importing EDVR ( ) p. 3-26 and Importing CIPM 2000 Records ( ) p. 3-28.

## Counselors ( )

Only CIPM registered counselors can access member's data. All CIPM users are considered counselors and thus the terms, *user* and *counselor* are used interchangeably. The CIPM Log On security requires a potential user to select his/her User ID from a list of registered users and enter his/her valid password before the user can access the CIPM

data. If the user is not in the list or enters an invalid password, the user will be denied access.

The initial CIPM 99 installation has one pre-registered counselor with the User ID, *SYSADMIN*, and password, *SYSADMIN*, and must always be present. Initially, use this User ID and password to access CIPM. You should change user's password, name, office location and rate. The SYSADMIN counselor will be designated as the *CIPM System Administrator* and will be responsible for performing certain maintenance functions like adding new counselors, performing file maintenance, setting security levels, etc… You will not be able to delete this counselor nor change its security options.

CIPM security system requires the each counselor be designated as a Division Level Counselor, Department Level Counselor, UIC Level Counselor or System Administrator. A Division Level Counselor will have access to all members' records within his/her Division plus any member he/she has been explicitly assigned. (See Section Input – CIPM Records, p. 4.42) A Department Level Counselor will have access to all members' records within his/her department including all divisions below his/her department plus any member he/she has been explicitly assigned. An UIC Level Counselor will have access to all members' records within his/her UIC plus any member he/she has been explicitly assigned. The System Administrator has access to all members' records. Below is table that summarizes the data accessible by each level:

| | **Members** | | | | |
|---|---|---|---|---|---|
| **Counselor's Level** | ***Division*** | **Department** | **UIC** | **Explicit** | **Everyone** |
| Division | ✓ | | | ✓ | |
| Department | ✓ | ✓ | | ✓ | |
| UIC | ✓ | ✓ | ✓ | ✓ | |
| SYSADMIN | ✓ | ✓ | ✓ | ✓ | ✓ |

You can add, change information and delete counselors from the Counselor list with this function. The following section describes the procedures to add, edit and delete counselors.

To access the Counselors List, select *Inputs\Counselor* from the menu bar. A list of registered counselors will be displayed in a Browse Counselor screen, as shown below:

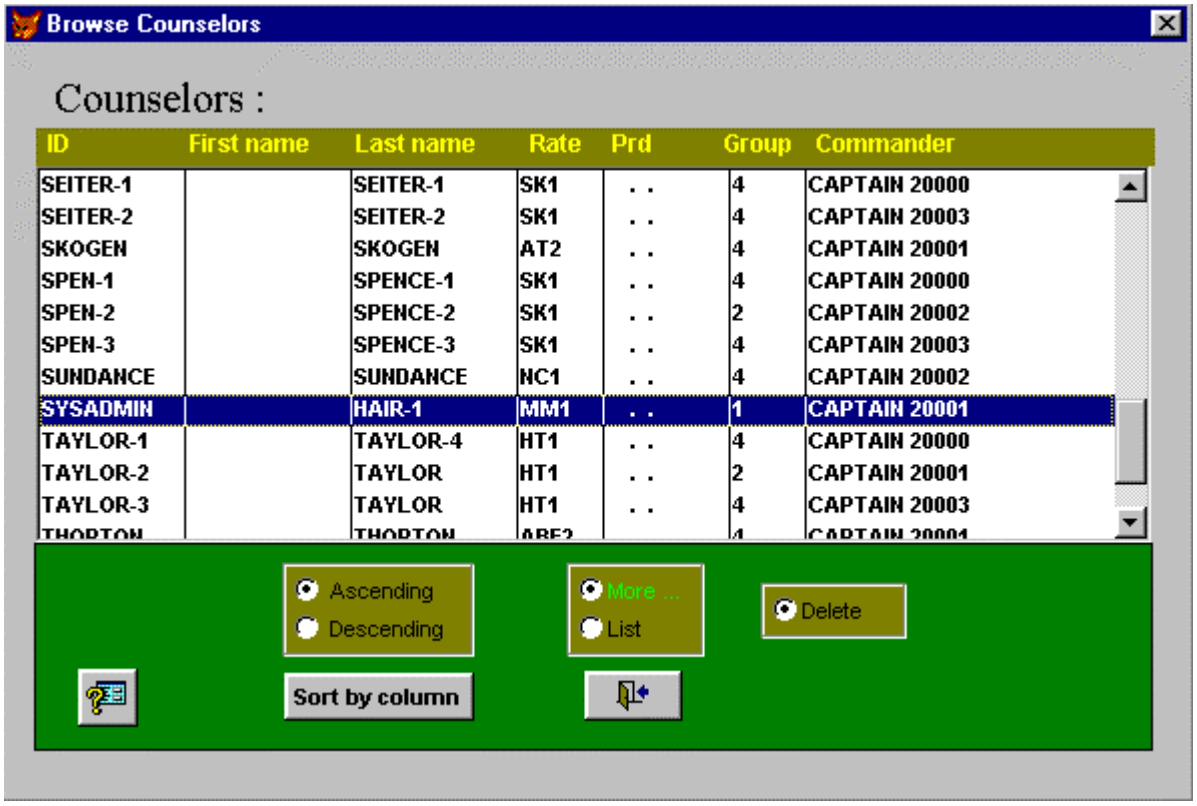



**Figure 19 Counselor - Browse Screen**

In the initial installation, the Counselor List will contain only one counselor, SYSADMIN, John A. Carter. You should change the SYSADMIN's name, rate, SSN and office information to match your designated CIPM System Administrator.

### *Delete a Counselor*

To delete one or more counselors, select the counselor(s) from the list and click *Delete*. A confirmation message will be displayed, "*There are(is) xx-records to be deleted. Are you sure you want to delete them(it)?*". Click *Yes* to continue or *No* to cancel the deletion. If no member's are explicitly assigned to the selected counselor(s), the counselors will be deleted. Otherwise, an information message will be displayed, "*This User has been assigned to one or more members. You can NOT delete this record now.*" Click *Ok* to acknowledge the message and remove the member's explicit assignment from the counselor (See Section Page 1 Basic Data, p. 4-33) and retry the deletion.

### *Add or Change a Counselor Record*

To add a new counselor or edit a counselor's record, select a counselor from the list and click ***More***. The counselor's record will be displayed as:

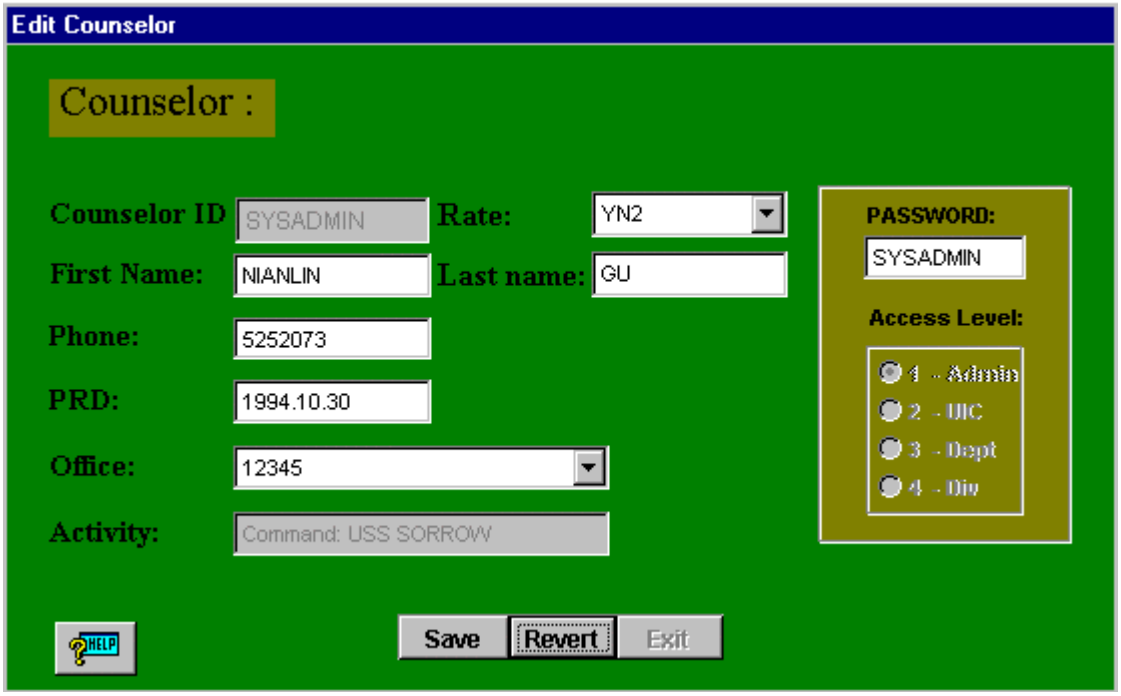



**Figure 20 Counselor - Edit Screen**

| Data Label | Content |
|---|---|
| **Access Level:** | User's Access Level:<br>1-Administration<br>2-UIC<br>3-Department<br>4-Division |
| **Activity:** | Name of the counselor's activity/office. |
| **Counselor ID** | Counselor's (User's) identifier, e.g. SYSADMIN. Max 8-character. |
| **First Name:** | Counselor's First name, e.g. John. Max 20-characters. |
| **Last Name:** | Counselor's Last name, e.g. Perez. Max 20-characters. |
| **Offices:** | Counselor's UIC, Dept (if departmental counselor), Div (if division counselor). Pick one from the drop down list. (See note below.) |
| **Password:** | User's password. Max 8-characters. |
| **Phone:** | Counselor's work phone. Max 20-characters. |
| **PRD:** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter date as YYYY/MM/DD format. Otherwise, leave blank. |
| **Rate** | Career counselor's Rate. Max 10-characters. Either enter the Rate or pick one from the drop down list. |

The ***More*** button allows you to view the counselor's data but not change it. All data fields will be disabled. You must click ***Add*** or ***Edit*** before you can make any changes.

> You can not change the Office name and Commander name. You must select one from the list provided. To change the Office information or to add a new office, see Section Offices, p. 3-13.

To add a counselor's record, click *Add* and fill in the information. To correct information, click *Edit* and correct the data. The table below the figure describes the type of data needed for each field. Once the information has been entered, click *Save*. If you are adding a new counselor, CIPM will create and register the new counselor. If your are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new counselor or your changes.

### *SYSADMIN Counselor Record*

For new installations, change the *SYSADMIN* counselor's information to your information. Edit the *SYSADMIN* record (See the above section). Type over the information, i.e. enter your *First* and *Last* names (first and last), *Rate*, *Phone Number*, and PRD over the default values.

Optionally, type in a new *Password*. Make sure you remember the new password. The next time you start CIPM 99 and select SYSADMIN, you will be required to enter the new password or you will not be able to start up CIPM 99.

> You can not change the ***Access Level*** nor the ***Counselor ID*** in the SYSADMIN record and you can not delete the SYSADMIN record.

## Offices ( )

All members and counselors must be assigned to an office. All offices are defined in the Office table. An office can be a Department, Division or UIC. Member and counselor records simply point to the office to which they belong. In a multi-counselor environment, office assignments are fundamental to CIPM's security. CIPM uses the assignments to control counselor access to member's data. When a counselor, logs onto CIPM, CIPM checks the counselor's access level and office assignment. The counselor will be given access to all members in his office plus all members in offices below his level, if any, plus any member who was specifically assigned to this counselor. For example, if a department counselor logs on successfully, the counselor will be able to view, change, and create report concerning all the members in his department and all his divisions under the counselor's department. (For a more complete discussion on CIPM Security see section, Counselors ( ), p. 3-9.)

You can add, change information and delete offices from the Office table with this function. The following section describes the procedures to add, edit and delete offices.

To access the Offices, select *Inputs\Offices* from the menu bar. A list of registered counselors will be displayed in a Browse Counselor screen, as shown below:

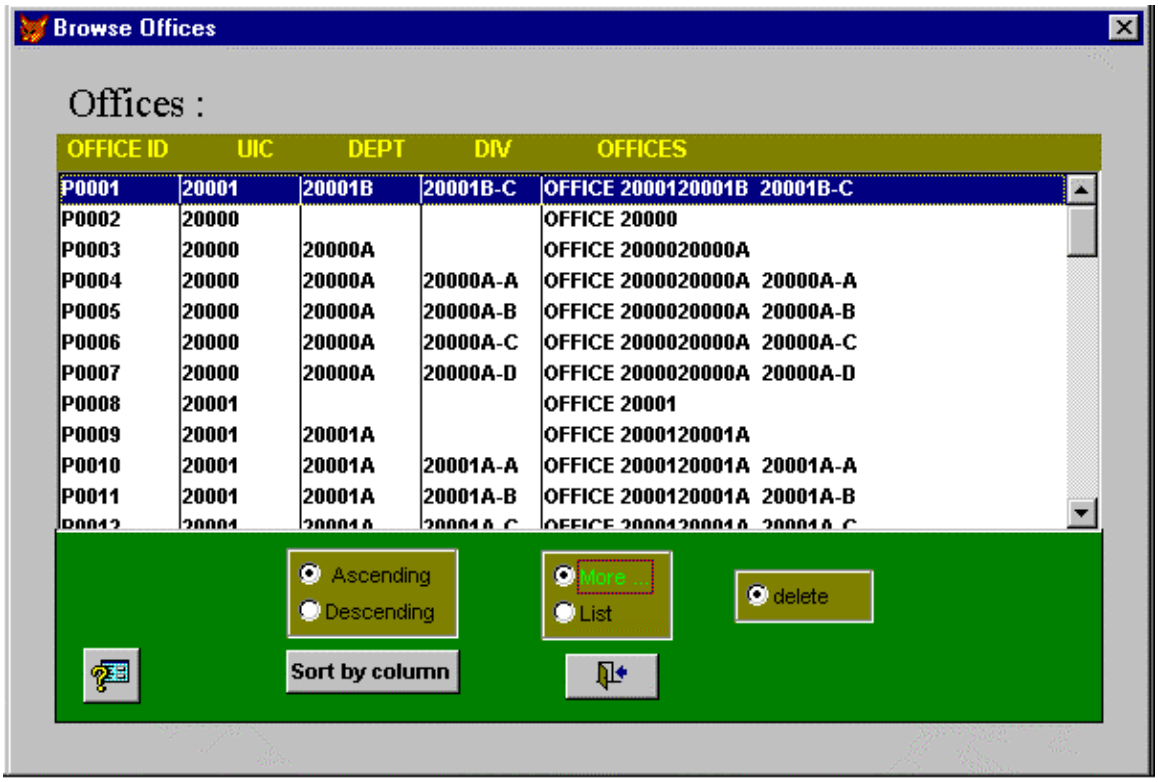



**Figure 21 Offices - Browse Screen**

In the initial installation, the Office List will contain only one office, Emergency Services. You should change information to match your designated CIPM System Administrator's office name, UIC, Department, Division, office title and commander.

### *Delete an Office*

To delete one or more offices, select the office(s) from the list and click *Delete*. A confirmation message will be displayed, "*There are(is) xx-records to be deleted. Are you sure you want to delete them(it)?*". Click *Yes* to continue or *No* to cancel the deletion. If no offices' are being used by either counselor or members, the office(s) will be deleted. Otherwise, the information message will be displayed, "*This Office has been assigned to one or more Users. You can NOT delete this record now.*" Click *Ok* to acknowledge the message and remove the member's explicit assignment from the counselor (See Section Page 1 Basic Data, p. 4-33) and retry the deletion.

### *Add or Change an Office Record*

To add a new counselor or edit a counselor's record, select a counselor from the list and click *More*. The counselor's record will be displayed as:

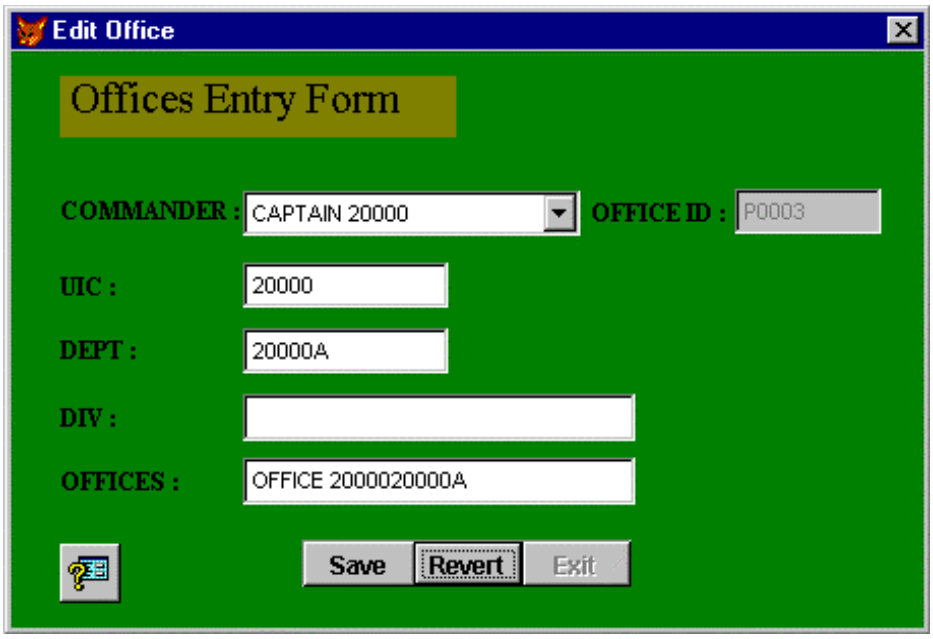



**Figure 22 Office - Edit Screen**

| Data Label | Content |
|---|---|
| **Commander:** | Name of Activity's Commander. Select from the drop down list. |
| **DEPT:** | Name of Department, e.g. AIROPS. Max 8-characters. Leave blank for UIC office. |
| **DIV:** | Name of Division. Max 8-characters. Leave blank for Dept or UIC office. |
| **Office ID:** | Pointer to Office. Used internally by application. 5-characters. |
| **Offices:** | Office within the Activity, e.g. HMR & Retention. Max 30-characters. |
| **UIC:** | Unit Identification Code. For example 63105. Max 5-characters. |

To add an office record, click *Add* and fill in the information. To correct information, click *Edit* and correct the data. The table below the figure (See above) describes the type of data needed for each field. Once the information has been entered, click *Save*. If you are adding a new office, CIPM will create the new office. If your are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new office or your changes.

## Commanders ( )

All offices must have a commander assigned. CIPM maintains a list of commanders' and their activities' names. The names are used to for signature blocks and report titles.

You can add new commanders, change commanders' and their activity names and delete commanders no longer needed from the Commander table with this function. The following section describes the procedures to add, edit and delete offices.

To access the Commanders, select *Inputs\Commanders* from the menu bar. A list of commanders will be displayed in a Browse Commanders screen, as shown below:

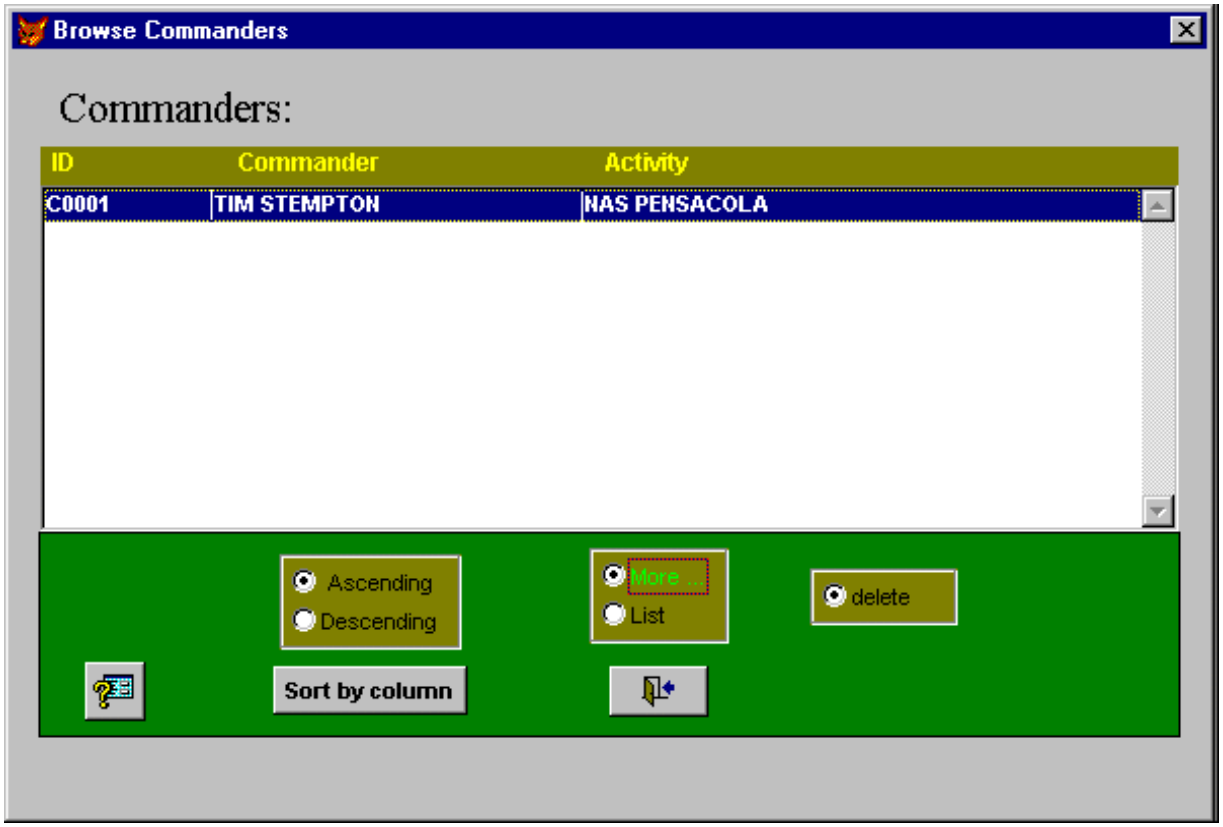



**Figure 23 Commanders - Browse Screen**

### *Delete an Commander*

To delete one or more commanders, select the commander(s) from the list and click *Delete*. A confirmation message will be displayed, "*There are(is) xx-records to be deleted. Are you sure you want to delete them(it)?*". Click *Yes* to continue or *No* to cancel the deletion. If no offices' references the commander(s), the commander(s) will be deleted. Otherwise, the information message will be displayed, "*This Commander has been assigned to one or more Offices. You can NOT delete this record now.*" Click *Ok* to acknowledge the message and remove the office's explicit reference from the counselor (See Section Add or Change an Office Record p. 3-12) and retry the deletion.

### *Add or Change Commander's Record*

To add a new counselor or edit a counselor's record, select a counselor from the list and click *More*. The counselor's record will be displayed as:

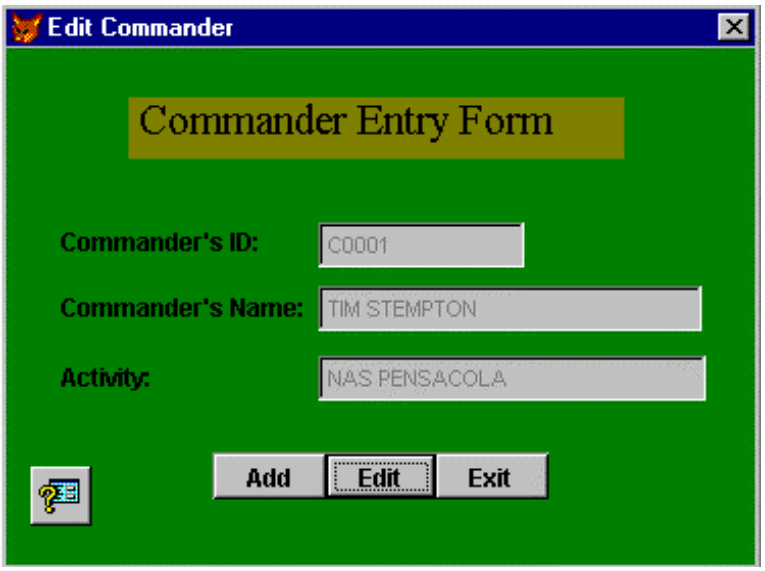



**Figure 24 Commander - Edit Screen**

| Data Label | Content |
|---|---|
| **Activity:** | Name of Activity, e.g. NAS PENSACOLA. Max 30-characters. |
| **Commander ID:** | Pointer to Commanding Officer. Used internally by application. 5-characters. |
| **Commander Name:** | Commanding officer's name (First and Last Name). Max 30-characters. |

To add a commander record, click *Add* and fill in the information. To correct information, click *Edit* and correct the data. The table below the above figure describes the type of data needed for each field. Once the information has been entered, click *Save*. If you are adding a new commander, CIPM will create the new commander. If your are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new commander or your changes.

## CREO Data ( )

CIPM can prepare an ASVAB Worksheet for each of your members. The worksheet list the Navy's high demand jobs and advancement opportunities for which the member qualifies. The qualifications are based on his/her ASVAB scores. Job opportunities are based on the current CREO/REGA (Career Reenlistment Opportunities) NAVGRAM.

The CREO function allows you to update the CIPM CREO's database with the latest CREO/REGA, i.e. you can add, delete and change the CREO records with the function. To access the CREO data, select *Inputs\CREO* from the menu bar. A list of ratings will be displayed in a Browse CREO screen, as shown below:

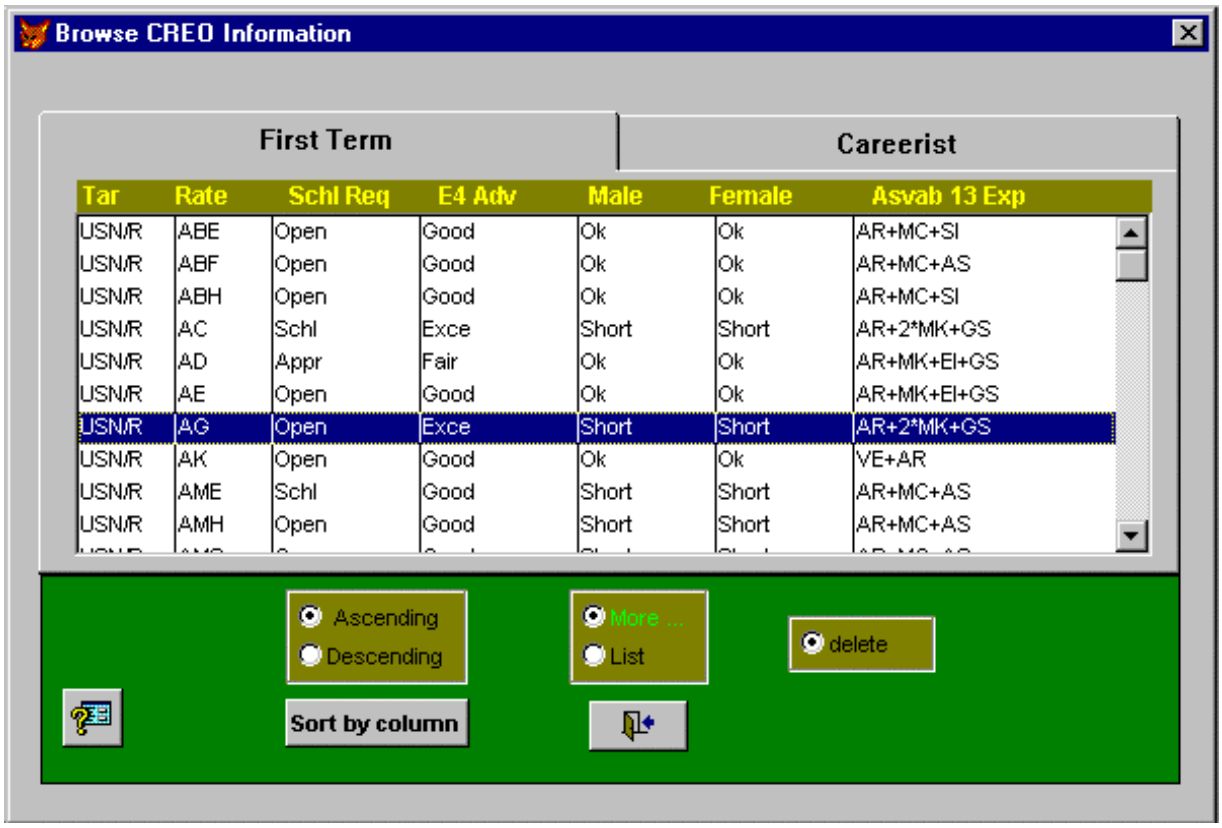



**Figure 25 CREO - Browse Screen**

The CREO Browse screen has two CREO Rating lists: one for first termers and one for careerist. To select a CREO list, click either the *First Term* or *Careerist* page tab.

### *Delete a CREO Record*

To delete one or more CREO Ratings, select the CREO Ratings from one of the lists and click *Delete*. A confirmation message will be displayed, "*There are(is) xx-records to be deleted. Are you sure you want to delete them?*" Click *Yes* to continue or *No* to cancel the deletion.

### *Add or Change CREO Records*

To add a new CREO Rating or edit a CREO record, select a CREO Rating from the either list and click *More*. (NOTE: Each list has CREO Rates for USN/R and TAR categories.) The CREO's record will be displayed as:

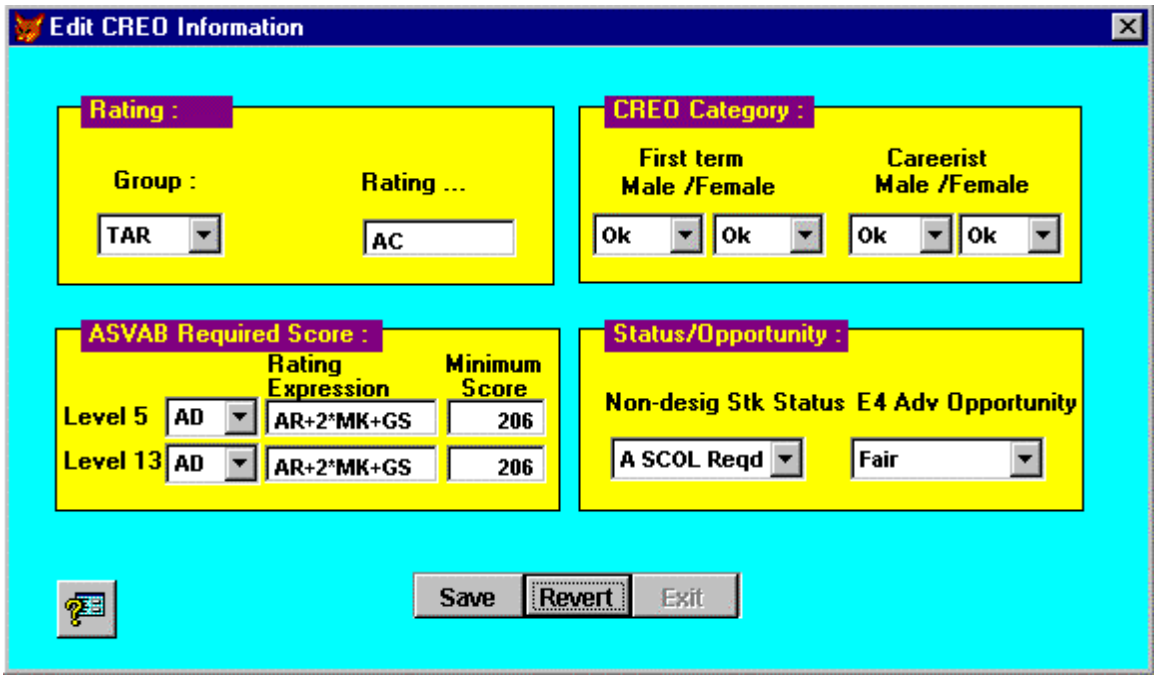



**Figure 26 CREO - Edit Screen**

| Data Label | Content |
|---|---|
| **Careerist Male/Female** | Male/Female Careerist Sailor – Female sailors who have reenlisted at least once. Generally, sailors with more than six years of active service.<br>Select one:<br>Short – Shortages in this category<br>Ok - Normal Loading<br>Over - Overage in the Category<br>N/A - Not available |
| **E4 Adv Opportunity** | E-4 Advancement opportunities:<br><br>EXCELLENT – Greater than 70 percent advancement opportunity.<br><br>GOOD - 40-69 percent advancement opportunity.<br><br>FAIR - Less than 40 percent advancement opportunity.<br><br>N/A - No E-4 exam for these ratings. |
| **First Term Male/Female** | First Term male/female sailors – sailors on their first enlistment or extension thereof who must receive BUPERS approval to reenlist. Generally sailors with six or less years of active service.<br><br>Select one:<br>Short – Shortages in this category<br>Ok - Normal Loading<br>Over - Overage in the Category<br>N/A - Not available |
| **Group:** | TAR - Enter Y, if member is a TAR. N, Otherwise. |
| **Level 13** | List of ASVAB Version 6 or later test categories. Used to build the algebraic expression to calculate minimum required score. |
| **Level 5** | List of ASVAB Version 5 or earlier test categories. Used to build the algebraic expression to calculate minimum required score. |
| **Minimum Score** | ASVAB version 13 or 5 minimum score required for acceptance into this rating. Range 000-999. |
| **Non-desig Stk Status** | Non-Designated Striker Status:<br><br>A SCOL RQRD - A school required. Rating entry only via Class A school. |

| Data Label | Content |
|---|---|
| | OPEN – Ratings which are open to all personnel. Those non-designated strikers who want to pursue ratings outside their normal path of advancement no longer require PERS-292/932 approval to take the E-4 exam.<br><br>APPRV RQRD. BUPERS approval required for rating entry.<br><br>CLOSED. No E-4 rating entry opportunities.<br>Rating manned by E-5 and above only.<br><br>PHASED OUT. Rating being disestablished. No entry into these ratings allowed.<br><br>DE-TARRED. Per NAVOP 99-89, ratings being removed from TAR program. Career opportunities in these ratings do not exist. First Termers in these ratings will not be allowed to reenlist in-rate as TARS. They must convert in-rate to USN or to another CERO 1 or 2 TAR or CREO 1 USN rating to be eligible for reenlistment. Career sailors in these ratings should consider conversion to ratings with career potential. |
| **Rating** | The expression used to compute |

| Data Label | Content |
|---|---|
| **Expression** | the minimum required ASVAB score that combines either the ASVAB Version 8 or 13 test scores. ,e.g.<br><br>AR+2*MK+GS<br><br>Max 15 characters. Use operators (+,-,*,/) and ASVAB categories (See Section ASVAB p. 4.47) |
| **Rating:** | Rating (Navy job classification for enlisted personnel) of member or career counselor. For example: AB rating means the sailor is qualified as an aviation boatswain's mate, AD for aviation machinist mate,... Max 10-characters. |

To add a CREO Rating record, click *Add* and fill in the information. To correct information, click *Edit* and correct the data. The Data Content table describes the type of data needed for each field. Once the information has been entered, click *Save*. If you are adding a new CREO Rating, CIPM will create the new CREO Rating. If your are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new CREO Rating or your changes.

## Archiving Members ( )

CIPM maintains two lists of members: *active* members and *transferred* members. Active members are accessible by all CIPM functions. Inactive members are transferred members, whose CIPM record has been moved to the CIPM's Archive File and thus not accessible by most CIPM functions. CIPM uses the Archive File data in a few statistical reports requiring historical information. Moving transferred members to the Archive file

can enhance CIPM performance. You can re-activate an archived member's record with the Unarchive function. (See Section Unarchiving Members p. 3-18.)

To Archive members, select *Tools\Archive Members* from the menu bar. A list of active members will be displayed in a Browse Archive Member screen, as shown below:

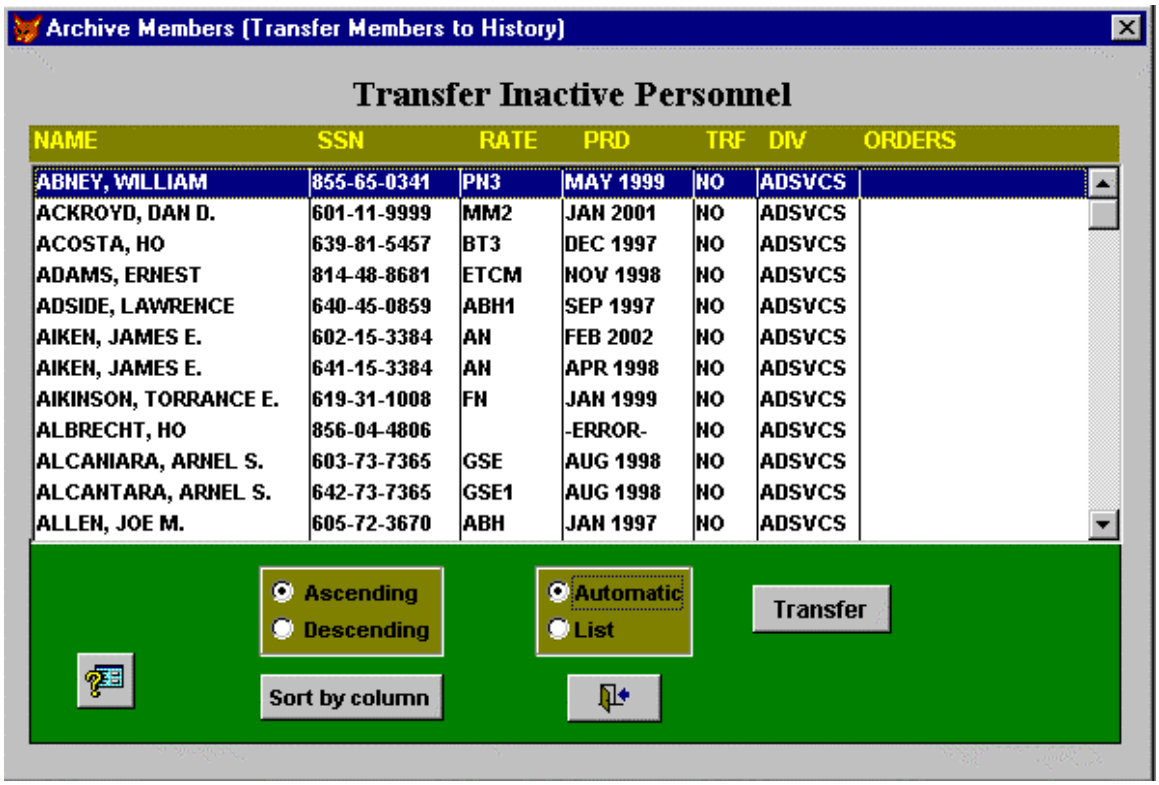



**Figure 27 Archive - Browse Screen**

You can select members to transfer to the Archive File with your keyboard and/or mouse. Just click on the member's entry. For multiple selections, hold the shift or control key down while selecting members. You can sort the entries using the Sort Control (*Sort by Column*) sorting by *Name*, *SSN*, ratings (*RATE*), *PRD*, Transfer Complete Flag (*TRF*), Division (*DIV*), or Order's description field (*ORDERS*).

CIPM can automatically select member to be transferred. Click on the *Automatic* button. CIPM will tag all members who have their TRF (Transfer Complete Flag) set to *Yes* (See Section Page 3 Retention, p. 4-36,) and members who have PRD's older than 14-months. Click *Yes* to confirm the tagging, when the following message appears:

***"There are xx-active members with PRD's over 14-months old OR have their Transfer Complete Flag (TRFCMP) set to 'Y'. Tag these members for inactive file?"***

Otherwise, Click *No*. CIPM will highlight all the members that are tagged for transfer.

Once you have tagged all the members to be transferred, click on the *Transfer* button. Click *Yes* to confirm the transfer, when the following message appears:

***"There are xx - Active member records to be transferred. Are you sure you want to transfer them?"***

Otherwise, Click *No* and no transfer will occur. If yes, CIPM will move the selected records to the Archive File. Click *OK* to acknowledge the transfer completion when the message "*INFORMATION: xx-Active Member(s) moved to history, successfully!*"

Remember this process is reversible, i.e. you can retrieve any archived record with the Unarchive Tool.

## Unarchiving Members ( )

CIPM maintains two lists of members: *active* members and *transferred* (archived) members. Transferred members are accessible only by the *Unarchive Members* tool described here. Archive members can be re-activated, i.e. moved to the CIPM file, or permanently removed them from the CIPM system using this tool. To access this tool, select *Tools\Unarchive Members* from the menu bar. A list of archived members will be displayed in a Browse Unarchive Member screen, as shown below:

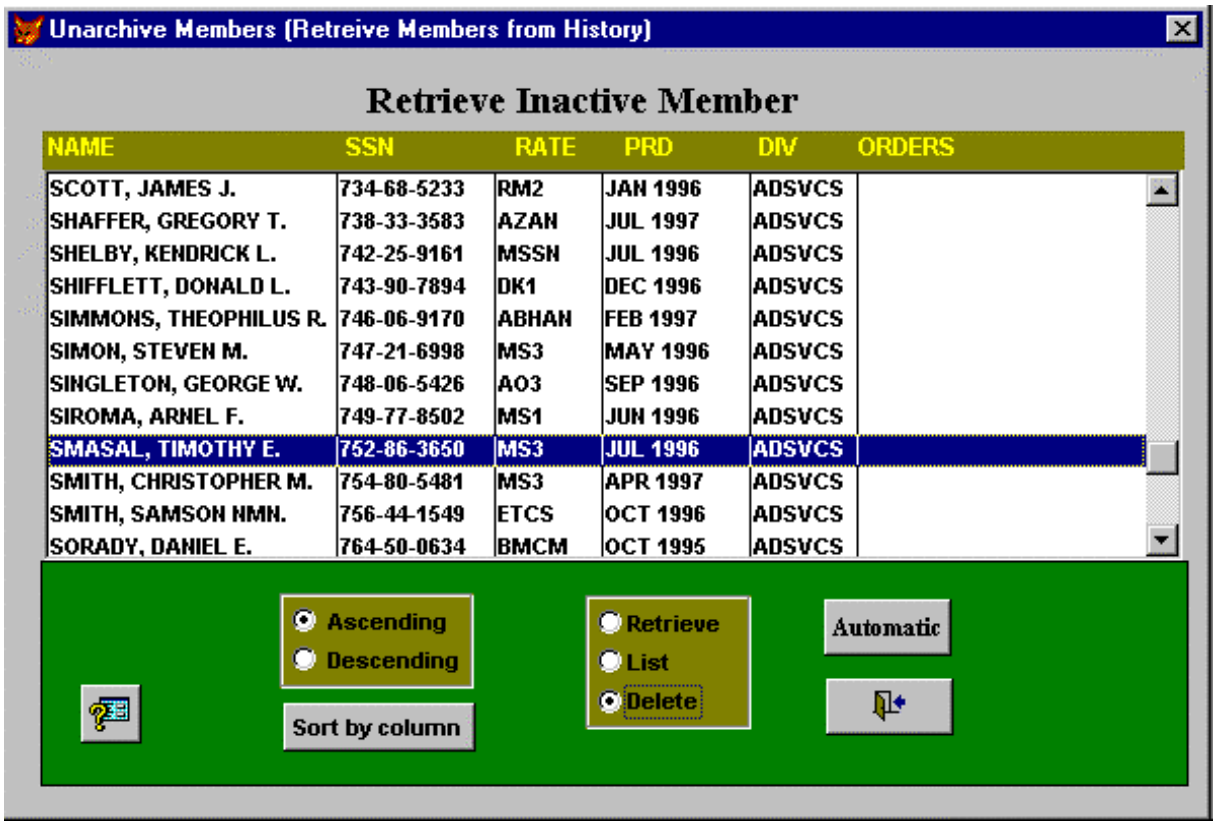



**Figure 28 Unarchive - Browse Screen.**

The Unarchive Members Screen lists inactive members. Members can be sorted by *Name*, *SSN*, *Rate*, *PRD*, *Division* and *Orders*.

To reactivate members, select the member(s) from the list and click the *Retrieve* button. Click *Yes* to confirm the re-activation, when the following message appears:

"There are xx - records selected for retrieval from history file. Do you want to activate these records?"

Otherwise, Click *No* and no transfer will occur. If yes, CIPM will move the selected records to the CIPM active member file. Click *OK* to acknowledge the transfer completion, when the message "*INFORMATION: xx-Inactive Members Reactivated successfully!*"

To delete archive members, select the members from the list and click *Delete*. To automatically select for deletion archived records with PRD's older than 3-years, click *Automatic*. CIPM will select all archived members whose PRD's are more than 3-years old. Click *OK* to acknowledge the information, when the message "*There are xx-Inactive members with PRD's over 3-years old. NOTE: You must click the 'Delete' button after selection to start the deletion process.*"

Once you have tagged all the members to be deleted, click the *Delete* button. Click *Yes* to confirm the deletion, when the following message appears:

"There are xx - Inactive member records selected for deletion. Are you sure you want to delete these records?"

Otherwise, click *No* and no deletion will occur. If yes, CIPM will remove the selected records.

> Deletion is not reversible. Once a record is deleted, the record is permanently removed from the CIPM database. To recover the data you will need to either restore the data from a backup file or you will have to re-enter the member's data.

## Importing Records ( )

The Import function is a CIPM 99 Tool that (1) automatically recognizes a valid data source, (2) creates and displays a list of members found in the data source, (3) allows you to select one or more members to be loaded into CIPM 99 database and (4) converts the selected member's records into the CIPM 99 format.

The Import function can automatically initialize, upgrade, consolidate, transfer or update your CIPM 99 member's database using data from many U.S. Navy computer databases without you having to manually input each member's information or update certain fields. If you are just starting to automate your counselor's office and have access to PC EDVR or RSTARS data files, you can load your CIPM 99 databases directly from your PC EDVR or RSTARS data files. CIPM 99 will create member's records from your PC EDVR or RSTARS data files. When newer data is available, you can load new members and/or update existing member's dates from PC EDVR or RSTARS. With this function, your data can be synchronized with other U.S. Navy computer databases. This function can not only reduce your data entry time necessary to create and maintain your member's information but can also improve the accuracy of your data.

> NOTE: Currently, CIPM 99 can not read/write to the ***Smart Card™***. However, this capability is being developed and may be available in the near future.

The Import functions can read data from the following sources and convert the data into CIPM 99 records:

| SOURCES | MEDIA | Member Data | ASVAB SCORES | COUN-SELORS |
|---|---|---|---|---|
| **CIPM 1.0** | Backup file or CIPM.DBF file. | ✓ | ✓ | |
| **CIPM 2000** | MS Access file (CIPM2000.MDB) | ✓ | ✓ | |
| **CIPM 3.0** | ENLPERS.DBF file | ✓ | ✓ | |
| **CIPM 95A** | Export file (NEWCIPM.DBF) | ✓ | ✓ | |
| **CIPM 95B** | Backup diskette. | ✓ | ✓ | ✓ |
| **CIPM 97B** | Backup diskette.(CIPM97.ZIP) | ✓ | ✓ | ✓ |

| SOURCES | MEDIA | Member Data | ASVAB SCORES | COUN-SELORS |
|---|---|---|---|---|
| **CIPM 99** | Export file (NEWCIPM.DBF) | ✓ | ✓ | ✓ |
| **PC EDVR** | Download file (EDVR.DBF) | ✓ | | |
| **RSTARS** | Download file (PERS.DBF) | ✓ | | |

**Table 3 Sources of Information for CIPM 99**

Although all sources contain member information, some sources do not contain all necessary data for completely filling in CIPM records, such as, ASVAB Scores and Counselor records. The table above indicates which sources contain which data.

### *Initializing CIPM99*

If you are a first time CIPM user and have access to PC EDVR or RSTARS data, CIPM 99 can create member records for you. If you do not have access to either data source, you will have to manually key in the CIPM information for each member. (See Section CIPM Records, p. 4-33.) Locate the most current data. Ask the Admin personnel to provide you with a file with the most current PC EDVR or RSTARS data. The can be stored either (1) on a diskette and, optionally, compressed with Pkware© ZIP program, if necessary, or (2) on a network hard drive for which you have access from your workstation. If you do not have the latest information, use the data provided. When new data becomes available, use the Update procedure below to refresh your data and load any new gains.

### *Upgrading to CIPM 99*

If you are converting from an older CIPM system, locate your most recent Backup diskette or make a new one using your older CIPM system. If you are using more than one version of CIPM, use the one with the most current information. If they are equally current, choose CIPM 95B; otherwise; choose CIPM 95A, CIPM 3.0, or CIPM 97 in this order.

### *Consolidating Many-to-One CIPM 99 Systems*

If you have many counselors with various versions of CIPM (including CIPM 99), you can *consolidate* all their data by importing each counselor's Backup data. If you do consolidate your data, remember to load the data sources from worst data source to the best, since the Import function will overlay member's data with the last data imported. We want the best data to be loaded last. This can happen if one or more member's information occur in two or more counselor's databases.

### *Transferring Between CIPM 99 Systems*

Using the CIPM 99 Import and Export functions member information can be *transferred* between two commands via diskette or e-mail. For example, if some of a ship's company is transferred to temporary shore duty for 6-months, the ship's career counselor using the Export function can create a CIPM 99 diskette with the transferring

member's information. The diskette can be hand carried or the file e-mailed to the shore career counselor, who would load the member's records into his shore CIPM 99 database.

### *Updating CIPM 99 Data*

You can keep your CIPM 99 current by periodically loading newer PC EDVR or RSTARS data into CIPM 99. CIPM 99 will add to your CIPM 99 database new members and will update the member's dates found in the PC EDVR or RSTARS data.

### *Importing Data*

> Before you import data from another system, we recommend that you back up your data. If the import loads older data than you wanted, you could restore the data to the pre-Import state.

To import data from CIPM 1.0, CIPM 3.0, CIPM 95A, CIPM 95B, CIPM 97 CIPM 2000 or RSTARS use the Import Tool (Note: To import data from PC EDVR use the Import EDVR tool. (See Section Importing EDVR, p. 3-26). To import CIPM 2000 data use the Import 2000 tool. (See Section Importing CIPM 2000 Records ( ) p. 3-28.) To access this tool, select *Tools\Import Members* from the menu bar. The Import Screen will be displayed, as shown below:

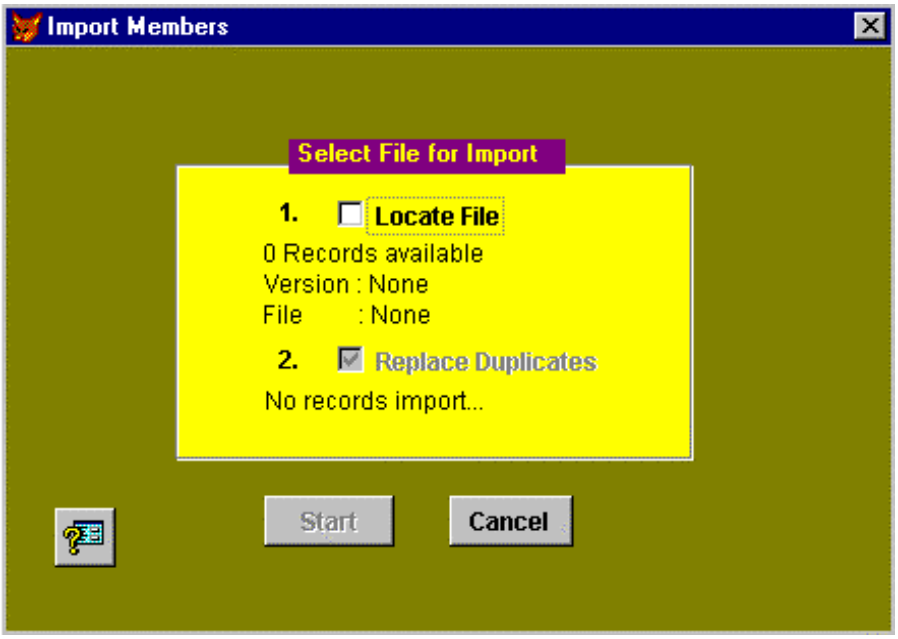



**Figure 29 Import Members Screen**

#### *Locate File*

Select the file to be imported by clicking on the *1. Locate File* check box. An Open File dialogue box will be displayed. Use the controls (Look In Drop Down List, File List

Box, Locate Text Box, Files of Type to select ZIP or DBF files) to locate and open the file to Import, as shown below:

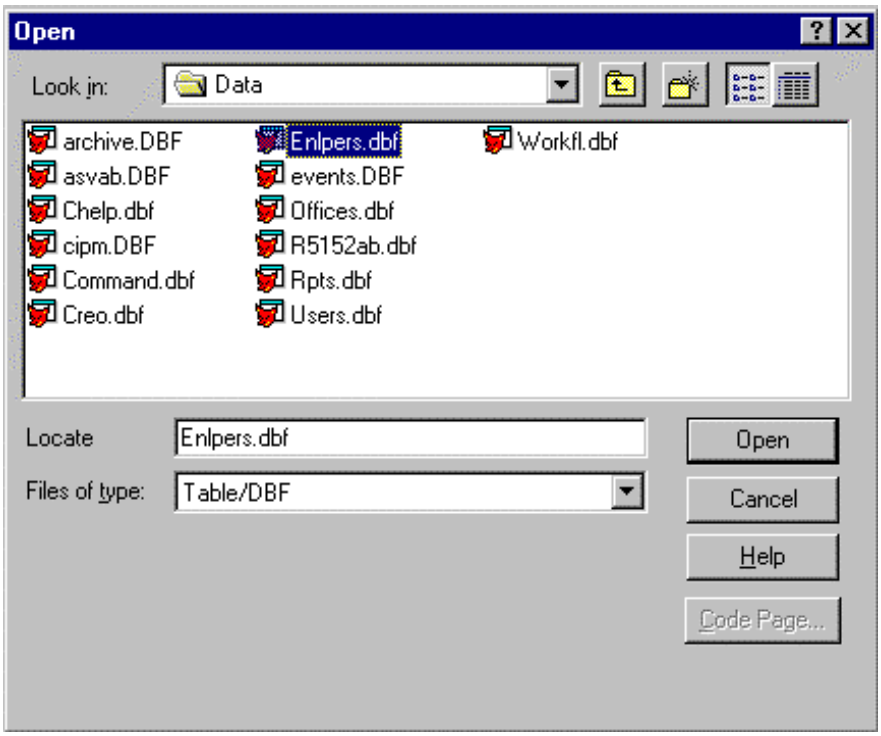



**Figure 30 Open File Dialogue Box**

The following table lists the most common Import Sources and their type of files. Locate your Import Source and Type of Import File. Then set the *Files of type* control to either ZIP or DBF and look for the file name indicated.

| Import Source | Type of Import File | *Files of type* | Look for File |
|---|---|---|---|
| CIPM 1.0 | Backup Diskette | ZIP | CIPM.ZIP |
| CIPM 3.0 | Database file | DBF | ENLPERS.DBF |
| CIPM 95A | Export file | DBF | NEWCIPM.DBF |
| CIPM 95B | Backup diskette. | ZIP | CIPM.ZIP |
| CIPM 97B | Backup diskette | DBF | NEWCIPM.DBF |
| CIPM 99 | Export file | DBF | NEWCIPM.DBF |
| RSTARS | Download file | DBF | PERS.DBF |

**Table 4 Import File Types**

After locating and selecting the desired file, click *Open* button. The Open File dialogue box will disappear and the previous screen will be displayed. Otherwise, click *Cancel* and the file will not be opened.

**NOTE**: If the data being imported is compressed, CIPM 99 will decompress the data. A special ***DOS Window*** will be displayed during the decompression. After the decompression is completed the DOS Window Title Bar will display "***Finished***". Close the DOS Windows.

*Code Page*

After selecting a file (and optionally decompressing it) CIPM 99 will ask you to select a code page set with a Code Page dialogue box as shown below:

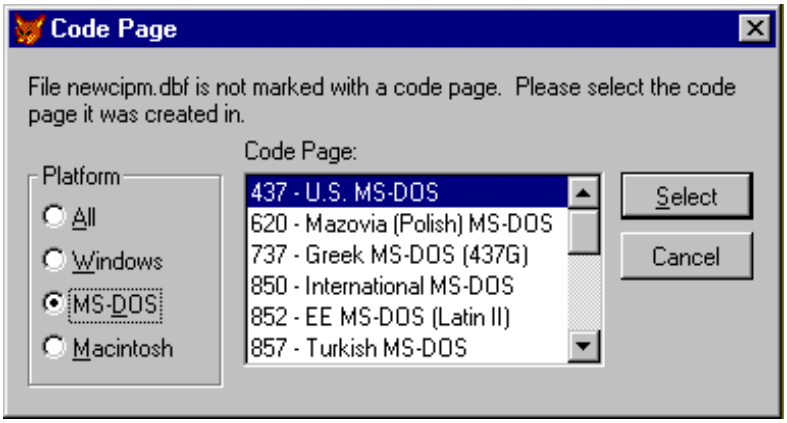



**Figure 31 Code Page Screen**

**NOTE**: The imported file must have a ***code page set***. (A code page set is a table of characters and corresponding numbers in memory that CIPM 99 uses to display data properly.) If you use a file from an earlier version of CIPM, the file might not have a code page mark. If the mark is missing when you open the file, CIPM 99 prompts you for a code page and then marks the file with it. However, if the code page is incorrect, some characters in the file might not display properly.

To properly convert an import file, select *MS-DOS* from the *Platform* list, *437-U.S. MS-DOS* from the *Code Page* list and click on the *Select* button. CIPM 99 will convert the code page of the input data, appropriately.

After the import file has been identified, decompressed and code page set, CIPM 99 will return to the Import CIPM Data screen. The program will display the results below the Locate File check box. In the example below, Import locate the file at *J:\CIPM30\ IMPORT\ENLPERS. DBF*, which contained 279 enlisted personnel records from a *CIPM 3.0* file.

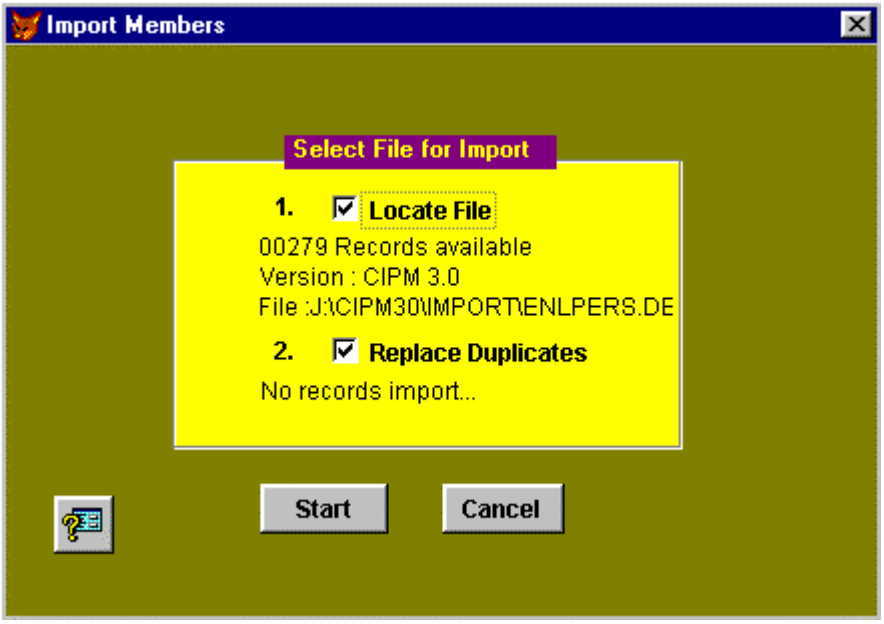



**Figure 32 Import Members Screens**

To have the Import function replace CIPM 99 records with imported records, where social security number matches, check the *2. Replace Duplicates* check box. Otherwise, uncheck the box.

### *Selecting Members*

To continue with the import click on the *Start* button. Otherwise, click on the *Cancel* button. By clicking on the Start button CIPM will present an alphabetical list of CIPM members found in the imported file, as shown below:

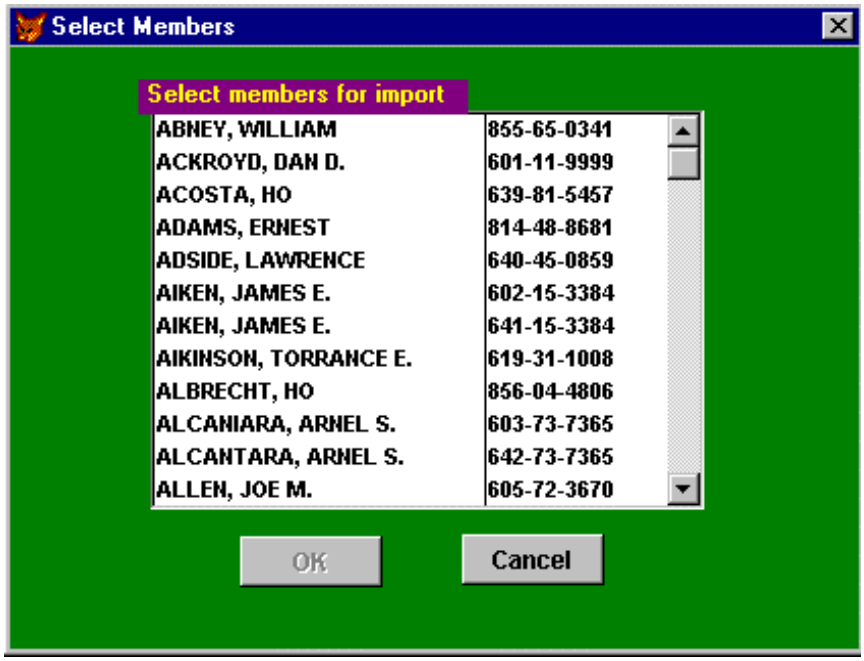



**Figure 33 Import Member - Selection Screen**

Select one or more members from the list by pointing to a member with the mouse pointer and click on the member. To select multiple members, hold the *Shift Key* down and press the *Page Down* key repetitively. To view more names, use the *Slider* control on the right side of the list and scroll through the list.

After one or more members have been selected the OK button will be enabled. Click on the *OK* button to continue. Otherwise, click on the *Cancel* button.

After importing the data, CIPM 99 will display a message indicating how many records were imported successfully. Click on *OK*. Congratulation! The import has completed successfully.

## Importing EDVR ( )

The Import EDVR function is a CIPM 99 Tool that: (1) reads PC EDVR data files; (2) creates and displays a list of members found in the data source; (3) allows you to select one or more members to be loaded into CIPM 99 database; and (4) converts the selected member's records into the CIPM 99 format. This function behaves exactly as the General Import function (See Section Importing , p. 3-20). Use this section for general information on importing PC EDVR data.

To import PC EDVR data, select *Tools\ EDVR* from the menu bar. The Import EDVR Screen will be displayed. Click the *1.Locate File* check box and locate the PC EDVR file, usually, *EDVR.DBF*. Open the file. Import EDVR will read the data and display the statistical results on the Import EDVR screen, as:

**Figure 34 Import Members - EDVR Screen**

To continue with the import click on the *Start* button. Otherwise, click on the *Cancel* button. By clicking on the Start button CIPM will present an alphabetical list of CIPM members found in the EDVR file grouped by status: **PG** (Projected Gains), **Onboard**, **PL** (Projected Losses) as shown below:

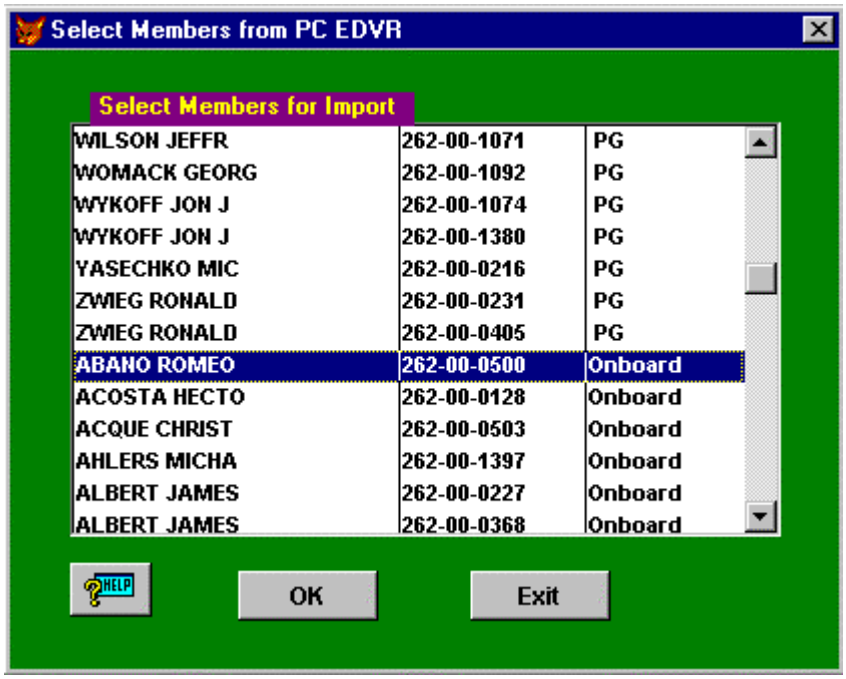



**Figure 35 Select EDVR Members**

Select the members to import and click *OK*. After importing the data, CIPM 99 will display a message indicating how many records were imported successfully. Click on *OK*. The import has completed successfully.

## Importing CIPM 2000 Records ( )

The Import 2000 function is a CIPM 99 Tool that: (1) opens a CIPM 2000 database and reads member's data files; (2) creates and displays a list of members found in the data source; (3) allows you to select one or more members to be loaded into CIPM 99 database; and (4) converts the selected member's records into the CIPM 99 format. This function behaves exactly as the Import Members tool (See Importing Data, p.3-22.) Use this section for general information on importing CIPM 2000 data.

To import CIPM 2000 data, select ***Tools\Import 2000*** from the Menu Bar. The Import CIPM 2000 screen will be displayed as shown below:

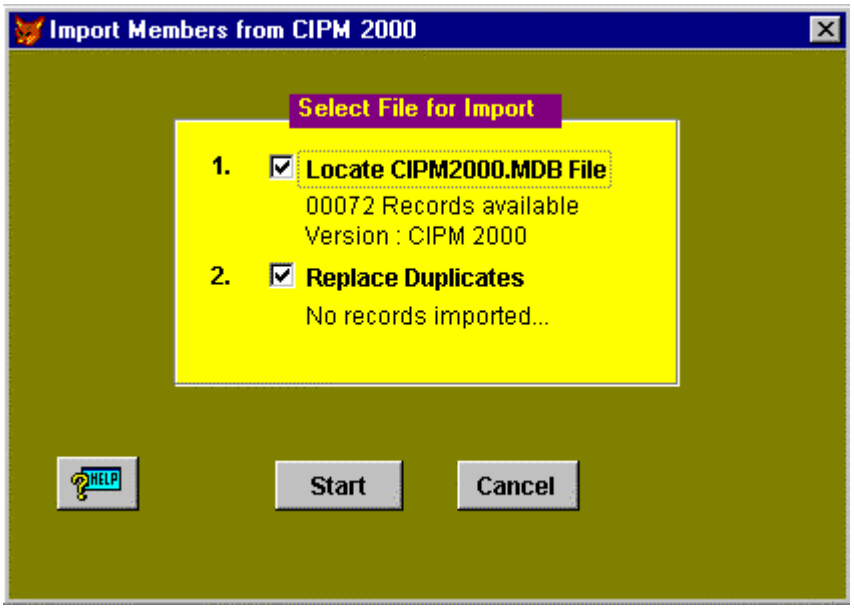



**Figure 36 Import Members – CIPM 2000 Screen**

Click the ***1.Locate CIPM2000.MDB File*** check box and locate the CIPM 2000 file, usually, **CIPM2000.MDB**. Open the file. Import 2000 will read the data and display the statistical results on the Import EDVR screen, as shown above.

To continue with the import click on the ***Start*** button. Otherwise, click on the ***Cancel*** button. By clicking on the Start button CIPM will present an alphabetical list of CIPM members found in the 2000 file.

Select the members to import (See Selecting Members, p.3-25) and click ***OK***. After importing the data, CIPM 99 will display a message indicating how many records were imported successfully. Click on **OK**. The import has completed successfully.

**NOTE**: The **ODBC** (Open Database Connectivity) driver for **MS Access 97 Database** must be installed before CIPM 2000 data can be imported into CIPM 99. CIPM 99 installs the ODBC driver onto the workstation when CIPM 99 is installed. However, if the driver is missing, re-install CIPM 99 from that workstation and re-

import the CIPM 2000. Optionally, if you have MS Access 97, load it onto the workstation and Access will install the driver.

## Exporting Members ( )

CIPM can transfer individual member or groups of members by office between CIPM 99 systems via diskette or e-mail. Use this Export Members tool to create a transportable file on diskette. This diskette can be hand carried to another CIPM 99 system or the Export File can be attached to a e-mail and sent to another command, where the recipient CIPM Counselor can import the file directly into his system (See Importing , p. 3-20). To access this tool, select *Tools\Export Members* from the menu bar. An Export Member screen will be displayed, as shown below:

**Figure 37 Export Screen**

To export members, click either ***Select records by Name*** to export individual members or ***Select records by offices*** to export entire offices.

### *Export Individuals*

The Select Members screen will be displayed, as:

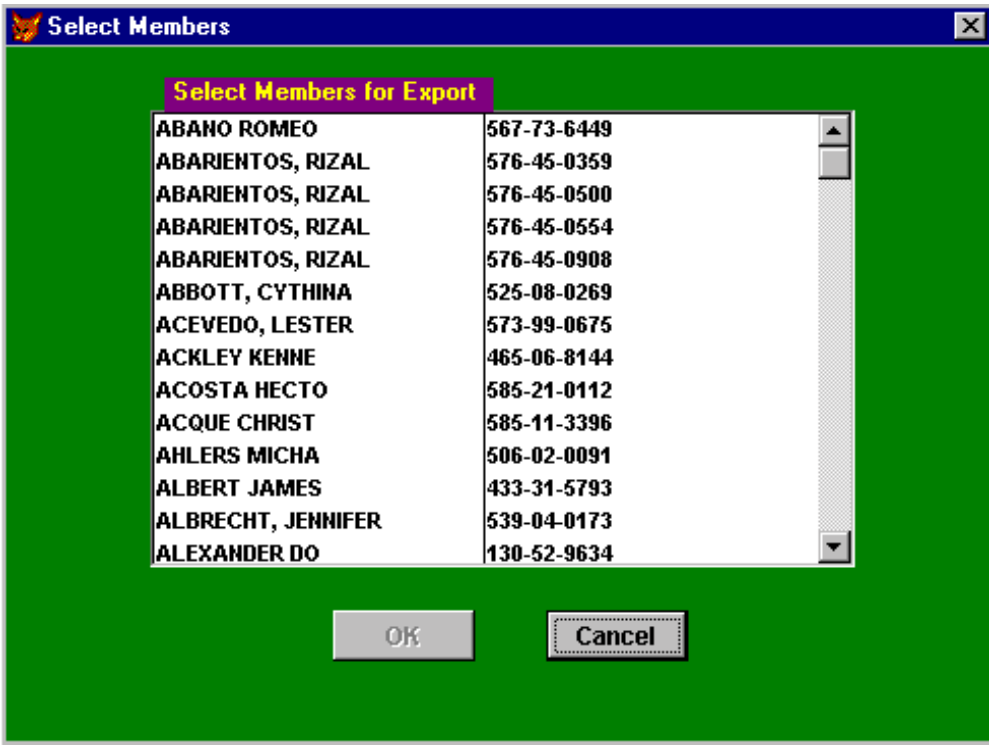



**Figure 38 Exporting by Member Screen**

Select the member or members to be transferred and click on *OK*. CIPM will count the number of selected members. Click *Ok*, when the message appears, " *Information: xxx-Records have been selected for Exporting. Please select output drive (A: or B) and click START button!*" CIPM will display the number of records selected again on the Export Screen. Click *Start* to continue or *Cancel* to quit. CIPM will create a file Pkzipped file, *NEWCIPM.ZIP*, on the floppy drive selected. This file contains all the selected members member's information. This file can be attached to an e-mail letter and sent to the new command or the diskette sent to the new command. Click *Ok*, when the message appears,"*INFORMATION: xxx-Records Exported Successfully*." Remove the diskette and label it.

> **NOTE**: Exporting a member does not remove his/her information from your CIPM database. It simply copies the information. To remove the member, you must delete them using the Browse CIPM screen.

### *Export Offices*

The Select Office screen will be displayed, as:

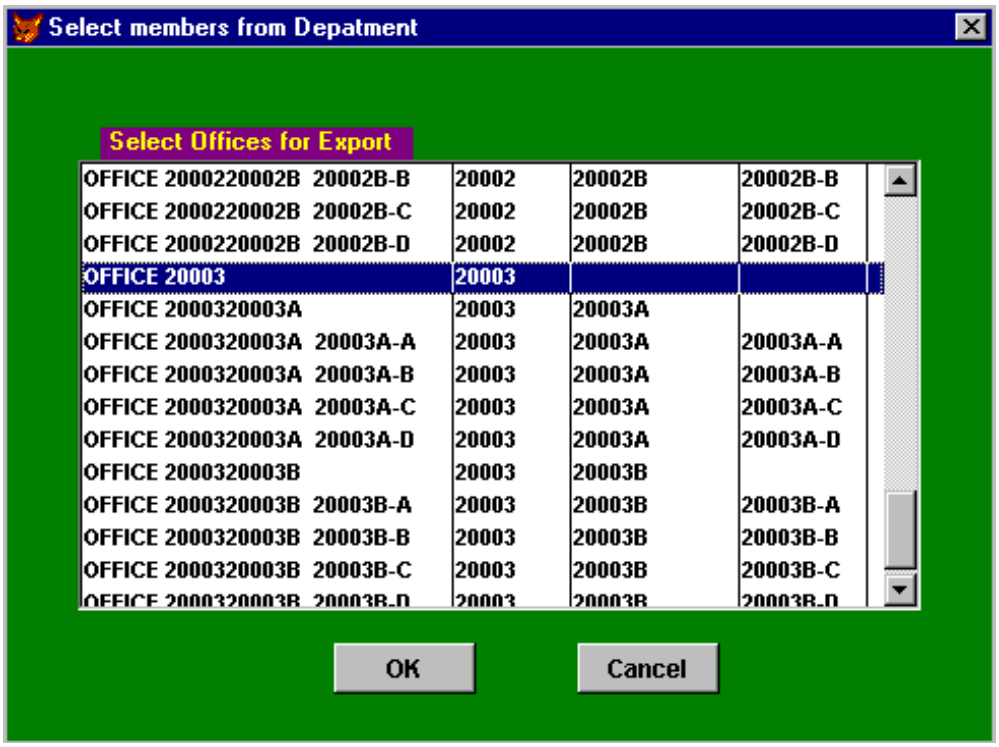



**Figure 39 Export by Offices Screen**

Select the office or offices to be transferred and click on *OK* and follow the directions for exporting members (See above section, Export Individuals).

After exporting, click *Cancel* on the Export Member screen to clear the screen.

## Introduction/Overview

All CIPM registered counselors have access to all Counselor Functions (See Table 2 SysAdmin and Counselor Functions, p. 3-1). This chapter describes these Counselor Functions, e.g. maintaining CIPM records, managing interviews and printing worksheets and reports.

The CIPM security system controls a counselor's access to member's data. When a counselor logs onto CIPM, CIPM will check the counselor's security level. CIPM will create a view of all members who are in his/her office and all sub-offices below his/her office plus all members that have been explicitly assigned to the counselor. For example, a department level counselor will have access to all his department members' records plus all its divisions' records plus any member in any office that has been assigned to this counselor. Once the counselor has logged into CIPM successfully, the counselor can view, change, list, report, create worksheets and prepare interviews for these members.

The User Functions are a set of screens, worksheets report and tools that support every day business operations for U.S. Navy Career Counselors.

## CIPM Records

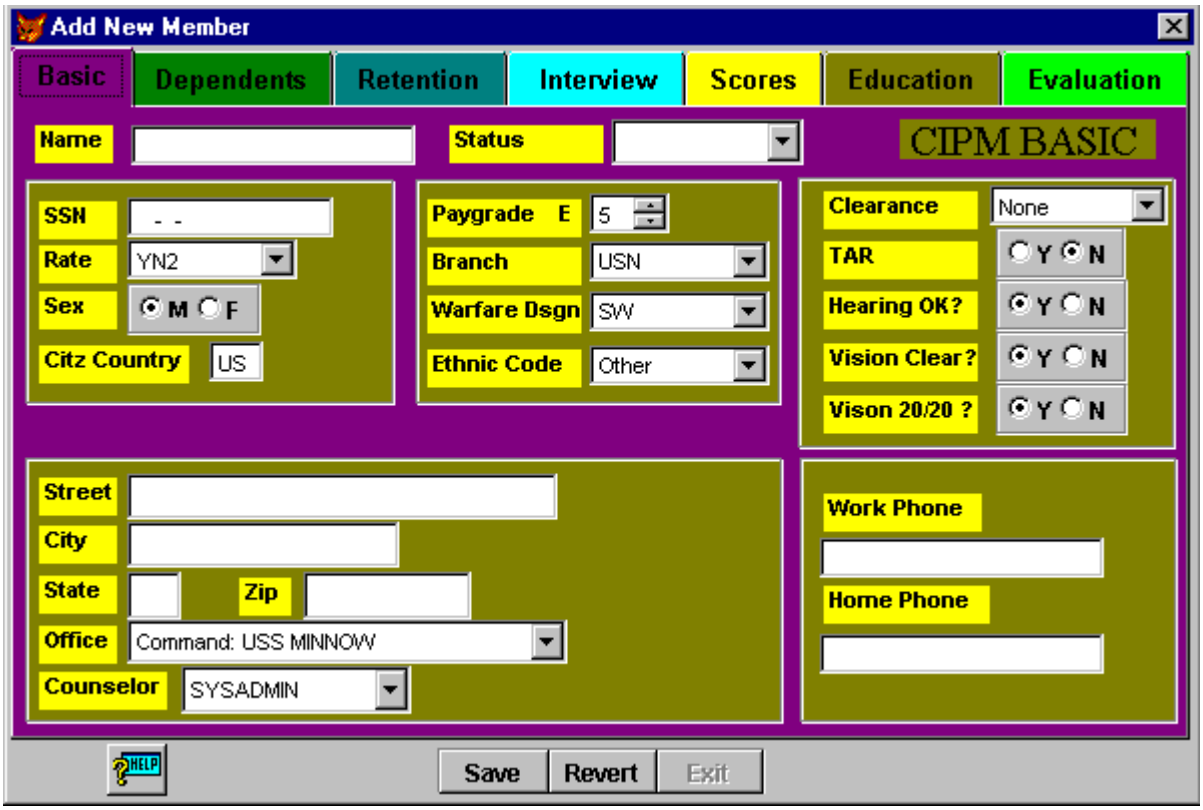
CIPM has been designed for three types of users: Tickler, ASVAB or Full CIPM Users. Since each type of user requires different views of member's records, CIPM has different screens for each type (See Tickler , ASVAB and Input – CIPM Records below). Each screen permits a counselor to list, view, create, delete and correct member's records, each with different is fielding. Additionally, CIPM has a quick access screen for inputting member's data with complete member record fielding. The following section describes these four types of screens.

A member's record has many fields. The member input screen groups these fields into pages with labeled tabs. Page 1, labeled *BASIC*, contains demographic data, pages 2-7 contain other groups of data and are labeled as *Dependents*, *Retention*, *Interview*, *Scores*, *Education* and *Evaluation*. Fill in the pages with the information that you want to retain. The more data you enter, the more function CIPM can help you with. For example, if you add the ASVAB Scores, CIPM can print ASVAB Worksheets for the member. Adding dates in the Interview Page will allow you the schedule interviews.

### *Input – Add Members*

To manually add a complete record for a new member, select *Inputs\Add Records* from the menu bar. A partially filled-in member's record will be displayed, as shown below:

### *Page 1 Basic Data*




| Data Label | Content |
|---|---|
| **Branch** | Branch of service member (USN,..,USNR) |
| **City** | City of member's residence, e.g. Virginia Beach. Max 15-characters. |
| **Citz Country** | Country of Citizenship (US). Max 2-characters. |
| **Clearance** | Security Clearance: S = Secret, TS = Top Secret, C= Confidential |
| **Counselor** | Assigned counselor. (Optional). |
| **Ethnic Code** | Ethnic Code:<br>I = American Native,<br>A = Asian,<br>B = Black,<br>C = Caucasian,<br>H = Hispanic,<br>O = Other |
| **Hearing OK?** | Adequate Hearing? Enter: Y or N. |
| **Home Phone** | Home phone of service member. Max 20-characters. |
| **NAME** | NAME of Service member. Enter: Last Name, First Name MI. Max 25-chars. |
| **Office** | Member's office. |
| **Paygrade** | Paygrade Enter: 1..9 |
| **Rate** | Rating (Navy job classification for enlisted personnel) of member or career counselor. For example an:<br>AB rating means the sailor is qualified as |

| Data Label | Content |
|---|---|
| | an aviation boatswain's mate, AD for aviation machinist mate, ... Max 10-characters. |
| **Sex** | Gender of service member Enter: M or F. |
| **SSN** | Social Security Number. Required. Enter 9 digits.<br>Format 999-99-9999 |
| **State** | State of member's residence, e.g. TX, VA. 2-characters. |
| **Status** | Member's status Enter: 1 = Projected Gain, 2 = Onboard, 3 = Limdu, 4 = Transferred, 5 = Discharged, 6 = Dead, 7 = Deserter |
| **Street** | Street address of member's residence, e.g. 7272 Saranac St Apt 26. Max 25-characters. |
| **TAR** | TAR – Enter Y, if member is a TAR. N, Otherwise. |
| **Vision 20/20?** | 20/20 Vision w/Correction? Enter: Y or N. |
| **Vision Clear?** | Color Vision? Enter: Y or N. |
| **Warfare Dsgn** | Warfare Designation:<br>AW-Air Warfare<br>SW-Surface Warfare<br>SS-Subsurface Warfare |
| **Work Phone** | Work phone of service member. Max 20-characters. |
| **Zip** | Zip code of member's residence. 5-digits, e.g. 78412 |

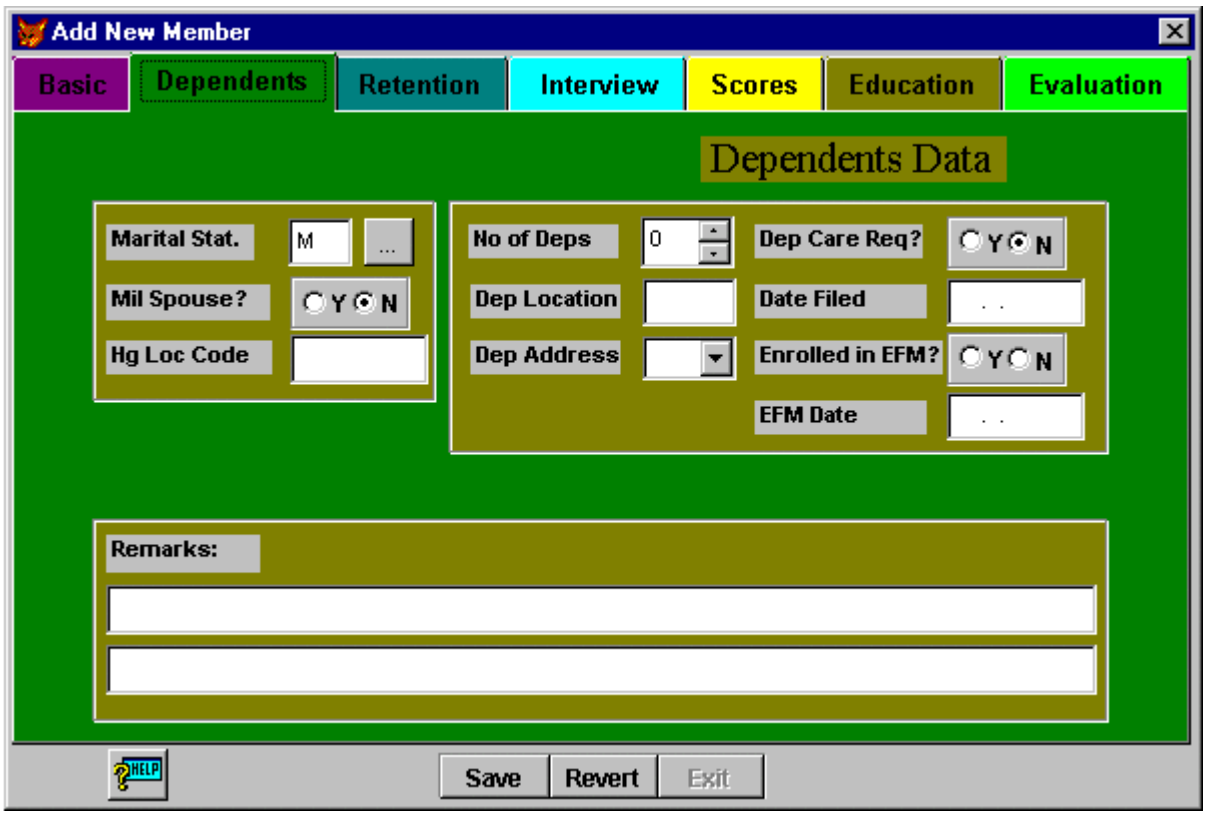
**Figure 40 CIPM Input Record Screen – Page 1 Basic Data**

To add a member's record, enter the information in the fields according to the field description. Once the information has been entered, click *Save*. CIPM will add the member. Otherwise, click on *Revert* to discard the new member.

> You must enter a unique SSN. CIPM will not let you enter a second record for the same person, i.e. a duplicate SSN.

The following are the screens for pages 2-7 along with their field descriptions:

### *Page 2 Dependents*

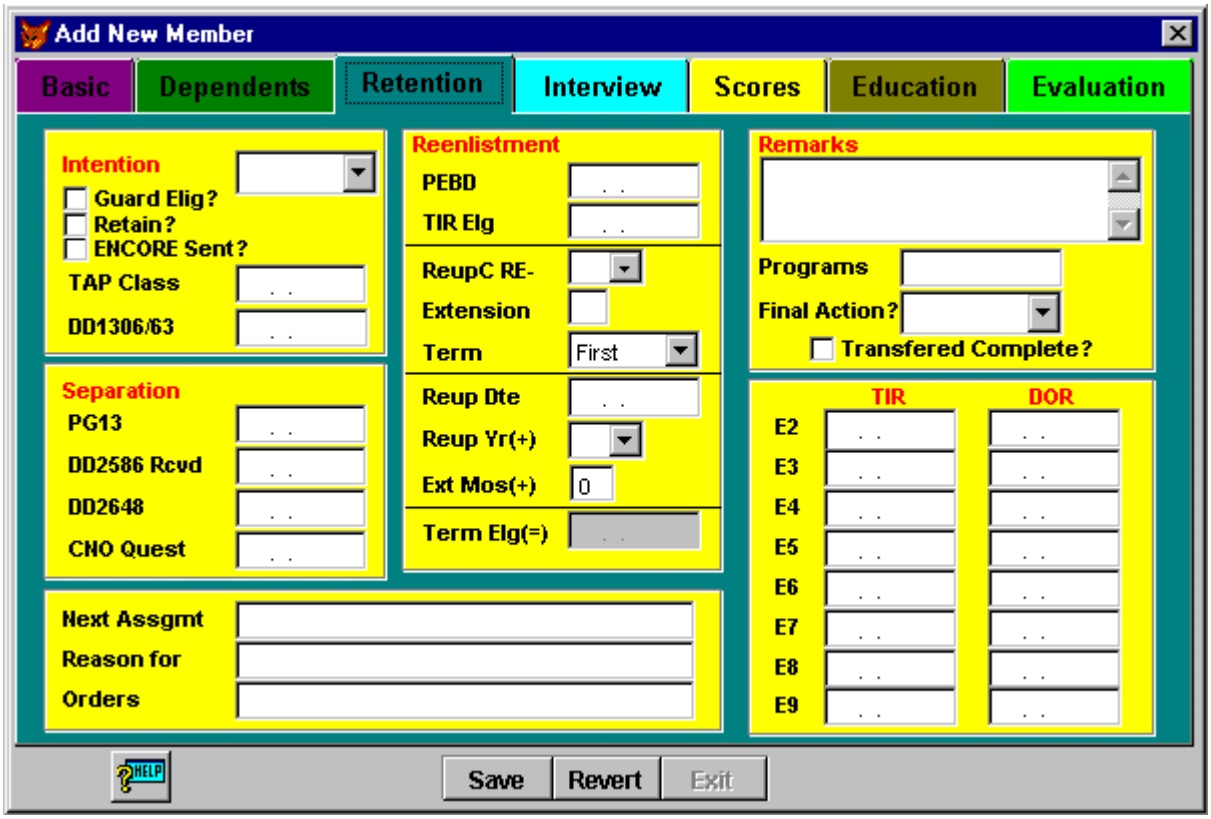



| Data Label | Content |
|---|---|
| **Date Filed** | Date Dependent Care Certificate was filed. Enter: YYYY/MM/DD. Otherwise, leave blank |
| **Dep Address** | Address of Dependents. Enter: SAME or DIFF |
| **Dep Care Req?** | Dependency Care Required? Enter: Y or N. |
| **Dep Location** | Location Code for Dependents (See Transman Chpt. 25). Max 3-chars.. |
| **EFM Date** | Exceptional Family Member Certificate Filed on this date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Enrolled in** | Exceptional Family Member. One character. |

| Data Label | Content |
|---|---|
| **EFM?** | Y=yes or N=No. |
| **Hg Loc Code** | Location Code of Household Goods (See Transman Chpt. 25). Max 3-characters. |
| **Marital Stat.** | Martial status of service member. M = Married, S = Single |
| **Mil Spouse?** | Is spouse in the military? Enter: Y or N. |
| **No of Deps** | Number of dependents. Enter 0-9. |
| **Remarks:** | Misc. remarks about Basic Data. Max 70-characters per remark. |

**Figure 41 CIPM Input Screen - Page 2 Dependents**

### *Page 3 Retention*




| Data Label | Content |
|---|---|
| **CNO Quest** | Date CNO Questionnaire was completed. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **DD1306/63** | Date of Duty Preference Form completed. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **DD2586** | Date DD2568 was filed. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **DD2648** | Date DD2648 was filed. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **DOR E2-E9** | Date of Rate for E2,E3,…,E9. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **ENCORE Sent?** | Has the ENCORE request be sent in? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Ext Mos(+)** | Number of months pending on this enlistment. Range 0-99. |
| **Extension** | Number of Extensions on this Contract. Range 1-9. |
| **Final Action?** | Member's Final Disposition: D = Discharged, E = Extended, F = Fleet Res, R = Reenlist |
| **Guard Elig?** | Eligible for Guard? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Intention** | Member's Reenlistment Intention: E = Extend for orders, F = Fleet Reserves, K = |

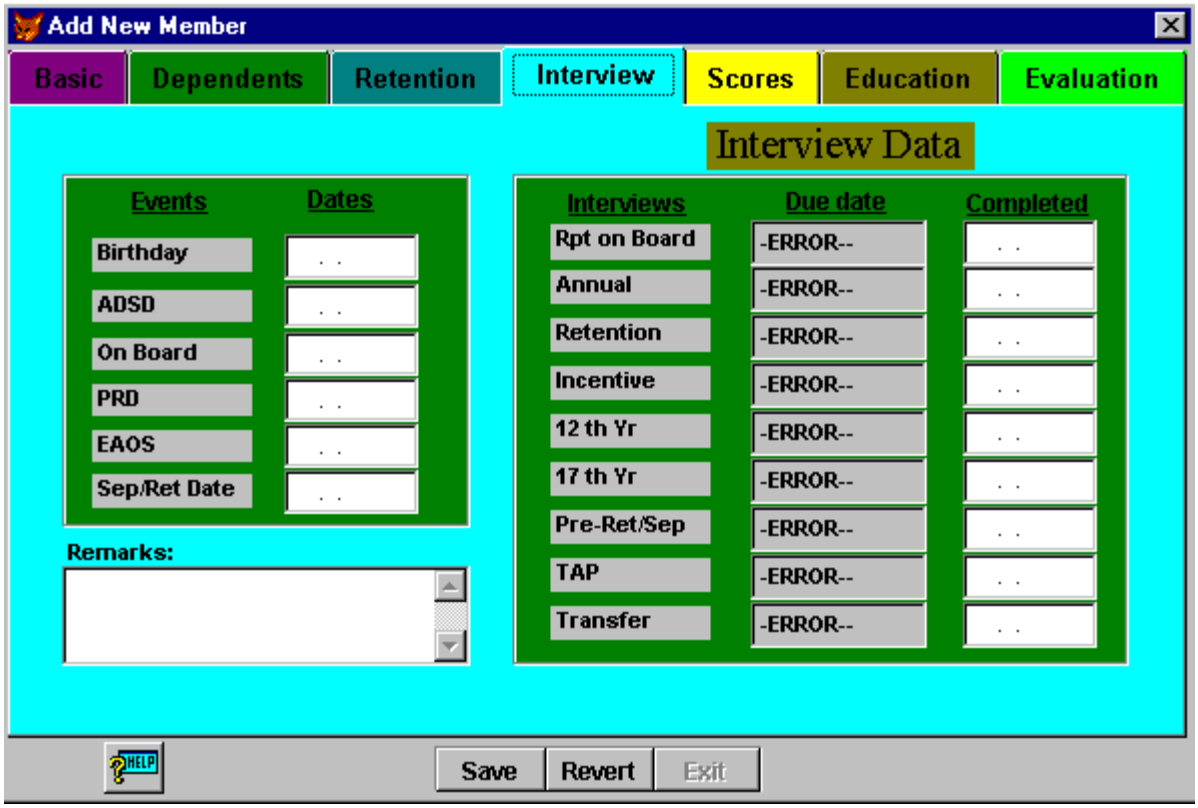
| Data Label | Content |
|---|---|
| | Unknown, P = Extend at Present Command and/or to PRD, R = Reenlist, S = Separate. U = Undecided |
| **Next Assgmt** | Station to be transferred to. Max 30-characters. |
| **Orders** | Information on Transfer Orders. Max 35-characters. |
| **PEBD** | Pay Entry Base Date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **PG13** | Pay Entry Base Date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Program** | Reenlistment Programs Available. Max 10-characters. |
| **Reason for** | Reason for Reenlistment Extension. Max 25-characters. |
| **Remarks** | Misc. remarks about Retention Data. Max 70-characters per remark. |
| **Retain?** | Recommended for Retention? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Reup Dte** | Date of Reenlistment. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Reup Yr(+)** | Number of years of Reenlistment. Range 0-9. |

| Data Label | Content |
|---|---|
| **ReupC RE-** | Reup Code at Discharge Date. Max 2-characters |
| **TAP Class** | Date member completed TAP class. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Term** | Term of Enlistment. Enter:<br>1 = First,<br>2 = Second,<br>C = Career. |
| **Term Elg(=)** | Terminal Eligibility Date. (Calculated) YYYY/MM/DD. Otherwise, leave blank. |

| Data Label | Content |
|---|---|
| **TIR E2-E9** | Date of Time-in-Rate for E2,E3,…,E9. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **TIR Elg** | Date Eligible for Advancement. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Transfer Complete?** | Has transfer been completed? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |

**Figure 42 CIPM Input Screen - Page 3 Retention**

### *Page 4 Interviews*




| Data Label | Content |
|---|---|
| **12 th Yr** | Twelfth Year Careerist Interview DATE (ADSD + 12 yrs) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **17 th Yr** | Seventeenth Year Careerist Interview DATE (ADSD +17 yrs) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **ADSD** | Active Duty Service Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |

| Data Label | Content |
|---|---|
| **Annual** | Annual Interview Date (Birthday) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **Birthday** | Member's Date of Birth. Enter: YYYY/MM/DD. |
| **EAOS** | Active Duty Obligation Expiration Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Incentive** | Incentive Programs Interview DATE- First Termer (11 months prior to EAOS) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: |

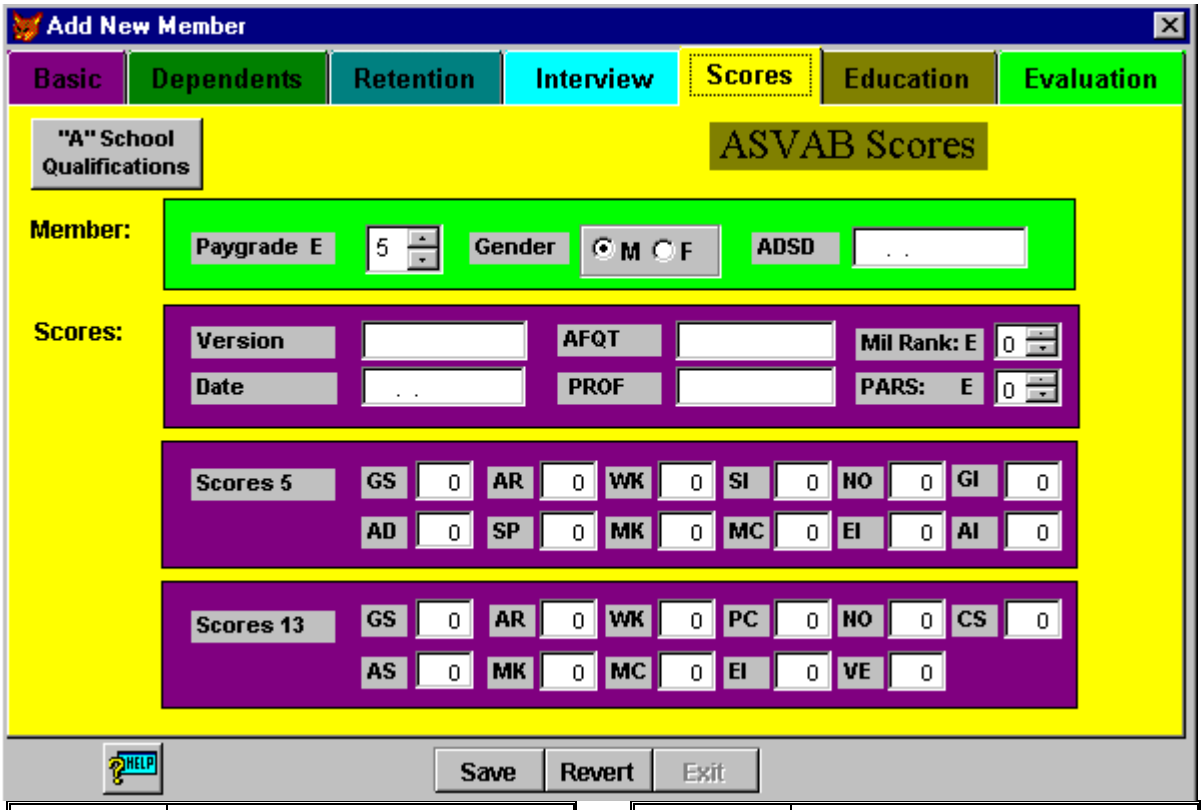
| Data Label | Content |
|---|---|
| | YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **On Board** | Date Reported to Command. Enter: YYYY/MM/DD when expected. Correct date on arrival. |
| **PRD** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Pre-Ret/Sep** | Pre-Retirement/Separation Interview DATE (within 6 months of retirement/separation) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Remarks:** | Miscelenous remarks about the interviews. Max 70-characters. Otherwise, leave blank. |
| **Retention** | Retention Interview DATE – First Termer (ADSD + 18 months) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Rpt on Onboard** | Reporting Aboard Interview Date (30 days after reporting onboard) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. |
| **Sep/Ret Date** | Active Duty Separation Date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **TAP** | Transition Assistance Program Interview (within 6 months of retirement/separation). Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Transfer** | Transfer Interview DATE (within 6 months of PRD) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |

**Figure 43 CIPM Input Screen - Page 4 Interviews**

### *Closing Interviews*

This screen provides an alternate method for entering the interview completion dates (See Section Add or Change a Tickler Record, p.4-45, for a more efficient method.) Once the interview has been completed, update the member's CIPM record with the date that the interview was given. Save the changes. Repeat for each completed interviewee.

## ***Page 5 ASVAB Scores***



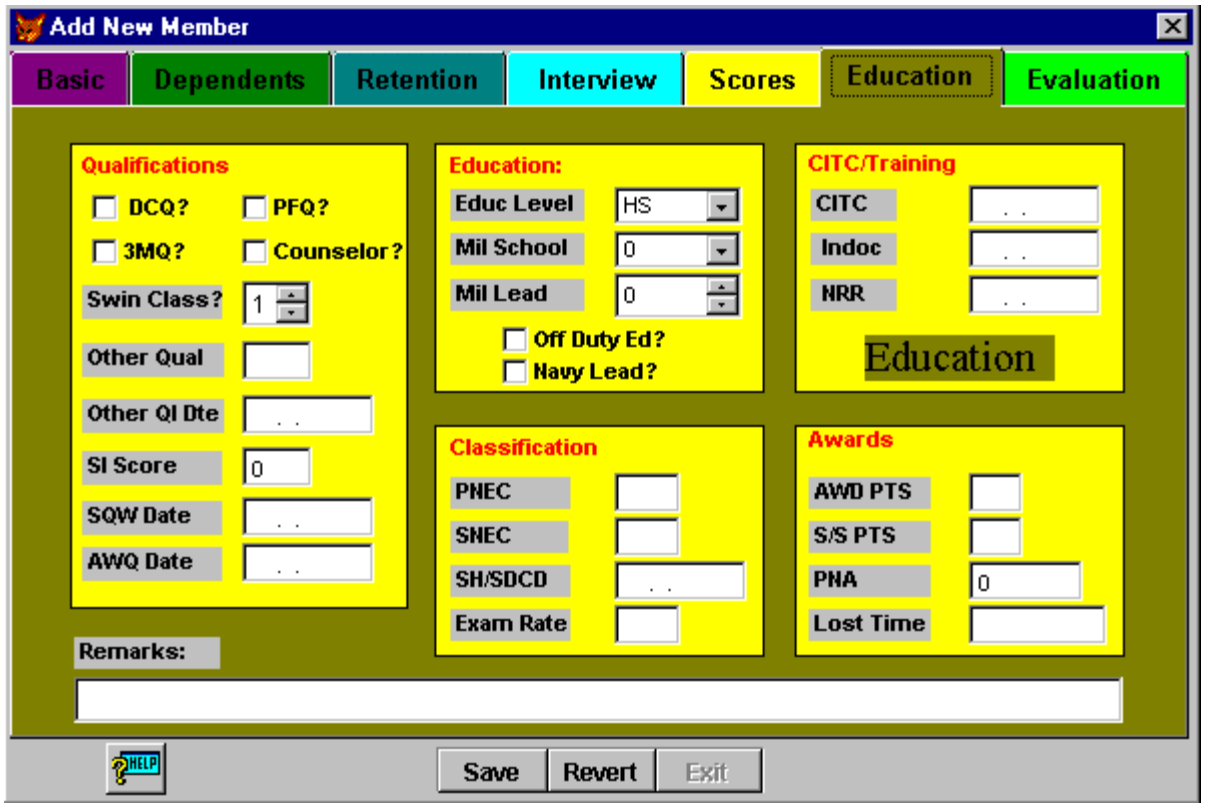

| Data Label | Content |
|---|---|
| "A" School Qualifications | Not used. For future use. |
| **AD** | Attention to Detail Score, e.g. 34. Range 0-99. |
| **ADSD** | Active Duty Service Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **AFQT** | Armed Forces Qualifying Test Score. Range 00-99 |
| **AI** | Automotive Information Score, e.g. 34. Range 0-99. |
| **AR** | Arithmetic Reasoning Score, e.g. 34. Range 0-99. |
| **AS** | Auto/Shop Score, e.g. 34. Range 0-99. |
| **CS** | Coding Speed Score, e.g. 34. Range 0-99. |
| **Date** | Date ASVAB Test Taken. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **EI** | Electronics Information Score, e.g. 34. Range0-99. |
| **Gender** | Gender of service member Enter: M or F. |
| **GI** | General Information Score, e.g. 34. Range 0-99. |
| **GS** | General Science Score, e.g. 34. Range 0-99 |
| **MC** | Mechanical Comprehension Score, e.g. 34. |

| Data Label | Content |
|---|---|
| | Range 0-99. |
| **Mil Rank: E** | Rank of Exam Enter: 1..9 |
| **MK** | Math Knowledge Score, e.g. 34. Range 0-99. |
| **NO** | Numerical Operations Score, e.g. 34. Range 0-99. |
| **PARS: E** | Practical Factor. Enter: 1...9 |
| **Paygrade E** | Paygrade Enter: 1..9 |
| **PC** | Paragraph Comprehension Score, e.g. 34. Range 0-99. |
| **PROF** | Rate of Training Manual Enter: xxx-E(1..9) exp.(QMS-E4). Max 6-characters. |
| **SI** | Shop Information Score, e.g. 34. Range 0-99 |
| **SP** | Special Perception Score, e.g. 34. Range 0-99. |
| **VE** | Verbal Expression Score, e.g. 34. Range 0-99. |
| **Version** | Version of ASVAB Test Taken. Max 3-characters. |
| **WK** | Word Knowledge Score, e.g. 34. Range 0-99. |

**Figure 44 CIPM Input Screen - Page 5 ASVAB Scores**

(See section Add or Change an ASVAB Record, p.4-49 for more information.)

### *Page 6 Education*

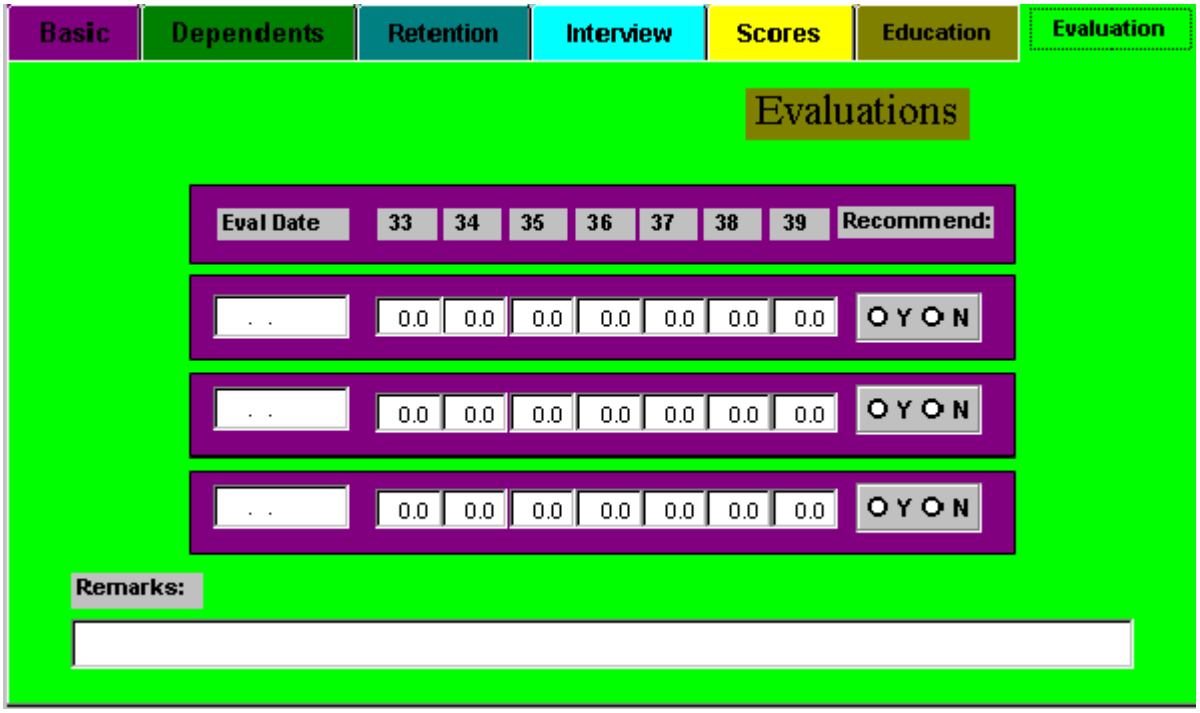



| Data Label | Content |
|---|---|
| **3MQ?** | 3M Qualified? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **AWD PTS** | Award Points Earned Towards Exam. Range 00-99. |
| **AWQ Date** | Date of Air Warfare Qualification completed. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **CITC** | CITC – Career Information Training Course: Enter the date that the member attended the CITC course, as 2001.03.15 Otherwise, leave blank. |
| **Counselor?** | Retention team member? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **DCQ?** | Damage Control Qualified? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Educ Level** | Educational Background: HSG,NHS,GED,13,14,15,16,16+ |
| **Exam Rate** | Rate of Exam. Max 15 characters. Note: Blank except when changing rating. |
| **Indoc** | Indoctrination completion date. Enter YYYY/MM/DD. Otherwise, leave blank. |
| **Lost Time** | Days Lost Thru Unauthorized Absence (Adjusts EAOS). Max 8-characters. |
| **Mil Lead?** | Rank of Leadership Exam Passed. Enter: 1..9 |
| **Mil School?** | Type 'A' School Attended Enter: A,B,C or 0 (zero) = none. |
| **Navy Lead?** | Navy Leadership? (NLDP or LMET) Enter a check mark (√ ) for Yes. Otherwise, leave blank. |

| Data Label | Content |
|---|---|
| **NRR** | Date NRR (Naval Rights and Responsibilities Training received. Enter YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Off Duty Ed?** | Was highest level of education obtained while in the service? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Other Ql Dte** | Date of Other Qualification. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Other Qual** | Other Qualification. Max 2-characters. |
| **PFQ?** | Physical Test Passed? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **PNA** | Pass/Not Advanced Points. Range 0-9999999. |
| **PNEC** | Primary Enlistment Class Code. Max 4-characters. |
| **Remarks:** | Misc. remarks about Educational Data. Max 70-characters. |
| **S/S PTS** | Passing S/S Points. Max 2-characters. |
| **SH/SDCD** | Commencement Date of Sea/Shore Duty. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **SI Score** | Shop Information Score, e.g. 34. Range 0-99. |
| **SNEC** | Secondary Enlistment Class Code. Max 4-characters. |
| **SQW Date** | Date of Sea Warfare Qualification. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Swim Class?** | Swimmer Class. Enter: 1, 2, or 3. |

**Figure 45 CIPM Input Screen - Page 6 Education**

### *Page 7 Evaluations*




| Data Label | Content |
|---|---|
| **Eval Date** | Date of Evaluation. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Recommend:** | Recommend for Advancement? Enter: Y or N. |
| **Remarks:** | Misc. remarks about Evaluation Data. Max 70-characters. |
| **33** | 33. Evaluation Points: Professional Knowledge: Technical Knowledge and practical application. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |
| **34** | 34. Evaluation Points: Quality of Work: Standard of work: value of end product. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |
| **35** | 35. Evaluation Points: Equal Opportunity; Fairness, respect for human worth. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |
| **36** | 36. Evaluation Points: Military Bearing/Character: Appearance, conduct, physical fitness, adherence to Navy Core Values. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |
| **37** | 37. Evaluation Points: Personal Job Accomplishment/Initiative: Responsibility, quality of work. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |
| **38** | 38. Evaluation Points: Teamwork: Contributions to team building and team results. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |
| **39** | 39. Evaluation Points: Leadership: (Optional for E1-E3) Organizing, motivating and developing others to accomplish goals. Range 1-5.<br>1.0 Below Standards<br>2.0 Progressing<br>3.0 Meets Standards<br>4.0 Above Standards<br>5.0 Greatly Exceeds Standards |

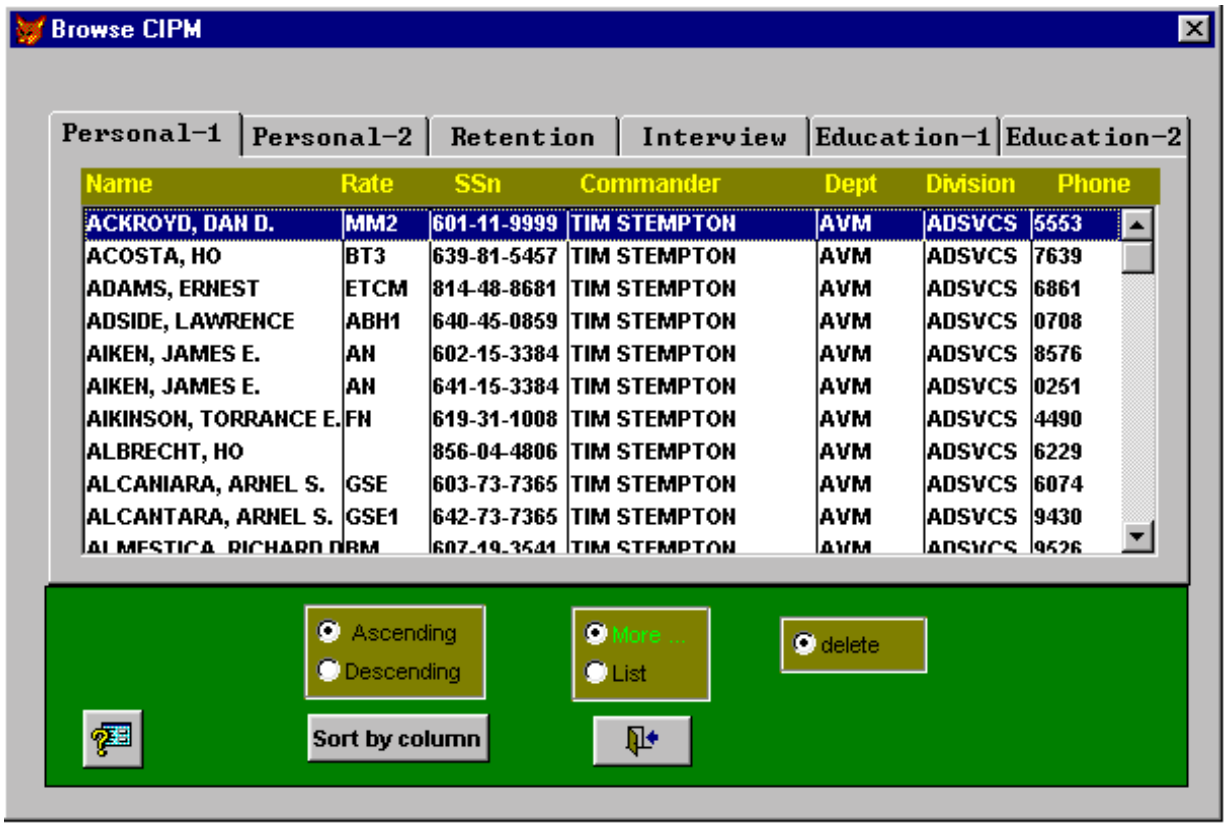
**Figure 46 CIPM Input Screen - Page 7 Evaluations**

> CIPM can store three years of EVALS, one row per year. Enter the date of the EVAL. On the same row enter the member's EVALS. The top row is usually the oldest EVAL and the bottom row, the most current.

### *Input – CIPM Records*

You can add members, change member's information and delete members no longer needed with this function. The following section describes the procedures to add, edit and delete members records. (Note: CIPM provides short cuts to adding records: the Add Record above and the Import functions in the System Administration chapter.)

To access full view member records, select *Inputs\CIPM* from the menu bar. A member list will be displayed, as shown below:




(See Browse Form, p. 2-8 for more information.)

**Figure 47 Browse Members Screen**

### *List/View Members*

The Browse Members screen has six views of member data***: Personal-1, Personal-2, Retention, Interview, Education-1*** and ***Education-2***. To change the view, click on one of the six tab labels. Each page has seven information fields. You can sort

on any column in either ascending or descending order using the ***Sort by Column*** and/or ***Ascending/Descending*** controls.

To list members, select a view, sort the records, select the records and click ***List***. From the popup list, select ***Browse*** or ***Printer***. *Browse* will present a scrollable list of the selected members. *Printer* will print a list of selected members to the default printer.

### *Delete a Member*

To delete one or more members, select the member(s) from the list and click ***Delete***. A confirmation message will be displayed, "***There are(is) 1-records to be deleted. Are you sure you want to delete them(it)?***". Click ***Yes*** to continue or ***No*** to cancel the deletion.

### *Add or Change a Member's Record*

To add a new member or edit a member's record, select a member from the list and click ***More***. The member's record will be displayed as:

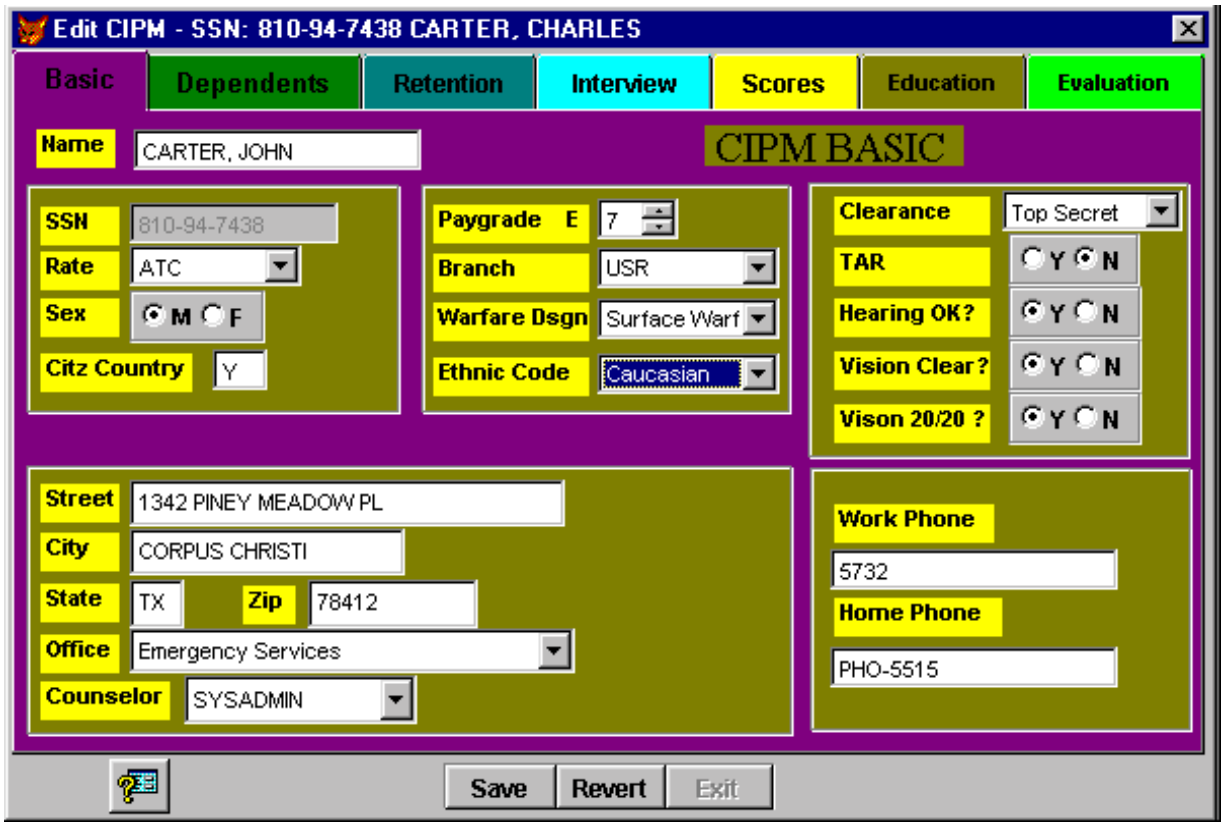



**Figure 48 Member's Edit Screen**

To add a member's record, click *Add* (the *Save* button is initially labeled *ADD*) and fill in the information. To correct information, click *Edit* (the *Revert* button is initially labeled *Edit*) and edit the data (See CIPM Records, p. 4-33 for complete fielding definitions).

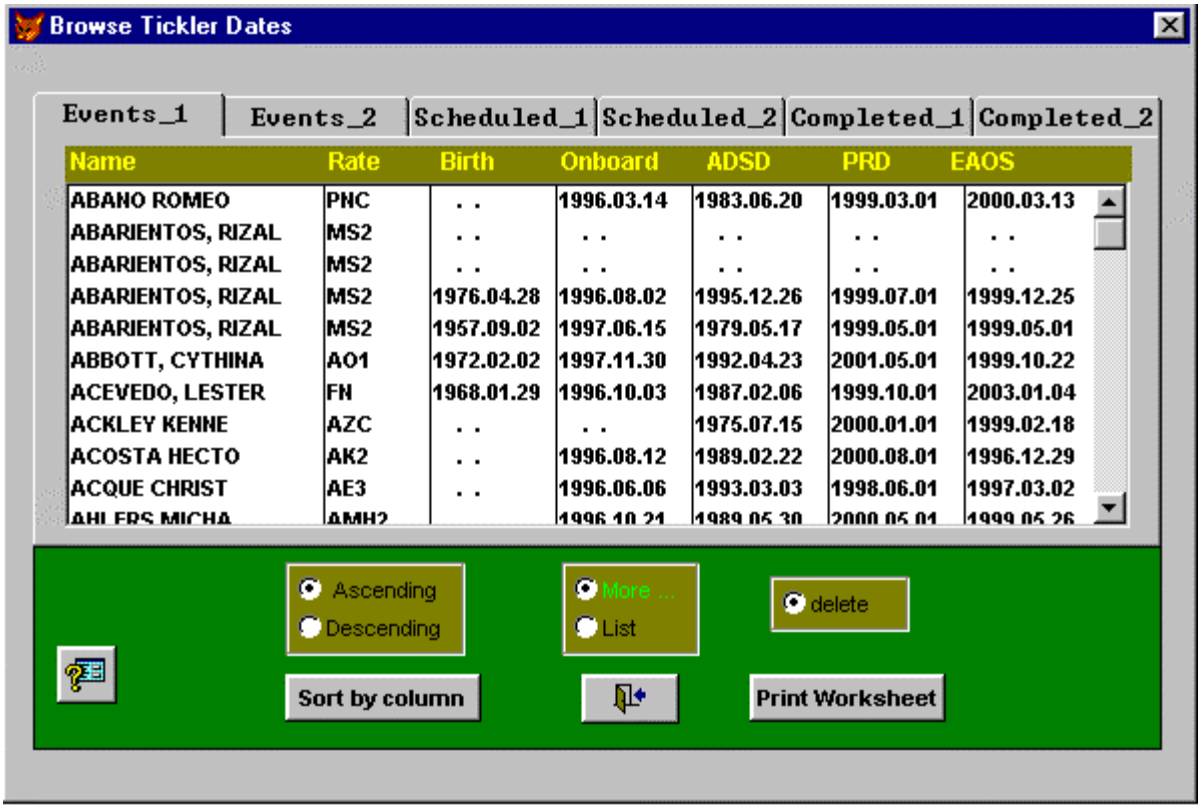
Once the information has been entered, click *Save*. If you are adding a new member, CIPM will create the new member's record. If you are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new member or your changes.

## Tickler Records

The Tickler Dates function is a specialized CIPM function used by counselors who want quick access to a member's key career and interview dates, as when using the tickler system. You can add members, delete members and edit member's dates with this function. Additionally, this function will print Interview worksheets for selected members.

### *Input – Tickler Dates*

To access member tickler dates, select *Inputs\Tickler Dates* from the menu bar. A member list will be displayed, as shown below:




(See Browse Form, p. 2-8 for more information.)

**Figure 49 Browse Tickler Dates Screen**

### *List/View Tickler Dates*

The Browse Tickler Dates screen has six views of tickler dates: (career) *Events-1, Events-2, Scheduled-1* (interviews), *Scheduled-2* (interviews), *Completed-1* (interviews) and *Completed-2* (interviews). To change the view, click on one of the six tab labels. Each page has seven information fields. You can sort on any column in either ascending or descending order using the *Sort by Column* and/or *Ascending/Descending* controls.

To list tickler dates, select a view, sort the records, select the records and click *List*. From the popup list, select *Browse* or *Printer*. *Browse* will present a scrollable list of the selected member tickler dates. *Printer* will print the list to the default printer.

### *Print Interview Worksheet*

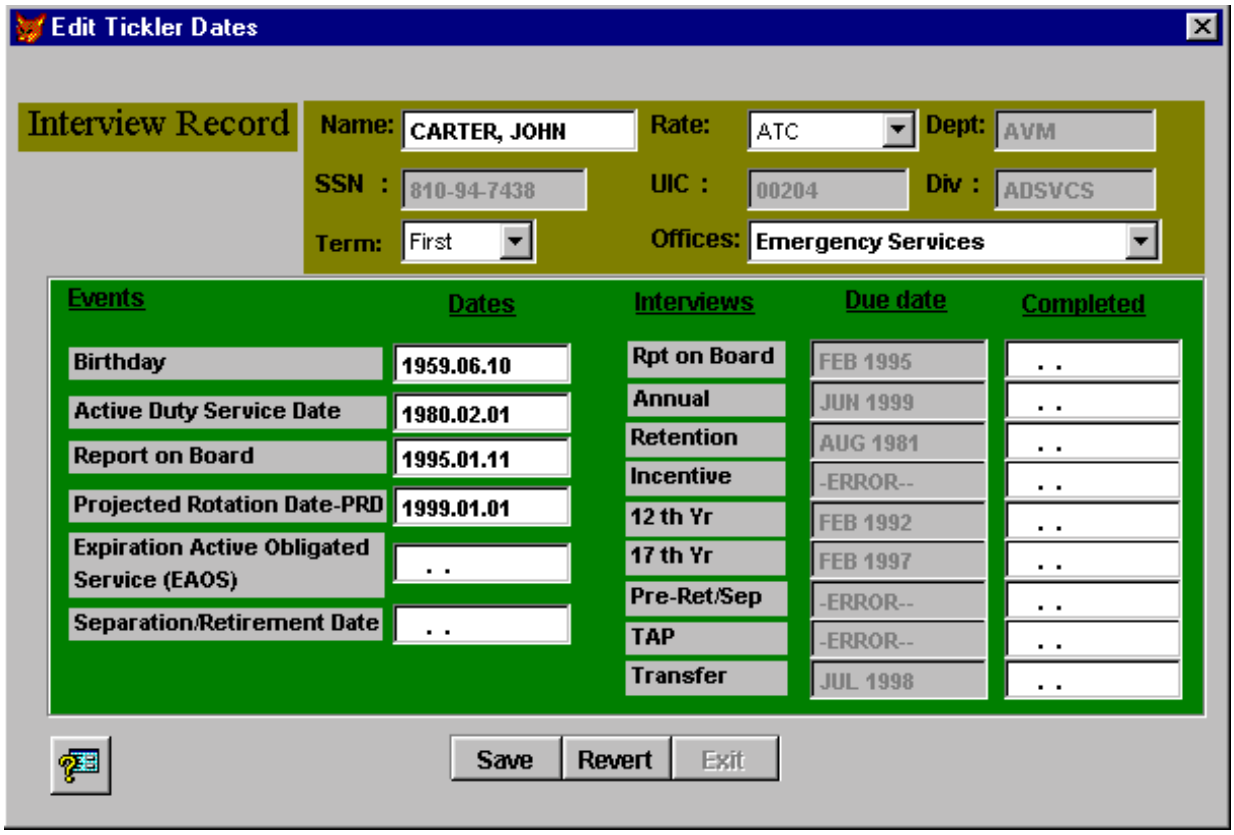
You can print individual interview worksheet for any of the nine interviews for any member using the *Print Worksheet* button. To print a worksheet select a member from the list, click *Print Worksheet* and select one of the interviews from the list of interviews. A preview of the worksheet will be displayed. To print the worksheet, click the *Print Report* icon. Otherwise, click the *Close Preview* icon to cancel.

### *Delete Tickler Records*

To delete one or more members, select the member(s) from the list and click *Delete*. A confirmation message will be displayed, "*There are(is) 1-records to be deleted. Are you sure you want to delete?*". Click *Yes* to continue or *No* to cancel the deletion.

### *Add or Change a Tickler Record*

To add a new member or edit a member's record with Tickler Dates only, select a member from the list and click *More*. The Edit Tickler screen (see below) will be displayed as:




| Data Label | Content |
|---|---|
| **12 th Yr** | Twelfth Year Careerist Interview DATE (ADSD + 12 yrs) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **17 th Yr** | Seventeenth Year Careerist Interview DATE (ADSD +17 yrs) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **ADSD** | Active Duty Service Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Annual** | Annual Interview Date (Birthday). Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **Birthday** | Member's Date of Birth. Enter: YYYY/MM/DD. |
| **Dept** | Member's Department. |
| **Div** | Member's Division. |
| **EAOS** | Active Duty Obligation Expiration Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Incentive** | Incentive Programs Interview DATE- First Termer (11 months prior to EAOS) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview date. Otherwise, leave blank. |
| **NAME** | NAME of Service member. Enter: Last Name, First Name MI. Max 25-chars. |
| **Office** | Name of Member's office. Pick from list. |
| **On Board** | Date Reported to Command. Enter: YYYY/MM/DD when expected. Correct date |

| Data Label | Content |
|---|---|
| | on arrival. |
| **PRD** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Pre-Ret/Sep** | Pre-Retirement/Separation Interview DATE (within 6 months of retirement/separation) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Rate** | Rating ( Navy job classification for enlisted personnel) of member. |
| **Retention** | Retention Interview DATE – First Termer (ADSD + 18 months) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Rpt on Onboard** | Reporting Aboard Interview Date (30 days after reporting onboard) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. |
| **Sep/Ret Date** | Active Duty Separation Date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **SSN** | Social Security Number. Required. Enter 9 digits. Format 999-99-9999 |
| **TAP** | Transition Assistance Program Interview (within 6 months of retirement/separation). Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Term** | Term of Enlistment. Enter: |

| Data Label | Content |
|---|---|
| | 1 = First,<br>2 = Second,<br>C = Career. |
| **Transfer** | Transfer Interview DATE (within 6 months of PRD) in Block 24. INTERVIEW/DATE of NAVPERS 1160/11. Enter: |

| Data Label | Content |
|---|---|
| | YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **UIC** | Unit Identification Code. |

**Figure 50 Edit Tickler Dates**

The *Event/Events Dates* determine when the interviews are scheduled, *Due Date*. For example a Reporting Onboard event of *1995.001.11* will create a Reporting Onboard interview Due Date within 30-days (*FEB 1995*) of the Reporting Onboard event. Once the interview has been completed, enter the completed interview date in the *Completed* column for the appropriate interview.

To add a member's record, click *Add* (the *Save* button is initially labeled *ADD*) and fill in the information. To correct information, click *Edit* (the *Revert* button is initially labeled *Edit*) and edit the data.

The Event Date determines the Interview Due Date. If no Event Date is entered the Interview Due Date will display "**-ERROR-**". If you enter an Event Date, then CIPM will schedule the Interview. For example, if you enter a Birthday of ***1976.10.15*** and the current year is 2002, then CIPM will schedule the member for an Annual Interview in **OCT 2002**.

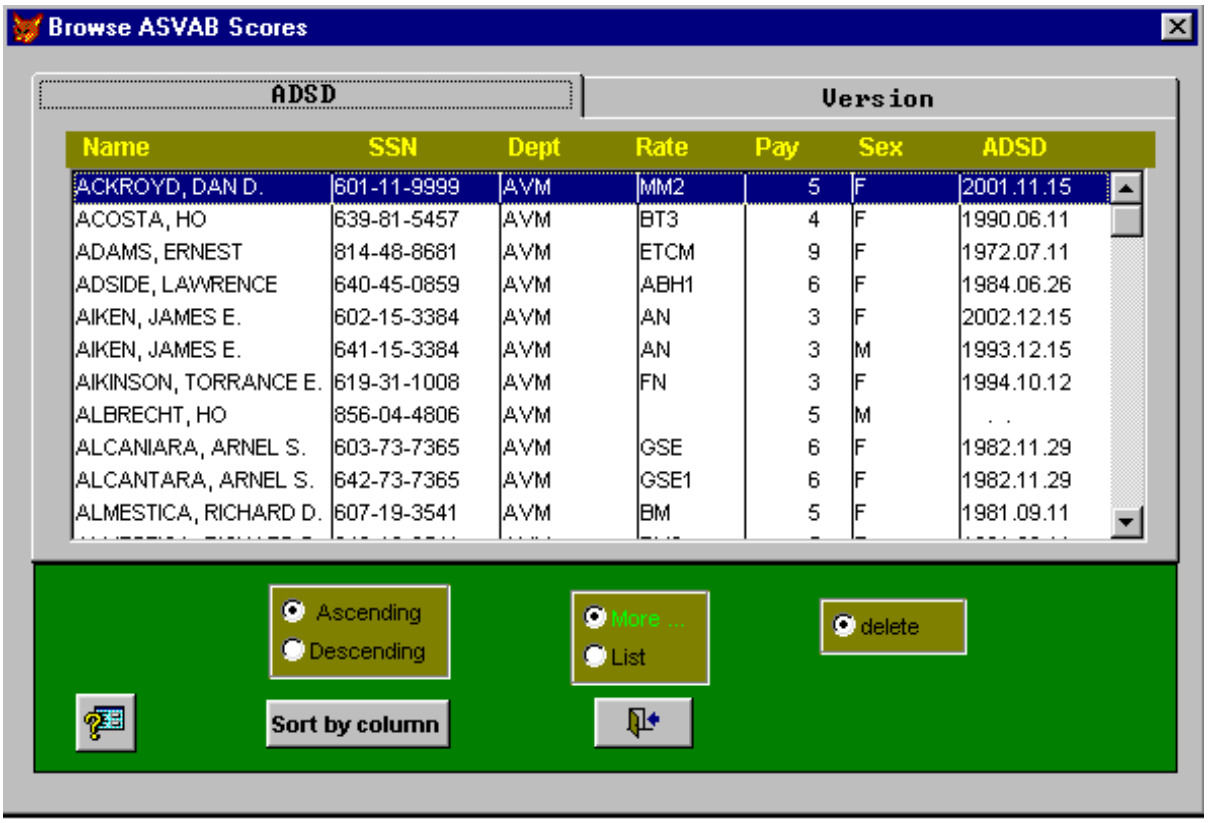
Once the information has been entered, click *Save*. If you are adding a new member, CIPM will create the new member's record. If your are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new member or your changes.

## ASVAB Records

The ASVAB Scores function is a specialized CIPM function used by counselors who want quick access to member's ASVAB Scores, as when using the ASVAB Worksheet function. You can add members, delete members and edit member's dates with this function.

### *Input – ASVAB Scores*

To access member ASVAB Scores, select *Inputs\ASVAB Scores* from the menu bar. A member list will be displayed, as shown below:




(See Browse Form, p. 2-8 for more information.)

**Figure 51 Browse ASVAB Scores Screen**

### *List/View ASVAB Scores*

The Browse ASVAB Scores screen has two views of ASVAB data: *ADSD* and *Version*. To change the view, click on one of the two tab labels. Each page has seven information fields. You can sort on any column in either ascending or descending order using the *Sort by Column* and/or *Ascending/Descending* controls.

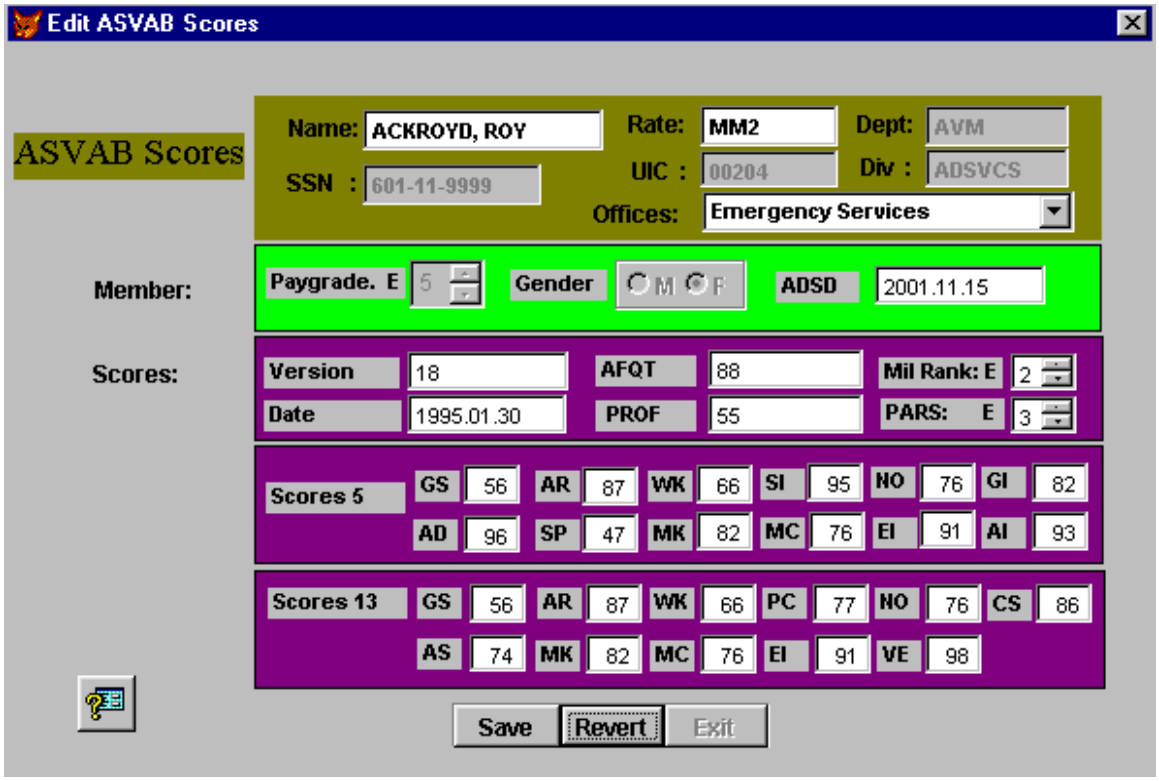
To list ASVAB records, select a view, sort the records, select the records and click *List*. From the popup list, select *Browse* or *Printer*. *Browse* will present a scrollable list of the selected member ASVAB data. *Printer* will print a list of selected dates to the default printer.

### *Delete ASVAB Records*

To delete one or more members, select the member(s) from the list and click *Delete*. A confirmation message will be displayed, "*There are(is) 1-records to be deleted. Are you sure you want to delete?*". Click *Yes* to continue or *No* to cancel the deletion.

### *Add or Change an ASVAB Record*

To add a new member or edit a member's record with ASVAB data only, select a member from the list and click *More*. The Edit ASVAB Scores screen (below) will be displayed as:




| Data Label | Content |
|---|---|
| **AD** | Attention to Detail Score, e.g. 34. Range 0-99. |
| **ADSD** | Active Duty Service Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **AFQT** | Armed Forces Qualifying Test Score. Range 00-99 |
| **AI** | Automotive Information Score, e.g. 34. Range 0-99. |
| **AR** | Arithmetic Reasoning Score, e.g. 34. Range 0-99. |
| **AS** | Auto/Shop Score, e.g. 34. Range 0-99. |
| **CS** | Coding Speed Score, e.g. 34. Range 0-99. |
| **Date** | Date ASVAB Test Taken. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **Dept** | Member's Department. |
| **Div** | Member's Division. |
| **EI** | Electronics Information Score, e.g. 34. Range0-99. |
| **Gender** | Gender of service member Enter: M or F. |
| **GI** | General Information Score, e.g. 34. Range 0-99. |
| **GS** | General Science Score, e.g. 34. Range 0-99 |
| **MC** | Mechanical Comprehension Score, e.g. 34. Range 0-99. |
| **Mil Rank: E** | Rank of Exam Enter: 1..9 |

| Data Label | Content |
|---|---|
| **MK** | Math Knowledge Score, e.g. 34. Range 0-99. |
| **Name** | |
| **NO** | Numerical Operations Score, e.g. 34. Range 0-99. |
| **Office** | Name of Member's office. Pick from list. |
| **PARS: E** | Practical Factor. Enter: 1...9 |
| **Paygrade E** | Paygrade Enter: 1..9 |
| **PC** | Paragraph Comprehension Score, e.g. 34. Range 0-99. |
| **PROF** | Rate of Training Manual Enter: xxx-E(1..9) exp.(QMS-E4). Max 6-characters. |
| **Rate** | Rating ( Navy job classification for enlisted personnel) of member. |
| **SI** | Shop Information Score, e.g. 34. Range 0-99 |
| **SP** | Special Perception Score, e.g. 34. Range 0-99. |
| **SSN** | Social Security Number. Enter 9 digits. Format 999-99-9999 |
| **UIC** | Unit Identification Code. |
| **VE** | Verbal Expression Score, e.g. 34. Range 0-99. |
| **Version** | Version of ASVAB Test Taken. Max 3-characters. |
| **WK** | Word Knowledge Score, e.g. 34. Range 0-99. |

**Figure 52 Edit ASVAB Record**

To add a member's record, click *Add* (the *Save* button is initially labeled *ADD*) and fill in the information. To correct information, click *Edit* (the *Revert* button is initially labeled *Edit*) and edit the data.

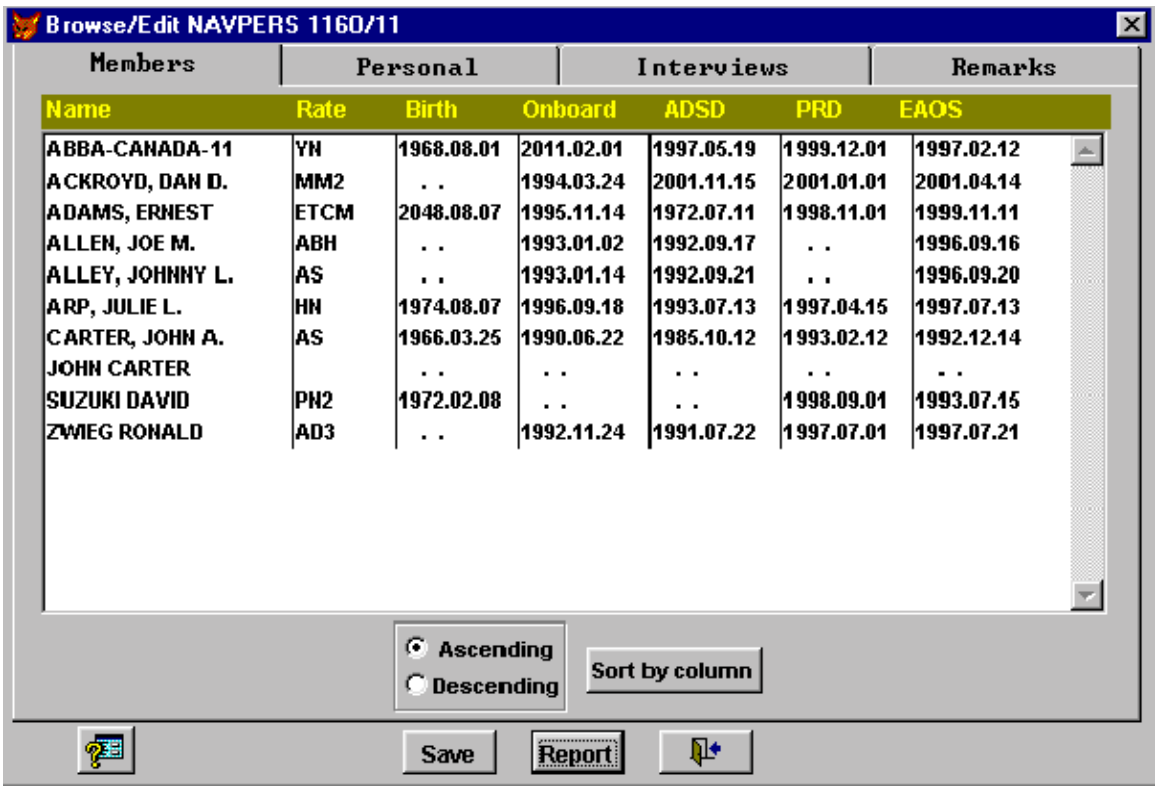
Once the information has been entered, click *Save*. If you are adding a new member, CIPM will create the new member's record. If your are editing, CIPM will make the changes permanent. Otherwise, click on *Revert* to discard the new member or your changes.

## NAVPERS 1160 Form

CIPM can edit and print NAVPERS 1160/11 form from CIPM member's data and the built in NAVPERS 1160 screen. The screen has four tabbed pages: one page (*Member* List) to select members and three pages of editable NAVPERS 1160 form data (*Personal* Data, *Interview* History and *Remarks*). With this screen you can print a NAVPERS 1160/11 form for one or more CIPM members. If any information is incorrect or incomplete, you can change data directly on the screen using the tabbed pages 2 through 4.

### *Input – NAVPERS 1160*

To print NAVPERS 1160 forms, select *Inputs\NAVPERS 1160* from the menu bar. A member list will be displayed, as shown below:




| Name | Rate | Birth | Onboard | ADSD | PRD | EAOS |
|---|---|---|---|---|---|---|
| ABBA-CANADA-11 | YN | 1968.08.01 | 2011.02.01 | 1997.05.19 | 1999.12.01 | 1997.02.12 |
| ACKROYD, DAN D. | MM2 | . . | 1994.03.24 | 2001.11.15 | 2001.01.01 | 2001.04.14 |
| ADAMS, ERNEST | ETCM | 2048.08.07 | 1995.11.14 | 1972.07.11 | 1998.11.01 | 1999.11.11 |
| ALLEN, JOE M. | ABH | . . | 1993.01.02 | 1992.09.17 | . . | 1996.09.16 |
| ALLEY, JOHNNY L. | AS | . . | 1993.01.14 | 1992.09.21 | . . | 1996.09.20 |
| ARP, JULIE L. | HN | 1974.08.07 | 1996.09.18 | 1993.07.13 | 1997.04.15 | 1997.07.13 |
| CARTER, JOHN A. | AS | 1966.03.25 | 1990.06.22 | 1985.10.12 | 1993.02.12 | 1992.12.14 |
| JOHN CARTER | | . . | . . | . . | . . | . . |
| SUZUKI DAVID | PN2 | 1972.02.08 | . . | . . | 1998.09.01 | 1993.07.15 |
| ZWIEG RONALD | AD3 | . . | 1992.11.24 | 1991.07.22 | 1997.07.01 | 1997.07.21 |

(See Browse Form, p. 2-8 for more information.)

**Figure 53 Browse NAVPERS 1160/11 Screen – Page 1 Member List**

### *Print NAVPERS 1160 Form*

To print a NAVPERS 1160 form select one or members from the member list on the *Members* page. Click the *Report* button. A report preview screen will display the form(s). Click on the *Printer* icon to sent the form to the printer. Otherwise, click on the *Exit* icon.

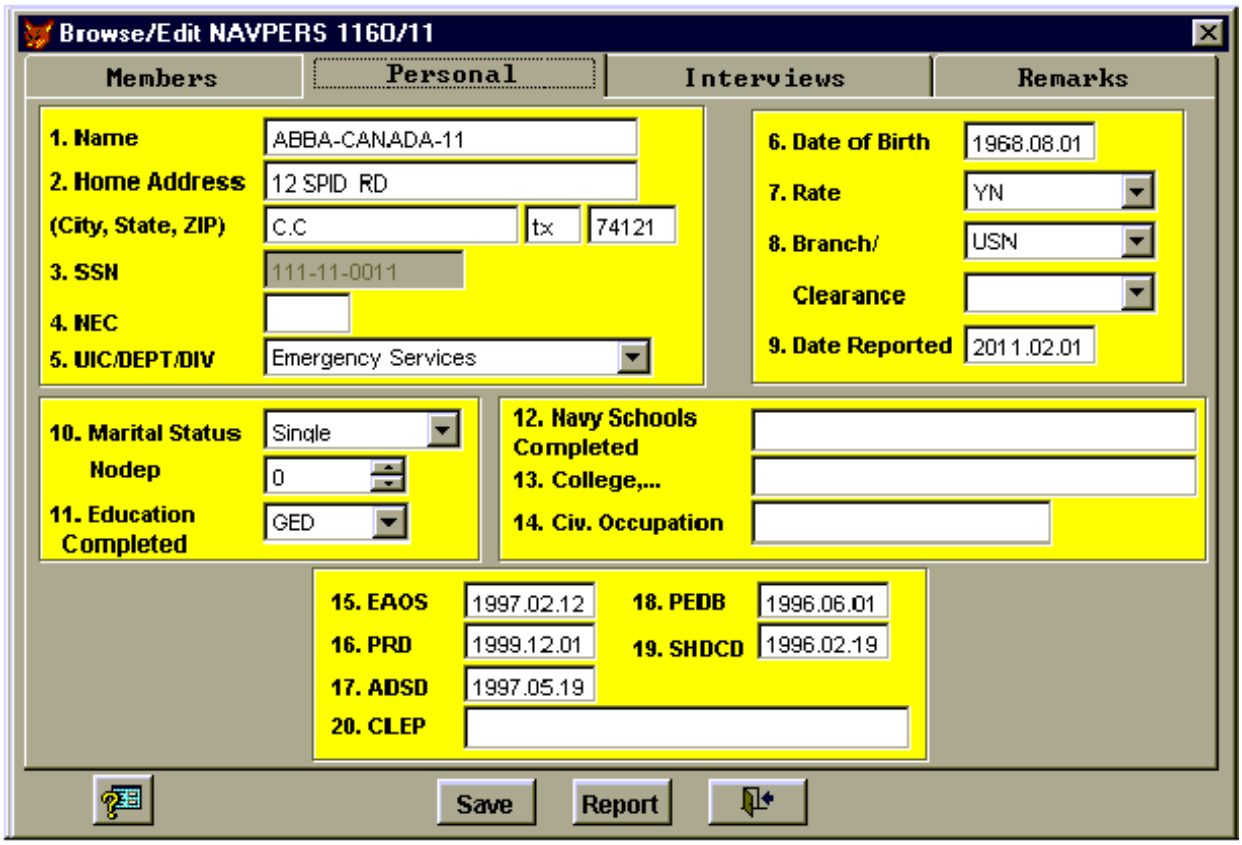
### *Edit NAVPERS 1160 Data Items*

To correct data found on the form, select the member's record on the *Members* page and click on one of the three pages (*Personal*, *Interview*, *Remarks*) containing the form's data. Make the appropriate changes and click *Save*. To discard your changes, click on the *Members* page and select another member without saving your changes.

> You must save your changes before you print the member's form. Otherwise, the printed NAVPERS 1160 form will show incorrect data

The following are sample NAVPERS 1160 Screen pages 2-4 and their field definitions.

### *Page 2 Personal - NAVPERS 1160*

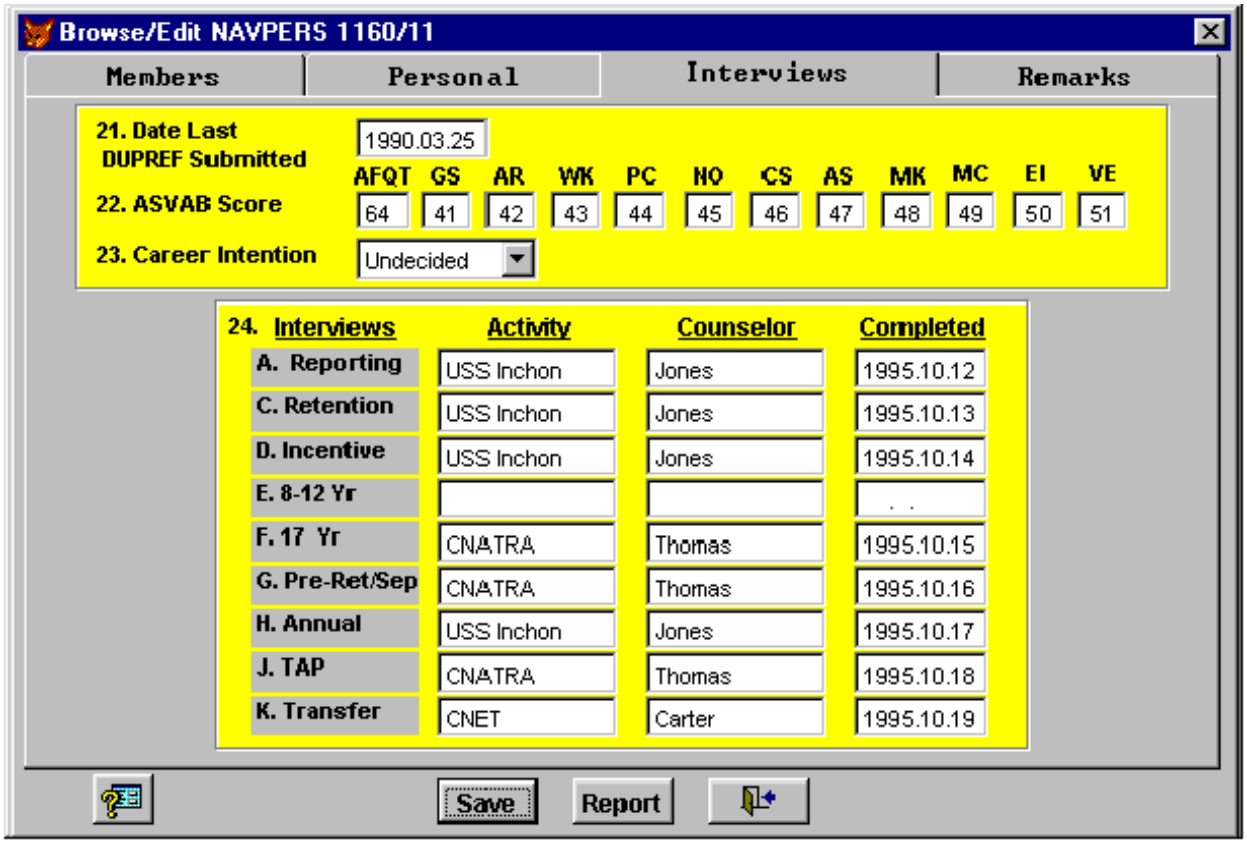


| Data Label | Content |
|---|---|
| **1. Name** | NAME of Service member. Enter: Last Name, First Name MI. Max 25-characters. |
| **2. Home Address** | Home Street address of member's residence, e.g. 7272 Saranac St Apt 26 |
| **(City, State, ZIP)** | Home Address (City, State, ZIP) in NAVPERS 1160/11, e.g. Virginia Beach, VA 23464 |
| **3. SSN** | Member's Social Security Number. |
| **4. NEC** | Primary Enlistment Class Code. Max 4-characters. |
| **5. UIC/DEPT/ DIV** | Member's Activity's Name including member's Unit Identification Code, Department and Division. |
| **6. Date of Birth** | Member's date of birth. YYYY/MM/DD format. |
| **7. Rate** | Rating(Navy job classification for enlisted personnel) of member. |
| **8. Branch/** | Branch of service member (USN,..USNR) |
| **Clearance** | Security Clearance: S = Secret,TS = Top Secret, C=Confidential |
| **9. Date Reported** | Date Reported to Command. Enter: YYYY/MM/DD when expected. Correct date on arrival. |
| **10. Marital Status** | Martial status of service member. M = Married,S = Single |
| **Nodep** | Number of dependents. Enter 0-9. |
| **11. Education Completed** | Educational Background: HS,GED,BS,AS,MS |
| **12. Navy** | NAVY SCHOOL (S) COMPLETED in |

| Data Label | Content |
|---|---|
| **Schools Completed** | Block 12 of NAVPERS 1160/11, e.g. SEALS TRAINING. Max 30-characters. |
| **13. College,…** | Name of college attended.. Max 30-chars. |
| **14. Civ. Occupation** | Block: 14. Civilian Occupation in NAVPERS 1160/11: e.g. Admin, Medical, Law Enforcement, ... Max 20-characters. |
| **15. EAOS** | Active Duty Obligation Expiration Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **16. PRD** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **17. ADSD** | Active Duty Service Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **18. PEBD** | Pay Entry Base Date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **19. SHDCD** | Commencement Date of Sea/Shore Duty. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **20. CLEP** | Block: 20. CLEP Areas Completed in NAVPERS 1160/11: e.g. English, Math,Science,... Max 30-characters. |

**Figure 54 Edit NAVPERS 1160/11 Screen – Page 2 Personal Data**

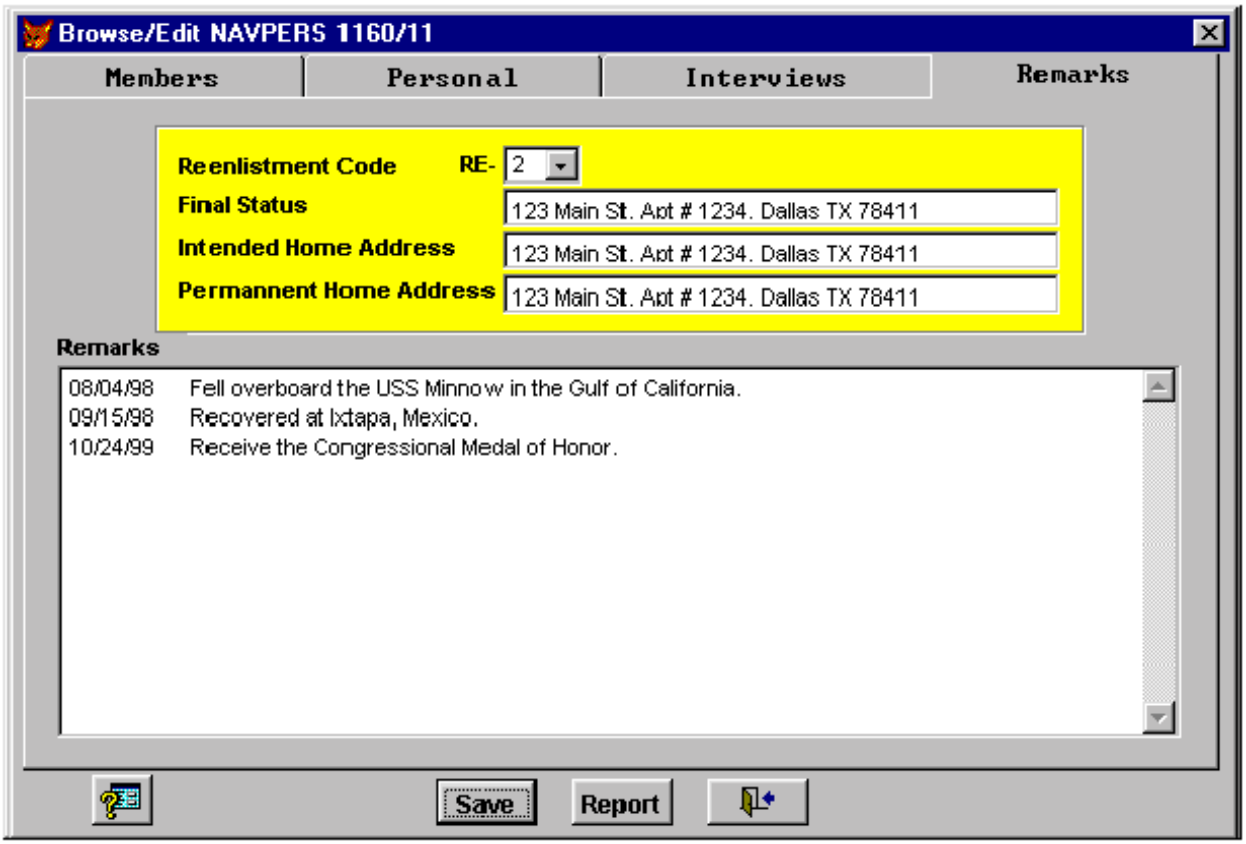
### *Page 3 Interviews - NAVPERS 1160*




| Data Label | Content |
|---|---|
| **21. Date Last DUPREF Submitted** | Date of Duty Preference Form completed. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **22. ASVAB Scores: AFQT** | Armed Forces Qualifying Test Score. Range 00-99. |
| **23. Career Intention** | Member's Reenlistment Intention:<br>D = Discharge<br>E = Extend<br>F = Fleet Res<br>P = Present Command Extension<br>R = Reenlist<br>U = Undecided |
| **24. Interviews Activity** | Name of the ACTIVITY/COMMAND who preformed the interview (A. Reporting On Board, C. Retention, D. Incentive, E. 8-12 Year, F. 17 Year, G. Pre-Retirement/Separation, H. Annual, J. TAP, K. Transfer). Otherwise, leave blank. Max 10-characters. |
| **AR** | Arithmetic Reasoning Score, e.g. 34. Range 0-99. |
| **AS** | Auto/Shop Score, e.g. 34. Range 0-99. |
| **Completed** | Date the interview was preformed (A. Reporting On Board, C. Retention, D. Incentive, E. 8-12 Year, F. 17 Year, G. Pre-Retirement/Separation, H. Annual, J. TAP, K. Transfer). Enter: YYYY/MM/DD of the actual interview. Otherwise, leave blank. |
| **Counselor** | Name of the Counselor who preformed the interview (A. Reporting On Board, C. Retention, D. Incentive, E. 8-12 Year, F. 17 Year, G. Pre-Retirement/Separation, H. Annual, J. TAP, K. Transfer). Otherwise, leave blank. Max 10-characters. |
| **CS** | Coding Speed Score, e.g. 34. Range 0-99. |
| **EI** | Electronics Information Score, e.g. 34. Range 0-99. |
| **GS** | General Science Score, e.g. 34. Range 0-99. |
| **MC** | Mechanical Comprehension Score, e.g. 34. Range 0-99. |
| **MK** | Math Knowledge Score, e.g. 34. Range 0-99. |
| **NO** | Numerical Operations Score, e.g. 34. Range 0-99. |
| **PC** | Paragraph Comprehension Score, e.g. 34. Range 0-99. |
| **VE** | Verbal Expression Score, e.g. 34. Range 0-99. |
| **WK** | Word Knowledge Score, e.g. 34. Range 0-99. |

**Figure 55 Edit NAVPERS 1160/11 Screen – Page 3 Interview Data**

### *Page 4 Remarks - NAVPERS 1160*




| Data Label | Content |
|---|---|
| **Final Status** | Block: Final Status in NAVPERS 1160/11: Final address of member's residence,e.g. 7272 Saranac St Apt 26, Virginia Beach, VA 23464. Max 40-characters. |
| **Intended Home Address** | Block: Intended Home Address in NAVPERS 1160/11: 7272 Saranac St Apt 26, Virginia Beach, VA 23464. Max 40-characters. |
| **Permanent Home Address** | Block: Permanent Home Address (Street and Number, City, State, Telephone No.) in NAVPERS 1160/11, e.g. 7272 Saranac St Apt 26, Virginia Beach, VA 23464. Max 40-characters. |
| **Reenlistment Code RE-** | Reup Code at Discharge Date. Max 2-characters. |
| **Remarks** | Remarks Block in NAVPERS 1160/11, page 2. Memo field. No practical limit on size. |

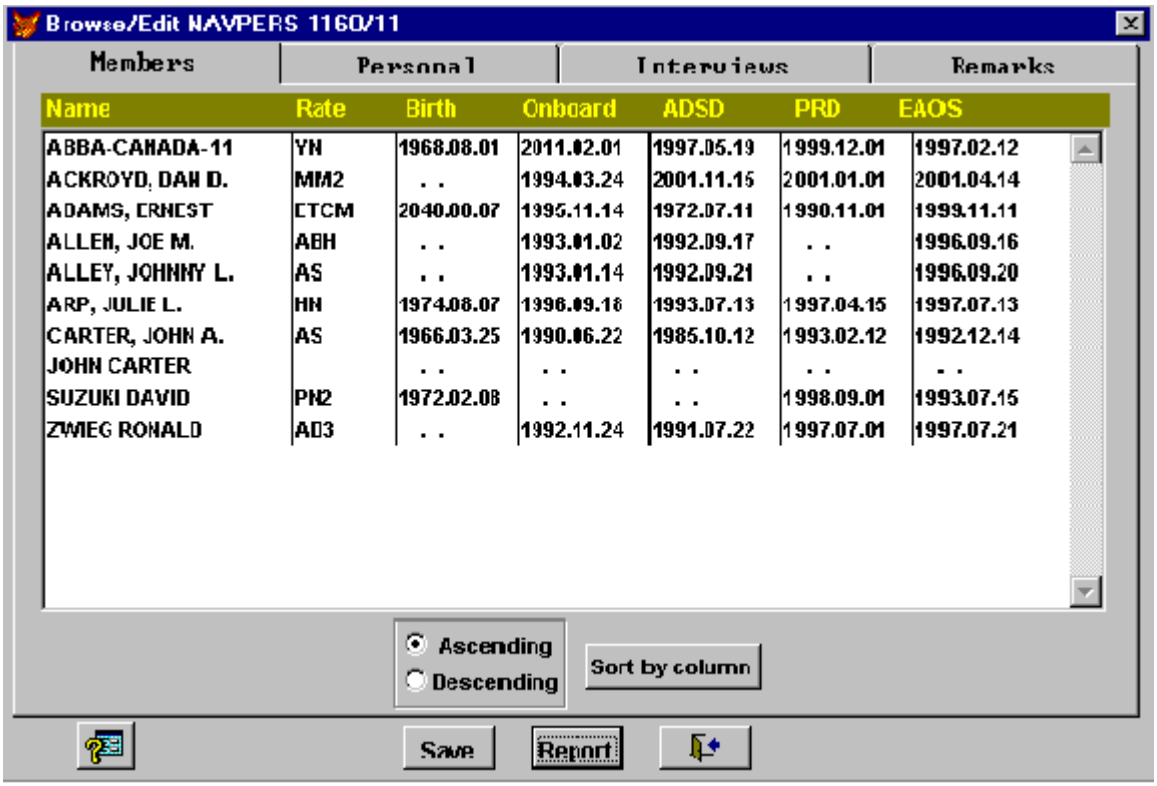
**Figure 56 Edit NAVPERS 1160/11 Screen – Page 4 Remarks Data**

## NAVPERS 1306/7 Form

CIPM can print and edit Enlisted Personnel Action Request (NAVPERS 1306/7) from CIPM member's data and the built in NAVPERS 1306/7 screen. The screen has four tabbed pages: one page (Browse Member List) to select members and three pages of editable NAVPERS 1306/7 form data (See Page 2 Action - NAVPERS 1306/7, p. 4-56, Page 3 Data-1 - NAVPERS 1306/7, p. 4-57, Page 4 Data-2 - NAVPERS 1306/7, p. 4-58.) With this screen you can print a NAVPERS 1306/7 sheet for one or more CIPM members. If any information is incorrect or incomplete, you can change data directly on the screen using the tabbed pages 2 through 4.

### *Input – NAVPERS 1306*

To access the NAVPERS 1306/7 screen, select ***Inputs\NAVPERS 1306/7*** from the menu bar. A member list will be displayed, as shown below:




| Name | Rate | Birth | Onboard | ADSD | PRD | EAOS |
|---|---|---|---|---|---|---|
| ABBA-CANADA-11 | YN | 1968.08.01 | 2011.02.01 | 1997.05.19 | 1999.12.01 | 1997.02.12 |
| ACKROYD, DAN D. | MM2 | . . | 1994.03.24 | 2001.11.15 | 2001.01.01 | 2001.04.14 |
| ADAMS, ERNEST | ETCM | 2040.00.07 | 1995.11.14 | 1972.07.11 | 1990.11.01 | 1999.11.11 |
| ALLEN, JOE M. | ABH | . . | 1993.01.02 | 1992.09.17 | . . | 1996.09.16 |
| ALLEY, JOHNNY L. | AS | . . | 1993.01.14 | 1992.09.21 | . . | 1996.09.20 |
| ARP, JULIE L. | HN | 1974.08.07 | 1996.09.18 | 1993.07.13 | 1997.04.15 | 1997.07.13 |
| CARTER, JOHN A. | AS | 1966.03.25 | 1990.06.22 | 1985.10.12 | 1993.02.12 | 1992.12.14 |
| JOHN CARTER | | . . | . . | . . | . . | . . |
| SUZUKI DAVID | PN2 | 1972.02.08 | . . | . . | 1998.09.01 | 1993.07.15 |
| ZWIEG RONALD | AD3 | . . | 1992.11.24 | 1991.07.22 | 1997.07.01 | 1997.07.21 |

(See Browse Form, p. 2-8 for more information.)

**Figure 57 Browse NAVPERS 1306/7 Screen – Page 1 Member List**

### *Print NAVPERS 1306/7 Form*

To print a NAVPERS 1306/7 form select one or members from the member list on the Browse Members page. Click the *Report* button. A report preview screen will display the sheet(s). Click on the *Printer* icon to sent the sheets to the printer. Otherwise, click on the *Exit* icon.

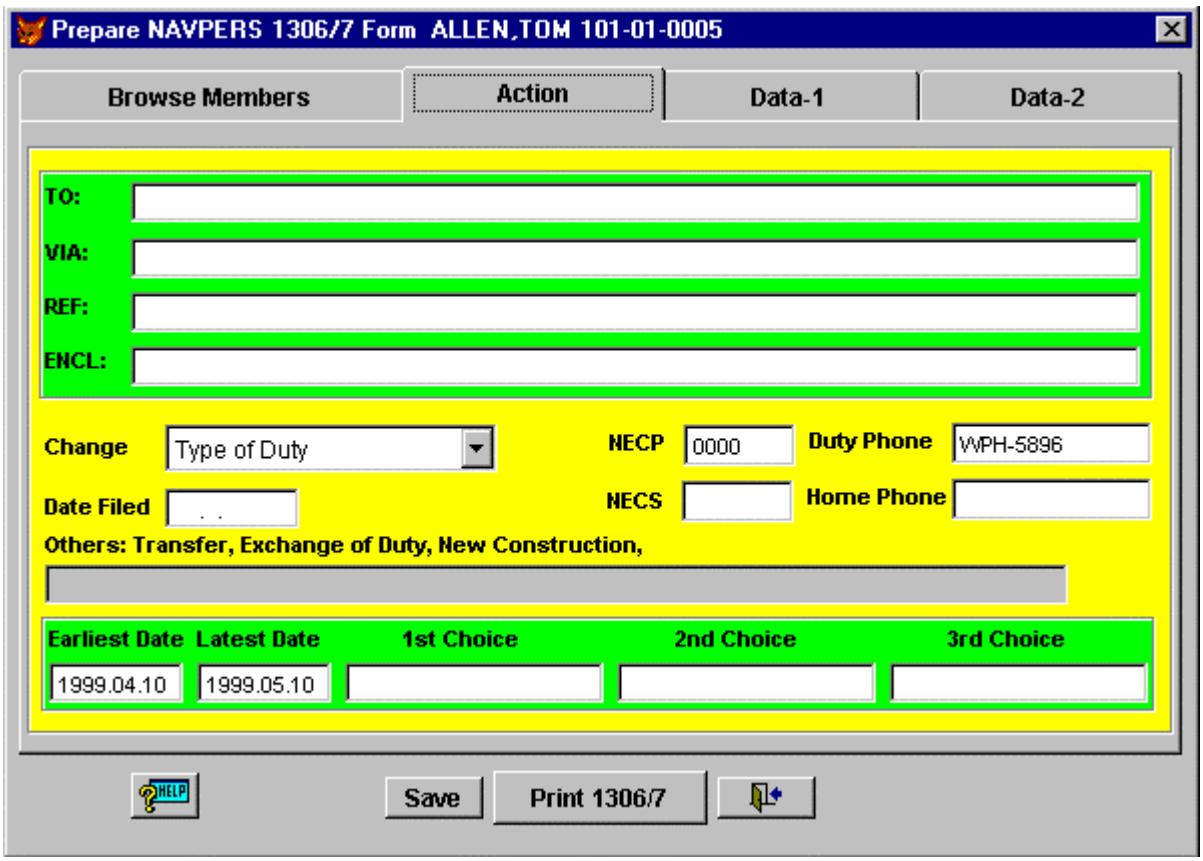
### *Edit NAVPERS 1306/7 Data Items*

To correct NAVPERS 1306/7 data, select the member's record on the *Members* page and click on one of the three pages (see Page 2 Action - NAVPERS 1306/7, p. 4-56, Page 3 Data-1 - NAVPERS 1306/7, p. 4-57, Page 4 Data-2 - NAVPERS 1306/7, p. 4-58.) containing the data. Make the appropriate changes and click *Save*. To discard your changes, click on the *Browse Members* page and select another member without saving your changes.

> You must save your changes before you print the member's form. Otherwise, the printed NAVPERS 1306/7 will show incorrect data.

The following are sample NAVPERS 1306/7 Screen pages 2-4 and their field definitions.

### *Page 2 Action - NAVPERS 1306/7*




| Data Label | Content |
|---|---|
| **1st Choice** | Requester's first choice of actions. Max 20-chars. |
| **2nd Choice** | Requester's second choice of actions. Max 20-chars |
| **3rd Choice** | Requester's third choice of actions. Max 20-chars |
| **Change:** | Reason for change. Pick one: Change of Rate, Extention/Reenlistment,Other,School, Score, STAR, Special Program, Tour Adjustment, Type of Duty. |
| **Duty Phone** | Member's duty telephone number. Max 8- |

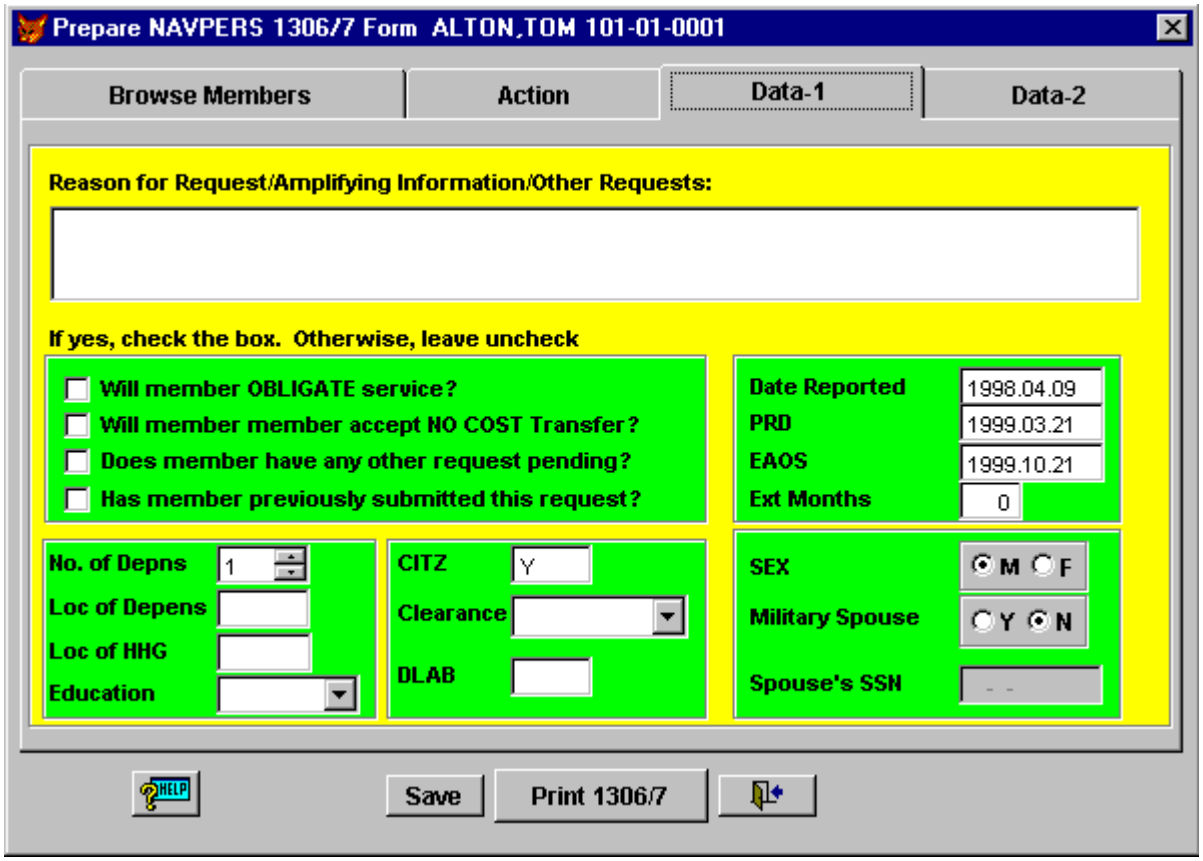
| Data Label | Content |
|---|---|
| | chars |
| **Earliest Date** | Earliest date the requester desires the change to take effect. Enter YYYY/MM/DD. Otherwise, leave blank. |
| **ENCL:** | Title of enclosure, if any. Max 50-chars. |
| **Home Phone** | Member's home telephone number. Max 20-chars |
| **Latest Date** | Latest date the requester desires the change to take effect. Enter YYYY/MM/DD. Otherwise, leave blank. |

| Data Label | Content |
|---|---|
| **NECP** | Primary Enlistment Class Code. Max 4-characters. |
| **NECS** | Secondary Enlistment Class Code. Max 4-characters. |
| **Others: Transfer,…** | Other Reason for change. Available for ***Other*** Change category. Max 50-chars |

| Data Label | Content |
|---|---|
| **REF:** | Appropriate reference, if any. Max 50-chars. |
| **TO:** | Agency's name. Max 75-chars. |
| **VIA:** | Route through Agency's name, if any. Max 75-chars. |

### *Page 3 Data-1 - NAVPERS 1306/7*

The following is a sample NAVPERS 1306/7 page 3 and its field definitions.




| Data Label | Content |
|---|---|
| **CITZ** | Country of Citizenship (US). Max 2-characters. |
| **Clearance** | Security Clearance: S = Secret, TS = Top Secret, C= Confidential |
| **Date Reported** | Security Clearance: S = Secret, TS = Top Secret, C= Confidential |
| **DLAB** | Number 0-999. |
| **EAOS** | Active Duty Obligation Expiration Date. Enter: YYYY/MM/DD. Otherwise, leave |

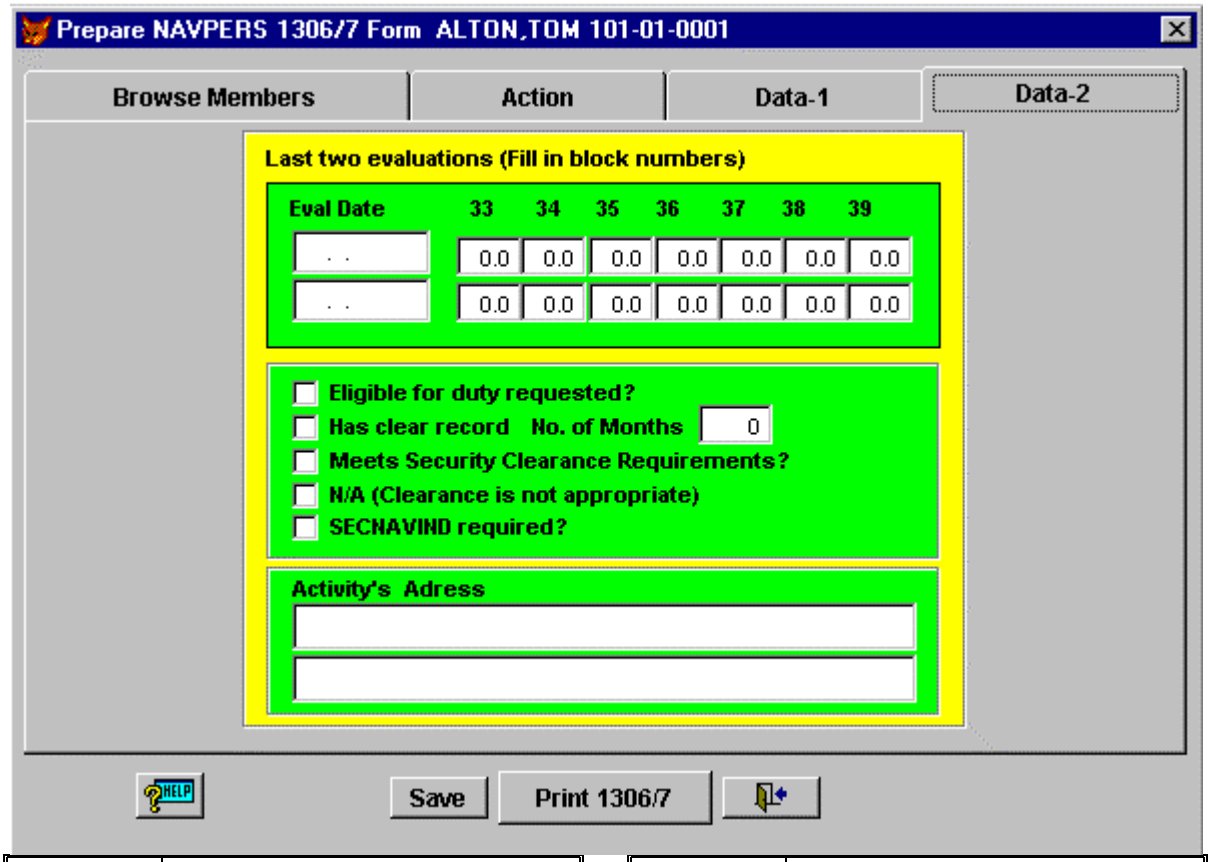
| Data Label | Content |
|---|---|
| | blank. |
| **Education** | Educational Background: HSG,NHS,GED,13,14,15,16,16+ |
| **Ext Months** | Number of months extended on the current contract. 1-24. Otherwise, leave blank. |
| **Loc of Depens** | Location Code for Dependents (See Transman Chpt. 25). Max 3-chars. |

| Data Label | Content |
|---|---|
| **Loc of HHG** | Location Code of Household Goods (See Transman Chpt. 25). Max 3-characters. |
| **Military Spouse** | Is spouse a member of the armed forces? Y=yes. N=No. |
| **NO COST?** | Will member accept a no cost to the government transfer? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **No. of Depns** | Number of member's dependents. Enter 1-9. Otherwise, leave blank or zero. |
| **OBLIGATE?** | Will member incur additional obligated service? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Pending Request?** | Any pending NAVPERS 1306/7 requests? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |

| Data Label | Content |
|---|---|
| **PRD** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Previously Submitted?** | Is this request the first time the request has been submitted? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Reason for Request…** | Description of reason for request. Max 255-characters. |
| **SEX** | Sex of member. M=male, F=female |
| **Spouse's SSN** | Social Security Number of spouse. 11-chars. Otherwise, leave blank. |

## *Page 4 Data-2 - NAVPERS 1306/7*

The following is a sample NAVPERS 1306/7 page 4 and its field definitions.




| Data Label | Content |
|---|---|
| **33** | 33. Evaluation Points: Professional Knowledge: Technical Knowledge and practical application. Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **34** | 34. Evaluation Points: Quality of Work: Standard of work: value of end product. |

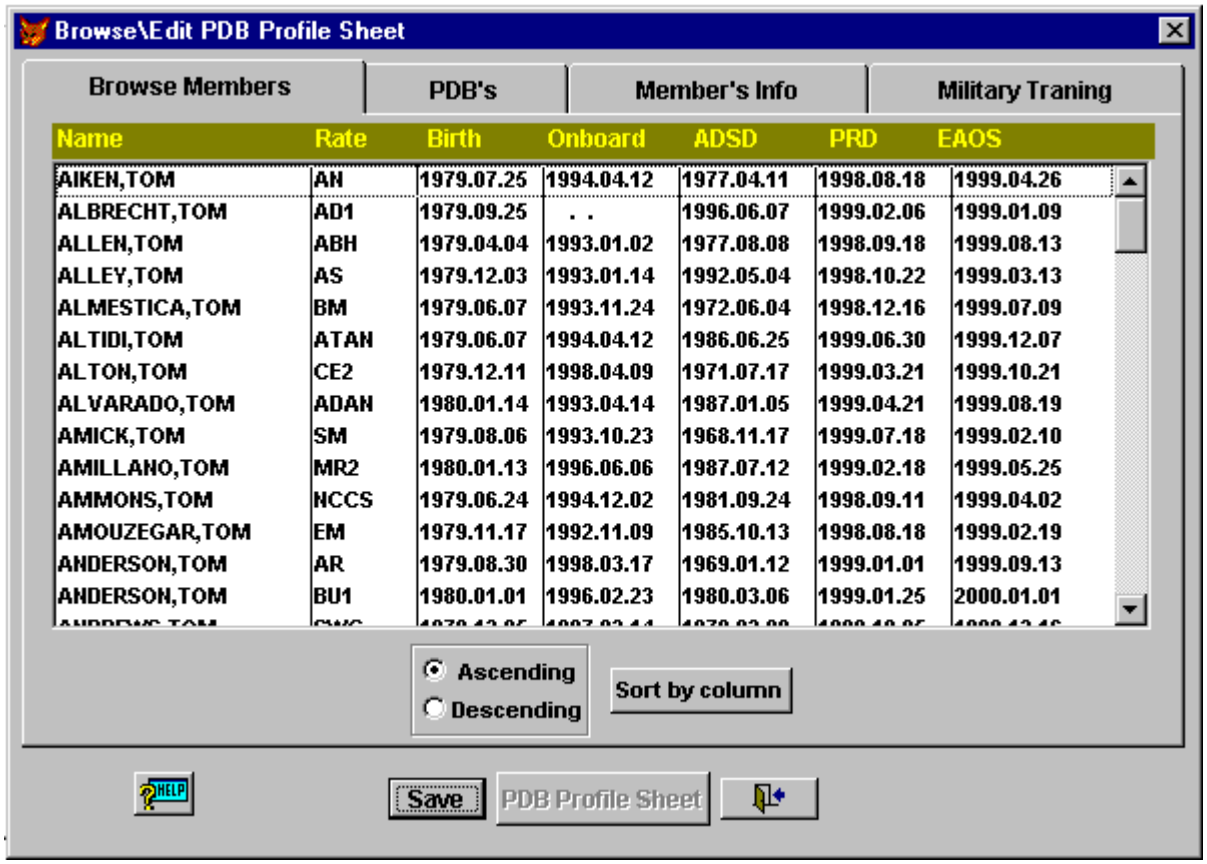
| Data Label | Content |
|---|---|
| | Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **35** | 35. Evaluation Points: Equal Opportunity; Fairness, respect for human worth. Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **36** | 36. Evaluation Points: Military Bearing/Character: Appearance, conduct, physical fitness, adherence to Navy Core Values. Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **37** | 37. Evaluation Points: Personal Job Accomplishment/Initiative: Responsibility, quality of work. Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **38** | 38. Evaluation Points: Teamwork: Contributions to team building and team results. Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **39** | 39. Evaluation Points: Leadership: (Optional for E1-E3) Organizing, motivating and developing others to accomplish goals. Range 1-5. 1.0 Below Standards, 2.0 Progressing, 3.0 Meets Standards, 4.0 Above Standards, 5.0 Greatly Exceeds Standards |
| **Activity's Address** | The requester's organizational address. 2-lines. Max 50-chars ea. |
| **Clear record?** | Dose the requester have a clean/clear record? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Clearance?** | Dose the requester have the necessary security clearance for the action? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Eligible?** | Is the requester eligible for the requested duty? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **Eval Date** | Date of Evaluation. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **N/A?** | Is a security clearance necessary for the requested action? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |
| **No. of Months** | Number of months the requester has a clear record. 1-24. Otherwise, leave blank. |
| **SECNAVIND ?** | Does the requester need a SECNAVIND for the requested duty? Enter a check mark (√ ) for Yes. Otherwise, leave blank. |

## PDB Profile Sheet

CIPM can print and edit PDB (**Professional Development Board**) Profile Sheets from CIPM member's data and the built in PDB Profile screen. The screen has four tabbed pages: one page (**Browse Member List**) to select members and three pages of editable PDB data (**PDB's**, **Member's Info** and **Military Training**). With this screen you can print a PDB Profile sheets for one or more CIPM members. If any information is incorrect or incomplete, you can change data directly on the screen using the tabbed pages 2 through 4.

### *Input – PDB Profile Sheet*

To access PDB Profile Sheet function, select ***Inputs\PDB Profile*** from the menu bar. A member list will be displayed, as shown below:




(See Browse Form, p. 2-8 for more information.)

**Figure 58 Browse PDB Profile Screen – Page 1 Member List**

### *Print PDB Profile Sheet*

To print a PDB Profile Sheet select one or members from the member list on the *Browse Members* page. Click the *Report* button. A report preview screen will display the sheet(s). Click on the *Printer* icon to sent the sheets to the printer. Otherwise, click on the *Exit* icon.

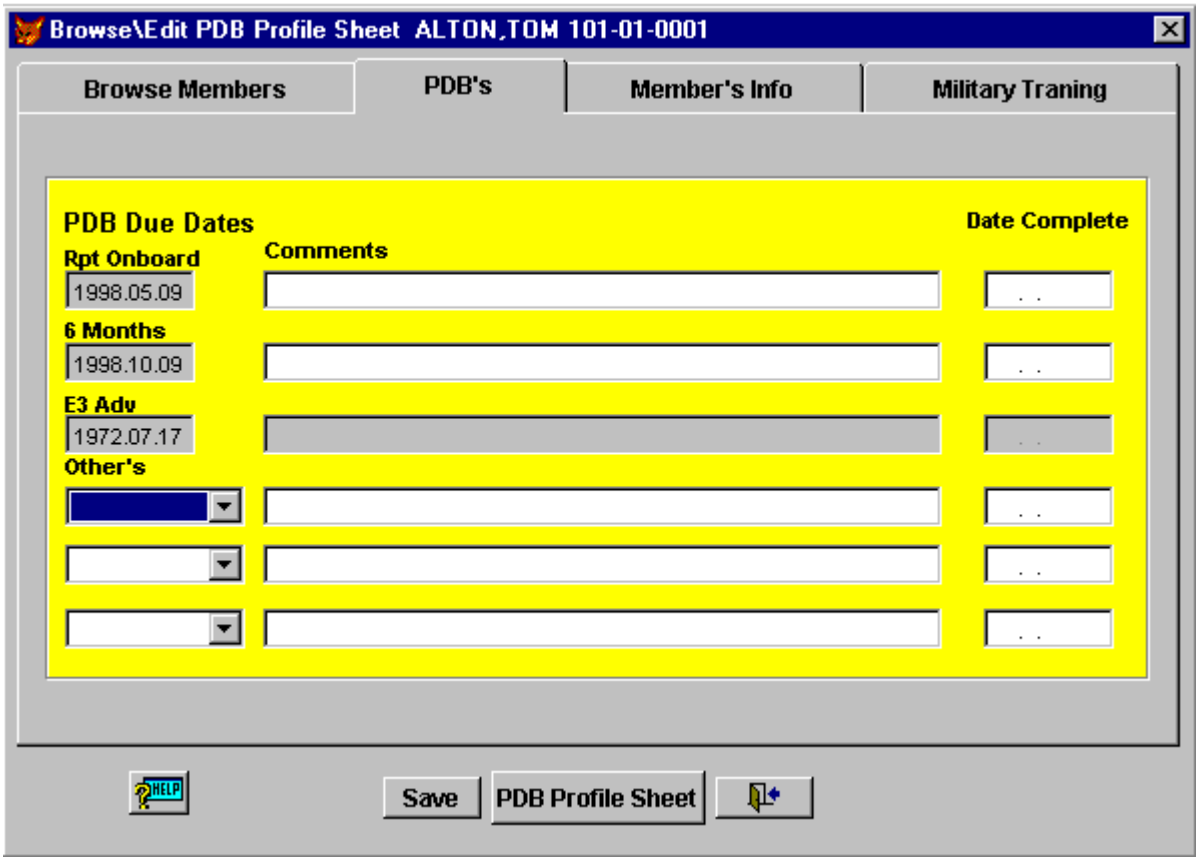
### *Edit PDB Profile Sheet Data Items*

To correct data found on the sheet, select the member's record on the *Members* page and click on one of the three pages (*PDB's*, *Information*, *Military Training*) containing the data. Make the appropriate changes and click *Save*. To discard your changes, click on the *Members* page and select another member without saving your changes.

> You must save your changes before you print the member's form. Otherwise, the printed PDB Profile Sheet will show incorrect data.

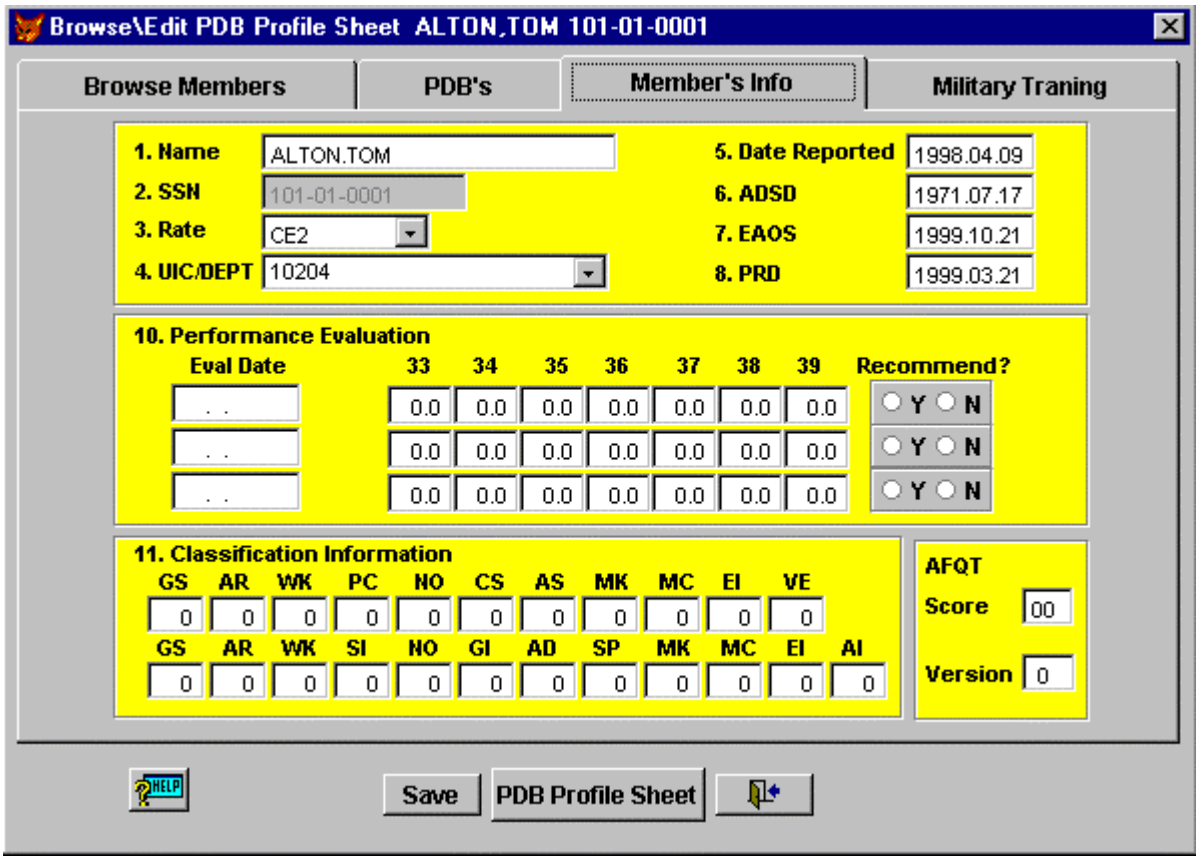
The following are sample PDB Profile Screen pages 2-4 and their field definitions.

### *Page 2 PDB's*




| Data Label | Content |
|---|---|
| **6 Months** | Date members 6-month PDB is due. 6-months within the member's reporting on board date. YYYY/MM/DD. |
| **Comments** | Comments to store about a PDB. Max 50-characters. (See NOTE in **Other's**). |
| **Date Completed** | Date members completed the PDB. YYYY/MM/DD. Otherwise, leave blank. |
| **E3 Adv** | Date members E3 Advancement PDB is due. 12-months after member's ADSD. YYYY/MM/DD. Not available for E3's and higher. |
| **Other's** | Other type of PDB's: Officer Pgms, Education Pgms, A-School, Advancement, Striker, Conversion, PNA's 2 Exams, Failed 1 Exam, Sen Enl Acad, Other.<br><br>**Note**: if Other is selected, type in the type of PDB in the adjacent Comment field. |
| **Rpt Onboard** | Date members Reporting Onboard PDB is due. 30-days within the member's reporting on board date. YYYY/MM/DD. |

## *Page 3 Member's Info – PDB Sheet*




| Data Label | Content |
|---|---|
| **1. NAME** | NAME of Service member. Enter: Last Name, First Name MI. Max 25-chars. |
| **10. Performance Evaluation** | 1 to 3 years of Evaluations. One year evaluation per row. |
| **11. Classification Information** | ASVAB Scores. Row 1 Versions 5 or before. Row 2 for later versions. |
| **2. SSN** | Social Security Number. Required. Enter 9 digits. Format 999-99-9999 |
| **3. Rate** | Rating (Navy job classification for enlisted personnel) of member. Max 10-characters. |
| **33** | 33. Evaluation Points: Professional Knowledge: Technical Knowledge and practical application. Range 1-5. |
| **34** | 34. Evaluation Points: Quality of Work: Standard of work: value of end product. Range 1-5. |
| **35** | 35. Evaluation Points: Equal Opportunity; Fairness, respect for human worth. Range 1-5. |
| **36** | 36. Evaluation Points: Military Bearing/Character: Appearance, conduct, physical fitness, adherence to Navy Core Values. Range 1-5. |
| **37** | 37. Evaluation Points: Personal Job Accomplishment/Initiative: Responsibility, quality of work. Range 1-5. |

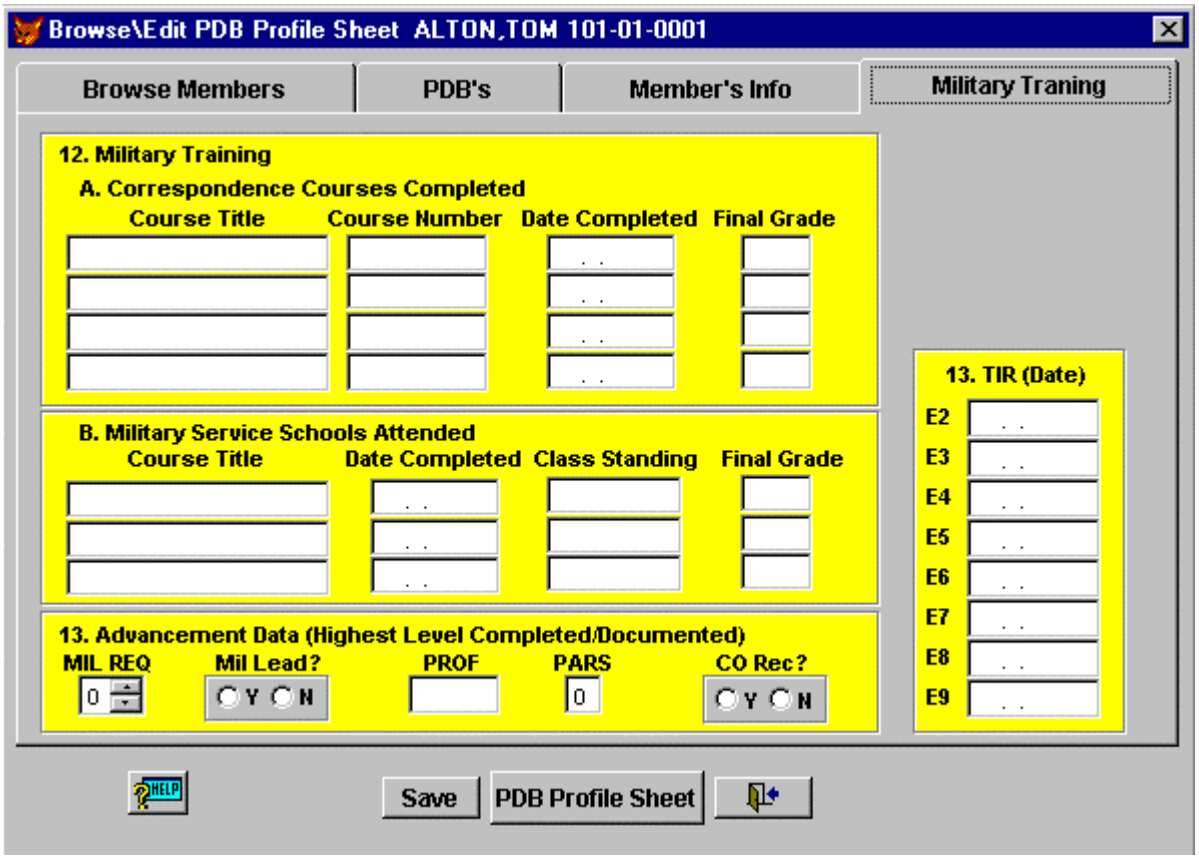
| Data Label | Content |
|---|---|
| **38** | 38. Evaluation Points: Teamwork: Contributions to team building and team results. Range 1-5. |
| **39** | 39. Evaluation Points: Leadership: (Optional for E1-E3) Organizing, motivating and developing others to accomplish goals. Range 1-5. |
| **4. UIC/DEPT** | Member's office. UIC, Department, Division. |
| **5. Date Reported** | Date Reported to Command. Enter: YYYY/MM/DD when expected. Correct date on arrival. |
| **6. ADSD** | Active Duty Service Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **7. EAOS** | Active Duty Obligation Expiration Date. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **8. PRD** | Projected Rotation Date Enter: Upon departure enter actual rotation date. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **AD** | Attention to Detail Score, e.g. 34. Range 0-99. |
| **AFQT** | Armed Forces Qualifying Test Score. Range 00-99 |
| **AI** | Automotive Information Score, e.g. 34. Range 0-99. |
| **AR** | Arithmetic Reasoning Score, e.g. 34. Range |

| Data Label | Content |
|---|---|
| | 0-99. |
| **AS** | Auto/Shop Score, e.g. 34. Range 0-99. |
| **CS** | Coding Speed Score, e.g. 34. Range 0-99. |
| **EI** | Electronics Information Score, e.g. 34. Range0-99. |
| **Eval Date** | Date of Evaluation. Enter: YYYY/MM/DD. Otherwise, leave blank. |
| **GI** | General Information Score, e.g. 34. Range 0-99. |
| **GS** | General Science Score, e.g. 34. Range 0-99 |
| **MC** | Mechanical Comprehension Score, e.g. 34. Range 0-99. |
| **MK** | Math Knowledge Score, e.g. 34. Range 0-99. |
| **NO** | Numerical Operations Score, e.g. 34. Range 0-99. |

| Data Label | Content |
|---|---|
| **PC** | Paragraph Comprehension Score, e.g. 34. Range 0-99. |
| **Recommend?** | Recommend for Advancement? Enter: Y or N. |
| **SI** | Shop Information Score, e.g. 34. Range 0-99 |
| **SP** | Special Perception Score, e.g. 34. Range 0-99. |
| **VE** | Verbal Expression Score, e.g. 34. Range 0-99. |
| **Version** | Version of ASVAB Test Taken. Max 3-characters. |
| **WK** | Word Knowledge Score, e.g. 34. Range 0-99. |

**Figure 59 Edit PDB Profile Screen – Page 2 Detailed Member Info**

### *Page 4 Military Training – PDB Sheet*




| Data Label | Content |
|---|---|
| **13.TIR(Date)** | Date of Time-in-Rate for E2,E3,…,E9. Enter: YYYY/MM/DD for the date. Otherwise, leave blank. |
| **Class Standing** | Class Standing in Block: 13 Military Training, Section B: Military Service Schools Attended, e.g. 13 of 100. Max 10-characters. |
| **CO Rec.?** | Does the Commanding Officer Recommend the member for promotion? Y-yes, N-No. |

| Data Label | Content |
|---|---|
| **Course Number** | Military Correspondence Course Number in Block: 13 Military Training, A. Correspondence Courses Completed (Other than Required Courses), e.g. CS123.A. Max 10 characters. |
| **Course Title** | Military Correspondence Course Title in Block: 13 Military Training, either A. Correspondence Courses Completed (Other than Required Courses) or B. Military |

| Data Label | Content |
|---|---|
| | Service Schools Attended, e.g. Mine Warfare. Max 20 characters. |
| **Date Completed** | Date Completed Military Correspondence course in Block: 13 Military Training, either A. Correspondence Courses Completed (Other than Required Courses) or B. Military Service Schools Attended as 1995.01.15. Format YYYY/MM/DD. |
| **Final Grade** | Final Grade in Block: 13 Military Training, either A. Correspondence Courses Completed (Other than Required Courses) or |

| Data Label | Content |
|---|---|
| | B. Military Service Schools Attended as, 84. Max 4-characters. |
| **Mil Lead?** | Rank of Leadership Exam Passed. Enter: 1..9 |
| **MIL REQ** | Rank of Exam Enter: 1..9 |
| **PARS** | Practical Factor. Enter: 1...9 |
| **PROF** | Rate of Training Manual Enter: xxx-E(1..9) exp.(QMS-E4). Max 6-characters. |

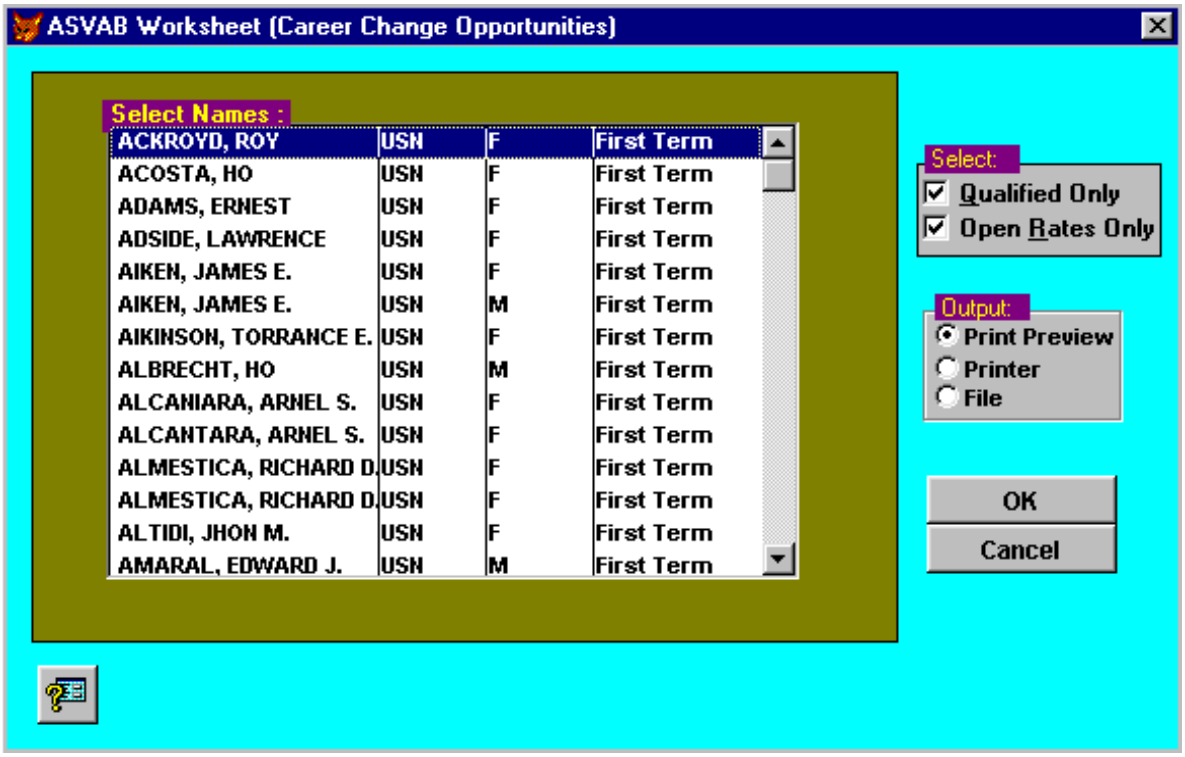
**Figure 60 Edit PDB Profile Screen – Page 3 Military Training**

## ASVAB Worksheets

CIPM can assist you in counseling career changes with the ASVAB Worksheet function. If you have entered the ASVAB scores, Branch of Service, TAR status and sex (male or female) of the members (See Section Add or Change an ASVAB Record, p. 4-49) and updated the CREO database (See Section Add or Change CREO Records, p. 3-14) with the latest BUPERS CREO information, CIPM can prepare ASVAB Worksheets. Each worksheet lists the CREO ratings which the member is qualified to transfer to, sorted by the difference in the minimum required score and the member's score, the largest first through the lowest grouped by CREO Category. The first group, CREO I, lists the rate with the highest demand. The second, CREO II, lists the rates with normal manning. Optionally, the third, CREO III, lists the rates that are over-manned.

### *Output – ASVAB Worksheets*

To access member tickler dates, select *Output\ASVAB Worksheets…* from the menu bar. A member list will be displayed, as shown below:




| Data Label | Content |
|---|---|
| **Cancel** | Closes the screen and does not print any reports. |
| **Help** | Help button displays online help screen related to this current screen. |
| **OK** | Creates a CREO report for each selected member using the current selection criteria to the current output device. |
| **Open Rates Only** | Check, to include only rates that have a CREO I or II openings. Uncheck, to include all CREO categories. |

| Data Label | Content |
|---|---|
| **Output** | Select one of the output options: screen (Print Preview), printer or a file. |
| **Qualified Only** | Check, to include only rates for which the selected member(s) have minimum ASVAB score. Uncheck to include all rates listed in the current CREO. |
| **Select Names:** | List of members. |

**Figure 61 ASVAB Worksheet Screen**

To print a worksheet, select one or members from the member list, select the qualifications (*Qualified Only*, the default) and job *opportunities (Open Rates Only*, the default). Select the output device (*Print Preview*, *Printer* or *File*). Click *OK* to create the worksheets. Otherwise, click *Cancel* to exit.

Click *Yes* to continue, when the message *"There are 99-members selected for the report. Do you want to print these ASVAB Worksheets?"* Otherwise, click *No*.

This report requires that each selected member have current ASVAB Scores, ASVAB Version and TAR status and a current CREO database. Otherwise, the message "*Can NOT find any open ratings for SSN 999-99-999. Check member's ASVAB Scores, version, TAR status and CREO database…*" will appear for each invalid member selected. Click ***OK*** to clear the message, correct the problem and retry the report.

## Interviews

CIPM can schedule up to nine different member interviews: Reporting Onboard, Annual Updates, Retention, Incentive, 12th-Year, 17th-Year, Pre-Separation/Retirement, TAP and Transfer. To help you prepare for the interviews, CIPM can print interview worksheets, memos to the XO and department heads and, if needed, Mini-Service records. Additionally, you can customize and change the interview worksheet topics for each type of interview.

### *Interview Date Calculations*

CIPM uses the member's career events dates (Birthday, ADSD, Reporting Onboard, PRD, EAOS and SEP/RET) to calculate projected interview dates. The following table defines the calculations and relationships of career events to interview dates:

| Career Events | Interview | Interview Date Calculations |
|---|---|---|
| **Birthday** | **Annual** | ***Birthday*** month of the current year. |
| **ADSD** | **Retention**<br>**12-year**<br>**17-year** | ***ADSD*** +18-months.<br>***ADSD***+12 years (for reservist only).<br>***ADSD***+17 years (for active duty only). |
| **Report On Board** | **Reporting onboard** | ***Rpt Onboard***+30 days |
| **PRD** | **Transfer** | 6 months prior to ***PRD*** |
| **EAOS** | **Incentive** | 11 months prior to ***EAOS*** |
| **Separation/Retirement** | **Pre-Ret/Sep**<br>**TAP** | 6 months prior to ***Separation/Retirement***<br>11 months prior to ***Separation/Retirement*** |

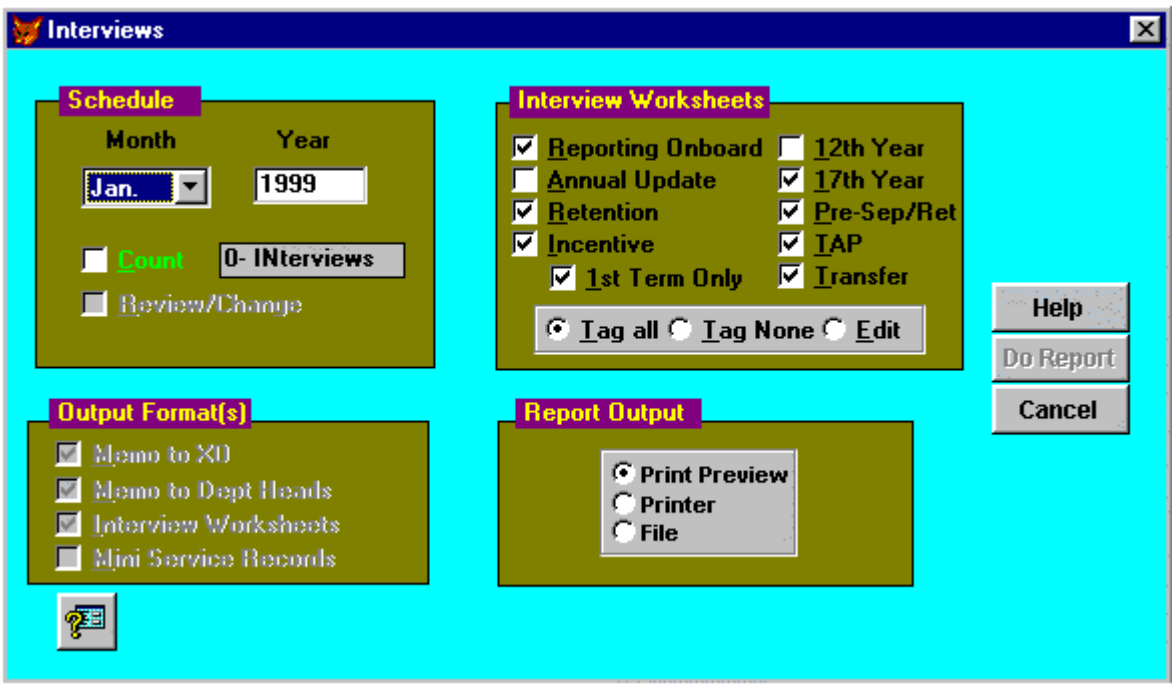
**Table 5 Interview Date Calculations**

### *Preparing for Interviews*

In preparing for interviews, CIPM expects the counselor to select one or more interview types and a month and year for the scheduled interviews. CIPM will create a list of all members whose interviews fall within the month/year selected or who are past due for the selected interview(s). The counselor can review and edit the list. Once reviewed the counselor can, optionally, print worksheets and memos for the selected month/year.

### *Output – Interviews*

To access the Interview function, select *Output\Interviews…* from the menu bar. The *Interview* screen will be displayed, as shown below:




| Data Label | Content |
|---|---|
| **1St Term Only** | For Incentive interviews, include only First Term members only, if checked. Otherwise, include all members who need Incentive interviews. |
| **Cancel** | Closes the screen and does not print any reports. |
| **Count** | Check, to start counting the number of interviews are due and overdue. The number of interviews counted is displayed to the right of this check box. |
| **Do Report** | Print the selected memos, worksheet and service records. |
| **Help** | Help button displays online help screen related to this current screen. |
| **Interview Worksheets** | Check to include all members who require a interview (***Reporting Onboard, Annual Update, Retention, Incentive, 12th year, 17th year, PreSeparation/Retirement, TAP, Transfer***). Uncheck, to exclude these interviewees. |
| **Interview Worksheets** | Check, if you want to have interview worksheet printed for each interviewee. Uncheck, if you do not want to print the worksheets.<br><br>Note: Only interview worksheets required for the interviews will be printed. |
| **Memo to Dept Heads** | Check, if you want to have one memo per department printed of members whose interviews are due or past due. Uncheck, if you do not want to print the Memo to the Department Heads.<br><br>Note: Only Departments with interview candidates will have their memos printed. |
| **Memo to XO** | Check, if you want to have one memo per UIC printed of members whose interviews are due or past due. Uncheck, if you do not want to print the Memo to the XO.<br><br>Note: Only UIC's with interview candidates will have their memos printed. |
| **Mini Service Records** | Check, if you want to have a mini-service record printed for each interviewee. Uncheck, if you do not want to print the service records.<br><br>Note: Only one mini-service record per interviewee will be printed. |
| **Month** | Select the interview month from the list of months.(***JAN, FEB,…,DEC***). Defaults to next calendar month. |
| **Report Output** | Select one of the output options: screen (Print Preview), printer or a file. |
| **Review/Change** | Check to see an editable list of members due interviews. |
| **Tag all** | Checks each interview type. |
| **Tag None** | Unchecks all interview types. |
| **Year** | Enter the interview year. YYYY format. Default to next month's calendar year. |

**Figure 62 Interview Preparation Screen**

### *Selecting Interview Types*

Check one or more interview types from the Interview Worksheets types (*Reporting Onboard, Annual Update, Retention, Incentive, 12th Year, 17th Year, Pre-*

*Sep/Ret*, *TAP*, and *Transfer*). Initially, the Interview Worksheets check boxes will be editable. If not, click the *Count* check box again. It acts as on/off switch for the Interview Worksheet type selection.

You can select either all members or only First Term members when counting Incentive Interviews. Check the ***1st Term Only*** check box to include only first term members. Otherwise, Un-check the box.

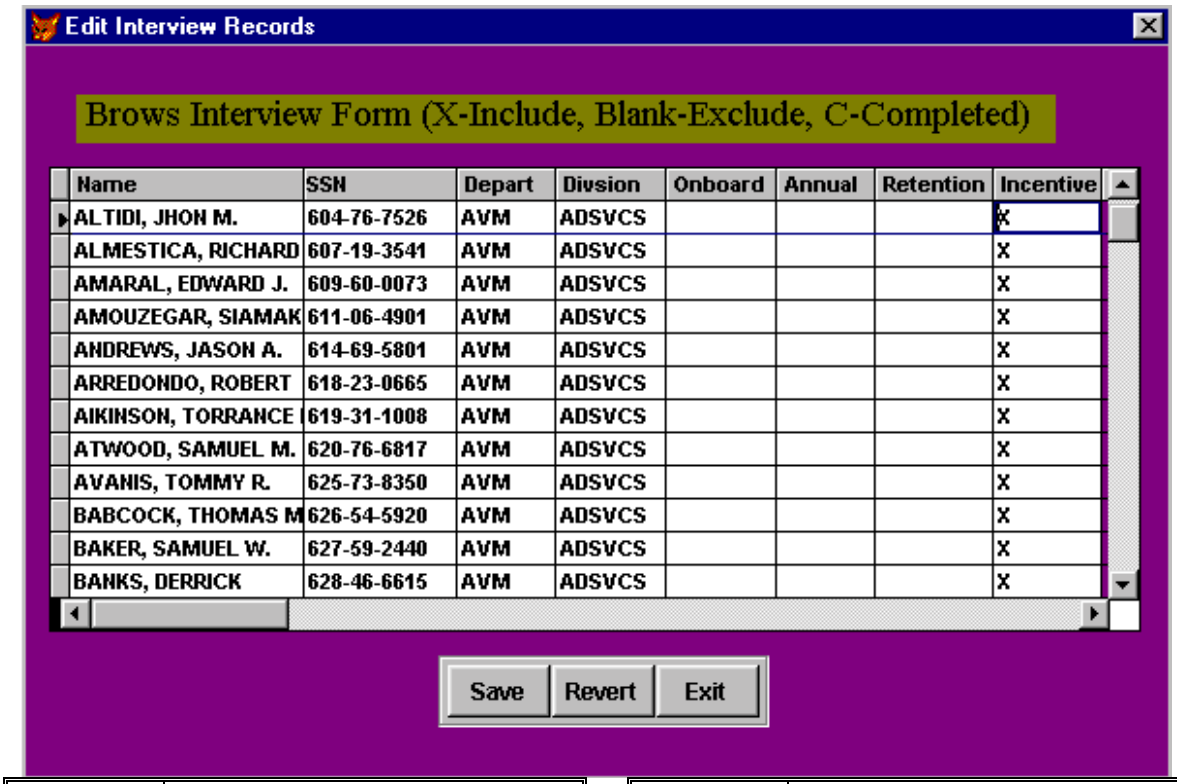
Use the ***Tag all*** and ***Tag None*** options to clear and set all the Interview check boxes at once.

### *Counting Interviews*

Select the interview period by selecting the month from the *Month* drop down list box and entering the year in the *Year* text box. The month/year are initially pre-loaded with next month's month/year. After setting the interview period, count the number of interviews due that month by clicking on the *Count* check box. The number of counted interviews will be displayed next to the *Count* check box. Once the count has been completed, the *Interview Worksheets* check boxes will be disabled until *Count* or *Do Report* is clicked.

### *Review/Completing Interviews*

After counting the number of interviews, click the *Review/Change* check box to review a list of the selected interviewees displayed in the *Edit Interview Records* screen shown below:




| Name | SSN | Depart | Divsion | Onboard | Annual | Retention | Incentive |
|---|---|---|---|---|---|---|---|
| ALTIDI, JHON M. | 604-76-7526 | AVM | ADSVCS | | | | X |
| ALMESTICA, RICHARD | 607-19-3541 | AVM | ADSVCS | | | | X |
| AMARAL, EDWARD J. | 609-60-0073 | AVM | ADSVCS | | | | X |
| AMOUZEGAR, SIAMAK | 611-06-4901 | AVM | ADSVCS | | | | X |
| ANDREWS, JASON A. | 614-69-5801 | AVM | ADSVCS | | | | X |
| ARREDONDO, ROBERT | 618-23-0665 | AVM | ADSVCS | | | | X |
| AIKINSON, TORRANCE | 619-31-1008 | AVM | ADSVCS | | | | X |
| ATWOOD, SAMUEL M. | 620-76-6817 | AVM | ADSVCS | | | | X |
| AVANIS, TOMMY R. | 625-73-8350 | AVM | ADSVCS | | | | X |
| BABCOCK, THOMAS M | 626-54-5920 | AVM | ADSVCS | | | | X |
| BAKER, SAMUEL W. | 627-59-2440 | AVM | ADSVCS | | | | X |
| BANKS, DERRICK | 628-46-6615 | AVM | ADSVCS | | | | X |

| Data Label | Content |
|---|---|
| **Depart** | The selected interviewee's department. |
| **Division** | The selected interviewee's division. |
| **Exit** | Closes the screen and does not save any changes. |
| **Name** | Alphabetical by last name list of selected interviewees. |
| **Onboard, Annual, Retention, Incentive, Yr_12th, Yr_17th, PreSep, TAP,** | ***Reporting Onboard, Annual Update, Retention, Incentive, 12th year, 17th year, PreSeparation/Retirement, TAP, Transfer*** interviews, respectively. The cell values are: Blank = interviewee is NOT selected for this type of interview. X=iterviewee is selected for this |

| Data Label | Content |
|---|---|
| **Xfer** | interview. C=complete this interview for the interviewee |
| **Revert** | Restores the field contents to the pre-edit values. |
| **Save** | Updates member's master record, if needed, saves changes for interviewees and closes the screen. |
| **SSN** | The selected interviewee's social security number. |

**Figure 63 Edit Interview Records Screen**

All selected members need one or more interviews during the selected month. The list has 13 data columns: *Name*, *SSN*, *Dept*, *Division* and nine *Interview Type* columns. An *X* indicates the type of interview that the member needs. A *C* indicates a dropped or closed interview. A Blank indicates no interview is scheduled.

Use the vertical scroll bars to view other selected members. Use the horizontal scroll bar to view more interview types.

### *Add/Drop Interviewees*

You can add/drop a member from an interview by clicking on the member's interview cell and entering an *X* to add the member to the schedule for the interview or a *Spacebar* (to blank the cell) to un-schedule the interview.

> If you drop a member from an interview, the member may show up next month on the interview list, as a late interview.

Once the interview has been completed, the counselors update the member's CIPM record with the date that the interview was given. To do so, the counselors open the *CIPM Browse* screen, pick a member from the list, open his detail record to the *Interview* page, type in the interview date for the appropriate interview(s) and save the changes. Repeat for each completed interviewee. The *Edit Interview Records Screen* provides a short cut for this process.

### *Permanently Drop an Interview*

You can complete a member's interview by clicking on the member's interview cell and entering a *C*. When you save the *Edit Interview* changes, CIPM will update the member's master record indicating that the particular interview has been completed on this date. This choice allows the counselors to permanently drop members from the interview list for interview types. Counselors can use this choice as an alternative to updating the member's master record manually.

### *Save Changes*

After reviewing and editing the interview list, click the *Save* button to apply the changes and exit the screen. Otherwise, click *Cancel* to restore the cells to their original values. Click *Exit* to close the screen and restore the values.

### *Print Interview Memos and Worksheets*

After reviewing the interviewee list, select one or more *Output Format(s)* from the four forms listed to be printed:

- ***Memo to XO*** is an alphabetical list of interviewees needing interviews during the selected month or past due in memo format for each UIC, as needed.
- ***Memo to Depart Heads*** is similar to the Memo to XO with department list of interviewees for each department, as needed.
- An ***Interview Worksheet*** is a checklist of interview topics to be covered during the interview. One worksheet is printed for each member for each type of interview needed.

- ***Mini Service Record*** is a one-page report of the interviewee's ASVAB scores, TIR, demographics and other CIPM data. CIPM will print one MSR for each interviewee.

To select an Output Format click the checkbox next to the form. Click the *Report Output* from the options: *Print Preview*, *Printer*, and *File*. To start printing the reports and memos click the *Do Report* button, which will be enabled once you select the Report Output type.

> Once the printing has started, you can interrupt and cancel the printing, by pressing the ***ESC*** key during either the preview or printing.

### *Correct Interview Worksheets*

The interview topics can be changed. Topics can be added, deleted or re-worded. To edit an interview worksheet click the *Edit* option on the Interview Worksheet and the Edit Worksheet will be displayed as:

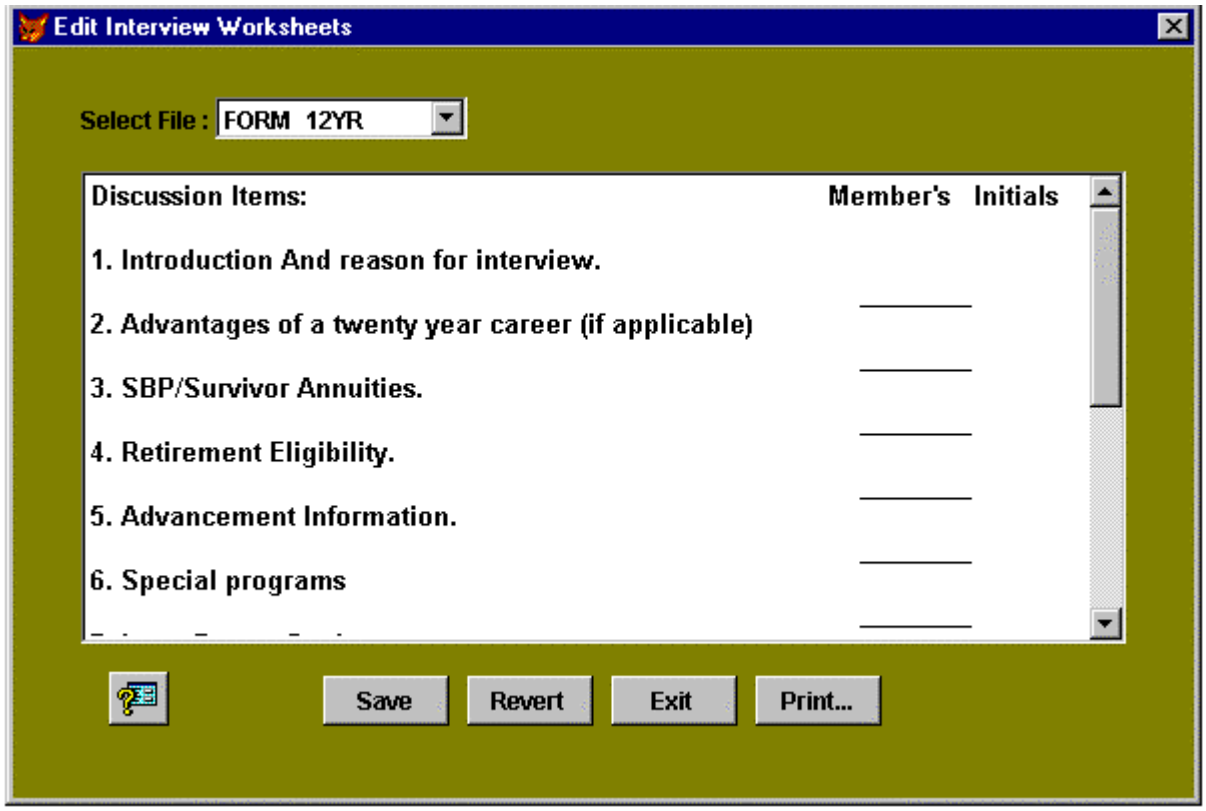



**Figure 64 Edit Interview Worksheet Screen**

Select the interview type from the *Select File* drop down list of nine interview types:

1. ***12-YEAR*** – 12th year Interview

2 ***17-YEAR*** – 17th year Interview
3 ***ANNUAL*** – Annual Interview
4 ***INCENTIVE*** – Incentive Interview
5 ***PRESEP*** – Pre-Separation/Retirement Interview
6 ***RETENTION*** – Retention Interview
7 ***ONBOARD*** – Reporting Onboard Interview
8 ***TAP*** – TAP Interview
9 ***XREF*** – Transfer Interview

Edit the text in the text area. Use the scroll bar to display other topics. Use the drop down list to change worksheets. After making your corrections click *Save* to permanently save your changes and close the edit screen. Click *Revert* to restore the topics to their pre-edit lists. Clicking *Exit* closes the edit screen and dose not save changes.

### *Print/Review Blank Worksheets*

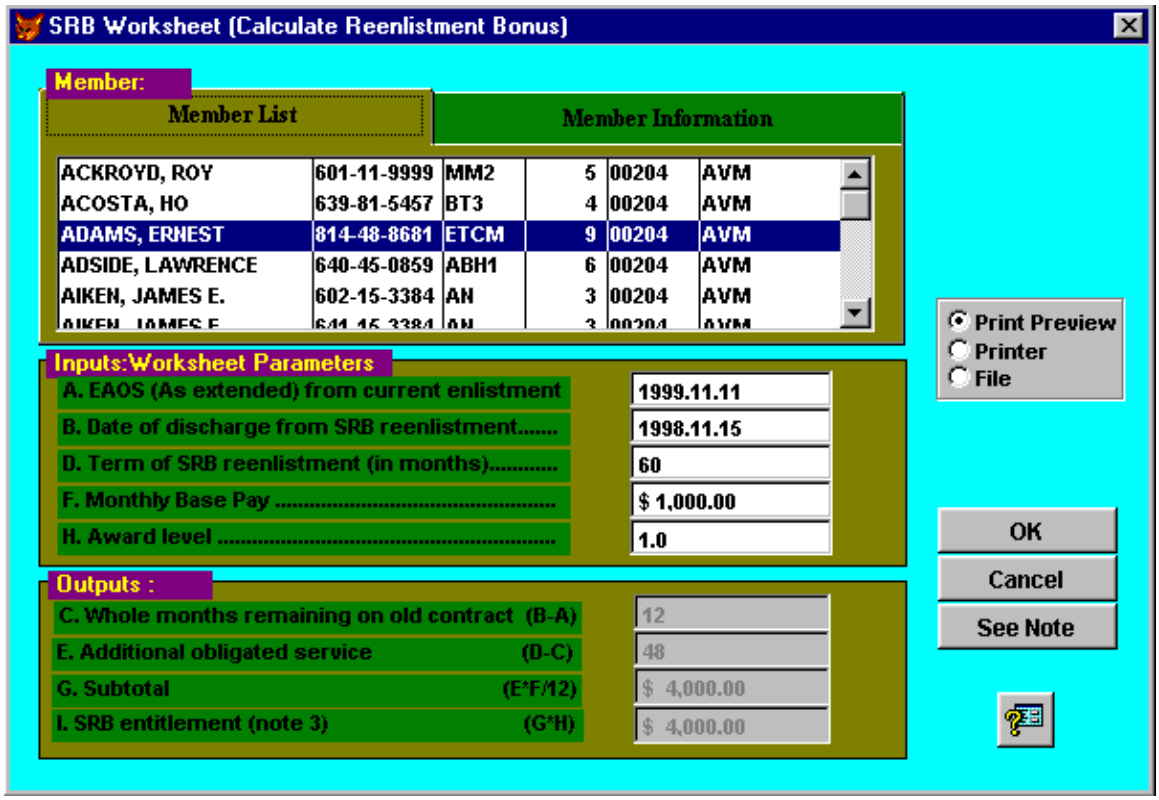
You can review the worksheets by printing a blank to verify your changes. The interview topics can be changed. Topics can be added, deleted or re-worded. To edit a interview worksheet click the *Edit* option on the Interview Worksheet and the Edit Worksheet will be displayed as:

## SRB Worksheets

CIPM can print SRB (Selective Reenlistment Bonus) worksheets needed for reenlistment bonus counseling. The counselor selects a member from a member list, enters a few numbers and CIPM will calculate his SRB. The counselor can change the numbers and recalculate the SRB, allowing what-ifs scenarios. Once the adjustment is made, the counselor can print a worksheet of the figures.

### *Output – SRB Worksheets*

To access the SRB function, select *Output\SRB Worksheet* from the menu bar. The *SRB Worksheet (Calculate Reenlistment Bonus)* screen will be displayed, as shown below:




| Data Label | Content |
|---|---|
| **Cancel** | Closes the screen and does not print any reports. |
| **Help** | Help button displays online help screen related to this current screen. |
| **Inputs** | Five input variables needed to calculate the SRB |
| **Member Information** | Additional data about a selected member |
| **Member List** | List of members to choose from. |

| Data Label | Content |
|---|---|
| **OK** | Prints the worksheet using the current input values. |
| **Output** | Four output variables calculated from the inputs. |
| **Report Output** | Select one of the output options: screen (Print Preview), printer or a file. |
| **See Note** | Additional information related to the bonus calculation. |

**Figure 65 SRB Worksheet – Calculate Reenlistment Bonus Screen**

Select a member from the ***Member List***. When a member is selected, CIPM will enter the member's EAOS date from his record into the ***Inputs: Worksheet Parameters*** section. This section has five input text fields:

***A. EAOS (As extended) from current enlistment*** – Format YYYY.MM.DD.

***B. Date of discharge from SRB reenlistment*** – Format YYYY.MM.DD. Defaults to today.

***D. Term of SRB reenlistment (in months)*** – 1-99. Defaults to 60-months.

***F. Monthly Base Pay*** – $0.01 to $99,999.99. Defaults to $1,000.00.

***H. Award level*** - 1.0 to 5.0. Defaults to 1.0

Adjust the five variables to meet your member's situation. As you move from field-to-field, the fields in the Outputs: section will change. This section has four fields:

***C. Whole months remaining on old contract (B-A)***

***E. Additional obligated service (D-C)***

***G. Subtotal (E*F/12)***

I. SRB entitlement (note 3)

Choose the output from the output options: *Print Preview*, *Printer* or *File*. Click *OK* to continue. Otherwise, click *Cancel* to close the screen. To see more details relating to the SRB calculations, click the *See Note* button and the following message will be displayed:

1. YYYY/MM/DD. If day is 31, use 30.
2. Any portion of a month is rounded up to the next month. Zero (0) is entered for three days or less.
3. Maximum amount is $20,000 except as noted in the impl. NAVOP.

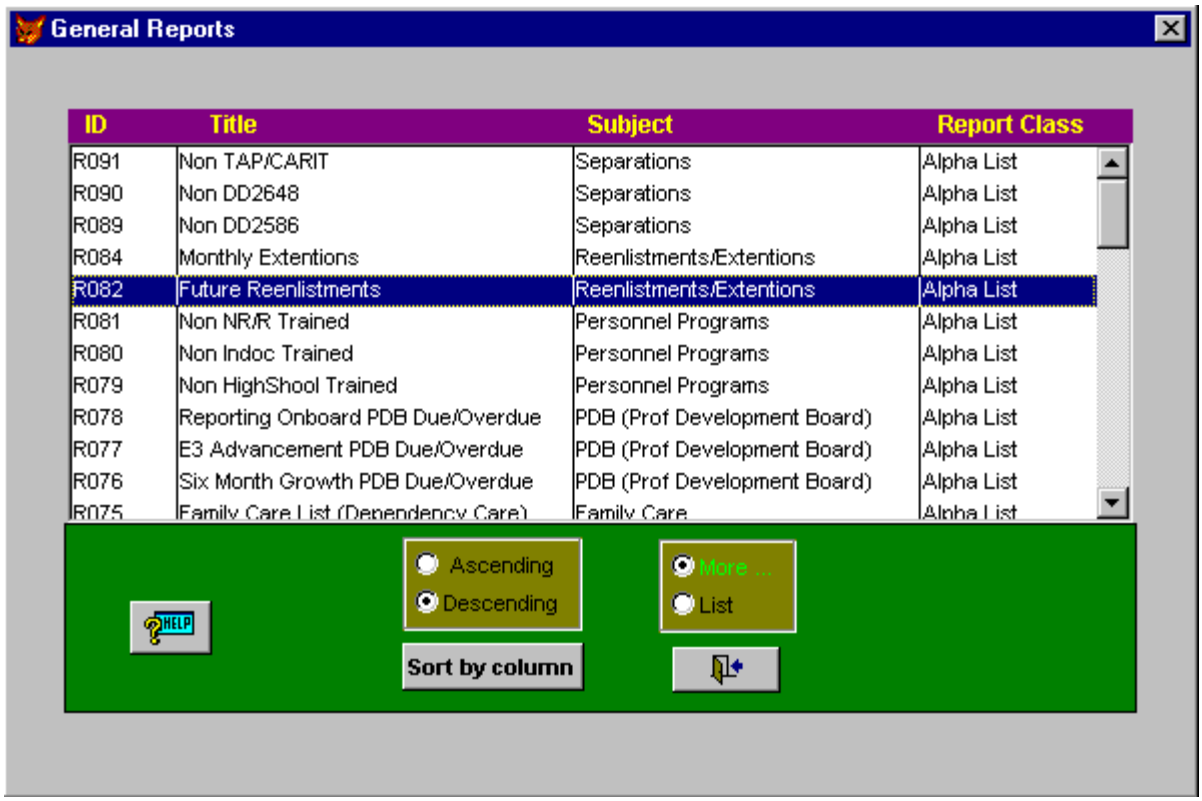
## General Reports

CIPM has nearly 50 general report to choose from. Each report has pre-defined record selection and sorting criteria. Additionally, CIPM has two simple to use but powerful query functions to permit the counselor to select and sort the data to meet local requirements. Additionally, General Reports can be e-mailed to others directly from the screen.

**Note:** In order to use the e-mail feature, you must install **Microsoft Outlook**.

### *Output – General Reports*

To select a general report, select *Outputs\General Reports* from the menu bar. A list of available reports will be displayed, as shown below:




(See Browse Form, p. 2-8 for more information.)

**Figure 66 General Reports List Screen**

This screen has the usual controls (*Ascending/Descending/Sort by column*) to help locate a particular report. For example, you can sort the reports by **ID** (Report ID number), **Title** (report title), **Subject** (general topic of the report) or **Report Class** (general type of report, e.g. *alpha list*, *statistical*, *form*).

Select a report form from the list of general reports and click the *More…* button. A record selection and sorting screen will be displayed pre-filled with defaulted values.

### *Record Selection/Sorting*

The **General Record Selection/Sorting** screen contains two pages, **Quick Query** and **Advanced Query** pages, to simplify report creation. The Quick Query (default page) provides organizational selection and up to three range criteria for record selections. The Advanced Query page provides a **SQL** (Standard Query Language) interface for more flexible record selections.

Weather you use the Quick or Advanced query, CIPM has preset queries for each report based on a typical use. Normally, you will print the report without having to change the defaulted query.

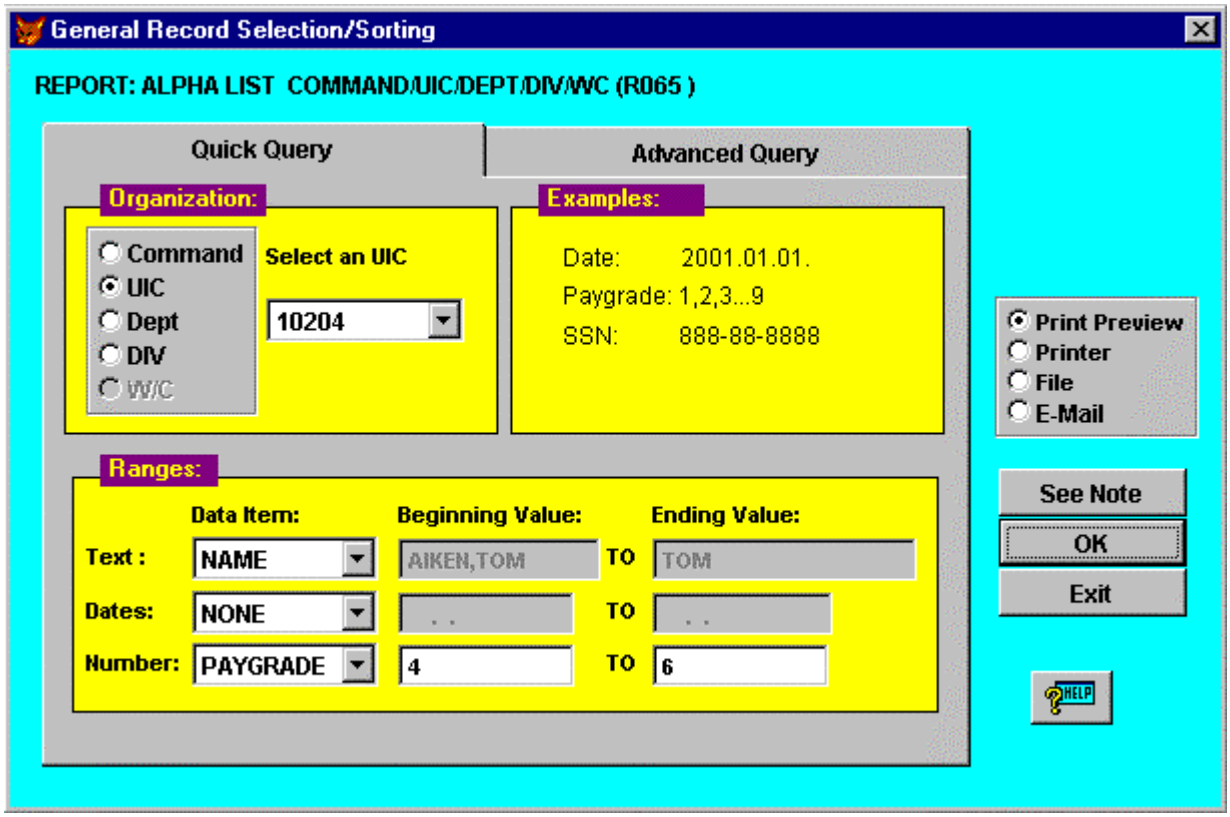
When printing a report, we suggest that you first try to use the defaulted values. Care has been taken to create values that meet most counselors' routine reporting needs.

Occasionally, you will need to make small adjustments, such as, change the timeframe of a report. In this case you would use the Quick Query. On rare occasions, you may need to create a special report that requires redoing all or part of the record

selection default values. This may require a more access to the SQL. For this situation, you may want to use the Advance Query.

### *Quick Query*

The Quick Query page contains controls to select records for the entire command (default) or for a specific organization within the command (***Organization*** section) and to select records by specifying data range(s) (***Ranges***: section), as shown below. A data range is data element that has a lower and upper limit definition associated with it.




| Data Label | Content |
|---|---|
| **Beginning Value** | The lowest value to be included in the report for a selected data item. For ***Text*** data items enter letters, digits and special characters, as needed. For ***Dates*** enter date in YYYY.MM.DD format. For ***Numbers*** enter digits and optionally decimal point. |
| **Data Items:** | Three drop down list boxes that contain text, date and numeric data fields, respectively that are available in the selected report. Lists varies with the report selected.<br><br>**Note**<br>All lists contain the item **NONE**. When NONE is selected in a given row, that row is ignored during record selection. |

| Data Label | Content |
|---|---|
| **Dates:** | List of date fields available in the selected report. List varies with the report selected. |
| **Ending Value** | The upper value to be included in the report for a selected data item. (See ***Beginning Value*** definition above for formats.) |
| **Exit** | Closes the screen and returns to the General Reports screen. |
| **Help** | Help button displays online help screen related to this current screen. |
| **Numbers:** | List of numeric fields available in the selected report. List varies with the report selected. **Note**: Some reports use this list for |

| Data Label | Content |
|---|---|
| | non-numeric fields. |
| **OK** | Print the selected report using the current record selecting and sorting criteria. |
| **Organization** | Specifies which group of members to include in the report: Command, UIC, Dept, Div. |
| **Report Output** | Select one of the output options: Print Preview, Printer or a File. |
| **REPORT:** | Name and number of selected report. |

| Data Label | Content |
|---|---|
| **See Note** | Examples and hints on constructing queries. |
| **Select an UIC** | A list of organizations available to included in the report. For example, if UIC is selected, then the drop down list will contain a list of all UIC in the command. |
| **Text:** | List of alphabetic or text fields available in the selected report. List varies with the report selected. |

### *Specify an Organization*

Select one group type: ***Command***, ***UIC***, ***Dept***, ***Div*** or ***W/C*** (Work center is not implemented yet). If you select UIC, Dept or Div, the list box to the right of the selection will be enabled and contain a list of available groups. For example, if you select Department, the list box will contain a list of all Departments found in the your database. Select a UIC (Department or Division) from the ***Select an UIC*** (Department or Division) list box.

For example to print a list of UIC 10204 members, select ***Alpha List Command Report (R065)*** from the **General Reports** screen. Select ***UIC*** in the **Organization** radio buttons. Select ***10204*** from the **Select an UIC** list box.

### *Specify a Range*

In the **Ranges** section, select one or more data items (*Text*, *Dates* and *Number*) from the ***Data Item*** drop down lists. For each Range row selected, enter the range's lowest possible desired value in the ***Beginning Value*** column and enter the range's largest possible desired value in the ***Ending Value*** column. (Note: Not all Data Items are available for all reports.)

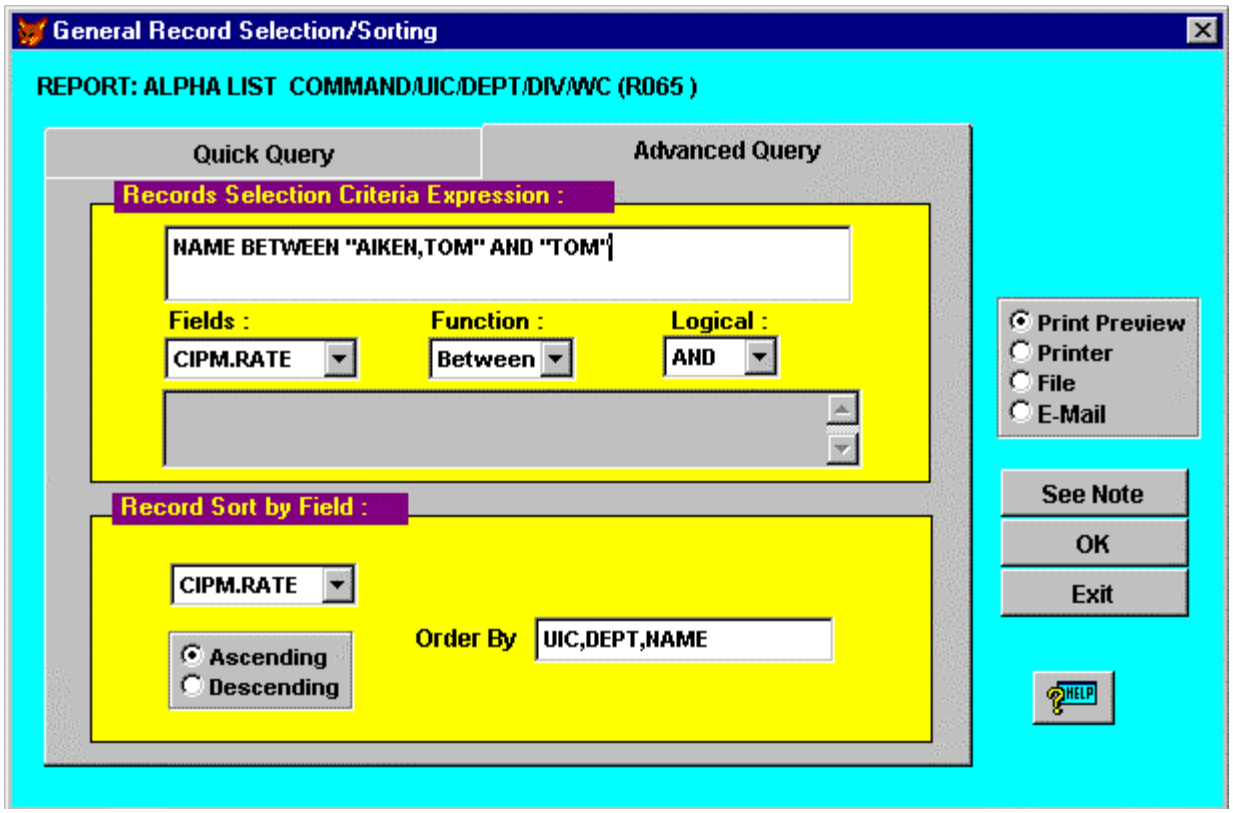
Continuing the above example, to restrict the UIC 10204 Command Report to include only E4 through E6's, select the ***Paygrade*** from the **Number Data Item** list. Change the lower range value to ***4*** (for E4) and the upper range value to ***6*** (for E6).

### *Advanced Query*

The **Advanced Query** page is an SQL interface to the CIPM Queries. The SQL **WHERE** and **ORDER BY** clauses are displayed in the Advanced Query page **Record Selection Criteria Expression** and **Record Sort by Field**, respectively.

The Advance Query is a SQL interface that uses the SQL syntax and model and **Boolean Algebra** for record selection and sorting. If you are familiar with SQL and Boolean Algebra you can erase the text in the Record Selection area and enter your own query. Otherwise, you can use the Fields, Function and Logical lists to assist you.

By clicking on the Advanced Query page and a pre-filled query with defaulted values will be displayed, as shown below:




| Data Label | Content |
|---|---|
| **Ascending/ Descending** | Sort options. Default is Ascending. |
| **Exit** | Closes the screen and does not print any reports. |
| **Fields:** | List of fields available in the selected report. List varies with the report selected. |
| **Function:** | List of operators used to create a record selection clause: Between, =, >, <. >=, <,<=,+,-,*, and /. |
| **Help** | Help button displays online help screen related to this current screen. |
| **Logical** | List of conjunctions used to join two clauses: ONLY,AND, and OR. |
| **OK** | Print the selected report using the current record selecting and sorting criteria. |
| **Order By** | List of selected sort key fields and their sorting order in major to minor key order. |

| Data Label | Content |
|---|---|
| **Record Sort By Field:** | SQL ORDER BY clause definition section. |
| **Records Selection Criteria Expression** | SQL WHERE clause definition section. |
| **Report Output** | Select one of the output options: Print Preview, Printer, File or E-Mail. |
| **REPORT:** | Name and number of selected report. |
| **See Note** | Examples and hints on constructing queries. |

### *Selecting Records*

Normally you will not need to change the values on this screen. Occasionally, you will need to make small adjustments, such as, to change the timeframe of a report. On rare occasions, you may need to create a special report that requires redoing all or part

of the record selection default values. When printing a report, we suggest that you first try to use the defaulted values. Care has been taken to create values that meet most counselors' routine reporting needs. If not, type over the numbers and quoted words to define the records you want to include in your report. Finally, if you don't achieve the desired result, erase the values and enter you own selection criteria.

CIPM record selection is based on the SQL (Standard Query Language) syntax and model and Boolean Algebra. If you are familiar with SQL and Boolean Algebra you can erase the text in the Record Selection area and enter your own query. Otherwise, you can use the Fields, Function and Logical list to assist you.

### *Simple Substitution*

CIPM record selection uses three types of fields and constants: Numeric, String and Date. A string is quoted text, e.g. "SYSADMIN". A date is number calendar date bound by braces, e.g. {2003.10.14} for October 14, 2003.

To determine the field type, click the *Fields* dropdown list. A list of available fields will be listed with their field type codes (*N*-numeric, *C*-string and *D*-date) and field lengths.

Example 1: Suppose you need to list all members whose EAOS falls within the next 12-months, today's date (April 4, 2001) and CIPM only provides a 30-day report with the following criteria:

**EAOS BETWEEN {2001.04.04} AND {2001.05.04}**

Change the 30-day report to a 12-month report, type over the ending date (2001.05.04) with *2002.04.03* so the criteria will appear as:

**EAOS BETWEEN {2001.04.04} AND {2002.04.03}**

### *Additional Constraints*

You can add additional constraints to the record selections by adding a Logical conjunction and a new expression.

Example 2: Suppose you need to list only E4 members whose EAOS falls within the next 12-months, today's date (April 4, 2001). Add the paygrade restriction to the above example as:

**EAOS BETWEEN {2001.04.04} AND {2001.05.04} AND PAYGRADE = 4**

### *Sorting Records*

To change the order that the data is printed, replace the text in the *Order By* text box with your primary key field followed, optionally, by the sort direction (*Ascending* – the default or *Descending*). You can add additional sort fields, if needed.

Example 3: Suppose in example 2 you needed to list the members in alphabetical order by names and the report lists the members in EAOS chronological order as:

**EAOS ASCENDING**

To change the sort order, replace the sort key in the ***Order By*** text box with:

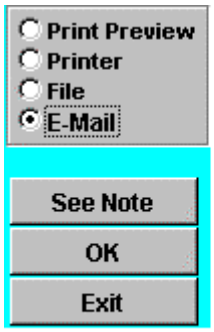
**NAME ASCENDING**

### *Printing General Report*

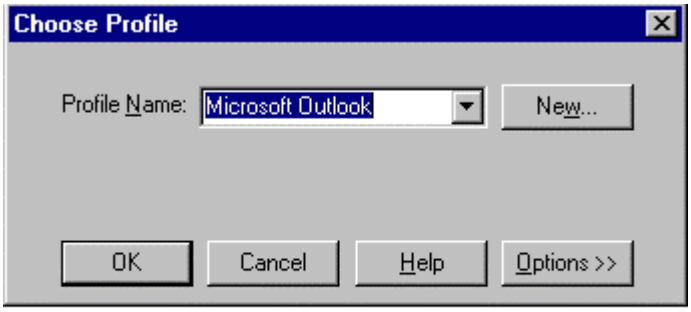
To print a General Report, first preview the report by clicking the *OK* button. Otherwise, click *Exit* to close the screen and report to the list of reports. A preview of the worksheet will be displayed. To print the worksheet, click the *Print Report* icon. Otherwise, click the *Close Preview* icon to cancel.

### *E-mailing a General Report:*

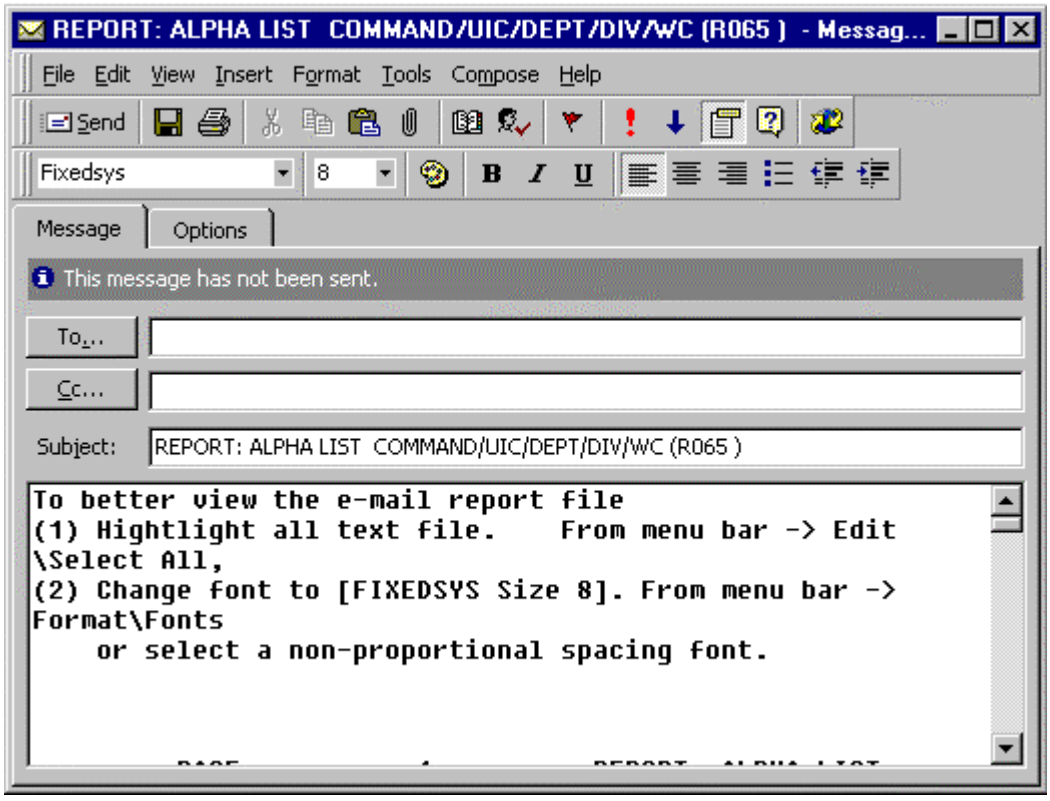
To e-mail a report, select E-Mail from the output options, as shown below:




Click *OK*. Otherwise, click *Exit* to close the screen and report to the list of reports. The **Microsoft Outlook Profile** dialog box will be displayed as shown below:




Select the user profile you want to use and follow the direction and click *OK*. The Outlook message composition screen will be displayed as shown below:




The Report Title will be displayed in the screen title bar and in the **Subject** text box. The e-mail body contains the Report. Click on the **To…** button to specify the addressee. Click the Send button to send the report to the addressee. For additional information, click on the Outlook Help button.

**Tip**: To better view an e-mailed report with the Outlook composer, change the text font to **FIXEDSYS**, Size **8** or some other non-proportional font.

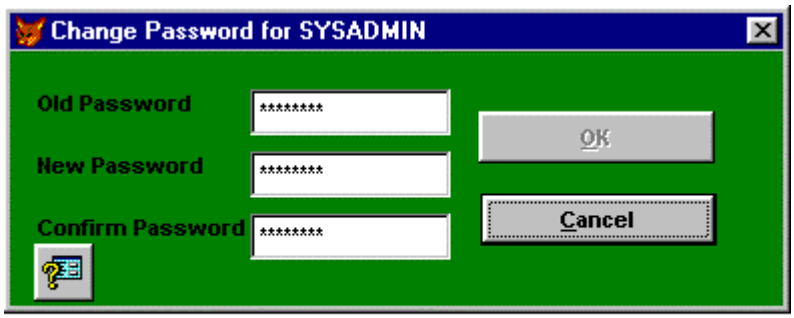
## Password

When the system administrator adds a new CIPM user, he assigned a temporary password. When the new user first logs onto CIPM, he will input the temporary password. After logging onto CIPM successfully for the first time, he should change the temporary password to a new one.

### *Tools – Change Password*

To access the Change Password function, select *Tools\Change Password* from the menu bar. The *Change Password for SYSADMIN* screen will be displayed, as shown below:

To verify that you are the current user enter you old/current password in the *Old Password* text box. Enter the new password in the *New Password* text box. To confirm




your new password re-enter your new password in the *Confirm Password* text box. To save your new password click *OK*. Otherwise, click *Cancel*.

Be sure and remember your new password. Otherwise, you will not be able to log onto CIPM. You will need to contact your System Administrator to retrieve your password.

# Glossary

**32-bit application** A collection of Visual FoxPro programs, forms, menus, and other files that are complied into a single program designed to run on Windows 95 or Windows NT operating systems.

**ASVAB** Armed Services Vocational Aptitude Battery

**CIPM** Career Information Program Management.

**CIPM 1.0:** Career Information Program Management computer program designed to automate some of the Navy Career Counselor's tasks. Developed by NETPMSA DET CORPUS in 1988.

**CIPM 3.0** Similar to CIPM 1.0. Written in Clipper by Navy Chief Potter.

**CIPM 95:** Update to CIPM 1.0 computer program. Released in 1994 by NETPMSA DET Corpus.

**CIPM 99:** Update to CIPM 95 computer program. Scheduled for release in Jan '98.

**CIPM Manual** Career Information Program Management Training Manual (NAVEDTRA 10238-A February 1990, 0502-LP-212-3600).

**CNATRA** Chief of Naval Air Training, Naval Air Station, Corpus Christi, TX.

**CITC** Career Information Training Course.

**COMMINEWAREFARE** Command Mine Warefare Command, Naval Air Station, Corpus Christi, TX.

**CREO** Career Reenlistment Objectives is a U.S. Navy enlisted career force management guideline for operation of current and future Navy program. The guidelines are published approximately every 6-months and contain job openings and job entry qualifications. Ref: OPNAVINST 1160.4G.

**DBMS** Database Management System

**EDVR** Enlisted Distribution and Verification Report is a U.S. Navy monthly report continuing a list of gain/loses of enlisted personnel by organization. Ref: NMPCINST 1616.1A.

**GUI** Graphical User Interface

**Interviews:** One of many formal scheduled meetings between Sailors and Navy Career Counselors to evaluate qualifications for new and exchange information on career opportunities in the Navy.

**MS/DOS** Microsoft Disk Operating System

**NAVEDTRA** Navy Education Training Command.

**NETPDTC** Navy Education and Training Professional Development Center.

**OOPS** Object Orientated Programming System

**PRD** Projected Rotation Date

**REGA** Rating Entry for General Apprentices is a U.S Navy program to

guide the general apprentice population into ratings were junior level vacancies exist. Ref: OPNAVINST 1430.5C.

**SRB Worksheets** Selective Reenlistment Bonus (SRB) program is a U.S. Navy incentive program to influence enlistment retention of mission critical skills. The SRB Worksheets are forms used to help calculate reenlistment bonuses. Ref: OPNAVINST 1160.6A.

**Tickler System** A system to assist the career counselor to schedule and monitor all of the required and some of the situational interviews.

**Year 2000 Compliant** A computer program that stores, retreives, and uses in calcuations, correctly, dates that are a mixture of 20-th and 21-st century data.

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**APPENDIX B - INTERVIEW SCHEDULES**

Notes:

1. All interviews should be conducted using the member's service record and after thorough preparation by the counselor. The interview schedules listed below are meant to be guides to ensure the member is afforded ample information at various times throughout their career. This is not an all-inclusive listing and the counselor may find it needs to be updated or modified to meet command needs/requirements.

2. These interviews may require liaison with other support services (PSD, Navy Relief, Family Services Center, etc.).

3. Some of the interviews listed below may be delegated to subordinate counselors, however, this does not remove the responsibility from the Command Career Counselor to ensure the interviews are completed in a timely manner and that they are properly documented using the Career Counselor Record, NAVPERS 1160, or a similar computer generated document.

4. Specific guidance regarding pre-separation interviews, to comply with Public Law, is contained in Chapter 14. In all cases, the Command Career Counselor will personally conduct and document this interview.

5. Review applicable portions of Chapter 2 of this manual concerning the interview system before commencing the interview process.

6. Ensure the appropriate use of the two forms: USN/USNR Active Duty and Selected Reserve Interview Schedules (pages B-2 and B-3).

# USN/USNR ACTIVE DUTY INTERVIEWS

**(Shaded areas do not apply)**

| | REPORTING | RETENTION | INCENTIVE | 17TH YEAR | PRE-SEP /RET |
|---|---|---|---|---|---|
| 1. Discuss purpose of interview | | | | | |
| 2. Describe your functions | | | | | |
| 3. Discuss members long range goals | | | | | |
| 4. Discuss the Command Career Information/Retention Team | | | | | |
| 5. Describe Command and Incentive Programs | | | | | |
| 6. Verify Record of Emergency Data (Page 2) | | | | | |
| 7. Verify Family Care Policy | | | | | |
| 8. Submit Duty Preference Sheet | | | | | |
| 9. Determine advancement eligibility | | | | | |
| 10. Describe Professional Development Board | | | | | |
| 11. Discuss New PRD/DoD Tour/PST | | | | | |
| 12. Discuss CREO/REGA | | | | | |
| 13. Discuss STAR/SCORE/Lateral Conversion | | | | | |
| 14. Describe Educational Programs | | | | | |
| 15. MGIB/VEAP/Tuition Assistance | | | | | |
| 16. Navy Schooling/Navy College Program | | | | | |
| 17. Discuss Commission Programs | | | | | |
| 18. Naval Academy/BOOST/Seaman to Admiral | | | | | |
| 19. OCS/AOC/NROTC/ECP/MECP/LDO/CWO | | | | | |
| 20. Ensure PSMC is being issued | | | | | |
| 21. Discuss Entitlements and Privileges | | | | | |
| 22. Movement of Household Goods/Travel Benefits | | | | | |
| 23. Commissary/Exchange | | | | | |
| 24. Medical/Dental | | | | | |
| 25. Review USCHBP Health Insurance | | | | | |
| 26. Describe SGLI/VGLI | | | | | |
| 27. Discuss Social Security Benefits | | | | | |
| 28. Discuss Disability Retirement/TDRL/PDRL (as applicable) | | | | | |
| 29. Discuss Non-Disability Retirement/High 3 Retirement Reform Act | | | | | |
| 30. Compute Retired/Retainer Pay | | | | | |
| 31. Review Survivor Annuities | | | | | |
| 32. Discuss Survivor Benefits Plan | | | | | |
| 33. Review Veterans Benefits | | | | | |
| 34. Discuss TAP/DORS/TBBS/Job & Relocation Assistance/Resumes | | | | | |
| 35. Discuss Naval Reserve Programs | | | | | PRE-SEP ONLY |
| 36. Complete Retention/Separation Questionnaire | | | | | |
| 37. Complete Pre-Separation Check List (DD 2648) and ITP | | | | | |
| 38. Issue VMET Document | | | | | |
| 39. Review and Update Navy Goal Card and Pocket Goal Card | | | | | |

## Selected Reserve INTERVIEWS
**(Shaded areas do not apply)**

| | REPORTING | RETENTION | INCENTIVE | 17TH YEAR | PRE-SEPARATION | PRE-RETIREMENT |
|---|---|---|---|---|---|---|
| 1. Discuss Purpose of interview | | | | | | |
| 2. Describe AT, IDT, and IDTT Policy | | | | | | |
| 3. Discuss member's long range goals | | | | | | |
| 4. Discuss the command Career Information Team | | | | | | |
| 5. Describe Command Programs | | | | | | |
| 6. Discuss MGIB-SR | | | | | | |
| 7. Discuss Family Care Policy | | | | | | |
| 8. Determine/Discuss advancement eligibility | | | | | | |
| 9. Describe Professional Development Board | | | | | | |
| 10. Describe Educational Programs (Navy College Program, CLEP, DANTES , etc.) | | | | | | |
| 11. Discuss Commissioning Programs | | | | | | |
| 12. Discuss Pay and Allowances | | | | | | |
| 13. Describe Insurance Entitlement | | | | | | |
| 14. Define Reserve Retired Pay | | | | | | |
| 15. Review Survivor Annuities | | | | | | |
| 16. Discuss RC-SBP | | | | | | |
| 17. Complete RC-SBP Application | | | | | | |
| 18. Review Veterans Benefits | | | | | | |
| 19. Discuss Separation Questionnaire (SARP) | | | | | | |
| 20. Discuss Leadership Programs | | | | | | |
| 21. Discuss Enlisted Community Management Objectives (ECMO) | | | | | | |

# INTERNAL COMMAND APPRAISAL PROTOCOL AND GUIDE

1. INTRODUCTION. The purpose of conducting an internal Command Career Information Program Appraisal is to ensure that every Sailor of that command is provided with a sufficient quality and quantity of career information. The appraisal is to find positive program attributes and strengthen them and not to only find fault or weaknesses. Your role as a CCC will also include the training, development and mentoring of Retention Team members/career counselors. This approach requires an exchange of ideas within the chain of command. A properly conducted internal Unit Appraisal can yield new ideas to improve the quality of operations and services provided.

There are few, if any, "perfect career information programs", so all commands have areas to improve. Determining those improvement areas is the focus of the appraisal. Be prudent in dealing with personnel; they very well may resent "outsiders" telling them what or how to do their job. Your attitude should convey that you recognize they know their job (or are trying to learn it) and that they know the governing guidance.

Among all of the work to be completed, an appraisal of any program brings additional stress on the command. In this instance, an internal appraisal of the Career Information Program places the chain of command on alert with the burden being shouldered by the CCC.

Bear in mind the mission, type, composition and geographic structure of a command may require minor changes or adjustments to the basic program. However, all CIPM program elements must be in place and evaluated.

2. APPRAISAL CYCLE. The appraisal cycle consists of four stages: pre-appraisal, appraisal, post-appraisal and growth.

a. THE PRE-APPRAISAL PHASE. Sound planning is essential for an effective and efficient appraisal. You must base your methods on clear, written guidance (this manual, fleet instructions, etc.) rather than your personal beliefs or perceptions. You must be completely familiar with all aspects of the CIPM program elements and how they are measured.

(1) Prepare for the appraisal well in advance. For example:

(a) Does each newly reporting CCC receive an in-brief with the ISIC counselor?

(b) Was the ISIC counselor available to help the CCC check into the command?

(c) Was the ISIC counselor available to help the newly reporting CCC review previous appraisals?

(d) Was the ISIC counselor available for providing periodic assistance, answering the CCC's questions or offering to provide training to the command?

(2) In completing the Unit Appraisal, attempt to answer the questions by section and not necessarily starting with section one then going to section two and so on. Take additional rough notes that you can smooth as you prepare each section summary area. Your notes will also help you prepare the summary report at the end of the appraisal.

(3) Continually think about what you are after. We want to improve the quality of operations and services. We want to streamline

operations, procedures, material, methods, records, reports, forms, etc. We want to eliminate unnecessary operations. We want to devise new processes, methods, and procedures. We want to save time, materials and manpower.

b. POST-APPRAISAL PHASE

(1) A properly documented appraisal will identify program strengths and opportunities for improvement. The document itself is important to support and defend your findings. It will also provide invaluable reference information and background data for future reviews. The final report should be organized, thorough, accurate and neat. The report should only contain findings and recommendations that are manifestly important or require action. It should also identify the cause of the problem provided such identification does not include spelling out corrective action. You should, however, place a reference source by any discrepancy.

(2) Identify discrepancies in a logical sequence grouping by the CIPM program elements (Personnel Entry System, Interview System, etc.). Do not submit deficiencies of minor significance for inclusion as a finding. If the discrepancy is correctable before the completion of the appraisal it should be considered as minor.

(3) Be objective in your reporting and include all significant, relevant information. Identify important assumptions and opinions. Be sure your conclusions are reasonable and can be supported with documented facts and findings. Recognize the efforts and eagerness of the departmental/divisional career counselors to correct deficiencies and any progress made to improve conditions noted in prior reviews. Fairly present the departmental/divisional career counselors' views and comments on your findings. And by all means, take time to recognize good performance!

c. THE GROWTH PHASE. This is where your mentorship and training of Retention Team members/career counselors begin. You may need to provide additional training for the first few months. Your continuous involvement can stenghthen their efforts and more solidly help build a program.

**INTERNAL COMMAND CAREER INFORMATION/PERSONNEL PROGRAMS APPRAISAL GUIDE**

COMMANDING OFFICER:_____

EXECUTIVE OFFICER:_____

COMMAND MASTER CHIEF:_____

COMMAND CAREER COUNSELOR:_____

DATE OF CURRENT APPRAISAL:_____

DATE OF LAST APPRAISAL:_____

This appraisal guide focuses on various areas dealing with retention and personnel programs. It also provides for site interviews of a representative cross section of the command structure to validate information previously obtained in the conduct of the appraisal. The guide is separated into three sections to more accurately identify/assign functional areas of responsibility. The sections include: (1) ADMIN/PERSONNEL/ESO, (2) COMMAND MASTER CHIEF (CMC)/CHIEF OF THE BOAT (COB), (3) COMMAND CAREER COUNSELOR (CCC).

**SECTION 1**
**ADMIN/PERSONNEL/ESO**

Recognition (past 12 months):

| AWARD | 01 AND ABOVE | E7-E9 | E5-E6 | E1-E4 |
|---|---|---|---|---|
| MM | _____ | _____ | _____ | _____ |
| NC | _____ | _____ | _____ | _____ |
| CO NA | _____ | _____ | _____ | _____ |
| OTHER NA | _____ | _____ | _____ | _____ |
| FLAG LOC | _____ | _____ | _____ | _____ |
| CO LOC/LOA | _____ | _____ | _____ | _____ |

Other forms of recognition used:

Command Enlisted Advancement status

1. Provide the number of personnel in each category for the examination paygrade for the last two completed exam cycles.

| | E-4 | E-5 | E-6 |
|---|---|---|---|
| * Time in rate eligible | __/__ | __/__ | __/__ |
| * Completed prerequisites | __/__ | __/__ | __/__ |
| * Recommended by CO | __/__ | __/__ | __/__ |
| Participated | __/__ | __/__ | __/__ |
| * Advanced | __/__ | __/__ | __/__ |
| Passed-not-advanced | __/__ | __/__ | __/__ |
| Failed | __/__ | __/__ | __/__ |
| Recommendation withdrawn | __/__ | __/__ | __/__ |
| Substitute exam | __/__ | __/__ | __/__ |
| Discrepancies | __/__ | __/__ | __/__ |

| | E-7 | E-8 | E-9 |
|---|---|---|---|
| Time in rate eligible | ____ | ____ | ____ |
| Completed prerequisites | ____ | ____ | ____ |
| Recommended by CO | ____ | ____ | ____ |
| Participated | ____ | N/A | N/A |

| | | | |
|---|---|---|---|
| Failed | ____ | N/A | N/A |
| Selection board eligible | ____ | ____ | ____ |
| Recommendation withdrawn | ____ | ____ | ____ |
| Advanced | ____ | ____ | ____ |

* Provide information for E2-E3 Personnel.

2. The command **does/does not** provide assistance to personnel in obtaining Microfiche records and Performance Summary Records (PSRs). How is this accomplished?

3. The Educational Services Officer (ESO) **can/cannot** readily provide a list of personnel and their advancement pre-requisite completion status.

EDUCATION/COMMISSIONING PROGRAMS

1. Number of personnel that applied for Tuition Assistance (TA) in the last 12 months _____.

2. There are ___ personnel onboard without a high school diploma or GED certificate. What methods are in place to identify these personnel? What action(s) has the command executed to assist these members in obtaining a high school diploma/GED? ____ are currently working towards their GED.

3. How is PACE utilized onboard the command?

a. How many command members utilized PACE in the last 12 months?____

4. How is Academic Skills utilized onboard the command?

a. How many command members utilized Academic Skills in the last 12 months? ____

5. Number of personnel enrolled in the Navy/Department of Labor National Apprenticeship Program in the last 12 months?

6. Application and acceptance information for Upward Mobility Programs over the past 12 months:

| | **Majority/Minority/Women** | |
|---|---|---|
| Program | Number Applied | Number Accepted |
| Naval Academy | ____/____/____ | ____/____/_____ |
| Naval Academy/NAPS | ____/____/____ | ____/____/_____ |
| NROTC | ____/____/____ | ____/____/_____ |
| BOOST | ____/____/____ | ____/____/_____ |
| ECP/MECP | ____/____/____ | ____/____/_____ |
| OCS | ____/____/____ | ____/____/_____ |
| LDO | ____/____/____ | ____/____/_____ |
| CWO | ____/____/____ | ____/____/_____ |
| Seaman to Admiral | ____/____/____ | ____/____/_____ |

SENIOR ENLISTED ACADEMIES

In the last 12 months, the following number of personnel have applied for:

| | TAD | PCS |
|---|---|---|
| Navy Senior Enlisted Academy | ____ | ____ |
| Army Sergeant Majors Academy | ____ | ____ |
| Air Force Senior NCO Academy | ____ | ____ |
| Coast Guard Senior Enlisted Academy | ____ | ____ |

U.S. NAVY FAMILY CARE POLICY (OPNAVINST 1740.4A)

a. Number of single members assigned that have custodial responsibility for family members or other dependents ____.

b. Number of dual military couples with family members assigned ____.

c. Number of family care plan certificates on file (NAVPERS 1740/6(4-96)) ____.

d. There **is/is not** a command coordinator for execution of dependent care policy.

e. What procedures are in place to ensure all affected personnel are identified and counseled?

f. Is documentation readily available to show that care plans have been executed? What does the documentation consist of?

## SECTION 2

## COMMAND MASTER CHIEF (CMC)/CHIEF OF THE BOAT(COB)

1. The CMC/COB chairs (CH), coordinates (C), or is a member (M) of the following (circle one): (OPNAVINST 1306.2C)

(1) Command Advancement Program (CAP) Board - CH C M

(2) Professional Development Board (PDB)/Career Review Board (CRB) - CH C M

(3) Warfare specialty qualification board - CH C M

(4) Sailor of the Year board - CH C M

(5) Petty Officer/Sailor of the Month/Quarter board - CH C M

(6) Welfare and Recreation committee - CH C M

2. Does the CMC/COB regularly attend quarterly command/monthly department retention team meetings?

3. The CMC/COB **does/does not** review the retention/separation questionnaires?

4. The CMC/COB **does/does not** coordinate and/or instruct the Petty Officer Indoctrination course.

5. The CMC/COB **does/does not** coordinate and/or instruct the Chief Petty Officer Indoctrination course.

6. The CMC/COB **has/has not** attended formal CITC training within six months of reporting aboard. (Date CMC/COB reported onboard _____)

7. The command ombudsman **has/has not** attended formal ombudsman training?

PROFESSIONAL DEVELOPMENT BOARD/CAREER REVIEW BOARD (PDB/CRB)

1. The command **does/does not** have specific written guidance (current command notice or instruction) covering the purpose, function, procedures and composition of the PDB/CRB.

2. The board is chaired by:

3. Board members are:

4. The purpose and functions of the board **are/are not** discussed in the Command Indoctrination Program.

5. Have all personnel in paygrades E1-E9 who reported in the last six months appeared before the board?

6. In the past 12 months, the following number of personnel have appeared before the board:

E9____ E8____ E7____ E6____ E5____ E4____ E1-E3_____

How many appeared for advancement?_____

How many appeared for commissioning programs?_____

How many appeared for education programs (Academic Skills, GED/High school completion, etc.)_____

How many appeared to strike for a rating?_____

How many appeared for assignment to class “A” school?_____

How many appeared for change of rating?_____

The board **does/does not** meet on a regularly scheduled basis?
How often?

Written reports/minutes are readily available for each PDB/CRB conducted in the last 12 months?

Are minutes maintained by the CMC/COB?

COMMAND ADVANCEMENT PROGRAM (CAP)

1. What is the command’s authorized limit for CAP?

E4_____
E5_____
E6_____

2. Does the CMC/COB serve as chairman of the CAP board? If not, who serves as chairman?

3. Membership composition of the CAP board:

4. Last two convening dates of the CAP board:

5. List the number of selectees by rating for the last two CAP boards:

| Board date: | Board date: |
|---|---|
| E4_____ | E4_____ |
| E5_____ | E5_____ |
| E6_____ | E6_____ |

6. Did the command comply with Career Reenlistment Objectives (CREO) restrictions?

PERSONNEL ENTRY SYSTEM

1. Command Sponsor Program (OPNAVINST 1740.3)

a. The command **does/does not** have a Sponsor Program instruction?

b. Who coordinates the command’s sponsor program?

c. Who conducts training for personnel designated to be sponsors?

d. The command **does/does not** explain advantages of the sponsor program to detaching personnel and encourage them to communicate with their sponsor/new command. Who conducts the brief?

e. The command **does/does not** use a written questionnaire to evaluate the effectiveness of the sponsor program.

f. The command **does/does not** send a welcome aboard package/ message/letter to all newly reporting personnel. (Some personnel may report without previous notification to the command.)

g. The command **does/does not** have an effective Sponsor Program.

2. Command Indoctrination Program (OPNAVINST 5351.1)

a. The command **does/does not** have an Indoctrination Program instruction.

b. Does the Commanding Officer and Executive Officer address command indoctrination classes?

c. Does the CMC/COB address command indoctrination classes? Does the CMC/COB specifically provide a brief concerning command PDBs?

d. Are qualified personnel assigned to brief command indoctrination classes on the following specific topics?

(1) History and mission of command.

(2) Unit operating schedule/daily routine.

(3) Request mast procedures.

(4) Drug and alcohol abuse.

(5) Command managed equal opportunity, including grievance procedures and identification of the equal opportunity program supervisor (EOPS).

(6) Operations Security (OPSEC) and shipboard/command wide security.

(7) Safety.

(8) Standards of conduct, attire and grooming.

(9) Training and education services.

(10) Physical fitness program, command PRT testing cycle and fitness coordinator name and location.

(11) Recreation services and off limits establishments.

(12) Personnel and disbursing services.

(13) Medical and dental services.

(14) Chaplain services.

(15) Family services program(s).

(16) Vehicle registration requirements.

(17) Energy awareness.

(18) Ombudsman program.

(19) Command tour.

e. Additional requirements for afloat commands:

(1) Man overboard procedures.

(2) Damage control, deck, operations and engineering organization briefs.

(3) Electrical safety.

(4) Marine corps detachment (as applicable).

f. Within the first 90 days of reporting provide:

(1) Military rights and responsibilities workshop.

(2) Suicide awareness.

(3) CPR training.

(4) Legal briefing.

(5) Navy campus brief.

(6) Navy relief brief.

(7) Voter registration brief.

(8) Personal financial management brief.

g. Does the command indoctrination program comply with existing requirements? If no, what are the specific discrepancies?

h. The command indoctrination course is _____ days in length.

i. What is the method/tracking system used to ensure personnel attendance? Who monitors attendance? Are the CO/XO/CMC kept appraised of personnel who fail to attend?

## SECTION THREE 3

## COMMAND CAREER COUNSELOR (CCC)

1. The CCC **has/has not** received adequate training to carry out the functions/duties/responsibilities of CCC. Minimum training required is to be a graduate of the four-week CCC Course (A-501-0011).

2. The CCC **does/does not** have access to private counseling space.

3. The CCC **does/does not** receive a verified copy of the most recent manpower document (PC-EDVR).

4. The CCC **does/does not** coordinate use of the NAVRES CARITs to provide formal pre-separation counseling to separating personnel. (OPNAVINST 1900.1D)

5. The CCC **can/can not** readily provide:

   a. Last three monthly retention reports to the CO.

   b. List of personnel within 12 months of EAOS/PRD/HYT.

   c. Career Information Training Course (CITC) levels.

   d. Minutes of last three monthly retention team meetings.

   e. Date of and action taken on the last internal Career Information Program Appraisal. Written feedback on the appraisal **was/was not** provided to the CO.

6. List collateral duties of the CCC:

7. The CCC **is/is not** on distribution for retention related message traffic and correspondence.

8. The CCC **does/does not** have unfiltered access to the CO/XO on retention related issues.

9. How frequently are the department/division retention programs evaluated? The Command Career Counselor **does/does not** have a written department/division appraisal itinerary. (12 month schedule)

10. Required interviews are conducted by:_____.

11. Group presentations **are/are not** used in the interview process. **(Reporting interview only)**

12. Scheduled and previously conducted retention interviews (and their results) **can/cannot** be readily identified.

13. How is retention related information disseminated? (i.e., POD Notes/Site TV/Radio/Family Grams/GMT lectures/LAN computer system)

14. Submission of the Officer/Enlisted Navy Retention and Separation Questionnaires is the responsibility of _____. The questionnaires **are/are not** used for command purposes. (OPNAVINST 1040.8D)

15. All personnel in receipt of Fleet Reserve, retirement, or separation orders **do/do not** attend a Transition Assistance Program, Pre-retirement or Pre-separation seminar. If not, explain why. (OPNAVINST 1900.2)

16. Are DD Forms 2648 on file for all members separating in the last 24 months?_____. Are forms completed greater than 90 days prior to separation?

17. What efforts are made on board the command to identify personnel in overmanned ratings and encourage them to convert to undermanned ratings? How is this accomplished?

CAREER INFORMATION TRAINING COURSE/FIRST TERMER SUCCESS WORKSHOP (NAVY RETENTION TEAM MANUAL (NAVPERS 15878H))

1. There **is/is not** an established method to monitor all newly reporting personnel (E5-O4) and track their attendance at CITC training within six months of reporting aboard.

2. _____ CITC classes were conducted onboard during the past 12 months, _____ personnel attended.

3. How many personnel attended CITC training at a location other than onboard the command in the last 12 months? _____

4. _____ First Termer Success Workshops (E4 and below workshop) were conducted in the past 12 months, _____ personnel attended.

5. Training Levels:

a. Command enlisted basic personnel authorization (BA), per the most recent EDVR is _____ enlisted personnel.

| | *DEPT/DIV Counselors | E5-E6 | E7-E9 | W2-04 |
|---|---|---|---|---|
| b. Number assigned | _____ | _____ | _____ | _____ |
| c. Number attended CITC | _____ | _____ | _____ | _____ |

d. *Minimum 30:1 client-to-counselor ratio required.

e. Number E4 and below assigned: _____

f. Number attended First Termer Success Workshop: _____

6. What assistance does the command receive from the ISIC in conducting CITC training?

7. The command **does/does not** comply with minimum training level requirements? If not, is there a written POA&M in place to correct this deficiency?

8. How does the CCC formally keep the CO/XO advised of training levels?

Assessors brief comments on quality and effectiveness on the command CITC training program:_____
_____
_____.

CAREER INFORMATION PROGRAM MANAGEMENT

Does the command Career Information Program function per the Navy Retention Team Manual and existing directives? **Yes or No** (expound on executive summary)

## SITE INTERVIEWS

1. At his/her discretion, the appraiser may conduct group/individual interviews with a representative cross section of division officers, Retention Team members/career counselors, CPOs and enlisted personnel. Information solicited will include, but is not limited to, the following:

a. Number of Retention Team members/career counselors (A) interviewed: _____

b. Number of E7-E9 personnel (B) interviewed: _____

c. Number of E5-E6 personnel (C) interviewed: _____

d. Number of E1-E4 personnel (D) interviewed: _____

2. Of those personnel interviewed:

| | A | B | C | D |
|---|---|---|---|---|
| a. Have you attended CITC at this command? | ___ | N/A | N/A | N/A |
| b. Have you attended a First Termer Success Workshop (E1-E4 personnel)? | N/A | N/A | N/A | ___ |
| c. Did you attend INDOC? | ___ | ___ | ___ | ___ |
| d. Did you receive a sponsor? | ___ | ___ | ___ | ___ |
| e. Did you receive a reporting interview? | ___ | ___ | ___ | ___ |
| f. Have you appeared before PDB/CRB at this command? | ___ | ___ | ___ | ___ |
| g. Have you received any type of career information interview other than when "reporting"? | ___ | ___ | ___ | ___ |
| h. Have you received career guidance on commissioning programs? | ___ | ___ | ___ | ___ |
| i. Have you received information on education programs? | ___ | ___ | ___ | ___ |
| j. Are you warfare specialty qualified? | ___ | ___ | ___ | ___ |
| k. Are you enrolled in the command warfare specialty qualification program? | ___ | ___ | ___ | ___ |
| l. Have you received formal recognition for performance? | ___ | ___ | ___ | ___ |
| m. Do you feel this command shows concern for your | | | | |

| | | | | | |
|---|---|---|---|---|---|
| | personal and professional growth? | ___ | ___ | ___ | ___ |
| n. | Have you been to HARP duty while assigned to this command? | ___ | ___ | ___ | ___ |
| o. | Are you aware of and understand the following programs: | | | | |
| p. | Transition Assistance (TAP) | ___ | ___ | ___ | ___ |
| q. | Naval Reserve opportunities | ___ | ___ | ___ | ___ |
| r. | National Apprenticeship | ___ | ___ | ___ | ___ |

**SITE INTERVIEW SUMMARY SHEET**

_____ Retention Team members/career counselors interviewed, _____ met CITC training requirements.

_____ E4 and below personnel were interviewed, _____ met First Termer Success Workshop requirements.

_____ enlisted personnel were interviewed, _____ had not attended command Indoctrination, _____ did not receive a sponsor, _____ did not receive a reporting interview.

Comments:_____

**STATISTICAL DATA**

1. Gross retention percentages based on the EPRS retention report:

   a. 12 months through _____ 19___:

| | 1ST TERM | 2ND TERM | 3RD TERM | 20+ YEARS |
|---|---|---|---|---|
| Fleet | _____ | _____ | _____ | _____ |
| TYCOM | _____ | _____ | _____ | _____ |
| COMMAND | _____ | _____ | _____ | _____ |

1. Listed below is a sample Retention/Personnel Programs Appraisal Summary Sheet to be provided to the Commanding Officer.

**RETENTION/PERSONNEL PROGRAMS**
**APPRAISAL SUMMARY**

An internal Retention/Personnel Programs Appraisal was conducted during the period (DATE). Following is a summary of the results:

STRONG POINTS

WEAK POINTS

AREAS REQUIRING REVIEW OR ADDITIONAL EMPHASIS

The following areas of command Retention/Personnel Programs are **particularly critical** to the overall success of our retention efforts and require increased emphasis by the entire chain of command.

* Personnel Entry System
* Command Professional Development Board (PDB)/Career Review Board (CRB)
* Career Information Training Course (CITC)
* Upward Mobility Programs
* Career Information Program Management (CIPM)
* Transition Assistance Management Program (TAMP)

# APPENDIX D CAREER INFORMATION REFERENCES AND MATERIALS

**Advancements (RTM Chapter 16)**

Advancement Manual
BUPERSINST 1430.16 series
Bibliography for Advancement Study
NAVEDTRA 10052
BUPERS Advancement Notices
BUPERSNOTE 1418 series
Health and Physical Readiness Program
OPNAVINST 6110.1 series
List of Training Manuals and Correspondence Courses
NAVEDTRA 10061
Manual of Navy Enlisted Manpower and Classifications and Occupational Standards, Section I Personnel
NAVPERS 18068
Naval Military Personnel Manual
NAVPERS 15560
Navy Enlisted Performance Evaluation System
BUPERSINST 1616.1 series
Personnel Advancement Requirement (PAR)
BUPERSINST 1418.10 series

**APG/OSVET/RESCORE-R Program Requirements (RTM Chapter 7)**

Administrative Procedures for Naval Reservists on Inactive Duty
BUPERSINST 1001.39 series
Administrative Procedures for the Selected Reserve (SELRES) and Participating Members of the Individual Ready Reserve
NAVRESFORINST 1001.5 series
Advancement Manual
BUPERSINST 1430.16 series
ALNAVRESFORs
Rating Entry for General Apprentices (REGA)
OPNAVINST 1430.5 series

**Assignment to School as a Reenlistment Incentive (RTM Chapter 7)**

Catalog of Navy Training Courses
NAVEDTRA 10500
ENLTRANSMAN Chapters 7 and 8
Reenlistment Quality Control
OPNAVINST 1160.5 series
Selective Reenlistment Bonus
OPNAVINST 1160.6 series

**Broadened Opportunity for Officer Selection and Training (BOOST) Program (RTM Chapter 17)**

MILPERSMAN 1530-030

**Navy Retention Team Objectives and Responsibilities (RTM Chapter 1)**

Command Managed Equal Opportunity
OPNAV 5354.5 series
ENLTRANSMAN Chapter 9
MILPERSMAN 1440-020
Navy Command Indoctrination Program

OPNAVINST 5351.1 series
Navy Equal Opportunity
OPNAV 5354.1 series
Navy Retention/Separation Questionnaire
OPNAVINST 1040.8 series
Navy Sponsor Program
OPNAVINST 1740.3 series
Pacific Fleet and Atlantic Fleet Career Information/Retention Program
CINCPACFLT/CINCLANTFLTINST 1040.1 series
Pre-Separation Counseling by Career Information Teams
OPNAVINST 1900.1 series
Reenlistment Quality Control Program
OPNAVINST 1160.5 series
Transition Assistance Management Program
OPNAVINST 1900.2 series
US Navy Single Sponsor/Military Couple with Dependent(s) Dependent Care Policy
OPNAVINST 1740.4 series

**Command Retention Program (RTM Chapter 2)**

MILPERSMAN 1740-010
Navy Retention/Separation Questionnaire
OPNAVINST 1040.8 series
Navy Sponsor Program
OPNAVINST 1740.3 series

**Career Reenlistment Objectives (CREO)/Rating Entry for General Apprentices**

**(REGA) (RTM Chapter 5)**

Administrative Procedures for the Selected Reserve (SELRES) and Participating Members of the Individual Ready Reserve
NAVRESFORINST 1001.5 series
ALNAVRESFORs
Career Reenlistment Objectives (CREO)
OPNAVINST 1160.4 series
MILPERSMAN 1160-090 1440-010
NAVADMINs
Procedures for Naval Reservists on Inactive Duty
BUPERSINST 1001.39 series
Rating Entry for General Apprentices (REGA)
OPNAVINST 1430.5 series
Reenlistment Quality Control Program
OPNAVINST 1160.5 series

**Change in Rate or Rating (RTM Chapter 7)**

Advancement Manual
BUPERSINST 1430.16 series
Career Reenlistment Objectives (CREO)
OPNAVINST 1160.4 series
MILPERSMAN 1440-010 1440-050
Requirements for Navy Wide Exams
BUPERSNOTE 1418
Selective Reenlistment Bonus
OPNAVINST 1160.6 series

**Constructive Service (RTM Chapter 10)**

MILPERSMAN 7220-130

**Death Gratuity (RTM Chapter 11)**

MILPERSMAN 1070-270

**Dependency and Indemnity Compensation (RTM Chapter 11)**

Federal Benefits for Veterans and Dependents
VA IS-1 Fact Sheet
Handbook for Veterans Benefit Counselors
VA H-27-73-1

**Education**

Educational Assistance
VA-22-73-3 0577-LP-008-5020
Educational Benefits Under The Post-Vietnam Era Veterans Educational Assistance Program
VA 22-79-1 0577-LP-008-5155
Educational Opportunities In The Navy
NP 15524B 0500-LP-277-8197
G.I. Bill Program Of Veterans Administration Educational Assistance
DOD FS-63 0503-LP-900-0950
Need a Lift College Financial Aid Handbook
DANTES, Code 30J, 6490 Saufley Field Road, Pensacola, FL 32509-5243
Scholarship Pamphlet
NP 15003 Stocked by Pers-4611
Veterans Education Newsletter
VA 22-82-2 0577-LP-008-5160

**Education Programs (RTM Chapter 9)**

Navy Voluntary Education Programs (Navy Campus)
OPNAVINST 1560.9 series
Petty Officer and Chief Petty Officer Indoctrination Courses Ordering Procedures
OPNAVNOTE 1510 series

**Family Counseling (RTM Chapter 13)**

ENLTRANSMAN Chapter 3
Family Advocacy Program
OPNAVINST 1752.2 series
Family Service Center Program
OPNAVINST 1754.1 series
MILPERSMAN 1820-340
Navy Family Ombudsman
OPNAVINST 1750.1 series
Navy Sponsor Program
OPNAVINST 1740.3 series

**Fleet Reserve/Retirement/Separation**

1995 Retired Almanac
0500-LP-733-6500
Bridge To A Second Career
HIGHLINE, Navy League of U.S., 818 18 ST. NW, Washington, D.C.
Disability Separation

NAVEDTRA 46601-F 0503-LP-212-6100
SBP Counselors Guide (Revised Sep95)
NP 15630A 0500-LP-754-3300
SBP for the Uniformed Services--The Simple Facts
NP 15617A 0500-LP-210-3600

**Fleet Reserve/Retirement/Separation Programs (RTM Chapters 10 and 14)**

MILPERSMAN 1160-040 7220-130 1800-010 1800-030 1800-050 1600-100 1830-030 1800-040
1800-060 1800-070 1800-020 1050-400 1810-010 1810-020 1820-010 5370-020 5370-030
Navy Guide for Retired Personnel & Their Families
NAVPERS 15891F
Retired Affairs Program
OPNAVINST 1720.3 series
Retired Pay
NAVCOMPINST 7220.52 series
Survivors Benefits
BUPERSINST 1750.2 series

## *Financial*

Financial Planning (You Can't Take It With You)
NAVEDTRA Miscellaneous 0503-LP-900-0850
How To Buy A House
NAVEDTRA Miscellaneous 0503-LP-900-0870
How To Rent A Home
NAVEDTRA Miscellaneous 0503-LP-900-0890
Living 138 Ways To Beat High Cost
NAVEDTRA Miscellaneous 0503-LP-900-0840
Money Management For Young People -- The ABC's
NAVEDTRA Miscellaneous 0503-LP-900-0860
Pointers For The Veteran Homeowner
VA 26-5 0577-LP-008-6001
Questions And Answers On Manufactured Home Loans For Veterans
VA 26-71-1 0503-LP-900-0972
Renting In The Civilian Community
NAVEDTRA 46611 0503-LP-003-0510
To The Home Buying Veteran
VA 26-6 0577-LP-175-4300
Veterans Administration Guaranteed Home Loans For Veterans
VA 26-4 0577-LP-324-9100
What Everyone Should Know About Checking Accounts
NAVEDTRA Miscellaneous 0503-LP-900-0820

**Funerals**

Casualty Assistance Calls Officer Handbook
NP 15607 0500-LP-323-3200
Navy Military Funerals
NP 15555B 0500-LP-277-8243

**Guaranteed Assignment Retention Detailing (GUARD 2000) Program (RTM Chapter 7)**

Career Reenlistment Objectives (CREO)
OPNAVINST 1160.4 series
ENLTRANSMAN Chapter 8

Reenlistment Quality Control Program
OPNAVINST 1160.5 series
SRB Program
OPNAVINST 1160.6 series

**Insurance/Wills**

Life Insurance -- What You Should Know About
NAVEDTRA Miscellaneous 0503-LP-900-0810
USVIP -- Uniformed Services Voluntary Insurance Plan
MC 22547-5-90 0506-LP-452-3300
Wills -- Why You Should Have One
NAVEDTRA Miscellaneous 0500-LP-900-0800

**Limited Duty Officer (LDO)/Chief Warrant Officer (CWO) Programs (RTM Chapter 17)**

ALNAVs
CHINFOGRAMs

**In-Service Procurement for Appointment Under the Active and Inactive Limited**

**Duty Officer (LDO) and Chief Warrant Officer (CWO) Programs**

BUPERSINST 1131.1 series
NAVADMINs
Perspective Magazine

**Manuals**

Advancement Manual
BUPERSINST 1430.16 series
Enlisted Transfer Manual
NP 15909F 0500-LP-754-3200
Naval Military Personnel Manual
NP 15560A 0500-LP-454-0600
Naval Military Personnel Manual, Binder to
NP 15560B 0500-LP-277-8288
Navy Customer Service Manual
NAVEDTRA 10119-81 0502-LP-001-1770
Navy Recruiting Manual
CNRCINST 1130.8
Officer Transfer Manual
NP 15559A 0500-LP-322-9600
Retention Team Manual
NP 15878H 0500-LP-455-7200
United States Navy Regulations
Miscellaneous 0584-LP-180-8800
United States Navy Regulations, Binder to
Miscellaneous 0584-LP-004-0015
United States Navy Uniform Regulations
NP 15665G 0500-LP-456-1600
United States Navy Uniform Regulations, Binder to
NP 15665 0500-LP-276-0050

**Medical**

CHAMPUS Handbook
CHAMPUS 6010,46H 0510-LP-211-0400
CHAMPUS Maternity Care
CHAMPUS FS-8 0510-LP-205-3300

CHAMPUS Poster - Medical Benefits In The Armed Forces
CHAMPUS P-1 0510-LP-500-0000
CHAMPUS Program For The Handicapped
CHAMPUS FS-6 0510-LP-212-3100
Health Benefits, CHAMPUS And Other Family Service Providers
NAVEDTRA 46607 0503-LP-003-0350
How To File A CHAMPUS Claim
CHAMPUS FS-12 0510-LP-205-3600
Manual Of Navy Enlisted Manpower And Personnel Classifications And Occupational Standards, Section 1
NP 18068E 0500-LP-453-0085
Navy Handbook "Children With Special Needs"
NP 15569 0500-LP-175-1400
The Effects Of Other Health Plans On CHAMPUS
CHAMPUS FS-7 0510-LP-205-3200
Uniformed Services Medical/Dental Facilities
NMP 5131 0510-LP-001-2560
Your Health Benefits In A Nutshell
CHAMPUS FS-11 0510-LP-205-3400

**Naval Academy Program (RTM Chapter 17)**

MILPERSMAN 1531-010
Naval Academy Catalog
Phone 1-800-638-9156 or DSN 281-4361
Secretary of the Navy Nominations for the Naval Academy/Naval Academy Preparatory School
OPNAVINST 1531.4 series

**Naval Reserve (RTM Chapter 12)**

Administrative Procedures for Naval Reservists on Inactive Duty
BUPERSINST 1001.39 series
Administrative Procedures for the Selected Reserve (SELRES) and Participating Members of the Individual Ready Reserve
NAVRESFORINST 1001.5 series
Enlisted Naval Selected Reserve (SELRES) Incentive Programs
NAVRESFORINST 1100.4 series
ENLTRANSMAN Chapters 21 and 22

**Naval Reserve Officer Programs (RTM Chapter 17)**

US Navy Reserve Officer Programs Open to Active Duty Navy Enlisted Personnel
OPNAVINST 1120.2

**Naval Reserve Retirement (RTM Chapter 10)**

Administrative Procedures for Naval Reservists on Inactive Duty
BUPERSINST 1001.39 series
Administrative Procedures for the Selected Reserve (SELRES) and Participating Members of the Individual Ready Reserve
NAVRESFORINST 1001.5 series
MILPERSMAN 1001-010

**Non-disability Retirement (RTM Chapter 10)**

MILPERSMAN 1001-010 1050-400 1100-060 1600-070 1800-010 1800-020 1800-050 1810-010 1810-020
1820-010 1830-020 1830-030 1830-040 1830-050 1830-060 1850-010 1850-020

**Ombudsman**

Command Guide For Navy Ombudsman Program
NP 15601 0500-LP-175-5300
Navy Ombudsman Manual
NP 15571 0500-LP-175-1700

**Overseas Assignment Suitability Screening (RTM Chapter 8)**

ENLTRANSMAN Chapters 4 and 28
Military Personnel Assignments
DOD Directive 1315.7
Officer Transfer Manual
Suitability Processing for Overseas Assignment of Navy and Marine Corps Members and Their Accompanying Dependents
BUMEDINST 1300.1 series

**Pay, Allowances and Entitlements (RTM Chapter 3)**

Career Sea Pay and Career Sea Pay Premium
SECNAVINST 7220.77 series
DODFMR
Issuance of the Navy Passenger Transportation Manual (PTM)
D-11
BUPERSINST 4650.2 series
JFTR, VOLUME 1
NTI NAVSQ P-1459
Submarine Duty Incentive Pay (SUBPAY) Program
SECNAVINST 7220.80 series
Unusually Arduous Sea Duty for Travel and Transportation Entitlement Purposes
SECNAVINST 4650.19 series

**Reenlistment**

Certificate of Reenlistment (Navy)
NAVPERS 1650/78 NSN: 0106-LF-983-9800
Certificate of Reenlistment (Naval Reserve)
NAVPERS 1650/77NR NSN: 0106-LF-983-8600
Certificate of Appreciation (Spouse/Navy)
NAVPERS 1650/76N NSN: 0106-LF-984-2200

Certificate of Appreciation (Spouse/Naval Reserve)
NAVPERS 1650/75NR NSN: 0106-LF-984-1000
Discharge Certificate, Honorable (Navy)
DD256N NSN: 0102-LF-002-4203

**Selective Conversion and Reenlistment (SCORE) Program (RTM Chapter 7)**

Advancement Manual
BUPERSINST 1430.16 series
Career Reenlistment Objectives (CREO)
OPNAVINST 1160.4 series
Catalog of Navy Training Courses
NAVEDTRA 105000
Enlisted Bonus and Special Assignment Pay Programs
OPNAVINST 1160.6 series
ENLTRANSMAN Chapter 7
Manual of Navy Enlisted Manpower and Personnel Classifications and Occupational Standards
NAVPERS 18068

MILPERSMAN 1160-090 1510-020
Reenlistment Quality Control Program
OPNAVINST 1160.5 series

**Selective Reenlistment Bonus (SRB) Program (RTM Chapter 6)**

DFAS PAYPERSMAN
DODFMR
Enlisted Bonus, Special Duty Assignment Pay and Foreign Language Proficiency Pay Programs
SECNAVINST 1160.1
Enlisted Bonus and Special Duty Assignment Pay Programs
OPNAVINST 1160.6 series
NAVADMINs
Reenlistment Quality Control Program
OPNAVINST 1160.5 series

**Selective Training and Reenlistment (STAR) Program (RTM Chapter 7)**

Advancement Manual
BUPERSINST 1430.16 series
Career Reenlistment Objectives (CREO)
OPNAVINST 1160.4 series
MILPERSMAN 1160-030 1160-100 1510-020
NAVADMINs
Navy Formal Schools Catalog
NAVEDTRA 10500
Reenlistment Quality Control Program
OPNAVINST 1160.5 series
SRB Program
OPNAVINST 1160.6 series

**Servicemembers' Group Life Insurance (SGLI)/Veterans Group Life Insurance (VGLI)**

**(RTM Chapter 11)**

MILPERSMAN 1741-020

**Social Security (RTM Chapter 11)**

Social Security Form
SSA 7004-PC-OP2 (6/88)
Social Security How it Works For You
SSA 05-10006
Social Security Survivors Publication
Latest Edition
VA IS-1 Fact Sheet
Latest Edition

**Support Materials**

Command Career Counselor Badges
Order through the Navy Supply System or purchase from the Navy Exchange
Link Magazine (Stocked by PERS-46)
NP 15980
Making A Home In The Navy, Ideas To Grow On
OPNAV 15-2 0420-LP-400-0200
National Veterans' Training Institute (NVTI)
Resource and Technical Assistance Center Library
1250 14th Street / Suite 640

Denver, CO 80202
1-800-451-5759
Navy Leader Planning Guide (Updated Yearly)
NP 15255Q
NROTC Current Bulletin
Send Requests To Navy Recruiting Command per OPNAVINST 1531.4
Sea Legs, A Navy Handbook
NP 15309 0500-LP-176-2600
Shift Colors (Stocked By PERS-46)
NP 15886
Your Career Planner
NP 15136H 0500-LP-272-1202
Your Navy Career Planner
Miscellaneous 0508-LP-115-5927

**Survivor Benefits and Entitlements (Miscellaneous) (RTM Chapter 11)**

JTR
MILPERSMAN 1770-160 1070-270
NAVPERS 15565B
Navy Casualty Assistance Calls Program
BUPERSINST 1770.1 series

**Training**

Catalog Of Navy Training Courses (CANTRAC) Volume 1
NAVEDTRA 10500 0502-LP-215-9900
List Of Training Manuals And Non-Resident Training Courses
NAVEDTRA 10061-AT 0502-LP-213-2600
Navy Campus Manual
CNETINST 1560.3

**Transition Assistance Management Program (TAMP) (RTM Chapter 14)**

Job Search, The Inside Track
Videotapes 0500-LP-541-8300
Workbook 0500-LP-541-8400
Trainer's Manual 0500-LP-541-8600
Once a Veteran, The Transition to Civilian Life
0503-LP-217-3900
Pre-Separation Guide
0500-LP-540-0700
Reserve Transition Benefits (RTB) for Members of the Selected Reserve (SELRES)
NAVRESFORINST 1740.1 series
Transition Assistance Management Program
OPNAVINST 1900.2 series

**Military Health System and TRICARE (RTM Chapter 4)**

CHAMPUS 6010.46-H
Civilian Health and Medical Program of the Uniformed Services (CHAMPUS)
SECNAVINST 6320.18 series
NAVEDTRA 46607
NAVEDTRA 46609
NAVTRA 1520.3

**Veterans Benefits (RTM Chapter 15)**

Federal Benefits for Veterans and Dependents (Also Stocked By Government Printing Office)

VA IS-1 Fact Sheet 0503-LP-214-7400
Summary Of Veterans Administration Benefits
A-27-82-2 0577-LP-175-4800

**SEPARATEES' / RETIREES' RECOMMENDED TIME MANAGEMENT CHECKLIST**

***This form is a guide for separatees, fleet reservists and retirees.***
***Contact the appropriate agency for current information.***

**12-9 MONTHS**
- Begin using transition & education office resources
- Familiarize spouse/family with transition process (FSC)
- See Command Career Counselor for pre-separation counseling
- Schedule physical
- Review wills & legal documents
- Begin draft of resume
- Request retired pay computations (PSD)
- Visit new area if relocating
- Develop your Individual Transition Plan (FSC mandated)
- Review DD Form 2648 (FSC)
- Discuss your plans with your family
- Assess job skills/interests & take vocational interest inventory
- Contact Veteran Service Officer if applying for disability (VA)
- Apply for transfer to Fleet Reserve up to 18 months prior (CCC)
- Request medical records for prior periods of service
- Begin networking & continue it throughout your job search period
- Schedule TAP Workshop (CCC) and preseparation counseling (FSC)

**6 MONTHS**
- Attend TAP Workshop (FSC)
- Make list of potential employers
- Schedule dental exam
- Schedule job hunting leave
- Begin attending job fairs
- Contact Executive Placement Service
- Establish a financial plan
- Subscribe to Sunday newspaper in new area for employment ads
- Consider joining veteran/community/fraternal organizations

**4 MONTHS**
- Fill out DD 295 (Navy Campus)
- Enroll in & utilize DORS, TBB & PACS Bulletin Boards (FSC)
- Finish resume
- Fill out SF 171 for federal employment
- Review DD Form 2586
- Ensure your service record is up to date (PSD)
- Research relocation options, entitlements, etc (RAP Office)
- Verify eligibility & benefits for GI Bill/VEAP (PSD, Navy Campus)
- Verify benefits & requirements with State Veterans Affairs Office

**3 MONTHS**
- Make SBP election (PSD)
- Make copy of service record (PSD)
- Send out resumes
- Visit private & public employment agencies
- Respond to classified ads
- Start shopping for CHAMPUS supplements & life insurance
- Plan travel arrangements for '30 days prior to' interviews
- Utilize employment services at Transition Assistance Office (FSC)

**2 MONTHS**
- Ensure allotments are correct
- Ensure physical exam is complete
- Schedule shipment of household goods
- Make copies of medical/dental/shot records for self & family
- If planning to attend school, complete VA Form 22-1990
- If going on terminal leave, ensure DD214 is correct and signed

**45 DAYS**
- Start checkout procedures
- Submit SF 1199A for direct deposit of retired pay
- Complete VA form 21-626 if requesting disability assessment

**30 DAYS**
- Complete check out processing
- Update DORS/PACS with civilian address
- Visit new area for interviews
- Visit the state employment agency & check on services
- Update emergency data & DEERS enrollment (PSD)
- Complete Navy Retention/Separation Questionnaire (CCC)
- Tell Transition Office when you find employment (FSC)

**15 DAYS**
- Ensure trans assistance Page 13 is in service record (CCC, FSC)
- Submit application for new ID cards for self & family

**0-90+ DAYS**
- Ensure ID cards are correct
- Register DD 214 at your county courthouse
- Decide to accept/decline VGLI
- Ensure DD 214 complete/correct/signed
- Report to VA outpatient clinic if dental work not complete
- Submit VA Form 21-626 for disability claim if needed

**120+ DAYS**
- Check VA for benefits changes
- Continue to use services at the Transition Assistance Office
- Evaluate job offers
- Negotiate
- Sign contract
- Begin new life
- Savor success
- Follow up
- Acknowledge networkers
- Send thank you letters
- Record lessons learned
- Assist other veterans

## APPENDIX F - NAVY CLASSIFIER'S RATINGS FACT SHEETS

The Navy Classifier's Ratings Fact Sheets are currently being revised by Commander, Navy Recruiting Command, Millington, TN. Upon completion, ratings fact sheets will be published as Appendix F.

# *NAVY RETENTION OFFICE*
# *OPNAV N136*
# (April 2000, Change 4)

# Navy
# *Career Information Training Course (CITC)*

**Appendix G**

## Summary of Changes

| CHANGE | DATE | SIGNATURE |
|---|---|---|
| CHANGE ONE | AUG 1999 | W. A. EATON, NCCM |
| CHANGE TWO | NOV 1999 | W. A. EATON, NCCM |
| CHANGE THREE | JAN 2000 | W. A. EATON, NCCM |
| CHANGE FOUR | APR 2000 | W.A. EATON, NCCM |
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# "CAREER COUNSELOR"

## *As You Appear To Others*

The image projected by a Career Counselor will doubtlessly have a great impact on managerial support for a command retention/career information program. A Career Counselor that projects a good image at all levels in the command will enjoy high levels of command support and invokes the trust and confidence of others. Conversely, the Career Counselor who projects a poor image, regardless of the quality of his/her program, will find little support from command management and, in turn, will lack credibility. Career Counselors that make a lasting impression will:

- **Always maintain a neat military appearance.**
- **Choose the proper uniform for a particular occasion. If you are talking with a group of snipes in the engine room, wearing "their" uniform instead of office whites lends credibility to you. Not having the foresight to dress for the situation portrays you as self-important.**
- **Always insist on proper military bearing. Those who openly display pessimism for command programs are inviting disaster. Also, those who are loud and boisterous or who openly ridicule others are likely to offend not only newcomers, but also everyone they encounter in the scope of their job.**
- **Display an interest in other Sailors. Let the member know you are always available and that you are interested in the Sailor as a person. Then be available and interested.**
- **Publicize your service to subordinates, peers and supervisors, but never make promises without delivering.**
- **Be approachable. Members that know they can come to you at anytime, without fear of being heckled, are members that will readily seek your guidance when a problem arises.**
- **Be organized. A sloppy office indicates disorganization and will enhance the probability that you will lose something that may be important to one of your clients.**
- **Be private, *NOT* secluded. The Career Counselor's office should offer a degree of confidentiality and privacy. Sailors will be reluctant to explain a problem if the content of the interview is subject to public scrutiny.**

*Dress and appearance make for lasting impressions. They are important to you and will be counted in the measurement of your success or failure. Career Counselors that present a poor impression are undermining their program. However, if you present a good impression, you will find your credibility and integrity will open many doors and guarantee success.*

## FORWARD

The Career Information Training Course (CITC) was developed to provide Command Career Counselors (CCCs) with a tool to train command Retention Team members in accordance with Career Information Program Management (CIPM) methodology that is clearly defined in Chapter Two. Additionally, it is to be used as a guide to conduct command First Term Personnel Success Workshops. This course can be tailored to fit command needs, however, it is imperative that the minimum career information contents in this "standard" CITC be imparted to E-1 through E-4 personnel within six months of reporting aboard.

This CITC must be viewed as "program level" guidance in a command's effort to train its Retention Team members and can be expanded to include additional career information subjects (i.e., Enlisted Service Record, Pay and Allowances, Retention Team and Career Information Program Management (CIPM), Counseling Methods and Techniques, additional Veteran Benefits, etc.) as the command sees fit. Additionally, as technology permits, commands should search for more innovative ways to deliver CITC training to its Retention Team members and first term personnel. The available media are increasing everyday (i.e., video tapes, animated computer programs, VTT/VTC, etc.). Regardless of delivery method, Chapters 1 - 8 of the CITC shall be covered during these training evolutions.

References for each topic should be thoroughly reviewed by the CCC and updated prior to teaching; at which time, a personalized Instructor's Guide (IG) should be developed containing pertinent information/data necessary to ensure maximum comprehension by all attendees. The result will be a knowledgeable, well-trained Command Retention Team equipped to effectively counsel personnel in a team effort to retain quality Sailors in today's Navy.

It is highly recommended that personnel used as instructors in this course possess NEC 9502 or be a graduate of the Shipboard Instructor Training Course.

The CITC will be updated as changes occur and distributed via BUPERS CD-ROM on a quarterly basis. Until changes are reflected, it is incumbent upon each CCC to keep the course current by networking with their retention chain of command and fellow career counselors.

IMPORTANT NOTE: Please submit recommendations to the Navy's CITC training curriculum to: Navy Retention Office, OPNAV N136, 2 Navy Annex, Washington, DC 20370; or send E-mail to address n136d@bupers.navy.mil.

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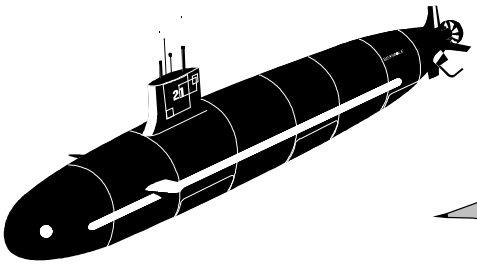

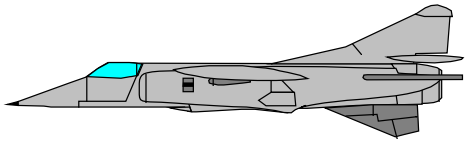

CH-3

# Chapter 1

## ENLISTED ASSIGNMENT SYSTEM

References: MILPERSMAN (NAVPERS 15560 Series)
ENLTRANSMAN (NAVPERS 15909 Series)

**Personnel Requisition System**

1. Function

a. To measure personnel activity for a period of nine months in the future.

2. Requisition Priorities. Provides Detailers guidance on priorities by which billets are filled.

a. CNO Priority - 1

b. CNO Priority - 2

c. Manning Control Authority Priority - 3

**Enlisted Assignment Terminology**

1. Type Duty Classification Codes

a. Shore Duty (Sea/Shore Code 1):

(1) Duty performed in the United States (including Hawaii and Anchorage, AK) land-based activities where members are not required to be absent from the corporate limits of their duty station in excess of 99 days per year.

(2) Long term schooling of 18 or more months.

b. Sea Duty (Sea/Shore Code 2): Duty performed in commissioned vessels or activities in an active status homeported/homebased in CONUS which operate away from their homeport/homebase in excess of 150 days per year.

c. Overseas Shore Duty (Sea/Shore Code 3): Duty performed in a land based activity which does not require members to be absent more than 99 days per year, but is credited as sea duty for rotational purposes due to the relative undesirability of the geographic area.

d. Non-rotated Sea Duty (Sea/Shore Code 4): Duty performed in commissioned vessels in an active status homeported overseas outside the contiguous 48 states or in activities which operate away from their overseas homeport/base in excess of 150 days per year.

e. Neutral Duty (Sea/Shore Code 5): Duty in activities which would normally be designated as shore duty for rotation; but where the members assigned are required to be absent 100-150 days per year from the corporate limits of their duty station, while accomplishing their assigned tasks. Also, school assignments of less than 180 days.

f. Preferred Overseas Shore Duty (Sea/Shore Code 6): Duty performed in overseas land based activities that is credited as shore duty for rotational purposes. Members are not required to absent from the corporate limits of their duty station in excess of 99 days per year. (NAVADMIN 133/97 refers.)

(1) Overseas Duty (Neutral)(Sea/Shore Code 6N): Duty performed in overseas land-based activities which receives no credit towards sea or shore rotation, but is considered neutral duty for rotational purposes. Members are not required to be absent from corporate limits of their duty station in excess of 99 days per year. The following definition applies for (Sea/Shore Code 6) effective 1 Jan 98.

g. Partial Sea duty (Sea/Shore Code 7): Criteria have been deleted from policy, but remains an active sea/shore code available for future use.

h. Double Sea Duty (Sea/Shore Code 8): Duty performed in commissioned vessels or activities an active status which operate away from their homeport/base in excess of 150 days per year, but where due to the nature of their mission are awarded double sea credit for the tour served.

2. Projected Rotation Date. A PRD for a member’s next duty station is established when orders are written. This PRD is based on an individual’s paygrade or projected paygrade at the time orders are written and the distributable community in which he/she will serve at his/her new duty station. A PRD will not normally be changed once established unless there is a change made to the sea/shore tours for an entire community.

3. Time-On-Station. Time-On-Station is defined as the period served in the same geographic area. It differs from “activity tour” in that Time-On-Station may be satisfied by one or more activity tours in the same geographic area. Time-On-Station applies to consecutive CONUS tours. All members must serve 36

months if they will be transferred under cost PCS orders to a follow-on shore tour with some exceptions.

4. Retainability. Applies to all cost PCS transfers and is not waiverable. Retainability is defined as time obligated to remain on active duty upon arriving at a new duty station with some exceptions.

5. Obligated Service Requirements for Reassignment (OBLISERV). OBLISERV is required before reassignment to ensure member completes the prescribed tour length. Required OBLISERV is based on factors such as Careerist/Non-Careerist, overseas assignment and participation in selected service schools.

6. Prescribed Sea Tour (PST). Sea tours are prescribed for all enlisted rates/NECs. Normally the sea tour shall not exceed 5 years nor be less than 3 years in duration.

7. Sea Duty Commencement Date (SDCD). A tour of sea duty commences when an individual reports to a permanent duty station classified as sea duty (Type 2, 3, 4 or 8) or departs CONUS whichever occurs first. SDCDs can be adjusted under various situations by COMNAVPERSCOM.

8. Shore Duty Commencement Date (SHDCD). Tours of shore duty commence when an individual first reports “For Duty” at an activity designated Type 1, 6 or 7 and terminates when the individual completes Normal Shore Tour (NST) or voluntarily returns to sea duty prior to completion of NST.

9. Split Tour. Split tours are defined as PCS assignments between two activities in the same geographic location during sea or shore tours of at least 49 months or greater.

**Documents Supporting Detailing**

1. Enlisted Distribution and Verification Report (EDVR). The EDVR is a monthly statement of the command’s enlisted personnel account, which reflects all individual assignments. Management of the EDVR is the single most important tool for personnel managers as it has a direct impact on overall manning of the command. Two copies of sections 1 through 4 and one copy of sections 5 through 11 are distributed monthly by EPMAC New Orleans, LA.

2. Enlisted Duty Preference Form (NAVPERS 1306/63). A means by which a member’s desired duty types and locations are expressed to his/her Detailer.

3. Enlisted Personnel Action Request (NAVPERS 1306/7). Provides a standard, Navy-wide format for the submission of

requests to higher authority. It is designed to present higher authority with all pertinent information necessary to assess and impartially judge the merits of the member’s request. A NAVPERS 1306/7 is generally used to request any program, school, reassignment or special duty for which a particular requesting format is not already specified.

**BUPERS Access (Electronic Bulletin Board System)**

1. BUPERS Access is a computerized direct link with COMNAVPERSCOM which allows Command Career Counselors to have online access to current program information, “Email” with Detailers, order status, some “hot fill” billets and downloadable utility programs and pertinent files. BUPERS Access can be utilized underway via the POTS. All carriers are equipped with the POTS, and smaller ships in the battle group can have access to the system.

**Communicating With Your Detailer**

1. All Navy personnel have the right to communicate directly with their Detailers and are strongly encouraged to do so, especially by Email.

2. When talking to Detailers, take the time to prepare first by talking to your CCC and having vital information on hand.

a. Know PRD, EAOS, NECs and any extensions you have.

b. Have previous messages or correspondence in hand.

c. Be practical in your requests and make sure you are eligible for what you are requesting. Have alternates in mind and be sure you keep an open mind on all requests.

**Job Advertising and Selection System (JASS)**

1. Under this system Detailers will show all open billets during the first week of the requisition cycle. Service members will select up to five billets that they wish to apply for. During the second week of the requisition cycle, Detailers will process the applications taking into consideration a person's qualifications for the assignment, cost and general needs of the Navy, such as fleet balance, etc. Service members will be notified during the second week of the requisition cycle as to what billet they have been selected for, if any. (A Requisition cycle is from two to three weeks long.)

2. JASS is on a dedicated server and only personnel with

command JASS Access will have access to this system. These personnel must be designated by official correspondence via Naval Message or Serialized Letter on Letterhead. (Refer to NAVADMIN 074/98 for format.) Additionally, you can fax it to: (901)874-2697/DSN-882

3. For assistance with configuration of JASS or JASS software, contact the JASS help desk:

- (504) 678-7070, DSN 678; or
- (800) 537-4617, 0700-1630 central time, Mon-Fri,
  0730-1600 central time, Sat; or
- E-mail: helpdesk@cnrf.nola.navy.mil.

Voice messages (and all Email) should include rate, full name, UIC, detailed description of problem, commercial and DSN phone number, and Email address if available.

4. For problems with userID, password or login, call:

- (901) 874-4209, DSN 882; or
- (901) 874-4153, DSN 882; or 0730-1600 central time, Mon-Fri
- Email: p455d7@persnet.navy.mil.

5. For direct feedback on the JASS program, contact the Project and Assistant Project Officers at:

- (901) 874-4211, DSN 882;
- Email: p455c@persnet.navy.mil or
- (901) 874-3495, DSN 882;
- Email: p455c8@persnet.navy.mil.

6. To download the JASS software, go to website:

www.bupers.navy.mil/jass or ftp://138.145.28.19/ftpuser, or dial (202) 422-8411/8412/8227, DSN 288.

# Chapter 2

## ENLISTED ADVANCEMENT SYSTEM

References: Manual of Advancement (BUPERSINST 1430.16 Series)
Occupational Standards (NAVPERS 18068 Series)
Bibliography for Advancement Study (NAVEDTRA 10052)
Catalogue of Nonresident Training Courses (NAVEDTRA 12061)
NAVADMIN 025/00

**Requirements for Advancement**

1. Commanding Officer's Recommendation is the most important requirement in the advancement system and is required once for each paygrade unless reduced in rate.

2. Proper Path of Advancement is that path from recruit to Master Chief Petty Officer a candidate must follow as set forth in NAVPERS 18068(Series). Non-designated personnel requirements may vary.

3. Completion of training courses as listed in NAVPERS 10061. Per NAVADMIN 025/00, completion of Non-Resident Training Courses (NRTCs) is NOT required for exam participation by "rated" Sailors.

4. Completion of performance tests as listed in NAVPERS 18068.

5. Completion of Service School (certain ratings are outlined in BUPERSINST 1430.16 Series).

6. Required performance marks for advancement as required by BUPERSNOTE 1418.

7. Fulfillment of Time Requirements

a. Terminal Eligibility Date (TED): This is the date following the exam to which service in paygrade (SIPG) is computed to determine eligibility for advancement to the next higher paygrade.

b. Time in Rate Date (TIR): This is the date from which service in paygrade is computed to determine eligibility for advancement to the next higher paygrade.

c. Service in Paygrade (SIPG): SIPG is that period of months,commencing with the TIR date and ending with the TED, required for advancement to the next higher paygrade. See below:

E-1 to E-2....9 months in paygrade E-1
E-2 to E-3....9 months in paygrade E-2
E-3 to E-4....6 months in paygrade E-3
E-4 to E-5...12 months in paygrade E-4
E-5 to E-6...36 months in paygrade E-5
E-6 to E-7...36 months in paygrade E-6
E-7 to E-8...36 months in paygrade E-7
E-8 to E-9...36 months in paygrade E-8

d. Limiting Date (LD): This is the last date of an advancement cycle in which an individual may be advanced after passing the Navy-wide Examination for Advancement in Rate/Rating.

8. Satisfactorily Pass The Navy-wide Examination. Normally, 50% of those who pass the E-7 examination are placed before the selection board.

9. Final Multiple System. Determines selectees for E-4, E-5, and E-6/E-7 selection board eligibility.

10. Total Active Federal Military Service (TAFMS)

a. Department of Defense prescribed minimum TAFMS requirements for next higher paygrade. Individual candidates may compete for advancement whether or not they meet the TAFMS requirements.

b. TAFMS Requirements:

| | | | |
|---|---|---|---|
| E-2 | 6 mos | E-6 | 7 yrs |
| E-3 | 1 yr | E-7 | 11 yrs |
| E-4 | 2 yrs | E-8 | 16 yrs |
| E-5 | 3 yrs | E-9 | 19 yrs |

c. Candidates who meet the TAFMS requirement by the end of the fiscal year of the exam’s TED are “regular” candidates.

d. Candidates who do not meet the TAFMS requirement are “early” candidates.

11. Selection Board for E-7, E-8, and E-9

a. E-7 candidates - normally 50% of those who pass the exam are selection board eligible. They are determined by final multiple score.

b. E-8, E-9 candidates - no exam. All eligible personnel are selection board eligible.

c. Selection boards select the most qualified candidates up to quota limitations for each rating.

(1) Each selection board is given guidelines on qualifications which may vary from board to board.

(2)The following areas tend to be common selection criteria from board to board.

(a) Sustained superior performance

(b) Career History (sea/arduous duty)

(c) Potential

(d) Examination score (E-7 candidates)

(e) Education

12. Miscellaneous Requirements

a. Citizenship and security clearance for certain ratings.

b. Physical requirements for certain ratings.

c. Weight control program.

**Command Advancement Program (CAP)**

1. A management option for commanding officers who as, final authority, may advance the most qualified designated E-3, E-4 and E-5 personnel to the next higher paygrade, within quota limitations as set forth in BUPERSINST 1430.17(Series).

NOTE: Commanding officers are authorized to CAP non-designated strikers into CREO 1 or 2 only.

2. Advancement of E-1, E-2 and E-3 Personnel

a. Eligibility Requirements

(1) Meet SIPG requirements

b. Examination

(1) None required for advancement to E-2

(2) Exams for E-3 are available and commands are encouraged to use them, but it is not mandatory.

3. Advancement of Designated E-3 Personnel to E-4

a. In accordance with Navy-wide examination eligibility requirements and final multiple system.

4. Advancement of non-designated E-3 personnel to E-4

a. Entry of non-designated personnel into various ratings must be guided by OPNAVINST 1430.5, Rating Entry For General Apprentices (REGA). Not all ratings may be entered by OJT.

b. The requirements of OPNAVINST 1430.5 make proper counseling an absolute necessity in order to assist non-designated personnel in entering ratings that are beneficial to them and the Navy.

# Chapter 3

## CAREER INCENTIVES

References: MILPERSMAN (NAVPERS 15560(Series))
ENLTRANSMAN (NAVPERS 15909(Series))

**1. Selective Conversion and Reenlistment (SCORE) Program**

a. Incentives

(1) Assignment to Class "A" School, with rating conversion upon satisfactory completion. Class "A" School may be waived.

(2) Guaranteed assignment to an appropriate Class "C" School, "C" School Package (if available) or Advanced First Term Avionics (AFTA) for AT, AQ and AX ratings.

(3) Possible advancement under the Accelerated Advancement program to Petty Officer Third Class. Member may be advanced to PO2 if eligible upon completion of Class "C" School, "C" School Package or AFTA training. Training must be listed in current Career Schools Listing (CSL).

(4) SRB, if otherwise eligible. SRB will be paid per the bonus level in effect at the time of reenlistment or at the time a service member signed his/her page 13 whichever is higher. SRB will always be paid by zone or eligibility that a person qualifies for at the time of reenlistment.

b. Eligibility Requirements

(1) Be a PO1, PO2, PO3 or E-3 (designated striker or non-rated) who has met professional growth criteria. (PNA E-4 Navy-wide examination).

(2) Be presently assigned in any rating in CREO Categories 2 or 3. Conversions to ratings within the same or better-manned CREO categories will not normally be authorized.

(3) Meet minimum physical and mental requirements for entrance into appropriate Class "A" School. This requirement may be waived on a case-by-case basis.

(4) Have demonstrated potential for conversion;

sustained superior performance in present rating, and be highly recommended by the Commanding Officer.

(5) Have no NJP and no record of conviction by courts-martial or civil convictions (other than minor traffic violations) on current enlistment (or within 48 months preceding the date of application).

(6) Not have derived any previous benefits from STAR, SCORE or RESCORE programs, and must have completed OBLISERV requirements for other programs.

(7) Be within one year of EAOS (as extended). If a service member is currently receiving SRB, he/she must be within nine months of EAOS, prior to requesting the SCORE program.

(8) Meet minimum activity tour requirements and/or DOD tour completion within nine months as defined in the ENLTRANSMAN prior to submitting.

(9) Have at least 21 months of continuous active Naval service, but not more than 12 years of total active military service.

(10) Obtain prior approval from COMNAVPERSCOM (PERS-815) and agree to extend for conversion of rating and reenlist for no longer than six years. This is contingent on the requirements contained in MILPERSMAN 1160-080 (5 YOs) and MILPERSMAN 1510-030 (AEF/ATF/NUC programs). Reenlistments for training pipelines not requiring five or six-year obligations must be for a minimum of four years.

**2. Selective Training and Reenlistment (STAR) Program**

a. Incentives

(1) Guaranteed assignment to an appropriate Class "A" or "C" School or "C" School Package (but not both).

(2) Guaranteed advancement to PO2 upon completion of Class "C" School or "C" School Package which is listed on the current Career Schools Listing (CSL).

(3) Guaranteed advancement to PO3 upon completion of Phase I of an AEF Class "A" School.

(4) SRB, if otherwise eligible.

b. Eligibility Requirements

(1) Be presently assigned to a rating in CREO Category 1, 2 or 3; or to a shortage skill/NEC. Category 3 ratings are not eligible unless NEC is on the shortage skills/NEC list.

(2) Be recommended by the Commanding Officer.

(3) Be a PO2 or PO3 serving in their first enlistment, or designated striker in paygrade E-3 who is otherwise eligible for reenlistment. Send STAR requests directly to PERS-815, if CREO 3.

(4) Non-nuclear personnel must have at least 21 Months but not more than six years of continuous active Naval service and not more than eight years of active military service. (See MILPERSMAN 1160-100 for nuclear personnel requirements). Also, nuclear trained personnel can include unserved portion of their current enlistment in SRB computation, conventional Navy personnel must request a waiver. Waivers are generally not approved.

(5) Agree to reenlist USN for six years contingent Upon requirements in MILPERSMAN 1160-080 (5YO’s) and MILPERSMAN 1510-030 (AEF/ATF/NUC). Reenlistments for training pipelines not requiring five or six-year obligations must be for a period of at least four years.

(6) Meet the minimum test score requirements for entrance into the appropriate Class "A" School (waiverable).

(7) Have no record of conviction by NJP/ courts-martial during the 18 months preceding the date of application.

(8) Not have derived any benefits from the SCORE program and must have completed obligated service for other programs.

(9) Commanding Officers/Officers-In-Charge may approve a STAR reenlistment if a member has an evaluation grade average of not less than 2.5 with no grade below 2.0 for the two years prior to the request. Commanding Officers cannot guarantee a specific “C” School as a reenlistment incentive. If a person desires a specific school, send STAR requests directly to COMNAVPERSCOM (PERS-815) first.

**3. Guaranteed Assignment Retention Detailing (GUARD 2000) Program**

a. Incentives

(1) Two guaranteed assignments during a career.

(a) One to be used on the first reenlistment.

(b) The second can be used anytime up to the commencement of the member's 17th year of service.

(2) Member may choose from four types of guaranteed duty assignments.

(a) Type ship/aircraft.

(b) Homeport for sea duty.

(c) Shore duty in a specific location.

(d) Split tour.

NOTE: Training can be part of a GUARD 2000 set of orders but never a part of GUARD 2000 guarantee, coast to coast moves are not part of a GUARD 2000 guarantee. Double guarantees are not authorized.

b. Eligibility Requirements

(1) Must not be under orders for PCS transfer; be processed for transfer to the Fleet Reserve or have an effective Fleet Reserve transfer date.

(2) Be E-4 through E-9 or an E-3 who has passed an E-4 exam and meet all other criteria for advancement to E-4.

(3) Be within six months of EAOS (as extended).

(4) If assigned to Type 3, 4, 6, 7 or Type 5 (where applicable), must complete prescribed DOD area tour. Generally, DOD is 36 months unless isolated duty or duty unaccompanied.

(5) Be eligible for duty requested.

(6) Be willing to reenlist for four or more years.

NOTE: A service member must have 48 months OBLISERV from EAOS as extended.

(7) Have a consistent record of above average performance evaluations.

(a) 3.4 or above for E-4 and below over the last two regular reports.

(b) 3.6 or above for E-5/6 over the last two regular reports.

(c) 3.8 or above for E-7/8/9 over the last two regular reports.

(8) Must have no courts-martial, NJP or involvement with civil authorities within 18 months of EAOS (as extended).

(9) Be recommended for reenlistment by the Commanding Officer.

c. Advantages

(1) Encourages direct communications between Eligible personnel and their Detailers. GUARD 2000 requests are handled as priority GENADMIN messages.

(2) First termers may elect reenlistment at EAOS regardless of Prescribed Sea Tour (PST) for transfer at completion of PST.

(3) First termers may be granted a maximum PST waiver of six months for a four year reenlistment; 12 months for a five year reenlistment and 18 months for a six year reenlistment. These are maximum waivers and may not be granted in all cases.

(4) Personnel whose completion of the specified activity/area tour is more than seven months in the future may request a general assignment guarantee for execution at their Projected Rotation Date (PRD); or extend their EAOS to coincide with their PRD in order to negotiate for an assignment guarantee with their Detailer.

**4. Assignment to School as a Reenlistment Incentive**

a. Incentive

(1) Guaranteed assignment to a specific school for reenlistment of four or more years.

b. Eligibility Requirements

(1) Must meet OBLISERV requirements and entrance requirements as specified in ENLTRANSMAN, Article 7.01 and the CANTRAC. Additionally, approval of requests will be based on the following criteria:

(a) Composite Training. Does member possess a critical skill?

(b) Sea/Shore rotation. Does member’s PRD provide for immediate utilization of the desired skill?

(c) Paygrade versus skill requirements. Is member in a higher paygrade in which utilization of desired skill is intended?

(d) Have a consistent record of average performance.

(e) Also, member must not have any NJP/courts-martial within 24 months of EAOS or EAOS as extended. As extended means all pending extensions.

c. Advantages

(1) Assignment to schools will normally occur at member’s PRD. However, school assignments on a TEMADDINS basis approved by appropriate type commander when feasible will also constitute fulfillment of the reenlistment incentive; and may occur at any time within the member’s activity tour that is agreeable to the member’s Commanding Officer.

**5. Job Oriented Basic Skills Program (JOBS)**

a. Provides remedial skills training to exceptionally qualified personnel who do not possess requisite ASVAB scores for entry into certain class "A" schools.

b. Upon successful completion to the JOBS strand training the member is then assigned to an "A" school.

c. Requires a minimum four-year reenlistment.

**6. Lateral Conversion Program**

a. Incentive

(1) Opportunity for members to serve in ratings for

which they have the greatest interest and aptitude.

b. Eligibility Requirements

(1) Be an enlisted member of the Navy or Naval Reserve on active duty (including TARs).

(2) Be a PO1 or below.

(3) Have less than 12 years active service.

(4) Request a rating that appears in CREO Category 1 or {possibly} 2 as defined in the latest CREO/REGA NAVADMIN.

(5) Must NOT be serving in a rating which is in CREO Category 1 or possess a shortage skill/NEC.

(6) Be eligible in all respects for transfer if conversion requires a PCS move.

(7) Satisfy eligibility requirements for rate or rating requested.

(8) Shall not be currently serving in an enlistment or extension of enlistment for which the individual was paid an SRB or other enlistment bonus. A member so serving shall not be eligible for a change in rating until within three months of EAOS.

(9) Be recommended by the Commanding Officer.

c. Lateral Conversions are effected as follows:

(1) Change of apprenticeship accomplished by the Commanding Officer at member’s request, provided there is a valid billet on the command’s Manpower Authorization (1000/2).

(2) Via Formal School Training.

(3) Through Direct Conversion.

(4) Through successful completion in a Navy-wide Exam.

(5) Via "In-Service Training" (OJT).

(6) Forced Conversions.

**7. Accelerated Advancement**

a. Incentive

(1) Opportunity for members enlisted in the Advanced Technical Field (ATF), Advanced Electronics Field (AEF), Nuclear Field (NF) programs or Submarine Advanced Electronics Field (SAEF); and for eligible graduates of certain other Class "A" schools to elect accelerated advancement to Petty Officer Third Class.

b. Eligibility Requirements

(1) ATF/AEF/NF/SAEF

(a) Complete Class "A" School or the preliminary phase of training and remain eligible to continue in the respective program.

(b) Not be involved in disciplinary action resulting in reduction in rate or suspended reduction in rate.

(c) Incur a six-year obligation for the program and advancement.

(d) Must elect advancement upon or prior to graduation from "A" School.

NOTE: The training command Commanding Officer has the authority to advance the "number one" student to E-2 or E-3.

(2) Other Class "A" Schools

(a) Graduate from a selected Class "A" School in the upper 10% of the class.

(b) Be recommended by the school Commanding Officer or Director.

(c) Obligate for five years total active service and have a minimum of two years active service from the date of advancement.

(d) The advancement is held in abeyance for a 4-10 month period after graduation, pending qualified performance at the gaining Commanding Officer's discretion.

c. Advantage

(1) Member may elect advancement without having to compete in a Navy-wide advancement examination.

NOTE: Member completes military requirements during the 4-10 month gaining command evaluation period.

**8. Twilight Tours**

a. Incentive

(1) Choice of shore, sea or overseas assignment for the last two years of active duty service prior to 30-year retirement. Service members can elect to apply earlier than two years if a DOD tour is involved.

b. Eligibility Requirements

(1) Enlisted personnel must be eligible for voluntary non-disability retirement.

(2) Not have been previously transferred to the Fleet Reserve. (If a person pulled his/her papers that is okay.)

(3) Submit request four to eight months prior to desired commencement of Twilight Tour. Requests should be submitted with letter requesting 30-year retirement.

c. Advantages

(1) Although needs of the Navy must prevail, personnel may expect reassignment to an activity within the geographic area of their choice provided a requisition exists in the member’s rate/rating.

(2) Detailers are authorized leniency in assignments to billets either one paygrade up or down from member's currently assigned paygrade.

(3) Some flexibility exists in selecting a date if member has constructive time.

(4) Commands should request additional requisitions from EPMAC if a valid billet is not available. Everything should be done to make sure Master Chiefs retire where they request, if at all possible.

# Chapter 4

## EDUCATIONAL OPPORTUNITIES

References: MILPERSMAN (NAVPERS 15560 Series)
ENLTRANSMAN (NAVPERS 15909 Series)
Retention Team Manual (NAVPERS 15878 Series)
OPNAVINST 1560.9 Series

**The Navy College Program (NCP)**

1. NCP provides our Sailors one-stop shopping to determine recommended college credit for Navy training courses and work experience, obtain academic counseling and advice in order to select and enroll in a college program of their choice either ashore or while deployed, and identify career related education degree programs. It focuses on helping Sailors to obtain a college degree while in the Navy, when they are ready and at their own pace.

2. NCP pulls together and enhances the current voluntary education programs under one umbrella. NCP centralizes all existing off-duty education programs, such as Servicemembers Opportunity Colleges-Navy (SOCNAV), Navy College Program for Afloat College Education (NCPACE), Tuition Assistance (TA), Navy College Offices, Navy College Learning Centers and Defense Activity for Non-traditional Education Support (DANTES), under one easily accessible program. It also includes the new components: Navy College Center (NCC), Sailor/Marine American Council on Education Registry Transcript (SMART), and Rating Roadmaps.

**Service Members Opportunity Colleges Navy (SOCNAV) Two and Four-Year Degree Programs**

1. A worldwide consortium consisting of over 80 regionally accredited colleges and universities that offer associate’s and bachelor’s degree programs that focus around the service member’s military occupation or any other area of interest. All undergraduate colleges offering courses or programs on a Navy installation or via NCPACE must be members of SOCNAV. All active duty and retired Navy personnel and their family members, members of other branches of service including the Coast Guard and their family members may enroll in SOCNAV colleges on Navy installations.



2. SOCNAV Institutions have agreed to:

a. Limit academic residency requirements for graduation (credits taken with the degree-granting institution, regardless of location or degree delivery method) to 25 percent or less of the total requirements for SOCNAV degrees.

b. Award credit appropriate to the curriculum for service schools and Navy rate and rating experience, based on the recommendations in the American Council on Education (ACE) Guide to the Evaluation of Educational Experiences in the Armed Services.

c. Award credit appropriate to the curriculum for nontraditional or other prior learning, from the results of one or more nationally recognized standardized tests (CLEP, DANTES SST, RCE, ASE), based on the recommendations in the ACE Guide to Educational Credit by Examination, in addition to other means the college may use to evaluate this learning.

d. Provide a SOCNAV Student Agreement (an official evaluation and a degree plan) on the standard form for each eligible SOCNAV student. The Official evaluation will include assessment of all previous learning, both formal and nontraditional, including tests, service schools, and Navy rate and rating experience.

e. Permit the student to complete the program under the terms of the Student Agreement, even after separation from active military service and even if the college’s membership in a network is terminated.

f. Award a minimum of 45 percent of the credits needed to complete certain SOCNAV-4 bachelor’s degrees assumes that credits awarded for service schools, military experience, and nationally recognized standardized tests will be within the limits recommended by the American Council on Education (ACE) in the Guide to the Evaluation of Educational Experience in the Armed Services and the Guide to Educational Credit by Examination.

**Navy College Program for Afloat College Education (NCPACE)**

1. NCPACE gives educational access to Fleet Sailors, Including Marines, Sailors assigned to shore-based commands with sea duty UIC’s and Sailors assigned to select remote sites. Sailors can get fully funded instruction in both undergraduate and graduate courses from regionally accredited colleges and universities. The only cost to Sailors is the cost of books.

NCPACE provides equity to Fleet Sailors by giving them educational opportunities comparable to those available to Sailors ashore. Courses aboard ship are taught through computer, video teleconferencing, and traditional classroom instruction. All undergraduate courses are from institutions with Servicemember's Opportunity College affiliation, so Sailors can transfer credit and complete degrees. NCPACE enables Sailors to initiate, continue, or complete a college degree program thereby enhancing both their personal and professional capabilities.

2. No tuition is charged.

3. Transferable academic credit is granted for all courses successfully completed in accordance with a Sailor's degree plan.

**Navy College Office (NCO)**

Navy Campus Education Centers were renamed Navy College Offices 1 Oct 99. They are the local on-base resource for general education and Navy College Program information. For the Navy College Office nearest you, go to the following web site: www.navycollege.navy.mil.

**Navy College Learning Center (NCLC)**

1. Navy College Learning Centers offer no-cost instruction in English, math, and reading to Sailors who need or desire to refresh or enhance their learning skills. Instruction is provided a facilitated, technology-delivered method at these centers. These courses can directly affect a Sailor's ability to succeed in college-level studies at academic institutions within the Navy College Program.

**Defense Activity for Non-Traditional Educational Education Support (DANTES)**

1. The ***DANTES Independent Study Catalog*** lists courses offered by regionally accredited colleges and universities with which DANTES has a Memorandum of Understanding.

2. The ***DANTES External Degree Catalog*** lists programs available from about 40 accredited colleges and universities that have little or no residency requirement for degree completion, making them very useful to service members in achieving their educational goals. The guide lists approximately 100 associate, 225 baccalaureate, 100 graduate degrees and about 45 credit-bearing certificate programs.

3. The ***DANTES Catalog of Nationally Accredited Distance Learning Programs***

Lists courses and programs available from schools accredited by the Distance Education and Training Council and other national accrediting bodies. Many of these programs are technical or vocational in nature.

4. Special Requirements for Enrolling

a. Some courses have prerequisites. There may be other requirements that must be completed prior to enrolling in a course or degree program. The school catalog or school advisor can provide this information. Students must receive education center counseling and approval prior to enrollment if tuition assistance is requested. If a student enrolls without going through an education center, tuition assistance may be denied.

5. Frequency of Courses

a. Counselors in recommending courses should consider the ability and experience of the student.

**Navy College Center (NCC)**

1. Something brand new in Navy voluntary education is the Navy College Center. The Center was developed to provide Sailors access and "one-stop shopping" for information on the Navy College Program and its components. Users can access this service by calling DSN 922-1828/the toll free number (1-877-253-7122) or via the web site (www.navycollege.navy.mil). It is an automated counseling center, opened seven days a week, 15 hours a day (0700-2200 EST) staffed by trained professionals. Sailors can access the center's web site anytime and anywhere. Sailors with advisers via the toll-free number. They can also e-mail the center at ncc@smtp.cnet.navy.mil with questions and expect a speedy reply.

**Sailor/Marine American Council on Education Registry Transcript (SMART)**

1. SMART is an electronic transcript for each Sailor that is an academically accepted document, approved by American Council on Education (ACE), to validate military occupational experience and training with the corresponding American Council on Education

(ACE) credit recommendation. SMART, available since 1 Oct 99, lists occupations held, Navy training courses completed with ACE credit recommendations, college-level exams completed, and other learning experiences. SMART will track Sailors' progress on the path to a degree. It will replace the DD295, which has been cumbersome to produce and difficult for the Sailor to obtain.

2. Sailors can either stop by a Navy College Office or contact the Navy College Center to obtain a copy of their SMART transcript. Within the next few months, Sailors will be able to obtain their unofficial SMART from the NCC web site.

3. Official copies of the SMART may be sent directly to academic institutions upon request of the Sailor at either a Navy College Office or the Navy College Center.

**Rating Roadmap**

1. Rating Roadmaps identify the college credit recommended for Navy training and on the job work experience across a Navy career for a specific rating. Assists a Sailor to identify the number of possible recommended credits from the American Council on Education (ACE) that could be earned for specific occupations. Rating Roadmaps will be placed in the CNET schoolhouses and are on line at the Navy College Center website where Sailors, Career Counselors, Classifiers, Recruiters, prospective recruits and the interested public can obtain them.

**Examination Programs**

1. Local Navy College Offices offer Credit-by-Examination. A Sailor should visit the local Navy College Office to obtain information on how to prepare and schedule examinations.

a. Test Preparation

To assist the Sailor in preparation for any of the standardized tests, the Navy provides instruction in basic subjects. Navy College Learning Centers provide instruction in English, mathematics, and reading skills. A diagnostic test will assess a Sailor's level and allow for appropriate instruction.

b. General Education Development (GED)

(1) The General Education Development program is for adults who lack a high school diploma, have good reading skills and want to prepare to take the high school equivalency

examination. Instruction is offered in the six areas covered on the GED test: Social studies, science, literature, the arts, mathematics and writing skills.

c. College Level Examination Program (CLEP)

(1) The College-Level Examination Program is a great way to earn credit for knowledge that a Sailor might have acquired through reading, life experience, or non-credit courses taken for educational development and/or professional advancement.

(2)Anyone can take a CLEP exam. Sailors should take the exams for which they feel they are best prepared. If enrolling in a college, they should check with their local Navy College Office to verify its CLEP policy before taking any exam. The Navy College Office has a list of CLEP exams that they offer.

d. DANTES Subject Standardized Tests (DSST)

(1) This program is an extensive series of examinations in college and technical subjects which are comparable to the final or end-of-course examination in particular undergraduate courses. A Sailor should check with his local Navy College Office to obtain a complete listing of exams.

(2) ACE recommends three to six semester hours of credit depending on the specific DSST examination.

e. Regents College Examinations

(1) Regents College Examinations are well known among the nation's colleges and universities as respected measurements of knowledge. Regents College Exams are accepted for credit at nearly 1,000 universities and colleges worldwide. Regents College Exams cover a wide range of subjects, and many of them provide upper-level college credit.

(2) Regents College Examinations are FREE to all Sailors. A Sailor can choose from 39 Regents College Examinations in a variety of subject areas, such as: Arts and Sciences, Business, Education, and Nursing.

(3) To help a Sailor prepare for an exam, Regents College Examinations Program offers a free content guide with every exam. They may be requested toll free at 1-888-RCEXAMS; or downloaded from the web site: www.regents.edu/804.htm.

f. National Certification Examinations

(1) Certification is a national recognition of an individual’s qualifications to perform specific technical tasks.

(2) Professional achievement in a particular field.

Why should a Sailor get certified?

a. Enhances job opportunities for transitioning military personnel.
b. Validates military training in meeting national occupational standards.
c. Documents experience and credentials.
d. Certifies an individual’s competence in a given field.

What are the in-service benefits on getting certified?

a. Promotes growth and professionalism in job.
b. Promotes professional ethics.
c. Validates for military that jobs are done independently and completely.

Certification Exams that are offered by the following organizations

- National Institute for Automotive Service Excellence (ASE)
- Institute for Certification of Computing Professionals (ICCP)
- American Council on Exercise (ACE)
- Electronics Technicians Association International (ETA-I)
- Food Protection Certification Program (FPCP)
- Institute of Certified Professional Managers (ICPM)
- Electronics Technicians Association International (ETA-I)
- Society of Broadcast Engineers (SBE)
- National Association of Radio and Telecommunications Engineers (NARTE)

Certification Exams that are offered

- National Institute for Certification in Engineering Technology (NICET)
- Emergency Medical Technicians (EMT)
- Dental Assisting National Board (DANB)

- Liaison Council on Certification for the Surgical Technologist (LCCST)
- American Medical Technologist (AMT)

**Navy Apprenticeship Program**

1. Provides certification of apprenticeship completion for many licensable trades.

2. Apprenticeship must be completed while on active duty.

**Financial Assistance**

1. Tuition Assistance (TA)

a. Tuition Assistance is the primary means of financial aid used by Sailors to pursue education during off-duty hours. TA enables Sailors to earn a high school diploma; a vocational-technical certificate; or an associate's, bachelor or master's degree. All regular active duty personnel, reservists on continuous active duty, reservists ordered to active duty for 120 days or more, and members of other Services and the Coast Guard who are operationally or administratively attached to a Navy installation, may receive Navy TA.

b. Financial assistance to attend educational institutions on an off-duty basis.

c. Current Navy policy allows both officer and enlisted personnel to receive tuition assistance in the following amount: 75% of tuition up to a maximum of $187.50 per semester hour with an overall cap of $3,500 per individual per fiscal year.

d. Officers incur a two-year OBLISERV for use of TA.

2. Military associated scholarships

a. Various scholarships are available to military members and their dependents through military affiliated groups at the state and national level.

b. Scholarships may also be available to military members and dependents through local colleges, universities and trade technical schools in the area of a military facility.

3. In-Service and Out-Service Educational Programs

a. Title 38, Chapter 32, Post-Vietnam Veterans Educational Assistance Program (VEAP)

(1) Members who contracted and entered active duty on or after 1 JAN 77 and before 1 JUL 85 are entitled to 36 months of educational benefits and have 10 years from date of separation or discharge to utilize their benefits.

(3) Most members eligible for VEAP were offered conversion to Chapter 30, Montgomery GI Bill. VEAP eligible personnel who did not convert should call the Navy VA Hotline at DSN 882-4258, toll free 1-800-962-1425, or commercial (901) 874-4253.

b. Title 38, Chapter 30, Montgomery GI Bill

(1) Requirements - New Recruit

(a) Initially enlists from 1 JUL 85 to present.

(b) Must serve honorably for term of enlistment.

(c) Must possess high school diploma or GED by the end of the first enlistment.

(d) Agree to a voluntary pay reduction of $100 per month for the first 12 months of service.

(e) Members are enrolled automatically in the program unless an election is made to disenroll. This decision will take place within the first two weeks of initial entry on active duty, and is irrevocable. If a member elects not to participate, there will be no opportunity to enroll at a later date, with the exception of involuntary separatees.

(2) Requirements - Vietnam Era GI Bill Eligible

(a) Also eligible for Montgomery GI Bill benefits are those individuals who have remaining entitlement under the Vietnam Era GI Bill of 31 DEC 89, and served on active duty sometime during the period 19 OCT 84 and 30 JUN 85, and continued to serve on active duty to 1 JUL 88 or present.

(b) The individual who converts from the Vietnam Era GI Bill must have met the requirements for a high school diploma or equivalency certificate before education benefits can be received.

(c) Receive an honorable discharge from the required term of service.

(3) Benefits - New Recruit (Full-time Attendance)

(a) For persons serving only a two-year obligation, **$436** per month. For persons serving three years or more, **$536** per month. (Rates are subject to change, check with local NCO to verify current rates.)

(b) Benefits may be used after two years of active duty or within 10 years of honorable discharge.

(c) Persons committed for less than three years must complete a minimum of 20 months, while persons committed to three years or more must complete at least 30 months in order to qualify for the full 36-month benefits. Members that are being separated early for any one of the qualifying reasons may receive one month of educational benefits for each month of active duty served, if less than the month requirements listed above. The reasons are as follows:

1 Disability.

2 Hardship.

3 A medical condition existing before service.

4 A medical condition that is NOT a disability or due to misconduct but interferes with your ability to perform your duty (i.e., pregnancy).

5 Certain Reductions in Force (RIF).

(4) Benefits - Vietnam Era GI Bill Eligible

(a) The maximum number of months of educational assistance under the new Montgomery GI Bill is 36.

(b) The combined number of months of benefits to which an individual is entitled under the Vietnam Era GI Bill and the new Montgomery GI Bill cannot exceed a total of 48 months.

(c) The amount {enhanced rate} and number of months of educational assistance to which an individual is entitled under the new Montgomery GI Bill is related directly to the remaining entitlement under the Vietnam Era GI Bill.

1 The enhanced rate per month for the basic educational assistance is equal to **$724 (no dependents); $760 (one dependent); $791 (two dependents);** and **$16 for each additional dependent**. (Rates are subject to change, check with local NCO to verify current rates.)

2 The number of months for which the enhanced rate is payable may not exceed the number of months of entitlement under the Vietnam Era GI Bill that the individual had remaining on 31 DEC 89, or 36 months, whichever is less.

3 If an individual has used all 45 months of entitlement under the Vietnam Era GI Bill prior to 1 JAN 90, there is no remaining entitlement.

c. Educational Institutions

(1) An educational institution approved for training may include any public or private university or college, vocational training school, an on the job training or apprenticeship program, correspondence training school, or commercial flight schools.

(2) Generally a program of education outside the United States may be pursued only at an approved educational institution of higher learning.

d. Entitlement and Duration of Eligibility

(1) Members who enter military service on or after 8 SEP 80, will not be eligible for most Veterans Benefits based on service unless they complete 24 months of active service. Veterans with service connected disabilities, or discharged because of hardship, convenience of the government, pregnancy or a non-service connected disability are not held to this provision.

e. Payments

(1) Education allowances are paid at the end of each term the Veteran attends school.

# Chapter 5

## OFFICER PROGRAMS

References: MILPERSMAN (NAVPERS 15560 Series)
Retention Team Manual (NAVPERS 15878 Series)
OPNAVINST 1531.4
OPNAVINST 1120.2
BUPERSINST 1131.1A
BUPERSINST 1133.1

***Naval Academy/Preparatory School***

1. Purpose

a. Provides an outstanding opportunity for qualified men and women to embark on careers as officers in the United States Navy or United States Marine Corps.

2. Eligibility Requirements

a. 170 Active/ Reserve appointments

b. 17 - 23 years of age as of 1 July

c. Unmarried, not pregnant, no dependents

d. Top 30% standing in high school

e. SAT: 530 verbal/530 math,

f. ACT: 22 English/22 math

g. Completed four years of math and English, a year of chemistry and physics, and two years of a foreign language. Not mandatory, but will enhance chances for selection.

h. Deadline for all recommendations is 31 Jan.

**Naval Reserve Officer Training Corps (NROTC)**

1. Purpose

a. Leads to an appointment as an officer of the regular Navy or Marine Corps in the grade of Ensign or Second Lieutenant.

2. Eligibility Requirements

a. Application deadlines: 1 Dec/15 March.

b. Under 25 as of 30 June (age waiver).

c. Complete applicant questionnaire.

d. SAT: 530 verbal/520 math.

e. ACT: 22 English/22 math.

f. Submit application to desired college.

g. Complete final application.

h. Eight-year obligation.

i. Tuition, books, instructional fees, uniforms, and an allowance of $150 a month.

j. Eligible for grants, loans, and GI bill utilization, if eligible.

**Enlisted Commissioning Program (ECP)**

1. Purpose

a. Provides enlisted personnel, with previous college credit, a full time opportunity to complete requirements for a baccalaureate degree and earn a commission

in the unrestricted line.

2. Eligibility Requirements

a. Undergraduate education program which provides an opportunity for Enlisted personnel, with previous college credit, to earn a commission in the unrestricted line (URL) or Civil Engineer Corps (CEC).

b. Candidates attend the Naval Science Institute (NSI) at Newport, RI enroute to their host university for 6-1/2 weeks of academic/physical training.

c. Required to complete degree requirements for non-technical degree in not more than 30 months, and technical degree in not more than 36 months.

d. 45 fully transferable semester hours for a non-technical degree, 30 fully
transferable for a technical degree.

e. Have completed at least 4 years of service as of 1 Sep 1998.

f. Be at least 22 years of age and be commissioned prior to 31st birthday.

g. Although no minimum scores are required, scores below 950 SAT, and 44 ACT are not considered competitive.

h. Application deadline is 1 November 1997.

**Broadened Opportunity for Officer Selection and Training (BOOST)**

1. Purpose

a. Prepares selected applicants for entry into the NROTC Scholarship Program or the U. S. Naval Academy.

2. Eligibility Requirements

a. 10-month academic preparation program, located in Newport RI, aimed at preparing Sailors and Marines for entrance into the Naval Academy or NROTC.

b. NROTC applicants must be under 21 yrs of age on 30 June 98 (36 month waiver). Anyone born prior to 1 July 74 will not be considered.

c. Naval Academy candidates must not have passed their 23rd birthday on 1 July 98.

d. SAT 470 verbal, 490 math. ACT 16 English, 20 math (waiverable). Must be taken on or after 1 April 95.

e. Personnel possessing more than one year of college are ineligible for BOOST.

f. Deadline: 1 October.

g. No NJP’s, court convictions for two years preceeding application due date.

h. Applicants below E-4 may have no more than 2 dependents for NROTC, no dependents for the Naval Academy.

i. Must have 30 months of active duty by Fall of application year to be eligible for Montgomery GI Bill benefits.

j. Application deadline 1 October.

**Officer Candidate School/Aviation Officer Candidate School (OCS/AOCS)**

1. Purpose

a. Provides officer indoctrination and aviation training at the Naval Aviation Schools Command, Pensacola FL.

2. Eligibility Requirements

a. 16-week indoctrination in Newport, RI.

b. Bachelor degree or higher.

c. Physically qualified.

d. Meet age requirements per MILPERSMAN 1131-010.

e. AOCS is 14 weeks long.

**Chief Warrant Officer (CWO)**

1. Purpose

a. Provides a path of advancement to officer status for outstanding Chief Petty Officers of the regular Navy and Naval Reserve on active duty for performance of duty in the technical field indicated by their enlisted ratings.

2. Eligibility Requirements

a. Application deadline: 1 August.

b. E-7 to E-9 (includes frocked E-7).

c. Completed 12 to 24 years of Naval service.

d. E-9s with two years in rate are appointed to W-3.

e. Three-year obligated service.

f. E-7 and E-8s with 12-16 years service may apply for CWO/LDO in same application year.

**Limited Duty Officer (LDO)**

1. Purpose

a. Provides an opportunity for appointment to regular commissioned status for selected Chief Warrant Officers and senior enlisted personnel for the performance of duty in the broad occupational fields indicated by their former warrant or enlisted rating groups.

2. Eligibility Requirements

a. Application deadline: 1 August.

b. E-6 to E-8s eligible (E-6s must have served at least one year in paygrade).

c. Eight to 16 years active naval service.

d. E-6s must complete all requirements for E-7, except time-in-grade (TIG).

e. Three-year active duty obligation.

**Medical Commissioning Program (MECP)**

1. Purpose

a. Provides a full time opportunity for enlisted personnel to meet the requirements for a baccalaureate degree in nursing and earn a commission in the Nurse Corps.

2. Eligibility Requirements

a. Application deadline: 1 January.

b. Four to 11 years active naval service.

c. At least 22 years old and must be commissioned prior to 40th birthday.

d. 30 transferable credit hours applied towards a Bachelor’s degree in Nursing required.

e. Complete program in 36 months or less.

**Health Care Administration**

1. Purpose

a. Provide an opportunity for qualified active duty enlisted personnel of all ratings, to seek appointment to commissioned status in the Health Care Administration Section of the Medical Service Corps (MSC), U.S. Navy.

2. Eligibility Requirements

a. Application deadline: 15 December.

b. HM1/DT1.

c. WK/AR 115.

d. Completed 50 transferable semester hours.

e. Complete program in 24 consecutive months.

f. Accept commissioned status prior to age 40.

**Seaman to Admiral Program**

1. Program designed to select fifty enlisted Sailors to become commissioned officers and obtain a Bachelor's degree. Selectees will be appointed as permanent Ensigns after successful completion of OCS.

2. Eligibility Requirements

a. Have a superb record as well as strong academic potential and be recommended by their Commanding Officer.

b. Be a U.S. citizen.

c. E-4 or above with at least four years active duty service as of 30 September of application year.

d. E-4s must have scored a passing grade on the most recent E-5 Navy-wide examination.

e. Be at least 22 years old and have not reached their 27th birthday by 30 September of application year.

f. No minimum score is required. SAT scores greater than 1000 (math and verbal composite) or ACT scores greater than 45 (math and english) will enhance the potential for selection in the assigned colleges and universities. Test should not be more than two years old from time of application.

g. All eligible candidates must submit a signed, typed application using the format in the most current NAVADMIN. Mail application to: Commander, Navy Personnel Command (PERS-811), 5820 Integrity Road, BLDG C-1, Millington, TN 38055-0811. Contact PERS-811 for complete program details at COMM 901-874-3170 or DSN 882-3170.

# Chapter 6

## Reenlistments and Extensions

References: MILPERSMAN (NAVPERS 15560 Series)
OPNAVINST 1160.4 Series
OPNAVINST 1160.5 Series
OPNAVINST 1160.6 Series

**Career Reenlistment Objectives (CREO)**

1. CREO is used to provide optimum paygrade distribution of resources within Chief of Naval Operations (CNO) requirements.

a. Increase manning in undermanned rates.

b. Control averages in overmanned rates.

c. Minimize training/replacement cost.

d. Category 1 - manning less than 97%.

e. Category 2 - Manning correct 97-103%.

f. Category 3 - Manning more than 103%.

**Reenlistment Quality Control Program**

1. Provide a standardized quality control device. Establish terms of years for reenlistment based on CREO and years of active service at the time of reenlistment. Provide a personnel management program to control rate manning, reduce advancement stagnation and afford superior performing personnel the opportunity to continue active duty.

a. RE-R1: Recommended for preferred reenlistment.

b. RE-1: Eligible to reenlist.

c. RE-3R: E-3 personnel who fail to meet professional growth criteria.

d. RE-4: Does not meet minimum reenlistment criteria.

**Terms of Reenlistment/Extension and High Year Tenure (HYT)**

1. E-3 personnel that are in CREO Categories 1 and 2 are authorized to reenlist/extend for two to six years, not to exceed eight years naval service, if otherwise eligible.

a. Reenlistments may be made for periods of two, three, four, five or six years dependent on the member's paygrade and total active service and/or naval service.

2. High Year Tenure (HYT) for paygrades E4 - E9:

a. E-4: 10 years.

b. E-5: 20 years.

c. E-6: 20 years.

d. E-7: 24 years.

e. E-8: 26 years.

f. E-9: 30 years.

**Extensions**

1. Conditional extension: one to 48 months.

2. Unconditional extension: 24 - 48 months.

3. No extension may be cancelled after the operative date.

4. May not exceed 48 months in extensions on any enlistment.

**Monetary entitlements**

1. Sell back leave, maximum 60 days in a career.

2. Paid upon member’s reenlistment or initial extension.

**Selective Reenlistment Bonus (SRB)**

1. SRB is the Navy's principal monetary retention incentive. It is not a guaranteed entitlement. SRB is paid to members serving in selected ratings/NECs.

a. Zone A: 21 months to six years total service.

b. Zone B: six to 10 years total service.

c. Zone C: 10 to 14 years total service (payable to 16 years maximum).

# Chapter 7

## FORMAL PRE-SEPARATION/TRANSITION COUNSELING, NAVAL RESERVE PROGRAMS AND VETERANS BENEFITS

References: Retention Team Manual (NAVPERS 15878 Series)
MILPERSMAN (NAVPERS 15560 Series)
Enlisted Transfer Manual (NAVPERS 15909 Series)
OPNAVINST 1900.1 Series
OPNAVINST 1900.2 Series
OPNAVINST 1040.8 Series
OPNAVINST 1000.26 Series
BUPERSINST 1001.39 Series
BUPERSINST 1430.16 Series
COMNAVRESFORINST 1001.5 Series
COMNAVRESFORINST 1100.4 Series
COMNAVRESFORINST 1780.1 Series
Federal Benefits for Veterans and Dependents (IS-1 Fact Sheet)

**Transition Assistance Management Program (TAMP)**

1. The Transition Assistance Management Program (TAMP) assists separating or retiring members, and their spouses, as they transition from military to civilian life. Public Laws 101-510, 102-484, and OPNAVINST 1900.2 mandate that pre-separation counseling interviews (at least 90 days prior to separation), employment assistance, and overseas relocation assistance will be provided for all separatees. Command Career Counselors conduct, document, and provide the TAMP Manager at the local Family Service Center (FSC) with results of the pre-separation counseling interview. FSCs provide employment and relocation assistance and coordinate the delivery of the Transition Assistance Program (TAP) Workshop.

The TAMP can compliment the command’s retention efforts. Personnel who attend pre-separation briefs and TAP Workshops well in advance of their actual separation date may ultimately decide to continue a naval career.

The Command Career Counselor is a vital partner in the transition process and must maintain a close liaison with the TAMP Manager located at the local FSC. The TAMP Manager is an invaluable referral resource for all transitioning Sailors to use.

a. Documentation

(1) The pre-separation counseling interview should be conducted six to nine months prior to the anticipated separation or retirement date. Spouses should be encouraged to participate in the interview process. The interview must be completed no less than 90 days prior to separation, as required by Public Law 101-510. The interview will be documented on the Pre-separation Counseling Checklist (DD Form 2648) with one copy given to each service member, one copy retained by the Command Career Counselor, one copy forwarded to the TAMP Manager at the local FSC, and the original document filed in the service member's field service record. **NOTE:** ***The requirement to provide pre-separation counseling and initiate the DD Form 2648 should not be confused with the delivery of the Naval Reserve Career Information Team (NAVRES CARIT) briefing. Both interviews are required***. The pre-separation counseling interview will include the availability of general transition services listed below:

(a) Individual Transition Plan (ITP). Assistance is provided to create and execute a detailed Individual Transition Plan. A sample ITP Package is provided in Chapter 14 of the Retention Team Manual. The plan should include, but not be limited to, the following:

1 The service member's (and spouse's) post-military employment, education, training, and/or other objectives.

2 Specific transition services, involuntary separation benefits, and other available counseling or services needed to help achieve their objectives.

3 Location and points of contact for installation or community agencies that deliver TAMP services and benefits.

4 When the services will be delivered.

(b) Personal effects of a career change such as stress, personal identity change and impact on family members.

(c) Employment assistance, including:

1 Explanation of the Verification of Military Experience and Training Document (DD Form 2586). Service members should receive this form 120-180 days prior to their separation or retirement date.

2 Department of Labor Transition Assistance Program (TAP) Workshop and other available Service or installation-sponsored transition seminars.

3 Defense Outplacement Referral System (DORS). DORS is a mini-resume registry and referral system developed to provide employers with easy access to Defense personnel and their spouses who are seeking civilian employment.

4 Public and Community Service (PACS). Registry to help place members in public/community service related jobs. Although accepting employment is optional, registration in PACS is mandatory for members taking early retirement, and recommended for all other separating/retiring personnel.

5 Transition Bulletin Board (TBB). TBB is an electronic bulletin board listing job opportunities and related information.

6 Federal employment opportunities.

7 State employment agency services and/or Interstate Job Bank.

8 One-time hiring preference in Non-Appropriated Fund Instrumentality (NAFI) jobs for VSI, SSB, and Involuntary Separatees/Retirees.

(d) Relocation assistance, including:

1 Excess leave and Permissive Temporary Duty (PTDY).

2 Travel and transportation allowances - one-year storage of household goods and home of selection move for VSI, SSB, and Involuntary Separatees/Retirees.

3 Continued use of military family housing for up to 180 days on a space available basis (subject to Status of Forces Agreements overseas) for VSI, SSB, and Involuntary Separatees/Retirees.

4 Extended commissary and exchange privileges for a period of two years (subject to Status of Forces Agreements overseas) for VSI, SSB, and Involuntary Separatees/Retirees.

5 Department of Defense Dependents Schools (DODDS) extensions (subject to Status of Forces Agreements), providing each child has completed the 11th grade by the service member's date of separation for VSI, SSB, and Involuntary Separatees/Retirees.

(e) Education and training assistance, including:

1 Education benefits such as Montgomery GI Bill and Veteran's Educational Assistance Program (VEAP).

2 Teacher and Teacher Aide Certification Program.

3 Job Training Partnership Act (JTPA) for VSI, SSB, and Involuntary Separatees/Retirees.

4 Additional education or training options.

(f) Health and life insurance benefits:

1 60 or 120-day extended military medical and dental benefits for VSI, SSB, and Involuntary Separatees/ Retirees.

2 Option to purchase 18-month conversion health insurance, and Department of Veterans Affairs (VA) care. Service members should also be made aware that dental insurance under the DELTA Dental Plan does not carry over after separation.

3 Concurrent pre-existing condition coverage with purchase of conversion health insurance for VSI, SSB, and Involuntary Separatees/Retirees.

4 Veteran's Group Life Insurance.

(g) Finances

1 Financial management assistance including financial counseling, unemployment compensation, VA loans, and other government grants and loans.

2 Separation pay for VSI, SSB, and Involuntary Separatees/Retirees.

3 Unemployment compensation upon release from active duty.

4 Other financial assistance (VA loans, SBA Loans, and other government grants and loans).

(h) Reserve Affiliation/Priority for VSI, SSB, and Involuntary Separatees/Retirees.

(i) Disabled veterans benefits, including the Disabled Transition Assistance Program (DTAP) and VA disability benefits.

b. Responsibilities

(1) Commanding Officers are responsible for ensuring all separating and retiring members receive pre-separation counseling as mandated by Public Law 101-510. The Command Career Counselor will serve as the command's Transition Officer. To assist in the transition process, a variety of referral resources are available for the command's Transition Officer to use. The primary source of information and referral will be the Transition Assistance Management Program (TAMP) Manager, normally located at the nearest Family Service Center (FSC). Other sources include the Naval Reserve Career Information Teams (CARIT), Retired Activities Officers (RAOs), Spouse Employment Assistance Program (SEAP) managers, chaplains, medical/dental personnel, state employment personnel, etc.

(2) Transition Assistance Program (TAP). Although the member may choose whether or not to attend, it is required that all separating and retiring service members be afforded the opportunity to attend the Department of Labor (DoL) TAP Workshop.

(a) TAP is a three to five day workshop developed by the Departments of Labor and Defense to assist members in their transition. One day is devoted to discuss military/Navy-unique transitional topics.

(b) Host commands with TAP Workshops will coordinate logistics and program offerings to support tenant commands as well. Maximum publicity for information and counseling service opportunities is needed to ensure widest possible attendance.

(3) Command Career Counselor (CCC)

(a) Ensure each separating and retiring member receives a Pre-separation Interview. Ideally this should occur at least nine months prior to separation or retirement. Interview the member no later than 90 days prior to separation and assist the service member with the development of their own ITP. Every separating service member should receive a personal copy of The Pre-separation Guide (NAVPERS 15616) during the Pre-separation Interview. This publication is available through the stock system at no cost to the command. The stock number for the Pre-separation Guide (NAVPERS 15616) is: 0500-LP-010-1690.

(b) Conduct the Pre-separation Interview six to nine months prior to the anticipated separation date. Public Law 101-510 requires that all interviews be completed no later than 90 days prior to the actual separation date. Document Pre-separation Interview on DD Form 2648 and forward the original form to the Personnel Office/PSD for placement in the member's service record (this form will be retained in the permanent record which is forwarded to the Naval Records Center, St Louis, MO). Forward a copy of all completed DD Form 2648 forms to the TAMP Manger at the local Family Service Center no later than the 5th day of each month.

(c) Refer the service member to the proper sources of information to enable them to acquire the knowledge and skills required, making a smooth transition into the civilian workforce.

(d) Issue the Verification of Military Experience and Training Document (DD Form 2586) to the service member. This document is automatically queued for mailing to the CCC by the Defense Manpower Data Center (DMDC) 180 days prior to the separation or retirement date. Normal processing can take from six to eight weeks. If the CCC does not receive the form 120 days prior to anticipated date of discharge, contact the Navy TAMP Headquarters staff at (901) 874-4371 or DSN 882-4371. Questions or comments concerning policy or program information should be directed to the Navy TAMP Headquarters staff at (901) 874-4376 or DSN 882-4376.

**Navy Retention/Separation Questionnaire**

1. Officer and Enlisted Retention/Separation Questionnaires (OPNAV Form 1910/5 (1/90)) were developed to determine the reasons why service members leave active duty.

2. All members separating from active duty are requested to complete the questionnaire. Commands are required to complete and forward the front page for those members refusing to complete the questionnaire.

**Military Service Obligations**

1. All personnel who enter military service incur a Military Service Obligation (MSO) which may be satisfied by completing a combination of active duty and Ready Reserve time as follows:

a. Males, ages 18-26, who initially contracted prior to 1 JUN 84 incurred a six-year MSO.

b. Females, ages 18-26, incurred a six-year MSO after 31 JAN 78.

c. All members who enlist on or after 1 JUN 84 incur an eight-year MSO.

**Ready Reserve Categories**

1. Selected Reserve (SELRES) - Drilling/participating members assigned to organized reserve units.

2. Individual Ready Reserve (IRR) - Non-drilling members assigned to Naval Reserve Personnel Center (NRPC), Code 10, New Orleans LA.

a. Requirements:

(1) Must keep NRPC advised of change of address, phone number, marital/dependency status, medical condition, and reply to official correspondence received.

(2) Subject to mobilization.

(3) Attend one-day annual screening, if required.

3. Members completing their initial MSO will be granted a "Discharge" unless otherwise extended.

4. All males who have not reached their 26th birthday by separation date must register with the draft within 30 days after separation.

**Naval Reserve Programs**

1. Mission

a. The Naval Reserve assumes a vital role, as a component of the total force, by standing ready to augment the fleet in the event of a national emergency or wartime situation. Additionally, the Naval Reserve makes substantial contributions as many fleet units in the performance of peacetime operations.

b. Affiliation/enlistment procedures - sign an Enlisted Application and Orders to a Naval Reserve unit agreement to participate in SELRES as follows:

(1) Perform Inactive Duty Training (IDT)/Drills one weekend per month or as scheduled - 4 drill periods total (each drill is a minimum 4-hour training period).

(2) 48 scheduled drills annually.

(3) Attend 85% of regularly scheduled drills (40 of 48), and;

(4) Perform 12-14 days Annual Training (AT) per year.

2. Benefits

a. Pay

(1) One 4-hour drill period equals one full day's pay.

(2) Annual Training (AT) - full pay and allowances (excluding VHA).

b. Servicemember's Group Life Insurance (SGLI)

(1) Same coverage as active duty.

(2) Must perform a minimum of 12 drills annually to elect full coverage (to be covered 24 hours a day, 365/366 days a year).

c. Advancement

(1) Navy-wide examinations administered in FEB (E4-E7) and AUG (E4-E6).

(2) Time-in-rate retained if affiliation/enlistment occurs within 12 months of separation date.

(3) Members separated in a "selectee" status may request advancement upon joining the SELRES. Advancement authorized if affiliation/enlistment occurs within 6 months of separation.

d. Educational Opportunities

(1) Service schools

(2) Navy Campus programs (excluding Tuition Assistance).

(3) Reserve Montgomery GI Bill-Selected Reserve (RMGIB-SR), non-contributory.

(a) Eligibility criteria:

1 High school diploma or equivalent.

2 Incur a six-year SELRES service obligation.

(b) Monthly benefits:

1 **$255.00** for full-time attendance (36 months).

2 **$191.00** for 3/4 time attendance (54 months).

3 **$127.00** for 1/2 time attendance (72 months).

4 **$63.75** for less than 1/2 time attendance (90 months).

5 Total benefit: **$9,180**.

e. Uniforms.

f. Medical coverage.

g. Space "A" travel.

h. Exchange privileges.

i. Commissary privileges (24 visits per calendar year).

**IRR/Pre-Trained Individual Manpower Management System (PIMMS).**

1. Increased participation for Naval Reserve Retirement eligibility purposes. Points authorized for membership, Annual Training and successful completion of correspondence courses. A minimum of 50 points must be earned annually for a qualifying year.

**Naval Reserve Retirement**

1. Point System

a. Inactive Points (75 maximum allowed per year):

(1) Membership/Gratuitous

(2) Drills

(3) Correspondence Courses

b. Active Points:

(1) One point earned for each day of active duty served.

(2) 20 qualifying years:

(a) Must earn a minimum of 50 points per year while assigned to the Ready Reserve (SELRES/IRR).

(b) Last six years must have been served in a reserve component, need not be consecutive/continuous.

c. Formula/computation for retirement income:

(1) Total Points earned divided by 360 X .025 X Base Pay (at age 60) = Retirement Pay, if entered military prior to 8 SEP 80.

(2) Total Points earned divided by 360 X .025 X High 3 (at age 60) = Retirement Pay, if entered military on or after 8 SEP 80.

(3) Pay/benefits start at age 60.

***For further information, dial 1-800-USA-USNR***

**Training and Administration of Reserves (TAR) Program**

1. Purpose

a. Established subsequent to World War II to recruit, administer, instruct and train Naval Reserve personnel on inactive duty.

b. Available to:

(1) Officers of the Unrestricted Line, Supply Corps and Intelligence designators.

(2) Enlisted personnel in the following ratings: AC, AD, AE, AG, AK, AM, AO, AQ, AS, AT, AW, AX, AZ, BM, DC, DK, EM, FN, ET, HM, HT, IC, JO, MR, MS, NC, PH, PN, PR, RM, SK, and YN.

c. Benefits - eligible for all benefits, programs and privileges afforded Regular Navy personnel, with the exception of SRB.

d. Sea/Shore Rotation: 36/48

e. Eligibility Criteria for Personnel Desiring Conversion from USN to USNR(TAR):

f. Must be within 12 months of PRD/EAOS.

g. Personnel on "SRB" reenlistments must be within six months of EAOS.

h. Must have served on board present command for a minimum of 24 months.

i. Members will incur a 48-month minimum active duty obligation.

j. Certain members may have to take an administrative reduction in paygrade, based on billet availability.

**Veterans Benefits**

1. Conversion of Servicemember's Group Life Insurance (SGLI), in force at time of separation, to Veterans Group Life Insurance (VGLI):

a. Five-year, *renewable* term policy.

b. Application with first premium received within 120 days of separation - no proof of insurability required. After 120 days, plus one year - proof of insurability required.

c. Conversion possible to a commercial policy prior to the five-year term ending, without proof of insurability.

**Continued Health Care Benefit Program (CHCBP)**

1. Effective 1 OCT 94, separating members and their dependents can elect temporary health coverage through CHCBP.

2. Beneficiaries have sixty (60) days to enroll in CHCBP, but the period of coverage must begin on the day after entitlement to a military health care plan ends (including TAMP coverage).

3. CHCBP is not part of the TRICARE program; however, it functions under most of the rules and procedures of TRICARE. Unlike TRICARE however, the plan is not free. The quarterly premium is currently **$933** per individual and/or **$1,996** per family. This premium must be paid upon enrollment. Enrollment for coverage will be processed through the Health Benefits Advisor at Military Treatment Facilities or TRICARE offices.

4. For additional information contact: CHCBP Administrator, P.O. BOX 1608, Rockville, MD 20849-1608 or call 1-800-809-6119.

IMPORTANT NOTE: Unless a service member is leaving active duty under a special program (Retirement, VSI/SSB, Medical Discharges, etc.), military health coverage stops at 2400 on the day of separation.

**Dental Coverage**

1. Dental treatment not completed while on active duty may be requested through a VA hospital or civilian dentist (VA approval) required.

2. Application must be made within 90 days of separation.

a. Service-connected dental conditions will be treated by the VA on a case basis.

**Reemployment Rights**

1. Federal laws provide protection for those members who leave {permanent} civilian job positions to perform active duty or initial active duty for training.

2. Eligibility depends on length of service and whether member was inducted, enlisted or a reservist.

3. Must separate under honorable conditions.

4. Serve not more than four years on an initial active duty service contract. A 12-month extension is authorized provided it is for the convenience and at the request of the government.

5. Apply with 90 days after separation:

a. 31 days in the case of a reservist serving on initial active duty for training (ACDUTRA) of 12 consecutive weeks or more.

6. Reemployment will be in a position equal in seniority status and pay the veteran would have attained had the military absence not occurred.

## TRANSITION PLAN RESOURCES

| | BENEFITS AND SERVICES | RESPONSIBILITY |
|---|---|---|
| 1. | Pre-separation Counseling | CCC |
| 2. | Educational Assistance Benefits | NAVY CAMPUS/CCC/ CARIT/VA |
| 3. | Affiliation with Selected Reserve | CARIT/RESREC |
| 4. | Member Job Search Programs | FSC/TAP/CARIT/NPS |
| 5. | Job Search for Spouse | FSC/TAP/NPS |
| 6. | Relocation Assistance | FSC/CARIT |
| 7. | Medical/Dental Coverage | CARIT/FSC/MED |
| 8. | Effects of Career Change | FSC/CARIT |
| 9. | Financial Planning | FSC/NMCRS/CARIT |
| 10. | Compensation Entitlement for Medically Separated | MED/VA/NPS/CARIT |
| 11. | Documentation of counseling | CCC |

*LEGEND:*

| | | |
|---|---|---|
| *CCC* | - | *Command Career Counselor* |
| *CARIT* | - | *Career Information Team* |
| *FSC* | - | *Family Service Center* |
| *MED* | - | *Medical* |
| *NMCRS* | - | *Navy and Marine Corps Relief Society* |
| *NPS* | - | *Non-profit Service Organization (NCOA, TROA, AARP, DVA, etc)* |
| *RESREC* | - | *Reserve Recruiter* |
| *TAP* | - | *Transition Assistance Program* |
| *VA* | - | *U.S. Department of Veterans Affairs* |

# Chapter 8

## Fleet Reserve, Retirement, Survivor Benefit Plan (SBP), Reserve Component – SBP, and Death Benefits and Survivor Annuities

References: MILPERSMAN (NAVPERS 15560 Series)
ENLTRANSMAN (NAVPERS 15909 Series)
DODPM

**Fleet Reserve**

1. Purpose

a. The Fleet Reserve provides available former enlisted personnel who can be utilized without further training. In time of war or national emergency, Fleet Reserve members can be recalled without their consent.

2. Eligibility for Fleet Reserve Transfer

a. An enlisted member of the Regular Navy or Naval Reserve who has completed 20 or more years of active service in the armed forces may, at his request, be transferred to the Fleet Reserve.

b. ASAF includes active duty, annual training (AT), active duty for training (ACDUTRA), constructive time, and minority enlistments.

3. Constructive Time

a. Constructive time is credit given for enlistments terminated on or before 31DEC77 which were served to within three calendar months of normal expiration, and counted as a full enlistment.

4. Minority Enlistment

a. A type of constructive time allowing male enlistees whom had not reached their 18th birthday and who served within three calendar months of their EAOS (established at a day before their 21st birthday) were given credit for a completed enlistment and provided with four years ASAF.

5. Creditable Service Chart Eligibility Requirements

a. Serve a minimum activity tour (MAT) of two years on board present command or DOD activity tour if stationed overseas.

b. MCPO/SCPO/CPOs must serve at least two years service subsequent to effective date of advancement.

6. Officers

a. An officer of the Navy who applies for retirement after completing more than 20 years of active service, of which at least 10 years was service as a commissioned officer, may be retired on the first day of any month.

b. Retirement is initiated either upon request of the member or due to Defense Officer Promotion Management Act (DOPMA) time-in-service constraints.

7. Request for Transfer to the Fleet Reserve

a. Initiated using Application for Transfer to the Fleet Reserve (NAVPERS 1830/1).

b. Submit application to reach COMNAVPERSCOM 12-18 months prior to desired Fleet Reserve date.

c. Fleet Reserve is effective on the last day of the month. (Retirement is effective on the first day of the month.)

8. Fleet Reserve Is A Privilege

a. Transfer to the Fleet Reserve prior to completion of 30 years of active service is a privilege and not protected by public law.

9. Calculation of Retainer Pay

a. Computed by Defense Finance Accounting Service (DFAS) Cleveland, Ohio.

b. Projection of retainer pay is available from DFAS by submitting a Pre-Retirement Pay Information Request.

CH-1

c. Currently there are three different ways to compute retainer/retirement pay.

10. Basics of Retainer Pay Calculation

a. Factors that affect computation of retainer/retired pay include the following:

(1) Date of initial entry into active duty (or delayed entry obligation). CH-1

(2) Pay scale in effect.

(3) Member’s Pay Entry Base Date (PEBD).

(4) Amount of Active Service in the Armed Forces (ASAF).

(5) Active service is rounded down to the lowest month and converted to a decimal.

(a) Example: 23 years, 5 months, 23 days = 23 years, 5 months = 23.4166 years

(6) If the member has been credited by the Secretary of the Navy with extraordinary heroism in the line of duty, which determination by the Secretary is final and conclusive for all purposes, his retainer pay shall be increased by 10 percent.

b. Prior to 8 September 1980

(1) Basic Pay x .025 x ASAF.

(2) Equals fifty percent of final basic pay upon 20 years of service.

(3) Increase 2.5% for each additional year served, up to 75% upon reaching 30 years active service.

(4) Annual cost-of-living adjustments to match inflation, as measured by the Consumer Price Index (CPI).

c. From 8 September 1980 to 31 July 1986

(1) Average of highest 36 months (high three average) of basic pay x .025 x ASAF.

(2) Equals 50% of the three highest earning years upon reaching 20 years of active service.

(3) Increase 2.5% for each additional year, up to 75% upon reaching 30 years of active service.

(4) Annual COLA adjustments to match inflation, as measured by the CPI.

d. On or after 1 August 1986

(1) Average of highest 36 months of basic pay x .025 x ASAF minus 1% for each year less than 30 years of active service.

(2) Equals 40% of high three average of basic pay upon reaching 20 years of active service.

(3) An increase of 3.5% for each additional year, up to 75% upon reaching 30 years active service.

(4) Annual cost of living adjustments equal one percentage point below the CPI inflation rate until retiree reaches age 62.

(5) One-time recomputation of monthly retirement pay at age 62 to recover purchasing power lost to inflation. After age 62, COLAs will remain one percentage point below inflation.

**Retirement**

1. Non-Disability Retirement

a. Enlisted members who have completed 30 years active military federal service will be retired at the enlisted paygrade they are serving in (except for personnel that have held Warrant or commissioned status).

b. Applications should be submitted 9-12 months prior to requested date, however, applications can be submitted up to 18 months in advance.

c. Retirement dates are effected on the 1st day of the retirement month.

d. Fleet Reserve personnel will automatically be placed on the Retired List upon reaching 30 years total military service.

2. Temporary Disability Retired List (TDRL)

a. Must be on active duty and entitled to receive basic pay.

b. Must have at least 20 years of service creditable for retirement or have a disability rating of 30% or more.

c. Physical examination required every 18 months.

d. Can remain on TDRL for a maximum of five years.

3. Permanent Disability Retired List (PDRL)

a. The PDRL consist of members who have been found to be permanently unable to perform the duties of their rank/rating by

reason of a physical disability that is permanent.

b. Must be on active duty entitled to receive Basic pay or on the TDRL.

4. Computing Disability Retired Pay

a. Length of service method: .025 X Basic Pay X Years of Active Service (YAS).

b. Percentage method: 50% minimum to 75% maximum of Basic Pay for time assigned on the TDRL. 30% minimum to 75% maximum of Basic Pay while assigned to the PDRL.

c. Either method may be selected to allow a member to receive the highest pay.

5. Disability Severance Pay

a. Payment made to personnel who receive a physical disability while on active duty that do not qualify for disability retirement.

b. Have less than a 30% disability rating.

c. Pay computation: two months Base Pay X YAS (YAS cannot exceed 12 years for computation purposes).

**Survivor Benefit Plan**

1. Definition

a. Survivor Benefit Plan (SBP) is a voluntary program that allows military retirees the opportunity to provide an annuity of up to 55% of their retired pay to eligible survivor(s). Important Note: When a military retiree dies, their retirement pay stops.

2. Basic Mechanics

a. A retiree selects a dollar amount at the time of enrollment. This “Base Amount” may be any amount between $300 and the retiree’s full gross retired pay.

b. The survivor’s monthly annuity and the monthly premium paid by the retiree are based upon this amount.

3. Service Member Eligibility

a. Upon retirement (or Fleet Reserve transfer), SBP enrollment with the maximum amount of coverage is automatic unless he/she specifically declines to participate or elects to participate with a reduced amount of coverage. Spouse must concur in writing.

b. The same rules, regulations, and laws apply to TERA retirees.

c. Fleet Reserve eligible Sailors serving on active duty are automatically covered by SBP at the maximum level.

d. A version of SBP, called Reserve Component (RC-SBP), also exists for retirees of the Reserve program.

4. Categories of Beneficiaries

a. There are six categories of beneficiaries that may be elected to receive survivor protection under SBP. The category selected determines the amounts of the survivor's annuity and the amount of the retiree's premium.

b. Six Categories of Beneficiaries

(1) Spouse Only

(2) Spouse and Child(ren)

(3) Child(ren) Only

(4) Former Spouse

(5) Former Spouse and Child(ren)

(6) Persons with an Insurable Interest

c. Definition of each coverage

(1) Spouse Only:

(a) Covers widow(er) married to retiree at time of retirement, or married to retiree for at least one year before retiree's death. Written concurrence of spouse required to decline coverage or elect a reduced amount.

(b) Automatically applies to any future spouse unless retiree declines coverage for new spouse within one year of marriage. Concurrence of new spouse not required, but they will be notified.

(c) Surviving spouse receives annuity until death or until remarriage if under age 55.

(d) If remarriage later ends (death, divorce, etc.), entitlement to the annuity may be restored.

(e) Remarriage after age 55 does not terminate entitlement to the SBP annuity.

(f) A surviving spouse's annuity is 55% of the "Base Amount" elected by the retiree until the surviving spouse reaches age 62.

(g) At age 62, the annuity is reduced to 35% of the Base Amount due to the spouse's Social Security survivor benefits which are based on the retiree's active duty income.

(2) Spouse and Children:

(a) Expands coverage to child(ren) if there is no surviving spouse, or if the surviving spouse subsequently becomes ineligible for benefits due to remarriage before age 55.

(b) Essentially, payment will be made to the surviving child(ren) as if the member had elected "Children Only" coverage.

(3) Children only:

(a) Provides an annuity to dependent child(ren) regardless of whether a retiree is married or not at time of enrollment. If married, spouse must concur with "Child(ren) Only" coverage.

(b) Child(ren) are beneficiaries until age 18 (or 22 if a full-time, unmarried student). Children mentally or physically incapable of supporting themselves are eligible as long as incapacitation exists or until marriage.

(c) Children's annuities are 55% of retiree's "Base Amount" as long as they remain eligible and are NOT reduced due to entitlement to other government benefits.

(d) Annuity is equally divided among children.

(e) Payment is made to child's parent or guardian until age 18 (or 22 if a full-time, unmarried student).

(f) A retiree with no dependent children at time

of retirement may add children later acquired, but child must be added within one year of birth or adoption.

(g) A retiree with dependent children at time of retirement who does not elect to cover them may not later elect to cover them.

(4) Former Spouse:

(a) Retiree's may voluntarily elect SBP coverage for former spouses.

(b) State courts are permitted to order members to elect former spouse coverage for court orders issued on or after 14 NOV 96. Former spouses are ineligible if they remarry prior to age 55.

(c) A former spouse acquired after retirement must have been married to the retiree for at least one year to be named as a former spouse beneficiary.

(d) Former spouse elections are permanent and irrevocable, with a few exceptions (i.e., retiree remarries and gets a court order to drop the former spouse and cover the current spouse, etc.). A qualified attorney should be consulted for specific guidance.

(5) Former Spouse & Children:

(a) Provides equal annuity amounts, and monthly premium costs are at the same rate as coverage for current spouse and dependent children.

(6) Persons with an Insurable Interest:

(a) Allows retirees WITHOUT spouse or dependent child(ren) at time of retirement to cover a person who has a bona fide financial interest in the continued life of the retiree.

(b) A person who has a reasonable and lawful expectation of pecuniary benefits from the continued life of the member. It may include parents, stepparents, grandparents, grandchildren, aunts, uncles, sisters, brothers, half sisters, half bothers, dependent or nondependent child or stepchild, or any person more nearly related than a cousin.

(c) Annuity is 55% of retiree's full retired pay after the premium is deducted.

(d) There is no offset for other government benefits to which the recipient is entitled.

(e) A retiree may elect to discontinue insurable interest coverage at any time.

(f) If retiree marries, he or she may change insurable interest coverage to spouse and/or child(ren) coverage, if so desired.

5. Cost (Premiums)

a. Entered active duty on or after 1 MAR 90: retiree's Base Amount x 6.5%.

b. Entered active duty before 1 MAR 90: retiree's Base Amount x 6.5% OR 2.5% of the first ***$484** of retiree's Base Amount, plus 10% of the remaining Base Amount, whichever is a lower cost. (*Amount increases at same time and rate as COLA for active duty military pay.)

c. Spouse Only or Children Only Coverage:

(1) Calculated using an actuarial factor determined by a combination of the age of the retiree and the retiree's youngest child at the time of enrollment.

(2) Typical premium is about 2.5% of the Base Amount, but could be higher or lower.

d. Spouse and Children Coverage:

(1) Calculated at rate for spouse (or former spouse), plus a small additional charge for child(ren) portion.

(2) The amount of the additional charge for the child(ren) portion is based upon an actuarial factor that considers retiree's age, spouse's age, and age of youngest child.

(3) Typical premium average one-half of 1% of the Base Amount, but could be higher or lower.

e. Insurable Interest Premiums:

(1) Premiums are 10% of the retiree's gross retired pay, plus an additional 5% for each five full years the beneficiary is younger than the retiree.

(2) Premium cannot exceed 40% of the retiree's pay.

f. Social Security Offset:

(1) SBP guarantees survivors will receive income equal to 55% of the retiree's Base Amount.

(2) Under age 62, benefit is provided solely by SBP. After age 62, it's a combination of SBP and Social Security benefits, because the federal government pays part of the cost for both SBP and Social Security.

g. Dependency & Indemnity Compensation (DIC) Offset:

(1) Whenever a surviving spouse is also entitled to DIC, the SBP annuity is offset by the amount of the DIC payment.

(2) The total of the two amounts will be equal to full SBP. The DIC portion is nontaxable.

(3) If spouse loses DIC eligibility, SBP may be paid provided eligibility is met.

h. COLA Adjustments:

(1) SBP annuities and premiums are adjusted at the same time and the same percentage as military retired pay, which is usually the same annual increase as the CPI.

(2) This benefit protects the purchasing power of the survivor's annuity.

i. Tax Treatment:

(1) The SBP premiums are NOT counted as taxable income. This makes the actual cost for SBP even less expensive.

(2) The SBP annuities are considered taxable income for federal tax purposes, although many states exempt SBP annuities in whole or in part.

6. Benefits of SBP

a. SBP is the <u>only</u> means by which a portion of retired pay can be continued for survivors.

b. The premiums are tax-free and the annuity is COLA-adjusted to protect buying power.

c. Eligibility is NOT dependent on risk factors such as age or health.

d. There are no hidden costs or extra fees.

e. The annuity continues for the life of the beneficiary.

7. SBP Decision Software

a. A software program is available to assist Sailors with evaluating and comparing important factors about SBP.

b. The SBP software program should be available in the Command Career Counselor's office.

**Death Benefits and Survivor Annuities**

1. Death Gratuity

a. $6,000

(1) Lump sum payment made to eligible survivor(s) immediately upon death of service member.

2. Servicemember’s Group Life Insurance (SGLI)

a. **$200,000** ($16 monthly premium)

3. Dependency and Indemnity Compensation (DIC)

a. Monthly compensation (tax-free) to surviving dependent(s) for loss of financial support.

b. Death of service members on or after 1 JAN 93:

(a) **$881** (spouse)

(b) **$222** (per eligible child)

4. Dependents’ Education Assistance (DEA)

a. Upon death or permanent disability of service member, DEA is authorized to Spouses who have not remarried and to eligible children (generally between 18 and 26).

b. Associate, bachelor or graduate degrees.

c. **$485** a month for full-time attendance.

d. 45 full-time months or equivalent in part-time training.

e. **$21,825** total benefit.

f. 10-year limiting date from eligibility.

5. Burial Allowances

a. Preparation.

b. Encasement.

c. Transportation of remains.

d. Burial in a private or national cemetery.

e. Burial expenses paid by the Navy.

(1) Up to **$3,100** if internment is made in a private Cemetery.

(2) **$2,000** if remains are consigned to a funeral director prior to burial in a national cemetery (includes burial at sea).

(3) **$110** if remains are consigned directly to a national cemetery (includes burial at sea).

# APPENDIX H

## NAVAL RESERVE
## CAREER INFORMATION TRAINING COURSE
## (USNR CITC)

KNOWLEDGE OF RESERVE PARTICIPATION Time: 1:00 HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe the types of inactive duty training (IDT)

2. State the statutory limits associated with IDT periods

    a. Duration

    b. Fiscal Year

3. State the criteria for satisfactory reserve participation

4. Explain the actions taken for unsatisfactory participation

**Trainee Preparation**

A. Trainee Support Material:

    1. None

B. Reference Publications:

    1. BUPERSINST 1001.39(Series)
    2. COMNAVRESFORINST 1001.5(Series)
    3. ALNAVRESFOR 12/95
    4. ALNAVRESFOR 11/96

**Instructor Preparation**

A. Review Assigned Trainee Material.

B. Reference Publications:

    1. BUPERSINST 1001.39 (Series)
    2. COMNAVRESFORINST 1001.5 (Series)
    3. ALNAVRESFOR 12/95
    4. ALNAVRESFOR 11/96

DISCUSSION POINT

1. Types of Inactive Duty Training (IDT)

a. Regular

IDT’s performed per a published schedule established n advance by the unit commanding officer to meet the training and administrative requirements of the unit.

b. Reschedule

Regular IDT’s that are performed on an individual or group basis on a different date from the published unit schedule. They are scheduled due to a conflict with Annual Training (AT) or Active Duty for Training (ADT), or **to accomplish a specific training requirement or contributory support**. Rescheduled IDTs may be performed the month before, during or after the regularly scheduled IDT.

c. Equivalent Training (ET)

Training periods performed on an individual basis, as directed by the unit commanding officer, to accommodate an excused absence from a regular or

1. Reference BUPERSINST 1001.39 (Series) Chapter 12

rescheduled IDT **for personal reasons**. ET's may be performed the month before, during or after the regularly scheduled IDT. **Only FOUR paid ET periods are authorized per fiscal year.** Any more than four ET periods will be performed without pay. All ETs count toward satisfactory participation.

d. Additional

(1) Special training periods allocated to specific program and units in addition to regular IDT periods. They are implemented by Commander Naval Reserve Force (COMNAVRESFOR) to provide the opportunity to obtain readiness training which cannot be accomplished within the normal 48 IDTs per fiscal year schedule.

(2) May be performed with or without pay.

e. Flexible

Provides unit CO's added flexibility to schedule IDTs periods and accomplish peacetime contributory support or complete formal school training. Flexible IDTs may be performed separately or with AT, ADT, or Inactive Duty Training Travel (IDTT). CO's are authorized to schedule up to a maximum of 40 IDT periods per fiscal year. The remaining eight IDT

d. Reference COMNAVRESFORINST 1001.5(Series) Chapter 8

e. Reference ALNAVRESFOR 20/95

periods (two per quarter) will be performed at the supporting Naval Reserve Activity (NRA) to accomplish organizational and administrative requirements. Participation in this program is voluntary and will not be directed by unit CO's.

f. Authorized Absences (AA)

Authorized when there is not a requirement to make-up missed IDT periods and meaningful training is not available. AAs may be assigned for the following reasons:

f. Reference COMNAVRESFORINST 1001.5(Series) Chapter 6, paragraph 604.c.

(1) AT/ADT Conflict

(2) Airlift to aviation training site has been canceled.

(3) Temporary work conflicts/personal hardships for up to a period of three months with approval from the unit CO.

2. Statutory limits associated with IDT periods

a. Duration

(1) Minimum duration of any paid IDT is four hours.

a. BUPERSINST 1001.39 (Series) Chapter 12

(2) Maximum duration of a IDT is 24 hours.

b. IDT limitations

(1) No more than two IDT periods may be performed in one day.

(2) No more than 48 regular IDT periods may be performed in a fiscal year.

3. Criteria for satisfactory reserve participation

a. Selected Reservists in a pay and non-pay (VTU) must attend a minimum of 90 percent (43 of 48) scheduled Inactive Duty Training (IDT) periods. Percentage of attendance is based on a progressive 12 month period. This attendance is computed by counting IDT attendance, starting from and including the month of the last regular IDT and counting back 12 months.

b. Perform a minimum of 12 days Annual Training (AT) within each fiscal year.

c. Must report for scheduled physical examination.

d. Responsible for the receipt/response to all official correspondence.

3. Reference BUPERSINST 1001.39(Series) Chapter 11. Pass out NAVRES 1570/2.

e. Members must keep their commanding officer informed of:

(1) Current address and work/home phone number

(2) Changes in physical status

(3) Dependency changes

(4) Current employment status

(5) Other factors which could jeopardize mobilization potential

4. Actions taken for unsatisfactory participation

a. When a member fails to meet the satisfactory participation requirements, he or she will no longer be eligible for receipt of Reserve Incentive Bonus, MGIB-SR entitlement, Reserve Officer Stipend and recommendation for advancement or promotion. Additionally, one of the following administrative actions will be taken:

(1) Non-obligor personnel

(a) Place on six months probation

4. BUPERSINST 1001.39(Series) Chapter 11

(b) Removed from IDT assignment and transferred to the IRR

(c) Processed for administrative separation

(2) Sea/Air Mariners (SAM) personnel

(a) Place on six months probation

(b) As determined by NRA CO, if member has demonstrated mobilization potential, transfer member to the IRR.

(c) If NRA CO has determined member does not have mobilization potential, process member for administrative separation

(2) Reference ALNAVRESFOR 11/96

(3) Advanced Pay Grade (APG) personnel

(a) Place on six months probation

(b) Removed from IDT assignment and transferred to the IRR in his or her permanent rate

(c) Processed for an administrative separation in his or her permanent rate.

(3) Reference BUPERSINST 1001.39(Series) Chapter 11

RESERVE CAREER INFORMATION TRAINING COURSE
__KNOWLEDGE OF RESERVE PAY, ALLOWANCES AND ENTITLEMENTS
Time: 1:00HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe the pay authorized for Selected Reserve personnel.

2. Describe the allowances authorized for Selected Reserve personnel.

3. Describe the policy for commissary privileges.

4. Describe the policy for Exchange/Morale, Welfare and Recreation (MWR) facilities usage.

5. Describe the policy and procedures regarding Servicemen's Group Life Insurance (SGLI).

**Trainee Preparation**

A. Trainee Support Material:

1. None

B. Reference Publications:

1. BUPERSINST 1001.39(Series)
2. COMNAVSURFRESFORINST 7220.1(Series)
3. SECNAVINST 7220.77(Series)

**Instructor Preparation**

A. Review Assigned Trainee material.

B. Reference Publications:

1. BUPERSINST 1001.39(Series)
2. COMNAVSURFRESFORINST 7220.1(Series)
3. SECNAVINST 7220.77(Series)

DISCUSSION POINT

1. IDT

a. Basic Pay. One-thirtieth of a member's monthly basic pay prescribed for pay grade and years of service for each IDT.

1. Reference BUPERSINST 1001.39(Series) Chapter 14

b. Incentive Pay. One-thirtieth of the monthly incentive pay in effect for each IDT if hazardous duty is performed under orders or, as authorized for Aviation Career Incentive Pay (ACIP).

c. Special Pay. One thirtieth of the monthly special pay for each IDT if duty is performed under orders. Special pay may include:

(1) Diving Duty Pay. Authorized for personnel assigned to units authorized to engage in diving operations.

(1) Reference COMNAVSURFRESFORINST 7220.1

(2) Fleet Pay. Members assigned to designated NRF ships are authorized an additional pay of $10.00 per IDT up to 60 IDTs per fiscal year. Commander, Naval Surface Reserve Force publishes a message designating those reserve units authorized this additional pay.

(2) Reference current COMNAVSURFRESFOR message regarding Fleet Pay Test

d. Limitations. A member cannot accrue pay for IDTs performed on a day in which he or she is also entitled to basic pay for active duty or ADT/AT.

2. Annual Training (AT) With pay.

a. Basic Pay. One-thirtieth of a member's monthly basic pay prescribed for pay grade and years of service for each day actually served.

b. Special and Incentive Pay. As determined by orders.

c. Basic Allowance for Quarters (BAQ). As determined by dependency status, quarters in kind or commutation thereof.

d. Basic Allowance for Subsistence (BAS). As determined by the activity to which reporting for duty, subsistence in kind or commutation thereof.

d. Reference BUPERSINST 1001.39(Series) Chapter 14

e. Sea Pay. May be authorized while performing AT aboard designated ships.

e. Reference SECNAVINST 7220.77(Series)

f. Travel pay. Travel pay or transportation in kind as determined by the Joint Federal Travel Regulations (JFTR).

g. Per Diem. A daily payment for lodging, meals, and related incidental

g. Reference BUPERSINST 1001.39(Series)

expenses. Advance per diem may be paid to reservists performing a minimum of five continuous days of AT at sites **where government quarters or messing facilities are not available**. When there are disbursing facilities at the AT site, the per diem advance will be made after the reservist reports. If there is not a disbursing facility at the AT site, the disbursing officer servicing the activity where the reservist performs regular IDTs will make the advance to the member before he or she reports for AT.

3. Commissary privileges.

a. Entitlement is based on participation in the Ready Reserve. A member must earn 50 or more retirement points during a calendar year to be eligible for 12 commissary visits. The Commissary Privilege Card (CPC) will be issued on a calendar year basis with the qualifying year beginning on 1 January and expiring on 31 December of the calendar year for which the entitlement is issued. Example: Between 1 January 1994 and 31 December 1994, a reservist acquires 52 points. The reservist is subsequently issued a commissary privilege card which entitle him or her to 12 days of commissary privileges in calendar year 1995.

3. Reference BUPERSINST 1001.39(Series) Chapter 18

b. During any type of Active Duty for Training: members of the Ready Reserve are authorized unlimited usage of military commissaries during the inclusive period of the active duty.

c. Identification Requirements:

(1) Members must present their Armed Forces Identification Card and CPC or copy of orders as appropriate.

(2) Family members must present their DOD Guard and Reserve Family Member Identification Card, and CPC or copy of their sponsor's orders as appropriate.

4. Military Exchange/Morale, Welfare and Recreation.

a. Selected Reservists and their eligible family members are authorized to use the exchange and MWR facilities on the same basis as members serving on active duty.

b. Identification Requirements:

(1) Member must present their Armed Forces Identification Card.

(2) Family members must present their DOD Guard and Reserve Family Member Identification Card.

4. Reference BUPERSINST 1001.39(Series) Chapter 17

5. Servicemen's Group Life Insurance (SGLI).

a. Eligibility

(1) Ready Reserve members (pay or non-pay) who are assigned to a unit which they may be required to perform active duty or Active Duty for Training (ADT), and will be scheduled to perform at least 12 IDT periods annually are authorized the maximum amount of basic coverage, 365 days a year, in the amount of $200,000.

b. Coverage

(1) Coverage in the maximum amount of coverage provided without required action by the member.

(2) Coverage at a lesser amount in increments of $10,000 - member must submit a SGLV-8286, Servicemen's Group Life Insurance Election.

(3) Decline coverage - member must submit SGLV-8286.

c. Premiums

(1) Selected Reserve - DFAS Cleveland Center will make monthly deductions from the pay accounts of SELRES members.

5. Reference BUPERSINST 1001.39(Series) Chapter 15

(2) Non-pay personnel - DFAS will forward computerized billing statements for SGLI premiums to non-pay members.

d. Beneficiary designation. If a beneficiary has not been designated, the following order of eligibility applies:

(1) Widow or widower; if none, insurance is payable to:

(2) Child or children in equal shares with the share of any deceased child distributed among the descendants of that child; if none, insurance is payable to:

(3) Parent(s) in equal shares; if none, insurance is payable to:

(4) A duly appointed executor or administrator of the insured's estate, and if none to:

(5) Other next of kin.

e. If a member does not want the insurance paid as above, a SGLV-8286 must be completed to designate desired beneficiaries.

RESERVE CAREER INFORMATION TRAINING COURSE
_KNOWLEDGE OF THE ENLISTED ADVANCEMENT SYSTEM
Time: 1:00HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe criteria for test applicability

    a. Active

    b. Inactive

2. Define acronyms and time periods associated with Naval Reserve advancements

3. State the requirements for participation in the Navywide examination

4. Explain E2 and E3 requirements

**Trainee Preparation**

A. Trainee Support Material:

    1. None

B. Reference Publications:

    1. BUPERSINST 1430.16(Series)
    2. NAVADMIN 135/95

**Instructor Preparation**

A. Review Assigned Trainee Material.

B. Reference Publications:

    1. BUPERSINST 1430.16(Series)
    2. NAVADMIN 135/95

DISCUSSION POINT

1. Test applicability

a. Active

(1) Enlisted personnel of the regular Navy and Naval Reserve on active duty, including Training and Administration of Reserves (TARs), Active Duty for Special Work/One Year Recall (ADSW/OYR), and Canvasser Recruiter (CANREC) personnel ordered to and serving on active duty for one year or more. Any combination of the above categories with less than a 31 day break between periods of active duty, constitutes continuous active service and such personnel will participate in the active duty examination process.

b. Inactive

(1) Those personnel in a Inactive Duty Training Naval Reserve unit with a participation requirement including:

(a) On Special Active Duty for Training (ADT) or Active Duty for Special Work (ADSW) for periods of less than one year.

(b) On Annual Training (AT);

(c) Any combination of the above categories with more than a 30 day

1. Reference BUPERSINST 1430.16(Series) Chapter 1, paragraph 104

break between periods of active duty, ADSW/OYR, AT, ADT, or duty as a CANREC constitutes a break in active duty and such personnel participate in the inactive duty examination process.

2. Acronyms and time periods associated with the advancement system.

a. Time in Rate (TIR)

(1) The date from which service in paygrade is computed to determine eligibility for advancement to the next higher paygrade.

(2) For paygrades E4 through E9, TIR is the first day of the first increment month for that cycle's advancement no matter when the member actually gets paid for advancement.

(3) TIR date varies for paygrades E1 through E3.

(4) There are a number of ways to reestablish a TIR date depending on the conditions of enlistment or reenlistment. A few examples are as follows:

(a) Continuous Service Conditions is a period of less than 12 months in which a member was not a participating member of a drilling Naval Reserve unit, (Between periods of affiliation or period between

a. Reference BUPERSINST 1430.16(Series) Chapter 3, paragraph 301.12

release/discharge from active duty and affiliation with a drilling Naval Reserve unit). The TIR date will remain the same.

(b) Broken Service Conditions is a period of 12 months or more in which a member affiliates, enlists, reenlists in a drilling reserve unit after release/ discharge from active duty or transfer/discharge from a Naval Reserve drilling unit. The TIR date now becomes the date of the most recent affiliation with the Naval Reserve.

(c) Advanced Paygrade Personnel (APG). The TIR date is the date of affiliation/reaffiliation with a Naval Reserve drilling unit.

(d) Sea and Air Mariner (SAM) personnel. The TIR date begins when the member reports to Initial Active Duty for Training (IADT).

b. Terminal Eligibility Date (TED)

(1) The date following the exam to which service in paygrade (SIPG) is computed to determine eligibility for advancement to the next higher paygrade.

b. Reference BUPERSINST 1430.16(Series) Chapter 3, paragraph 301.11.2

c. Service in Paygrade (SIPG)

(1) That period of months, commencing with the TIR date and ending

with the TED, required for advancement to the next higher paygrade.

d. Limiting Date

(1) The last date of an advancement cycle in which an individual may be advanced after passing the Navy-wide Examination for advancement in rate/ rating.

d. Reference BUPERSINST 1430.16(Series) Chapter 8, paragraph 808.3

3. Requirements for participation in the Navywide examination

a. Navywide examinations for PO3 through PO1 are administered semi-annually in March and September for active duty and February and August for inactive duty candidates.

a. Reference BUPERSINST 1430.16(Series) Chapter 1, paragraph 105.6

b. Navywide examinations for E7 are administered in January for active duty and February for inactive duty candidates.

(1) Minimum TIR requirements

(2) Commanding Officer's recommendation

(3) Personnel Advancement Requirements (PARs)

(4) Mandatory training manuals

(5) Performance Tests

(1) Reference BUPERSINST 1430.16(Series) Chapter 3

(2) Reference BUPERSINST 1430.16(Series) Chapter 2, paragraph 200.2.6

(3) Reference BUPERSINST 1430.16(Series) Chapter 3

(6) Completion of required service school

(7) Naval Leadership Course (NAVLEAD) for E7/E8 candidates

(8) Must be assigned to a unit with a participation requirement and maintain satisfactory participation status

**NOTE: The Annual Training (AT) requirement has been deleted for advancement eligibility.

(8) Reference NAVADMIN 135/95

4. E2 and E3 advancement requirements

a. TIR requirements for both is nine months in the current paygrade.

a. Reference BUPERSINST 1430.16(Series) Chapter 3, paragraph 301.11.1

b. E3 examinations are encouraged but not mandatory (mandated by local authority).

b. Reference BUPERSINST 1430.16(Series) Chapter 1, paragraph 105.a

c. Advancement date is always the 16th of a month.

c. Reference BUPERSINST 1430.16(Series) Chapter 8, paragraph 807

(1) For a member who completes all requirements (including service in paygrade) between the 1st and 16th of a month can be advanced on the 16th of THAT month.

(2) For a member who completes all requirements (including service in paygrade) between the 17th and the last day of the month can be advanced on the 16th of the FOLLOWING month.

RESERVE CAREER INFORMATION TRAINING COURSE
__KNOWLEDGE OF NAVAL RESERVE EDUCATION PROGRAM
Time: 1:00HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe the Montgomery GI Bill-Selected Reserve

2. Describe the Defense Activity Non-Traditional Educational Services (DANTES)

3. Describe Naval Reserve Health Professional Scholarship Programs

4. Describe the Department of Veterans Affairs Health Professional Scholarship Program

5. Describe the Department of Veterans Affairs Work-Study Allowance Program

**Trainee Preparation**

A. Trainee Support Material:

1. None

B. Reference Publications:

1. COMNAVRESFORINST 1780.1(Series)
2. COMNAVRESFORINST 1100.5(Series)
3. COMNAVRESFORINST 1131.3(Series)
4. HSECTINST 1500.53(Series)

**Instructor Preparation**

A. Trainee Support Material:

1. None

B. Reference Publications:

1. COMNAVRESFORINST 1780.1(Series)
2. COMNAVRESFORINST 1100.5(Series)
3. COMNAVRESFORINST 1131.3(Series)
4. HSECTINST 1500.53(Series)



DISCUSSION POINT

1. Montgomery GI Bill-Selected Reserve(MGIB-SR)

a. Established on 1 July 1985 and amended as a permanent program on 1 June 1987. Requirements are::

(1) Both officer and enlisted members of the Selected Reserve (SELRES) who obligate for six years and participate satisfactorily.

(2) Complete the requirements of a high school diploma, an equivalency certificate, or completing 12 semester hours of college prior to completing Initial Active Duty for Training (IADT). Personnel who do not meet this requirement, but subsequently receive their

high school diploma or equivalency may then become eligible by executing a new six year obligation.

(3) Complete required IADT under prescribed regulations. Their is no required IADT for members accessed under the Advanced Pay Grade (APG) program.

(4) Not receiving of financial assistance for a NROTC scholarship

1. Reference COMNAVRESFORINST 1780.1(Series)

b. MGIB-SR is divided into three phases:

(1) Original

(a) Members incur a six year contract on or after 1 July 1985.

(b) Not possess a Baccalaureate degree or equivalent

(2) Enhanced

(a) On 1 October 1990, the baccalaureate or equivalency degree possession was eliminated. This allows for a member to obtain multiple degrees and vocational/technical training were added.

(b) Personnel must enlist, reenlist or extend service obligation for a period of six years

(c) Personnel who were ineligible under the original program must reenlist for a period of six years to obtain eligibility under this program.

(d) Personnel who were eligible and received their baccalaureate degree prior to 1 October 1990 may pursue a second degree but must reenlist for a second six year obligation

(e) Officers must sign an Administrative Remarks service record page 13 agreeing to serve satisfactorily in the SELRES for at least six years to obtain eligibility under this program.

(3) Expanded

(a) On 30 November 1993 MGIB-SR was expanded to include graduate level studies

(b) Members under either the original or enhanced benefits who have remaining entitlement and who take graduate courses on or after 30 November 1993 are eligible.

c. Benefits

(1) The maximum number of educational assistance is 36 months of full-time pursuit (or the equivalent based upon three-quarter, half-time or less than half-time)

(2) Educational assistance is available only for pursuit of a program of education at an institution of higher learning (i.e. colleges, universities, including technical or business schools) as approved by the Department of Veterans Affairs (DVA) benefits

d. MGIB-SR benefits end:

(1) 10 years from the date the member first became eligible. This is known as the delimiting date. The DVA automatically extends the delimiting date by the number of days member was recalled to active duty plus 120.

(2) When a member is declared an unsatisfactory participant in the SELRES. Eligibility for MGIB-SR can not be regained once a member is declared an unsatisfactory participant by the Navy or any other Armed Forces Reserve Component.

(3) On the date of separation from the SELRES, unless member:

(a) Is separated for a disability not the result of willful misconduct

(b) Prevented from pursuing an educational program because of a physical or mental disability incurred or aggravated in the line of duty

(c) Involuntarily separated from a SELRES status 1 October 1991 through 30 September 1999 and approved for Reserve Transition Benefits (RTB). Original 10 year delimiting date is retained.

2. Defense Activity for Non-Traditional Education Support (DANTES)

a. Selected Reservists are eligible for several DANTES programs including:

(1) Servicemember’s Opportunity College - Navy (SOCNAV)

(a) Awards credits appropriate to the curriculum for non-traditional or other Navy rate and rating experience, based on recommendations in the American Council on Education (ACE) Guide to the evaluation of Educational experiences in the Armed Forces

(b) College credits are appropriately awarded for non-traditional or other prior learning, from the results of one or more nationally recognized standardized tests (i.e. CLEP, ACT) based on the recommendations in the ACE Guide or other means of evaluation the college may use.

(2) DANTES examinations. There are five types of examinations available through DANTES:

(a) High School Equivalency. The examinee receives a High School Credential from five battery tests under the General Education Development (GED)

(b) College admission such as the American College Testing (ACT) and Scholastic Assessment Test (SAT)

(c) College Level Examination Programs (CLEP) tests on specific subject matters dealing primarily with academic content

(d) Professional certification provides an opportunity to document military skills that is readily understood in the civilian community, such as Board of Certified Safety Professionals (BCSP) and National Registry of Emergency Medical Technicians (EMT)

(e) Interest and Assessment Inventories provides several guidance tests that help determine the service member’s area of interest, their aptitude in certain areas and their ability

3. Naval Reserve Scholarship Programs

a. Selected Reserve Recruitment Bonus Test (SRBT) for Health Professionals

(1) Designed to recruit physicians in a variety of specialty fields

3. Reference COMNAVRESFORINST 1131.3(Series)

(2) Candidates must meet all eligibility requirements as outlined in COMNAVRESFORINST 1131.3 (Series)

(3) Participants in the program are required to affiliated in a SELRES billet for a period of one, two or three years at the time of recruitment. Participants must
perform satisfactorily in the SELRES including at least 12 days of Annual Training (AT) each year. Waivers of AT, although allowed by other directives, do not apply to this program

(4) Entitlement

(a) Anesthesiologists, orthopedic surgeons, general surgeons, neurosurgeons, urologists, diagnostic radiologists, family physicians, internal medicine, oral surgeons, physician assistants, and nurse anesthetists shall be entitled to $10,000 for each year of affiliation contracted at time of recruitment

(b) Operating room nurses and other nurses shall be entitle $3,000 for each year of affiliation contracted at time of recruitment

(5) Entitlement will be terminated when a participant completes the contracted period of SELRES service; or

(a) Fails to satisfactorily participate in the SELRES

(b) Separates from the SELRES for any reason, including voluntary recall to active duty

(c) Transfers to a medical/nursing specialty not designated for this program

(d) Fails to maintain a current, valid medical/nursing license, as appropriate or, if required, fails to maintain specialty certification

b. SELRES Specialized Training Assistance (STIPEND) Program for Health Professionals

(1) Designed to recruit and retain Medical Corp and Nurse Corp officers and other Reserve officers in certain health care specialties. Enlisted members may be eligible if commissioned into the program.

(2) There are two variations of the STIPEND Program

(a) Physicians in critical specialties

(b) Nurses in critical specialties

(3) Candidates must meet all requirements as outlined in COMNAVRESFORINST 1100.5(Series)

b. Reference COMNAVRESFORINST 1100.5(Series)

(4) Participants shall be entitled to a monthly STIPEND paid at the same rate paid to persons participating in The Armed Forces Health Professional Scholarship program. This rate is established on 1 July of each year as determined by the Secretary of Defense

(5) STIPEND participants incur a mandatory SELRES Inactive Duty Training (IDT) obligation at the rate of two years for each year of program participation

c. Reserve Allied Medical Program (RAMP)

(1) Designed to meet Naval Enlisted Classification (NEC) requirements for the expansion of the naval enlisted medical programs by recruiting personnel to go to civilian technical training vice Navy "A" and "C" schools.

(2) Applicants must be enrolled as a full-time student and have been accepted for full-time attendance at or graduated from an accredited educational institution in one of the technical specialties designated in either the Hospital Corpsman (HM or Dental Technician (DT) RAMP enlistment.

(3) Members obligate for a six year Ready Reserve obligation.

4. Department of Veterans Affairs(DVA) Health Professional Scholarship Program

a. Each year the DVA sponsors the Health Professional Scholarship Program for a specialty degree as needed

b. Selection is based on academic performance, career goals, practice preferences, and work/volunteer experience

c. Pays tuition and fees, reasonable education expenses, and a monthly stipend of $621.00. The DVA may change this amount at any time.

d. Recipients may collect MGIB-SR benefits concurrently, if eligible or any other DVA educational entitlement

e. Upon graduation, practical work experience is required for two years service in a DVA Medical Center

f. Applications are accepted by the DVA between March and May each year.

5. Department of Veterans Affairs(DVA) Work-Study Allowance Program

a. Allows a Naval Reserve Activity(NRA) the opportunity to obtain extra manpower assets, specifically dedicated to the MGIB-SR coordinator in day-to-day administrative responsibilities

b. Eligibility requirements include:

(1) Must be eligible for MGIB-SR

(2) Enrolled in school full or 3/4 time

(3) May work during or between periods of enrollment

c. Benefits include:

(1) Students may work up to a maximum of 25 hours times the number of weeks in their enrollment period

(2) May request to work a specific number of hours, but cannot exceed the maximum

(3) DVA will pay work-study students, tax free, at the rate of the Federal hourly minimum wage, or the state minimum wage, whichever is higher. This is paid in addition to and concurrently with regular MGIB-SR benefits

**NOTE - For more information regarding any DVA Educational Program, call 1-800-VA7-1000

RESERVE CAREER INFORMATION TRAINING COURSE

KNOWLEDGE OF NAVAL RESERVE RETIREMENT

Time: 1:30HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe criteria for establishing the service requirement for a qualifying year of service for non-regular service retirement

2. Describe the methods and limitations of earning retirement points

   A. Active Points

   B. Inactive Points

3. Describe the Notice of Eligibility to Retire at Age 60 (NOE)

4. Describe the procedures to transfer to retired reserve (without pay)

5. Describe the procedures to transfer to the retired reserve (with pay)

6. Identify the benefits available to Naval Reserve personnel retired

**Trainee Preparation**

A. Trainee Support Material:

   1. None

B. Reference Publications:

   1. BUPERSINST 1001.39(Series)
   2. DODINST 1215.7 of October 15, 1993

**Instructor Preparation**

A. Review Assigned Trainee Material

B. Reference Publications:

   1. BUPERSINST 1001.39(Series)
   2. DODINST 1215.7 of October 15, 1993

DISCUSSION POINT

1. Criteria for establishing the service requirement for a qualifying year of service for non-regular retirement

a. A member must have completed a minimum of 20 years of qualifying service to qualify for non-Regular service retired pay, at or after age 60. The last eight years of such qualifying service must be in a reserve component. During the period 5 October 1994 through 30 September 1999, the last eight year requirement is reduced to six years.

b. A qualifying year of service is based on “anniversary” years. These anniversary year periods are calculated from an anniversary date for 12 months, or pro-rated if discharged, transferred to the retired reserve (without/with) pay, or to USN or another regular component of the Armed Forces.

(1) Anniversary date is the member entered into active service or into active service in a Reserve component, whichever occurs first. The anniversary date will remain the same unless there is a break in service of more than 24 hours. Effective 1 October 1995, when a member with a break-in-service returns to an active Reserve status or to active service, the revised anniversary date shall be the date of return or reentry.

1. Reference BUPERSINST 1001.39 Chapter 20

(2) Anniversary year is a 12 month period beginning on the anniversary date (day for day).

(3) It is very important that each individual reservist be aware of his or her anniversary year because retirement points earned in one anniversary year are, by law, not transferrable to any other anniversary years. Years of qualifying service are calculated as of the end of each anniversary year.

c. Qualifying year of service is when a member earns a minimum of 50 points.

(1) In an anniversary year in which fewer than 50 points are credited, the earned points are added to the cumulative retirement point total, but that anniversary year is **not** a qualifying year of service.

2. Methods and limitations of earning retirement points.

a. Active Points

(1) One point for each day of active service. Active service is service on active duty including AT, ADT, IADT and ADSW.

b. Inactive Points

(1) One point for each IDT period.

(2) Navy correspondence courses successfully completed. The number of retirement points authorized for Navy nonresident correspondence courses are listed in the course assignment booklet.

(3) Members of a Ready Reserve shall be credited with 15 points per year for membership (gratuitous points).

c. Retirement points credited for **inactive** service may not exceed 60 points per year of qualifying service. A maximum of two retirement points may be awarded in one calendar day for any activity or combination of activities and no more than one point for any day in which the member is in on active duty including AT, ADT, or ADSW. A maximum of 365 points (366 points in a leap year) may be awarded in an anniversary year.

3. Notice of Eligibility for Retired Pay at age 60

a. Naval Reserve Personnel Center (NAVRESPERSCEN) will issue a NOE for non-Regular service retired pay at or after age 60 (NAVRESPERSCEN 1820/6) to each Naval Reservist, not on extended active duty, who has met all the following conditions to qualify for non-Regular service retired pay at or after age 60:

(1) Completed at least 20 years of qualifying service.

(2) Served the last six years of such qualifying service as a member of a Reserve component.

b. The NOE will automatically be issued by NAVRESPERSCEN within one year after the member has met all the requirements for the non-Regular service retired pay at or after age 60. Under normal conditions NAVRESPERSCEN issues the NOE five months after the end of the Anniversary Year the member completes the conditions necessary to qualify for retired pay benefits.

c. After a member has received an NOE for non-Regular service retired pay at or after age 60, issued by either BUPERS or NAVRESPERSCEN, the member’s eligibility may not be denied or revoked on the basis of any error, miscalculation, or misinformation in the administrative determination of years of service performed unless it resulted from fraud or misrepresentation of the member. However, the number of years of creditable service upon which retired pay is computed may be adjusted to correct any error, miscalculation, misinformation, or administrative determination. When such a correction is made, the member is entitled to retired pay based on the number of creditable years of service, as corrected.

4. Procedures to transfer to the Retired Reserve (without pay)

a. Applications for voluntary retirement and transfer to a Retired Reserve status should be sent in time to reach NAVRESPERSCEN (Code 25) between six and 12 months in advance of the requested retirement or transfer date. Members must forward their application via their unit commanding officer and the Naval Reserve Activity commanding officer.

5. Procedures to transfer to the Retired Reserve (with pay)

a. Individuals are responsible for making application to receive retired pay. It is **not an automatic process**.

b. NAVRESPERSCEN (Code 25) sends the application package to eligible personnel approximately 18 months prior to their 60th birthday. If an individual does not receive the application package eight months prior to turning age 60, the member should contact NAVRESPERSCEN (Code 25) and request an application package.

c. Member must complete the application and send it to NAVRESPERSCEN (Code 25) within 30 days of receipt to allow sufficient time for processing.

6. Benefits available to Naval Reserve personnel retired

a. Without pay

(1) Identification Card DD 2 (RES) ID card.

(2) Wearing of the uniform. In general, the uniform may be worn for ceremonies or at official functions when the dignity of the occasion and good taste indicates the propriety of the uniform. Specifically, the uniform may be worn at memorial services, military weddings, funerals, and balls, patriotic or other military parades.

(3) Use of military title. Retired personnel may use their military titles subject to certain restrictions and the exercise of good judgement.

(4) Correspondence courses. Retired personnel are eligible to apply for naval correspondence courses, however, retirement points will **not** be earned.

(5) Commissary. Members of the retired reserve are authorized 12 commissary visits per calendar year. Members/family members must present a Commissary Privilege Card (DD2529), issued by NAVRESPERSCEN (Code 41), along with an identification card for commissary access.

(6) Exchange and Morale, Welfare and Recreation (MWR). Members and their family members are authorized unlimited access to military exchanges and Category C MWR facilities upon presentation of their identification card.

(7) Space Available Travel. Retired Reservists (member only) are eligible for space available travel within the continental United States on DOD-owned/controlled aircraft upon presentation of their NOE and identification card.

b. With pay

(1) Identification Card (DD Form 2Blue)

(2) When in receipt of retired pay, reservists on the Naval Reserve Retired List are eligible for the benefits listed above and in addition:

(a) Unlimited use of commissaries

(b) Retired members and eligible family members are entitled to health care at uniformed services facilities. Health care available includes inpatient and outpatient treatment in any uniformed services facility subject to availability of space. Retirees should contact the Health Benefits Advisor at the closest uniformed services medical facility for complete information on health care benefits.

(b) Reference BUPERSINST 1001.39 Chapter 20, paragraph 2019

RESERVE CAREER INFORMATION TRAINING COURSE

KNOWLEDGE OF RESERVE COMPONENT SURVIVOR BENEFITS PLAN (RC-SBP) Time: 1:00HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe Reserve Component-Survivor Benefit Plan (RC-SBP)

2. Describe the Supplemental Survivor Benefit Plan (SSBP)

**Trainee Preparation**

A. Trainee Support Material:

    1. None

B. Reference Publications:

**Instructor Preparation**

A. Review Assigned Trainee Material

    1. NAVEDTRA 46605(Series)
    2. BUPERSINST 1001.39(Series)

B. Reference Publications:

    1. NAVEDTRA 46605(Series)
    2. BUPERSINST 1001.39(Series)

DISCUSSION POINT

1. Reserve Component-Survivor Benefit Plan (RC-SBP)

a. Enacted into law on October 1, 1978. It was established as a means of providing a survivor annuity to eligible beneficiaries of Reservists who become eligible for retired pay, but who have not yet reached age 60. This plan offers reservists the opportunity to provide monthly benefits to their survivors of up to 55% of the retired pay expected/ receiving.

b. An RC-SBP information booklet containing an option election certificate is forwarded via certified mail as part of the member's Notification of Eligibility (NOE) for retired pay on of after age 60. **Members will have 90 days from the date of receipt to file an election**. The original Option Election Certificate must be forwarded NAVRESPERSCEN (Code 41) within the 90 day time frame.

c. If you elect not to participate, or **do not respond by the deadline date of your enrollment period, you will, in effect, cause your survivors to lose all benefits if you should die prior to age 60**.

1. Reference BUPERSINST 1001.39(Series) and Reserve Component - Survivor Benefit Plan Instruction Booklet (NRPC 1772/2)



d. Enrollment options:

(1) Option A - decline to participate. If married, spouse must concur with election in writing on application.

(2) Option B - Deferred Annuity. In this option the member elects annuity to begin upon death or member's age 60, whichever occurs later.

(3) Option C - Immediate Annuity. Member elects annuity to begin upon member's death, regardless of age.

e. Costs

(1) There are no payments due for RCSBP coverage until age 60 and begin receiving retirement pay. The cost will be deducted from gross retired pay each month by the Navy Finance Center.

(2) The total cost for participation in RC-SBP is composed of two premiums and based on the level of coverage selected:

(a) A actuarial coverage before age 60 and;

(b) A Survivor Benefits Plan (SBP) cost for coverage after age 60

f. Level of Coverage

(1) A member may elect to provide RC-SBP coverage for a survivor based on the full amount of monthly retired pay or a reduced amount, but not less than $300. If retired pay will be less than $300, **full coverage** must be selected.

g. Annuity

(1) The annuity payable to a spouse/former spouse beneficiary under age 62 will be 55% of the monthly amount of retired pay selected.

(2) The annuity payable to a spouse/former spouse beneficiary over age 62 will be 35% of the monthly amount of retired pay selected.

(3) The annuity payable to eligible child beneficiary will be 55% of the monthly amount of retired pay selected.

(4) The annuity payable to a person named as an eligible insurable interest beneficiary will be 55% of the monthly amount of retired pay.

2. Supplemental Survivor Benefit Plan (SSBP)

a. Members participating in basic RC-SBP at the maximum level for a spouse or former spouse may purchase additional coverage, referred to as SSBP, that can increase their survivor's post age 62 benefits.

b. Participation in SSBP is totally voluntary and requires an affirmative election by the member.

c. To increase the survivor's post age 62 annuity from 35% to 40, 45, 50, 55%, a member must purchase one, two, three, or four units of SSBP coverage.

d. The election for SSBP **must** be made at the time of election for RC-SBP.

e. Premiums are based upon a participant's age on his or her birthday nearest to the effective date of the election.

3. Provisions to change RC-SBP and SSBP elections

a. There are circumstances under which RC-SBP participants need to change his or her participation:

(1) The loss of a spouse/former spouse beneficiary after election in RC-SBP does not terminate participation in the Plan. The costs associated with such type of coverage are merely suspended. In the event of remarriage there are three options available:

(a) Continue same coverage as before

(b) Increase the coverage as before up to the full amount of retired pay (if reduced coverage was previously selected)

(c) Not to provide coverage for the new spouse.

(2) If no eligible spouse or child at enrollment period, may request an election change to Option B or C within one year of obtaining a spouse and/or child. The election change must be made in writing and submitted to NAVRESPERSCEN (if not retired with pay). Documents such as a marriage certificate, divorce decree and/or birth certificate must also be provided.

RESERVE CAREER INFORMATION TRAINING COURSE
KNOWLEDGE OF CAREER INFORMATION PROGRAM MANAGEMENT
Time: 1:30HRS

**Topic Learning Objectives**

Upon successful completion of this topic, the trainee will be able to:

1. Describe the purpose of Career Information Program Management (CIPM)

2. State the roles and responsibilities of key members of the Career Information Team

3. State the interviews required for all personnel

**Trainee Preparation**

A. Trainee Support Material:

    1. None

B. Reference publications

    1. Retention Team Manual

**Instructor Preparation**

A. Review Assigned Trainee Material

B. Reference Publications

    1. Retention Team Manual
    2. BUPERSINST 1001.39(Series)

DISCUSSION POINT

1. Career Information Program Management

a. Provides the basis for establishing and managing the career information program and outlines the minimum standards required.

1. Reference Retention Team Manual Chapter 2

b. Decentralizing the Career Information Team (Retention Team) will bring all the command's resources into operation to support the local retention program while making full use of the chain of command.

c. Allows the command career counselor to be the career information program manager and provide appropriate training.

d. Key to success of the program is to delegate counseling to appropriate career information team members.

2. Roles and responsibilities of key members of the Career Information Team.

a. Commanding Officer

2. Reference Retention Team Manual Chapter 1

(1) Support the Career Information Program Management (CIPM) concept.

(2) Ensure active involvement at every level of the command.

(3) Ensure an effective Personnel Entry System is established and maintained

(4) Ensure an effective enlisted Professional Development Board is established and maintained.

b. Executive Officer

(1) Monitor the degree of involvement, motivation and attitude of retention team members

(2) Ensure proper training of retention team members

(3) Coordinate and monitor the efforts of the team

(4) Ensure commanding officer's retention policies are carried out

(5) Ensure timely flow of administrative items

c. Command Career Counselor

(1) Organize and manage an effective retention program utilizing CIPM

(2) Train and support the command retention team

(3) Schedule monthly meeting of unit career counselors

(4) Schedule command career information team meetings at least quarterly

(5) Inform retention team members of personnel and program policy changes

(6) Maintain a tickler for counseling interviews

(7) Ensure all interviews are conducted in a timely fashion

d. Command Master Chief

(1) Work closely with the command career counselor to support the retention team

(2) Be knowledgeable of retention programs and policies and participate in the attainment of retention objectives

(3) Keep the command career counselor informed of any matters or policies that may affect retention

(4) Randomly interview separating personnel to ensure everything has been done to retain highly qualified individuals

e. Department Head/Division Officers

(1) Coordinate the retention program as it pertains to their personnel

(2) Ensure all individuals of the department/division are interviewed

(3) Be actively involved in retention efforts

f. Reserve Unit Career Counselor

(1) Keep the command career counselor and unit CO informed of ongoing career information activities

(2) Conduct required counseling interview, and make required reports to the command career counselor

(3) Screen training records. Coordinate with the command career counselor to determine eligibility requirements are met, or a waiver is submitted, for all career information related requests. Make appropriate comments before forwarding requests up the chain of command.

3. Career Counseling Interview Records

a. The command career counselor is responsible for maintaining records of all interviews conducted with each enlisted

3. Reference Retention Team Manual Chapter 2

member of the command. The Career Counselor Record (NAVPERS 1160/11) can be utilized to record interview data. When a member is transferred this record will be checked for completeness, updated as necessary and placed either

(1) In the new unit's files if transferred within the same Naval Reserve Activity or;

(2) Forwarded with the service record to the new command.

b. Required Interviews

(1) Reporting Interview

(a) Required for all newly reporting personnel

(b) The group presentation should be conducted as part of the indoctrination process.

(c) The one-on-one interview must be conducted within 30 days/one reserve drill weekend from the time an individual reports on board a command. This is one of the most important interviews that the career counselor will conduct. It is in the initial contact with the member that the counselor establishes the career information/retention process.

(2) Retention Program Interview

(a) The group presentation should be conducted 17 months after **first affiliation** in the Naval Reserve with a Naval Reserve unit.

(b) The personal interview held by the unit career counselor should be conducted 18 months after first affiliation in the Naval Reserve with a Naval Reserve unit.

(c) This interview is a formal expression of the command's interest in the member's progress. A pre-interview examination of the member's service record will disclose the efforts and progress the individual has made. It is here that the career counselor might discover the trends, both favorable and unfavorable, which can be corrected or complimented.

(3) Incentive Programs Interview

(a) The proper time for conducting the group presentation is 13 months before the individual's Expiration of Service (EOS) and/or 10 months prior to the calendar year of reaching High Year Tenure (HYT) (i.e. Member reaches HYT in calendar year 1997. This individual must be counseled in March 1996).

(b) Personal interviews should be conducted by the unit career counselor 12 months before the individual's EOS and or eight months prior to the calendar year of reaching HYT.

(c) This interview is intended to provide the individual with career program information and facts relating to rights and benefits.

(4) 17-Year Monitor Interview

(a) The group presentation should normally be given when members have 16 years and 11 months of qualifying years of reserve service for retirement (schedule this interview 16 years and 11 months from PEBD. If member does not have 17 years of qualifying service, schedule follow-up interview when member accrues 17 years of qualifying service).

(b) The personal interview unit career counselor should be given at the 17 year point.

(c) During this interview the benefits of remaining a member of the Selected Reserve should be stressed and also the time frame when a member may be eligible to transfer to the retired

reserve (without pay/with pay) provided he or she continues to meet the eligibility requirements.

(5) Pre-Retirement Interview

(a) This is a **mandatory** interview for personnel of the Naval Reserve upon reaching 20 years of qualifying service.

(b) This interview must be scheduled three years from the 17-Year monitor interview to ensure the member is aware of their RC-SBP options and the importance of the Notice of Eligibility (NOE) for Retired Pay at Age 60. Selected Reserve personnel are required by law to make an election to the RC-SBP within 90 days of receiving a NOE.

(6) Pre-Separation Interview

(a) A group presentation for members separating because EOS/HYT and a separate presentation for members transferring to the retired reserve (without/with) pay should be conducted within 180 days before leaving the service.

(b) Personal interview with the unit career counselor should be conducted no later than 120 days before actual separation.

## APPENDIX I - COUNSELING METHODS AND TECHNIQUES

This appendix is provided to Counselors to assist them not only in counseling others, but also in developing better coping skills for themselves. Some of the material has come from the National Veterans' Training Institute Library. We acknowledge the authors, where appropriate, and thank the support of the staff at NVTI.

As Counselors, we are expected to be examples of positive leadership and the demands of that command role can often lead to professional burnout. Utilize the techniques and questionnaires in this appendix to help you find your own personal balances. Network with other Counselors to learn and share and relieve frustrations you may encounter. The good Counselor will remember to "counsel" themselves as well as Sailors.

# COUNSELING METHODS AND TECHNIQUES

There are as many different good counseling styles as there are good counselors. However, common elements exist in the style or technique of all successful counselors. With the application of these common elements, coupled with a genuine interest in the members, a successful counseling style can be developed that will suit the personality and meet the needs of the members.

It will be helpful for you and your retention team to review Human Behavior, NAVEDTRA 10058, before studying the following paragraphs. Keep in mind that the following counseling techniques are not only for your use but you must also teach them to your retention team.

## MULTILEVEL COUNSELING METHODS AND TECHNIQUES

There are distinct stages in every sailor's career, each of which requires specific counseling considerations and techniques. The counselor who can recognize these considerations and employ the necessary counseling techniques is likely to succeed in counseling endeavors. Members can be divided (roughly) into four categories: first term, second term, third term, and Fleet Reserve eligible.

### First Term Personnel

First term personnel can be subdivided into three categories: nondesignated/nonrated, designated/nonrated, and junior petty officers.

**NONDESIGNATED/NONRATED.--**Personnel in this category are generally sent to their first command from recruit training by way of a short apprenticeship or orientation course. Historically, a portion of this category will be disenchanted because of "recruiter promises" (which may be real or perceived) that did not materialize, or the perception that they did not "do well" in recruit training. If these disenchanted attitudes are not modified, they can (and will) dictate these members' actions for the remainder of their enlistments. Their bad attitudes can also adversely affect the attitudes of their shipmates. The first step should be to find out what the individual member's interests are and why the member did not attend an A school.

It must always be presumed that the member is trainable. Once this point has been reached, determine whether or not training in the area of the member's interests can be provided within the command. If this is not possible, the counselor should provide guidance about obtaining training and/or assistance. Explain the function of the professional development board and guide the member toward qualification for the board. Discuss the member's wants, needs, or desires with the member's division officer, leading petty officer, and counselor. Request feedback on the member's progress and then follow up. Some of the personnel in this category have been in the Navy for a year or more and have received little or no guidance. This is the counselor's opportunity to bring this young sailor on board and help him or her become a valuable asset to the command.

**DESIGNATED/NONRATED.--**Designated strikers, whether just out of A school or with some active duty experience behind them, can sometimes provide a counseling challenge. These members' perception of the Navy may be colored by boot camp classification, recruiter promises, desire (or lack of desire) for the rating for which training was received, and so on. By determining the

members' goals and using perceptions, the counselor may be able to give dissatisfied members a more desirable view of the Navy.

Unfortunately, a number of these people quickly become dissatisfied with their rating. This is can be a big problem because in some ratings it is virtually impossible to change rating once they have been designated via A school. In such cases, you must pursue every option to help them find satisfaction with their current rating. If members cannot adjust to their present rating, then discuss a change of rating. It never hurts to try. The least a counselor can get from a well-planned attempt is increased credibility.

On the other hand, if the members are satisfied with their rating, the counselor's job is much easier: you then guide the members toward qualification for advancement, discuss their wants, needs, and desires with the appropriate people, and follow up.

**JUNIOR PETTY OFFICER.--**Junior petty officers discussed here are still in their first enlistment, generally have 2 or more years of active service, and are approaching a decision point in their Navy career.

These members have seen how the Navy and the command work. Additionally, they have seen how the advancement system works and have received a "taste" of the ego boost that comes with making that first big step up the path of advancement.

These members generally have a need to determine what else the Navy has to offer. Proper counseling is critically important at this point in the members' life, since the members may be ready to commit themselves to a valued and fulfilling naval career.

Career enhancements now available due to the attainment of petty officer status should be emphasized; for example, special duty assignment pay and SRB (if they are applicable), GUARD III, advanced training assignment options, and so on. Hard facts and total honesty are the only way to deal with the young sailor. If the career counselors paint an erroneously rosy picture to their members, they run a high risk of credibility loss with everyone with whom they come in contact. Honesty and hard, documentable facts are always the best possible counseling tools with any member!

**Second Term Personnel**

Second term personnel are generally PO3 through PO1 with 4 to 10 years of service. These members reflect a wide range of experience and skills. Normally, members in this category will have served in at least two different commands and may have received advanced training.

These sailors are at a true turning point in their naval career. A disturbingly high percentage of these critically valuable, well-trained, and experienced sailors are lost to the civilian job market simply because they are improperly or inadequately counseled. At the end of these sailors' enlistment, they will very likely be at the halfway point and will be taking a critical and in-depth look at the next 10 to 12 years. A decision must be made, and the counselor owes the Navy <u>and</u> the members some very careful, thorough counseling. An evaluation of members' motives, perceptions, and future and current needs is required.

It is during this time frame in some members' careers that a feeling of professional stagnation may occur (8 to 10 year mark). They have reached the

point where advancement is becoming very competitive. PO1 may appear impossible to attain, or the member may have just advanced to PO1 and is looking at a minimum of 3 years before the earliest selection for CPO. In addition, these members are looking more at personal and family needs and feelings, rather than how well the Navy can be served. These members need new and constructive ways to use time that will improve advancement opportunity while simultaneously providing new, broadening experiences. The theory of horizontal mobility, discussed later in this appendix, can be very useful for these members.

**Third Term Personnel**

The third term or career category member presents one of the major challenges to any good career counselor. Counseling any member in this category requires every factor in career planning to come into play; no single factor can be excluded. A careful evaluation of all factors (advancement, assignment, technical expertise, education, family pressure, and so on) must be made to assist this member. This sailor may be experiencing feelings of professional stagnation again: "I've committed myself," "I've done it all," "The Navy has nothing new to offer," "I'm too old for education or officer programs," "The Navy offers everything to first termers, and nothing to the career sailor," and so on. By a careful application of the theory of horizontal mobility, this career Sailor can be assisted toward the rewarding continuation of a naval career.

**Fleet Reserve Eligible**

Fleet Reserve eligible personnel offer another major challenge to the career counselor. The member in this category has completed 18-plus years, is rapidly approaching a "magic figure" (usually 20 years), and is ready to end an active duty career. This member's attitude may well be: "I've seen it all," or "I can't advance any further; why should I stay in?" The career counselor has the answers to these statements.

While it is true that not every member in this category wants to continue beyond 20 years, the fact remains that many would if they felt that there was a challenge or a new experience left available.

Through a careful analysis of the member's career and a thorough review of what options are available, those new experiences or challenges may be found by the member remaining on active duty. Application of the theory of horizontal mobility may present a viable alternative to the Fleet Reserve for this member.

## THEORY OF HORIZONTAL MOBILITY

The theory of horizontal mobility is not a cure-all. It has been developed to assist in meeting and overcoming the problems encountered when members feel that they have reached a stagnation point in their career. It offers alternatives to the individual who reaches these stages of professional stagnation and provides a guideline for professional development and career enhancement.

When members reach one of these stages, they are, in effect, "banging their heads against a brick wall" and can see no way out of their predicament. It is up to the career counselor to help these individuals see the alternatives and guide them in their career development.

Example: Members facing a return to sea and may be reluctant to upset the stability in the family. They may not be able to spend every night with the family, but can very likely choose a home port and, by doing that, create a minimum of upset. Pay and promotion obviously go hand in hand. Members must ask themselves if they have truly made all the effort necessary for that advancement. Can they do better in a civilian job? Comparative pay tables are available to answer these questions. The local newspaper's Help Wanted section of the classified ads can also help.

Example: Members at the 12- to 14-year point may say, "Am I willing to make a further commitment?" Only they can answer this question and the basis of this theory is self-analysis. Quit while ahead? There is always more. Without some challenge, we would waste away.

Example: Members approaching Fleet Reserve eligibility. Have they really done it all? Doubtful. Too old for education? Says who? Too old for officer programs? Look again.

To effectively use the theory of horizontal mobility, counselors must help members go through a process of self-analysis and redefinition of goals so that they may truthfully answer all those questions. It hurts, but in the long run, it will help.

The process of assisting a member through the necessary steps to identify the strengths and weaknesses in a career path is indeed a difficult one.

## NEED SATISFACTION COUNSELING

The specific personal needs of the member are the heart of any counseling session. The counselor's job is to find these needs and satisfy them with Navy programs and/or services that are provided or accepted by the Navy. The need may be the solution of a problem, or it may be the satisfaction of a personal goal. Whatever it is, the member's needs must be satisfied for the counseling session to be successful. Career counseling is the process of satisfying the member's needs with Navy benefits by translating a feature of the Navy into a benefit for the member. For example: A member on shore duty is interested in off-duty classes at a local college. The member does not want to use VA educational entitlement at this time. The Navy has a benefit for the member's needs -- tuition assistance. The feature of tuition assistance is reduced personal expense for education without affecting the member's VA educational entitlement.

Before the proper benefit can be selected to meet the member's needs, those needs must be clearly identified. The member may or may not realize exactly what the needs are, and the counselor may need to uncover or clarify the needs. The counselor can identify the needs by questioning or probing to get the information required to select the right Navy benefit to satisfy the member's needs.

The counselor may begin probing before the counseling session starts. The more the counselor knows about the member before the counseling session, the better the chances of a successful interview. This is done by

reviewing the member's service record and career counselor record and interviewing the member's supervisors. The counselor should not refer to these preparations during the opening phase of the interview, and subtlety may be needed to use the advance information effectively. Prepare by planning the overall objective of the counseling session and the directions the questions should take.

**Categories of Personal Needs**

There are as many ways to categorize personal needs as there are experts to define those ways. For counseling purposes, however, there are six commonly accepted categories. These categories are order, safety, affiliation, achievement, recognition, and power. These needs are universal; that is, everyone has them. The variations in the intensity of each of these six needs are what makes each of us a unique entity. Each individual expresses the basic need to protect and maintain self-image through variations in the strengths of these personal needs.

**ORDER.--**A desire for definition and structure. A member who expresses a strong need for order will desire a well-defined, systematic approach to the solution of the need for which counseling was requested or indicated. This member will respond positively to logical, well-documented, and clearly presented solutions and negatively to ambiguity or solutions not clearly defined. The order-oriented member will make commitments and be a positive influence on others as long as the member perceives a methodical, thorough, well-documented approach. This member does not make snap decisions and cannot be rushed.

**SAFETY.--**The desire to avoid risk and seek certainty. A member who expresses a strong need for safety will generally avoid high risk and will weigh every variable before making any commitment. If the safety need is particularly strong, this member may require assurance of absolute certainty of the result desired as a result of a commitment. This member will make commitments and influence others to a limited degree so long as minimal risk is involved. A commitment from this member must be slowly developed, step by step.

**AFFILIATION.--**A desire to retain and continue team relationships or associations, a need for feelings of belonging. This member will desire to participate in team effort situations and will value cooperation. The member with a strong need for affiliation will seek and make commitments. This member will influence others, especially in the interest of maintaining group harmony.

**ACHIEVEMENT.--**The desire to produce results and/or effect positive change. This member will seek rapid tangible results. The member's prime concern is the achievement of the goal, rather than the mechanics involved. This member will often have a clear visualization of personal needs from the onset of the counseling session. The achievement-oriented member will make firm commitments and will actively influence others.

**RECOGNITION.--**The desire to be held in esteem or high regard. This member will seek the respect and admiration of others. If the need is strong, the member will seek admiration, praise, or even more tangible evidence of esteem. This member is apt to be concerned about receiving credit and/or personal visibility, will make commitments, and will influence others as long as visibility and credit are likely to result.

**POWER.--**The desire to exert or extend personal control or influence over others and over situations. A member with a strong need for power will want to dominate or, at a minimum, exert significant control over others and situations. Aggressive behavior on the counselor's part will usually be construed as a challenge (negative response), and passive behavior may be received with contempt (perceived as a sign of weakness), which is also a negative response. This member will tend to make firm decisions easily and will influence others to duplicate his or her decisions or actions.

Personal needs are a very important consideration in any counseling session. The counselor's approach will either enhance or detract from the member's perceptions of the counselor. Therefore, counselors should assess the personal needs of the member as they prepare for the interview and throughout the interview itself. In developing their approach, or while considering the member's needs, they must constantly be aware that their perceptions of the member are filtered through their own personal needs. If the counselor personally has a strong need for order, and the member's need for order is operating at a lower level, the member may appear to the counselor as disorganized. Additionally, counselors must be aware that the strength of each personal need will vary, even though one particular need will dominate the member's (and a counselor’s) personality.

Since career counselors are aware of the many options available to members, they will usually be able to identify which services or benefits are required to meet a member's needs long before the member does. As a result, counselors may be tempted to prematurely try to suggest the service or benefit before the member realizes the need for it. This may lead to member resistance since the member's perceptions will not match the counselor's and, therefore, the counselor's suggestions or recommendations might be rejected as "hard sell" tactics. Members will recognize and accept solutions to needs more readily when they are involved in the identification of those needs. When counselors restrain the impulse to tell members what their needs are and verify how they view their personal needs, they demonstrate understanding and appreciation of members' problems or situations that can be improved or corrected. In so doing, counselors build toward the member's commitment. This leads to achievement of counseling objectives.

**Conducting a Need Satisfaction Interview**

The techniques for conducting a need satisfaction interview are as follows:

- Open the interview.
- Probe to uncover the member's needs.
- Analyze and develop (as required) the member's needs.
- Support the needs the member acknowledges with benefits.
- Close and conclude the interview.

**PHASE ONE.--**The opening phase, or beginning of the interview/counseling session, is aimed toward easing information exchange. Initially, the counselor may be starting with information from other sources (service record, another counselor's entries in the career counselor record, information gotten from the member's supervisor, and so on). The member may not know much about the counselor either, which means the counselor must put the member at ease. This is done by performing the following actions:

- Greeting the member and shaking hands
- Asking the member to be seated, offering coffee, ashtray, and so on, as appropriate
- Asking a few general questions to establish rapport and put the member at ease
- Identifying the purpose of the interview in order to gain member interest and involvement (not necessary if the member requested the counseling session)

In addition to the needs voiced by the member, the counselor must also uncover the member's unvoiced personal needs. These personal needs will determine the method in which the counselor develops the interview, since they influence the following factors:

- The interview objectives that the counselor will be able to set and achieve
- The way the member perceives the counselor
- The way the member visualizes the results of dealing with the counselor
- The member's perceptions of the results of agreeing with the solutions the counselor recommends or suggests

**PHASE TWO.--**The second phase of the interview is probing to uncover the member's needs. To identify and fully understand the member's needs, the counselor should use three types of probes: open, closed, and visualizing.

**Open Probes.--**Open probes are used to encourage the member to freely express personal attitudes or conditions, put the member at ease, stimulate communication, and help the counselor identify an area of need.

Probes do not have to be deep, cunning, clever queries that go right to the heart of the problem with one penetrating question. In fact, since the member is being assisted to the discovery of the need or problem in most cases, the counselor should slowly build the member's understanding of the need or problem.

Typical open probes used in the <u>initial</u> phase of the interview would be as follows:

- "May I ask you some questions about your problems?"
- "How do you like being on sea duty?"
- "What types of jobs do you like to do?"
- "How do you like our home port?"

Once the member begins to relax and volunteer information, the counselor can use open probes to expand an area of discussion. Examples of open probes are as follows:

1. Member: "I don't know if I'm ready to decide..."
   Counselor: "Oh? Why not?"

2. Member: "I'm not sure you told me everything about..."
   Counselor: "What else would you like to know?"

3. Member: "I'll find a job in my hometown, there are always jobs for an experienced ex-sailor."
   Counselor: "Really?" or "What sort of jobs?"

4. Member: "I'm just not happy working as a (whatever the member's present rate is)."
   Counselor: "Oh?" or "Why not?" or "Tell me more about that."

Since open probes are intended to gather information, use them. Do not get one response and automatically assume that you have figured out the need or problem. You may have identified the need or problem, but has the member? Remember, the member must recognize the need or problem too!

**Closed Probes.--**Closed probes are used when the member is not responsive to open probes or the counselor wants to shift to another topic or area of conversation, or needs to analyze an identified need area. Examples of closed probes are as follows:

1. "That's interesting, have you had problems contacting the detailer?"

2. "Really? How often has that happened?"

3. "Are you saying that this has made it hard to understand just what options you have?"

4. "Now, if I understand you correctly, several things have been bothering you. Which ones have given you the most trouble?"

Remember that throughout the interview the counselor and the member are rarely at the same point in the perception of the member's needs or problem(s). With this in mind, it becomes obvious that there are some things that counselors must not do too early in the interview:

- Do not discuss the possible solution in great detail.

- Do not probe into specific problems or needs.

- Do not introduce Navy services or benefits except in the most general terms to establish the reason for the interview.

**Visualizing Probes.--**Visualizing probes are used to "sensitize" the member to the needs that have been identified and to help the member to envision the results of accepting the benefit or service suggested.

Most visualizing probes will fall in the "if ... then" category; for example:

Counselor: "If you could convert to an SRB eligible rating, then how would that affect your decision?"

The other common type of visualizing probe is the question that helps the member "see" the result of accepting suggestions or recommendations; for example:

Counselor: "Can you picture getting that education and experience? How would that help?"

In each of the above examples, counselors are helping the member visualize or paint a mental picture of how the Navy might assist in the solution of a problem.

Visualizing probes help the member to envision results. This has the distinct advantage of including the member in the identification of needs, thus allowing the member to "discover" the benefit or service offered in a way that is easier to accept.

**Additional Probing Techniques.--**Counselors must involve the member as an active participant during the probing process and they must demonstrate their interest in meeting the member's needs. Failure to meet these two criteria is risking the loss of credibility.

If, for example, a counselor only allows members to answer questions and does not get them actively involved, the members may not realize why the counselor asked a particular question and may not relate one question (or piece of information) to another. When members are locked into a passive role, the reasons for the counselor's questions are rarely understood, and the members feel that the counselor is simply wasting time and ignoring their needs. When this happens, members usually become reluctant to answer questions and will be anxious to end the interview as quickly as possible.

If, on the other hand, the counselor actively involves the member, and reinforces the concept of an interested counselor, the member will usually desire to continue the interview.

There are three techniques that can assure member involvement and show interest. These techniques are confirming, acknowledging, and bridging.

When counselors confirm, they are verifying that they understood what the member said. This is generally done by restating what the member said and asking for verification of the counselor's understanding. Examples are as follows:

1. "Let's see if I understand this correctly, .... Is that right?"

2. "Do you feel that...?"

3. "If I understand ... Is that the case?"

4. "So, to summarize, ... Is that correct?"

When counselors acknowledge, they are showing members that they value the opinions or feelings that members have given. When members make a statement that prompts another probe, the counselors should acknowledge that they heard and understood the last remark and should provide feedback before moving on to a related or different topic. Examples are as follows:

1. "Interesting, that makes me wonder ..."

2. "You know, that gives me another idea..."

3. "Hmm, that's a good point, let me ask you then ..."

When counselors bridge, they make a connection between one or more points made by them and/or the member. Examples are as follows:

1. "Earlier, you mentioned something I'd like to ask about."

2. "You mentioned ... Does that affect the way you feel about the situation you just described?"

Examples of how to confirm, acknowledge, and bridge are as follows:

1. Counselor: "Now, if I understand correctly, you feel that education is your most important goal?" (Confirming with a closed probe.)

   Member: "It sure is, I already have over 30 credits."

2. Counselor: "I see, that's a good point. I wonder, how does that influence the situation?" (Acknowledging with an open probe.)

   Member: "I'm not really sure that I know."

3. Counselor: "Let's see, earlier you said something about not liking your rating like the other guys in your shop do. Can you see yourself fitting in somewhere else?" (Acknowledging with a closed probe.)

   Member: "Sure, I think I'd really like electronics. Most of my college credits are math and electronics."

These probing techniques help the member realize that there is a purpose for the counselor's questions and that the purpose is of value to the member. They verify the counselor's understanding of the situation and of the member's needs and perceptions. They indicate to the member that the counselor is listening, interested, and has an honest desire to understand how the member feels. These techniques position the counselor as a problem solver who provides counseling services of value to the member, and thus give the counselor a basis on which to progress through the counseling session.

**PHASE THREE.--**Once the member's needs have been uncovered, the counselor needs to develop the member's understanding of these needs until the member recognizes and accepts them. Remember, if counselors "push" or introduce benefits prematurely, they risk alienating the member.

One of the best ways to help members accept their needs and the way(s) the Navy can satisfy them is to use visualizing probes. As mentioned before, visualizing probes are "if ... then" questions; for example:

Counselor: "If, for example, you could convert to one of the SRB eligible ratings, how would that affect your decision about reenlistment?"

or

Counselor: "Can you imagine getting that education and the experience you need? Wouldn't that help?"

In both cases, the counselor is helping the member see a mental picture of how the Navy might provide, or assist in finding, the solution to a problem or satisfy a need.

It is important to understand that visualizing probes help the member to both discover a need and mentally picture the solution to the need, while simultaneously allowing the member to see the benefit offered in a positive light.

The goal in each interview or counseling session is to direct the conversation toward a successful close. To achieve this, counselors probe to uncover needs, then analyze and develop those needs so both the counselor and member see the needs clearly. Then these needs are supported with Navy benefits. The more support provided, the easier it is for the member to accept the benefits the Navy offers.

The counselors' supporting statements indicate that they value the member's opinions, needs, and feelings. Such statements constantly reinforce the concept that counselors are there to help the member. Thus, the counselors' supporting statements help their clients see why their service is needed. Because the counselors' supporting statements are directly related to the member's needs, they establish an empathy between the counselor and the member. This bond of empathy is the means to a successful close.

Counselors can support any member statement that is a favorable remark about the Navy, or a statement of any member's need that can be satisfied by a Navy benefit.

Counselors do not support a statement or an implied member need that cannot be satisfied by a Navy benefit, or any negative or unfavorable comment about the Navy.

When counselors support, they agree with the member's need, and identify a Navy benefit that satisfies that need; for example:

Member: "I tried to find a job, but I didn't have the experience they wanted."

**NOTE**: The member stated a need for experience.

Counselor: "I know, it's tough to find a job when you haven't had much training."

**NOTE**: You agreed, thus providing support.

Counselor: "The Navy has many schools available if you reenlist. That way you earn money while you're learning, plus after the schooling, you get on-the-job experience to be better prepared for a civilian job if you want to look later."

**NOTE**: You just introduced a Navy benefit while continuing to support.

Members will not always have a clear grasp of their needs, and as a result may not be able to state their needs directly. The member may express needs very subtly or hide them in lengthy statements. If the member sees a need, the counselor can simply identify the benefit, but if the member does

not recognize the need, the counselor will have to build member perception of the need. Once the counselor has done a thorough job of probing, analyzing, and supporting, closing will be the natural and logical next step.

**PHASE FOUR.--**Closing is the third skill in need satisfaction counseling. When counselors close, they first summarize those Navy benefits that can satisfy the member's needs, describe how the benefits can satisfy the need(s), and request a commitment; for example:

Counselor: "Ralph, we've talked about how a change in rating will make you SRB eligible. Your ASVAB test scores look good, so the change should be no problem. You are also eager to learn about electronics, so the schooling and training will help you achieve your goals."

**NOTE**: This was the summary, now you request a commitment.

Counselor: "Let's get the physical done right away so we can process the paper work. Are you free this afternoon?"

Remember, only summarize those benefits accepted by the member.

The counselor's attitude should be that an agreement has been reached. By using positive statements, counselors transfer this attitude to the member. This attitude is furthered by reminding the member of the benefits that have been accepted, which will psychologically prepare the member to make a positive response to their request for commitment; for example:

Counselor: "Mark, we've agreed that you'll strike for electronics at the professional development board next week. I'll notify the board to expect you and I'll call you when the date and time have been set."

Other typical requests for commitment are as follows:

- "I'll arrange a date for your physical this afternoon."
- "I'll call the detailer and see what's available in that area."
- "Let's get together the day after tomorrow after you've looked at this pamphlet."
- "I'd like to meet with you tomorrow so we can go over some options."

As you can see, there are many ways to request a commitment.

If the member will not accept a close because not enough important needs have been satisfied, counselors should do the following:

1. Use open probes to uncover additional needs.
2. Support the new need with a Navy benefit.
3. Close again.

When to close is crucial. The time to close is when the counselor receives an indication of acceptance or agreement from the member. These signals can be as subtle as a facial expression that indicates interest, or as overt as a statement such as "sounds good," or "I like it."

Once the member has agreed to the counselor's request for a commitment, the counselor should end the interview by reviewing any commitments, indicating that the counselor is available for assistance in the future, and thanking the member; for example:

Counselor: "I'll send the GUARD message to the detailer today, and you are going to talk to your husband, right?"

Member: "Yes, he'll be glad to know we can be stationed together."

Counselor: "I'll call you as soon as I get a reply. Meanwhile, if you have any problems just call me. Thanks for coming in, Kim."

The main goal in any interview or counseling session is the identification of member needs that can be met by Navy benefits. In probing to uncover needs, counselors will also reveal a variety of member attitudes.

Usually members will display one of the following attitudes:

- Objection--The member displays opposition toward the Navy or the armed forces in general.

- Acceptance--The member agrees with the benefits proposed and has neutral or no negative feelings toward the Navy.

- Indifference--This member will show a lack of interest in the Navy or your work due to no identified need for either your services or the benefits available.

- Skepticism--This member is interested in a particular benefit, but doubts that either you or the Navy really can (or will) provide that benefit.

Member objections usually fall into two major categories:

1. Misunderstanding which is based on incomplete or erroneous information. Any time counselors encounter misunderstanding, they should rephrase the objection into a question and then provide accurate information to clear up the misunderstanding. This rephrasing is very important since it gives the member proof of the counselor's concern about negative feelings. It also shows that the counselor is listening to what the member is saying and it helps clarify the objection. DO NOT IMPLY AGREEMENT WITH THE OBJECTION; for example:

Poor: "You're right, OUTUS assignments are always a problem."

Much better: "If I understand correctly, you feel that OUTUS duty could be a problem?"

The second step in handling a misunderstanding is to provide accurate information to answer the question; for example:

Member: "If I get out now as a nuclear power plant operator, I'll be able to get a great civilian job!"

Counselor: "Hmm, you think you'll get a great job right now? By staying in, you'd gain more training and experience. That would make you much more competitive in the job market."

2. Perceived drawbacks are the second type of objection counselors may encounter. These may be real drawbacks, but only for that specific member. When you or your counselors encounter a member objection based on a perceived drawback, first rephrase the objection in question form, and then minimize the objection by stressing relevant Navy benefits that are intended to outweigh, or compensate for, drawbacks. Naturally, counselors want to rephrase in a manner that will lead to the benefit they want to emphasize; for example:

Member: "If I shipped under STAR, I'd be 2 years older and in my late twenties when I got out. I couldn't take the time to find a really good job if I was that old. I'd just have to take anything." (Benefit to lead into: The additional value the member would receive for that "extra" 2 years.)

Counselor: "In other words, you feel that the value received from the additional education, on-the-job training, and experience isn't sufficient to justify the 2 more years, is that right?"

Bear in mind that the relevant benefit can be:

- benefits already accepted by the member in an earlier segment of the interview, or
- new relevant benefits that you provide as a result of further probing, or
- a combination of "old" and "new" benefits.

The benefits counselors intend to emphasize as objection minimizers will naturally depend on their judgment and on the member's response to probing. If you are going to stress an old benefit already accepted by the member, remember to reintroduce it using closed probes; for example:

Counselor: "You've already agreed that working in a field you like is very important. You're already knowledgeable in the field of electronics, and additional training and experience are always very valuable to a potential employer. Plus you'll be SRB bonus eligible too."

The general strategy for handling indifference is to use closed probes to uncover areas of member need. Once an area of need is identified, the counselor should have the member's attention.

Skepticism will usually occur after counselors have supported a need with a benefit. Handling skepticism is simple; offer proof.

At times a member may attempt to conceal a negative attitude by stalling; for example:

Member: "Let me discuss this with my wife, and I'll get back to you later." or "Why don't I come back in a week or so."

When this happens, counselors must handle the stall by continued probing to identify the hidden negative attitude.

## PROBLEM-SOLVING COUNSELING TECHNIQUES

There will be occasions when counselors cannot create attitude change simply through influencing or responding to the personal needs of the member. When this condition occurs, and it appears that the counselor has reached a dead end, it may be possible to achieve his or her goal through the process of problem solving.

Problem solving is the process of reaching a solution that is mutually acceptable and substantially meets the needs of all parties involved. This is not to be confused with compromise, which is a settlement based on mutual concessions.

Problem solving is a three-step process: stating/confirming objections and/or restrictions; offering inviting alternatives; and building a "win-win" solution.

Confirm what is important to members. Counselors summarize what they understand to be the member's objectives and restrictions. This shows that counselors are attentive to members' issues of concern and verifies their understanding of them.

The counselor states what is important to him or her and to the Navy. The counselor's objectives and restrictions are as valid as those of the member. Identify and explain any restrictions under that which must operate, such as Navy rules, regulations, instructions, or policies that cannot be changed. This "clears the air," eliminates issues that are nonessential and can conceal needs, and focuses attention on the objectives. Be sure that any limitations or constraints that the counselor identifies really are restrictions that cannot be changed such as an item specifically stipulated in regulations. Otherwise, the problem-solving process will rapidly turn into a "win-lose" situation.

Offer or invite alternative methods. The counselor states his or her ideas and uncovers the member's ideas of what steps could be taken to meet all stated objectives. The focus must be placed on positive actions. Explore all stated alternatives with the member. Use a problem-solving approach to generate solutions that will substantially meet the counselor's needs and the needs of the member.

Once viable alternatives have been identified, build a win-win solution that allows counselors and their members to win stated objectives. Be sure that the counselor <u>and</u> the member clearly understand the commitments within the solution, and the actions that each will take to reach the solution. Avoid "lose-lose" or compromise solutions and avoid win-lose alternatives at all costs, since they will not result in an effective solution.

If the counselors encounter an objection or an attitude that they are not able to deal with successfully, it should be treated as an obstacle. They will have to define or identify what the obstacle is. To do this, they must ask themselves the following questions:

- Have you identified and met the member's needs?
- Have you addressed the personal needs of the member?
- Have you identified potential obstacles?

Once they have identified what the obstacle is, they should be able to summarize it clearly in terms of needs.

## INFORMATION AND REFERRAL ASSISTANCE

Providing counseling and referral service to members and their families is another duty of the career counselor. When sailors or their families experience problems, the counseling office is one of the first places where they seek assistance.

While CCCs primary counseling efforts are aimed at naval personnel, spouses, dependents, and retirees also receive counseling and/or referral assistance from CCCs. If counselors are unable to offer all the assistance or services required, an effort must be made to refer the person to an individual or agency who can provide the necessary assistance or service. To do this efficiently, CCCs will need to develop an information and referral (I&R) directory to provide an accurate, up-to-date listing of all the resources available in the local military and civilian communities.

# BUSINESS CONVERSATION, THE ART OF INTERVIEWING
# FEATURING 40 INTERVIEWING TECHNIQUES OF PROVEN EFFECTIVENESS

This section is designed to give the Counselor some basic information on how to best go about interviewing clients. And maybe nothing quite describes the purpose of the procedures involved more vividly or more accurately than the title of this booklet.

Interviewing is simply a conversation, with a business purpose. It is an art involving many skills, but all of the skill can be learned and improved upon with use and practice.

As a Counselor, you find yourself interviewing clients before you feel you have the experience necessary to do it well. Experience can be a great teacher, but a great deal can be learned from study too. And that is the purpose of this section -- to give you an overview of some basic, successful interviewing techniques.

The value of this self-study approach depends on you -- read, absorb and apply what is written here.

## INTERVIEWING DEFINED

Interviewing is a conversation between two people. It is something most people do every day in the normal course of business events. But people do it differently in different situations depending on the circumstances and purpose of the interview.

In most cases, the purpose of the interview is to learn something. And in most instances, the needed facts are learned from conversations -- a communication exchange between two people.

But many conversations are unpredictable things. Often little is learned of any substance. For example, in the normal give an take of a social conversation, communication is taking place, but in many instances it is communication without a business purpose. To give the conversation a useful business purpose, it must be controlled and consciously directed. When conversation is used in this way, it is called *interviewing*. And when people perform in this way, they are known as *interviewers*.

Every Counselor is in the interviewer role. It can be over the telephone or behind a desk. It can even occur in the passageway or the parking lot. Anytime and anyplace you enter into a conversation with anyone where the topic of conversation turns to career-related concerns, you can find yourself in an interviewing situation. How well you function as an interviewer in such cases can greatly influence your credibility to the Sailor, your value to the command and your personal feelings of self-worth and achievement.

## THE CAREER INFORMATION TEAM'S MISSION IS SERVICE

The Career Information Team is a service organization. Sailors and the command look to the Team for career-related services and expects those services to be provided when needed.

The services we provide are many and varied. Some are mandated by law. Others are offered or performed to support the chain-of-command. Emphasis on

the different services Counselors are able to provide will vary from command to command and at different times throughout the year. However, the Team's commitment to overall customer service quality, regardless of the specific program, is paramount to its credibility and stature within the command.

In all things the Team does, service is the primary mission. And that is why it is extremely important that all Counselors (Command, Departmental or Divisional) have a firm grasp of their purpose within the Team. We are a service organization. The Counselors on the Team must be service-oriented. Service is expected by the command and the Sailors who look to us for assistance.

## THE CAREER INFORMATION TEAM AND YOUR PLACE IN IT

As a Counselor, you will be assigned to any number of different commands, places and locations. Whether you are the Command Career Counselor, Departmental Career Counselor or Divisional Career Counselor matters not. You will still be expected to adjust and adapt to conditions as you find them. And sometimes, that is not an easy thing to do.

There is always a right way and a wrong way to do things. You will, of course, be expected to perform in the right way. And often, that may not be *your* way, or the way you believe it should be. And the way you are told to do things may not be the way you see others around you doing things.

In commands, some people may have developed bad habits that are difficult to break. Even in a small work unit, people may do things contrary to good practice or good sense. In some cases, that is because they have had poor supervision in the past, little or no training or have developed a high disregard for new ideas, new approaches or better ways of doing things. And you will counsel these people and may even have to work with them.

If you come across any of these contradictory situations, that is unfortunate. But it is not something to get terribly upset about. As a Counselor, you have commands to support and Sailors to take care of. If things are not to your liking, learn to look upon your current situation as a learning experience -- adjust and adapt and properly influence change. How well you learn to do that may well be critical to both your short-term success in your current command and your long-term success in the Navy.

## COMMUNICATION AS A SERVICE ELEMENT

As stated, service is the Career Information Team's mission. Communication is central to the performance of that service. In many ways, most service deficiencies can be tracked to the lack of, or poor use of, effective communications.

Communication can take many forms. In the workplace, it can be written or oral, spoken or unspoken, visual or totally abstract. And communication perceptions can be either feeling or uncaring, depending on the prior experiences of other people and the *mood of the moment*. In other words, how you *come across* will depend a great deal on how well you communicate with others, both the chain-of-command and the Sailors you serve.

As a Counselor, communication will be necessary. To be successful at that task, it is strongly suggested that you always keep the Team's mission of service in mind. That should make your communicating task easier.

The Team's service mission is a common mission; everything done in the name of the Team has a service purpose. Workplace frustrations often become less significant when service is stressed. And all communications tend to become clearer and of greater significance when service becomes and remains the primary objective of everyone.

For the purpose of this section, communication will be considered those business conversations that take place in the workplace. Those conversations may be directed to another member of the Team, the Command Master Chief, your supervisor or Sailors. These conversations are interviews and interviewing is the art of making such business conversations productive and meaningful.

## THE INTERVIEWING FUNCTION

Interviewing is central to the mission of the Team. Seldom can a service be performed before some interviewing takes place. The following 40 interviewing techniques of proven effectiveness are offered for your consideration. It is strongly suggested that you can make your counseling experience on the Team more meaningful and productive if you accept them and practice them.

**1. Deserve and gain the confidence of the client you are talking with, interviewing or otherwise dealing with.**

Heading the list, this is an interviewing essential no matter what the interviewing situation. Plainly stated, until and unless you can generate confidence in the other person, you cannot expect to be accepted as someone worthy of that confidence.

Confidence is very hard to define but it has its roots in honesty and a straightforward approach to people and the way they relate to one another. More basically, perhaps, it means "telling it like it is", not the way you would like it to be or the way you believe the other person should react or behave. It means admitting something you don't know when you don't, but offering to seek out the answers to provide a service needed or requested. It also means telling the other person what you do know when you do. It means sharing with one another -- "you tell me and I'll tell you". It is also an equitable thing -- "we're both in this thing together, and together we can work it out".

Seldom will you win confidence by bluffing, badgering or bullying. Rather, stick to the truth, let the other person tell you what they want you to know and offer the best service you can.

**2. Have a general plan for your interviews, but execute that plan with no greater formality than is common in your normal business conversations with the client.**

The primary notion here is that things always seem to go so much better when you *both* know where you want to go and how you want to get there. The five required career information interviews are planned out for you, but other interviewing situations will be spur of the moment and you won't have time to prepare a formal, written outline. But you can plan in your head and you can learn to do that as the interview develops or the conversation proceeds.

Another way to look at planning is to learn to think on your feet -- to anticipate where the conversation is going and how you can use it to learn the

facts you need to know to make a good decision or offer a service for which the person is requesting. When you plan too tightly, you may tend to execute too severely. Then you are liable to become too formal in your relationships with others. Informal conversations aren't like that. Neither should formal interviews become *too* formal.

**3. Be at ease and try to overcome any shyness or self-consciousness on the part of the person you are talking with.**

You cannot function effectively as an interviewer if only one of you is comfortable. *Orientation* is one way of overcoming the other person's uneasiness and it is a technique you can easily learn.

Orientation means starting your conversation at the other person's level, perhaps even first talking about nonessential things like the weather. Or you might start off with an explanation of the available services or a description of your function on the Team. The main point is to establish a comfortable rapport with the other person before rushing into the interview.

Sometimes, just a few words of pleasant, nonessential chit-chat will break the ice. Sometimes more will be needed. And if more time *is* needed to ease the person's frustrations, take it. Until and unless the person is comfortable with you and the situation, little good is liable to come from further interviewing efforts.

**4. Speak clearly and phrase questions so you will be easily understood.**

Neither of you will gain much from your conversation if both of you aren't talking on the same level. This element of interviewing stresses the need to make sure communication is taking place. It cannot if there is *mis*understanding.

This element also stresses the need to be aware of the comprehension level of the person you are dealing with. Some people have extensive vocabularies, others don't. Some people have extensive reading vocabularies, but cannot speak or comprehend the same words when used in oral conversation.

Perhaps you have an extensive vocabulary, be careful when using big words or acronyms with your clients. Your use of them can sometimes do more harm than good.

For many of your counseling situations, information and instructions are done with the printed word in easy to understand ways. Forms, pamphlets and various promotional materials are worded in very basic ways. Simple words are used. Sometimes a drawing or other illustration is used to help get the intended message across. All of these things are done to make sure the client understands the meaning and intent of the message.

But what you say and do as the interviewer cannot be controlled in that way. In many cases, you will find yourself alone with the other person in an interviewing situation. There will be no one around to tell you to forget big words, that the person you are talking to is not understanding or that you are wasting your time and only confusing the person by continuing. So you must learn to *monitor yourself* to make sure you are not talking over the other person's head, that you are not using words the other person cannot understand or that you are not trying to somehow impress the other person.

The real tragedy in this is that few people will ever admit they do not understand. In most cases they will simply sit there, nodding their heads in

apparent agreement, yet have no real notion of what's being said. So don't be misled. Take the time to phrase sentences and questions in ways that should be understood by even the least educated person.

**5. Extend a friendly greeting.**

This seems so very basic, doesn't it? Well it is. But oftentimes, when caught up in the rush of work to do or people to talk to, the temptation is great to "skip the frills", to forget to be polite, to become so caught up in one's own self-importance that the feelings of others are ignored.

Many of the people who visit Counselors enter the doors with a certain sense of suspicion -- they're not too sure their efforts will have a favorable pay-off, and they're just a little afraid of what they'll find there, or not find, as the case may be. In most cases, they are simply looking for a friendly face -- someone they feel they can *trust* with their concerns and goals. Seldom are they looking for sympathy, usually they are looking for a kind word, understanding and assistance.

Other people enter the office with a "chip on their shoulder". They've come to the Counselor as a *last resort*. Often they have exhausted all of the solutions they know of and have suffered through countless rejections along the way. And in many of these cases, they expect rejection from you as well.

But even the worst of enemies can negotiate in a climate of mutual respect. A friendly greeting gives you that edge. So a good rule to follow is to *accept everyone as your friend*. It's a self-fulfilling prophecy expectation that seldom fails. When you set about to consciously adjust your personal attitude to always think of people in friendly ways, the friendly greeting just naturally follows.

**6. Do not let stereotypes, halos or negative biases make your decisions for you.**

Counselors often have tremendous influence in the interview's decision making process. Sometimes these decisions will be small ones. Oftentimes they will impact the command climate and Sailors' careers. No matter what your place on the Team, the likelihood is great you will be expected to make some decisions. How well you do that is very important.

Stereotypes refer to the notion that people can be typed or grouped together. Some examples would be references to the surface-type, the aviator-type, the admin-type, the supply-type, and all the other words and phrases used to describe people who tend to appear *like* others. **This notion is false.** People are individuals and cannot be typed. Each person is unique and different and you will find yourself in *constant error* if you persist in judging people on a stereotype basis.

Halos refer to the practice of judging people on a basis of *likes and dislikes*. Granted, some people strike us the wrong way and we tend to dislike them. Others we perceive as being great, so we give them a halo and tend to treat them more favorably than those we don't like as well. The danger is that this method of judging people can be very misleading. False confidence people make a living by deceiving people. We often deceive ourselves when halos cloud our judgement.

Everyone has negative biases. No amount of social legislation can prevent it. Some people form their biases when very young, others start later in life but add to the list as they mature. Either way, negative bias has no

place in a Counselor's interviewing process. Neither should you allow it to cloud your judgement in any decision you make about people no matter where or when. Some very obvious examples of negative bias: thin people are energetic, fat ones are lazy; young folks have new ideas, old ones don't want to change; etc. Granted, sometimes these biases may prove to be accurate. But more often they are not. The are exceptions to every rule. And in most cases the exceptions far outweigh the biased opinions people have about other people.

Good interviewers make decisions based on facts and their perception of each person as an individual. You would be well advised to do the same.

**7. Encourage the other person to give detailed answers and help the person "stay on track".**

Counselors sometimes will *over-control* the interview. The predictable result is short, incomplete answers and a lack of meaningful data.

Control is essential to any interviewing situation, but over-control is a mistake. And often it is a fine line between too much and not enough control. Generally, a Counselor can get a fix quickly on over-control when they hear answers being given to them in one or two word phrases. When that happens, stop and listen to yourself. The chances are great that the fault lies in the way you are phrasing your questions. When a question is asked that requires only a "yes" or "no" response, that is usually all you *will* get: yes or no. And the pity is, often that yes or no will be given in response to your attitude about this or that. That is, the answer given will often be what the other person thinks you *want* to hear. it may or may not be what the other person really feels or otherwise has experienced.

Granted, you will generally expect the other person you are talking with to stick to meaningful, relevant data. But you also want to guard against cutting the other person off or showing signs of impatience with detailed answers. In many instances, a lot of very concrete facts can be learned if the other person is allowed to *tell you*, rather than you always relying on numerous, multiple questions that only pry and probe to get the answers you need.

*Closed probes* will normally bring short answers. Some examples: Did you like your last duty station? (yes or no) Do you want to re-enlist? (yes or no) Are you ready to submit a request? (yes or no)

*Open-ended probes* generally allow the other person to tell you about this or that. Some examples: Tell me about your last duty station. (discussion) Let's talk about re-enlisting. (more discussion)

Obviously, the open-ended probe allows the other person more freedom in responding to you. Answers given will usually more accurately reflect the real feelings of the other person. And these are usually the sorts of things that will help you in assisting with making better decisions.

But be careful. Closed probes do have their place in the overall interviewing process. They do save time and when used sparingly they can be useful in gathering facts quickly.

The trick is to use the right type of probe at the right time -- closed to get short, quick responses and open-ended to get detailed, personalized information.

**8. Carefully examine your views and learn to control your prejudices.**

Your personal attitude can often be sensed by the person you are talking with. That can affect your interviewing relationship with the other person.

As indicated earlier, and as will be touched upon in other segments of this material, people tend to respond to you in ways they believe will please you. In most cases you should not accept this as purposeful deceit on their part, but simply a part of most everyone's personal behavior.

Few people like confrontation. Few people want to fight or argue, particularly with someone who may be in a position to help them. To prevent the confrontation or the fight, they simply agree or fail to raise an otherwise opposing view. In truth, they may violently disagree inwardly, but they are not going to let that show. To do so could spoil their chances for an offer of service from you.

The wise Counselor strives for neutral ground. In some cases, that is a tough chore, particularly when you have strong personal views on this or that. In many instances, of course, the real fault is in your views -- when they are too extreme, they should be suspect.

Prejudices are hard to eliminate. But they must be controlled and overcome. When they are not controlled and overcome, they become constant errors and embarrassments to the Counselor community, your command and the Navy. Seldom are prejudices based on any sort of fact. They are normally completely wrong. You would do well to work at their elimination.

**9. Always be sincere.**

Sincerity can cover a multitude of mistakes. When you are truly sincere, people can sense your honest intentions.

As a Counselor, you will always have more to learn -- you will never know it all. And a lot of the things you will learn will come from experience. True, most everything you do as a Counselor is written down in the Retention Team Manual and various instructions. And you have these materials to read and study. But you cannot remember everything -- some things will slip past you. Even some of the words you are reading now may not sink in; you may forget or overlook some extremely important points. But with repetition, things should come into focus. And as you gain in experience, you will almost certainly learn of new things daily -- because you will be doing them.

But in doing them, the chances are great that people will ask you things you do not readily know. Obviously there is no shame in not knowing -- no one is expected to know it all. But neither is there ever a need for you to pretend otherwise. When you don't know, *say so*. Admit it. Simply tell the other person you don't know and then offer to find out. That way, you will know the next time the question is asked. You will have learned from your experience.

When you choose instead to fake an answer, insincerity is the usual consequence. And if the information you give proves to be wrong, that *misinformation* can come back to haunt you or other in the chain-of-command.

The same holds true for personal opinion. To illustrate: The person you are talking with may ask for your opinion of their chances to be selected for a certain program. If you, knowing the likelihood of their success is

little or none, respond to the contrary, you may put your sincerity in doubt -- particularly if they learn later on that you were truly insincere in your assessment. If that were to happen, what do you suppose would be their attitude toward you in the future? The chances are that their respect for you would be lessened. And what's worse, they would probably carry that attitude over into the Team and chain-of-command as a whole. In effect then, your insincerity as their Counselor in just a single instance could affect the attitude of that individual for a long time to come.

**10. Always remain calm and undisturbed during the interview or business conversation.**

As a Counselor you may be exposed to many things about people and their relationship to the Navy that surprises you. You may have religious or moral convictions, for example, that are strong and deep-seated. You may have strong feelings about how people should talk and behave in polite society. You may even have some notions about how people should act and behave in the office, how they should relate to you, speak to you, share with you and all the rest.

But people are different. Some of your clients will not be like you, will not think like you think, will not share the same ideas you have about things.

As a Counselor, though, your job is not to judge the other person's style or moralize about the person's attitudes and convictions. When you register shock, disbelief, discomfort or any number of other "negatives" about the person or their behavior, you will be sending signals of moral judgement that can seriously affect your interviewing relationship.

*Some actions, though, are not to be tolerated.* If a person's behavior is against Navy Core Values, disrespectful to you or the chain-of-command, threatening or abusive, you are to put a stop to the behavior immediately and report it through the proper channels in the chain-of-command.

Again, your job, no matter what unforeseen events may occur, is to remain undisturbed. Things will always seem to go so much better when you remain professional, calm and emotionally detached.

**11. Give the other person your undivided attention.**

When talking with anyone, put the last interview or business conversation out of your mind. And don't worry about the next one until you get to it. Concentrate fully on the person you are talking with now.

Concentrate with your eyes, your ears and with all your other senses. Look for meanings in the eyes of the person you are talking with and watch for tell-tale body movements. The eyes can tell you a lot, but so can the movements of fingers, hands, arms and legs. Even if you don't know the "alleged" body language signals (and some can be faked, you know), you can still often tell a lot about a person's sincerity, honesty and general attitude toward you -- and your efforts to provide that person with a needed service -- by giving your undivided and unbiased attention to that person.

**12. Be courteous and professional.**

In any service setting, courtesy is of the utmost importance. And it *cannot* be over-emphasized.

Too many times, we take each other for granted. It is too often assumed that people who want or need some type of career-related counseling are "takers", and the Counselors on the Team are "givers". Some would argue that "just by providing the service, the needs of people are being met and they can take it or leave it". No need for courtesy, they argue. No need to be polite, no need to go out of their way to please someone or make things easier for them.

All of these notions are false. True, the Team's mission is service and that does mean giving. But services cannot be provided if the people who need to be served do not avail themselves *of* those services. And they will not if they are not made to feel comfortable, needed and welcome when dealing with any member of the Team.

In many respects, the Career Information Team is much like any other department within the command. Services provided by the Team must be used to justify the Team's continued existence. In private business, profits are used to show justification for continuance -- without a profit, the business folds. In the counseling community, *results* become the yardstick for measuring effectiveness. If the results of the Team's work are not beneficial to the command, their Sailors or the Navy, the need for Career Information Teams ceases to exist. Profit-making businesses know the value of courtesy. Without it, their customers are lost. The same holds true for the Team. Courtesy is essential to assure that offered services will be used.

Courtesy is a state of mind. It means much more than a smile and a friendly handshake. It means approaching every person with an attitude that says, "I'm glad you are here, I want to know you better, and I hope we can work together for the benefit of all". How well you are able to convey this attitude to the other person will help determine how courteous you appear to them.

Maintaining a courteous attitude throughout the workday can sometimes be a tough chore. And too many Counselors have a tough time doing it -- some even become downright rude when dealing with people. This however, cannot be allowed to become an excuse, no matter how rushed or frustrated you may become. **No Counselor has the right to become discourteous**, no matter what the circumstances.

Attitude adjustment is often helpful and necessary throughout the workday. Sometimes simply recognizing your poor attitude will be enough and you can immediately adjust it. In other cases, you may need to take a walk to the break room, restroom or water fountain. You may even find a short chat with another Counselor or co-worker about this or that will help you to recapture a more courteous attitude. The point is, do *something!* Don't risk offending people by ignoring your courteous feelings. Do something to ensure that everyone you deal with is treated with courtesy and respect.

**13. Do not be too easily satisfied -- be sure your questions are completely answered.**

This item has to do with the "sense" of the situation. Are you getting all the information you need, or is something being withheld? Is something going unsaid? Is the other person being candid and open with you?

You can usually sense a reluctance on the part of the other person to tell you everything when you give the person your undivided attention. By listening *and* watching, you can often sense when something is missing, and follow up immediately.

It has been said that the eyes are the mirror to the soul. Learn to watch the eyes. They certainly can be indicators of the other person's real feelings -- indicators of truth and untruth -- and sensing instruments that can tell you when the other person is being less than candid.

**14. Make the interview, or any business conversation dealing with career-related concerns, a two-way affair.**

The notion central to this item is that every interview or business conversation should be a *sharing* experience. To help you make that possible, it is strongly suggested you always give the other person some information about Team practices and procedures or information about ways in which you can provide the person a meaningful service.

*Information* can be a service. In some cases, information may be the *only* service you *can* offer a particular individual at a specific time. Later, other services may be appropriate. But in any contact with the public, information of some sort can usually be provided immediately.

It's important that the sharing of information be a two-way street. To be effective, you both must examine the information and learn from one another.

Often, the temptation is great to make information sharing a one-way affair. Too often our meanings come across like this: "Tell me what I want to know and I will act upon it" or "I know what I need to know to provide you with the service I think you need -- all you need to know is what I want you to do next."

As a Counselor it is important that you know as much as possible about the Team, your command and the Navy in order to provide anyone with reliable information when it is needed. You may at times have to rely on the knowledge of others to fill you in. You should be able to say, "I don't know, but I will find out." As stated in a previous item, there is no shame in not knowing. The shame is in not knowing but *pretending* otherwise.

**15. Use your interviewing time to gather information not already stated on the request chit or interview form.**

The Team is provided standardized interview forms and many Teams have developed command-use forms for re-enlistments and other common activities as well. These aid in the interviewing process by speeding up the data gathering time needed. And in most instances, the forms serve their purpose very well. But they are not foolproof and Counselors will need to spend time verifying the information people put on them.

The purpose of reviewing items of information on the chit or form with the client is to verify that information given is correct and that the items were correctly interpreted.

Try to avoid a duplication of effort here. Initial accuracy review should come from the first Counselor who conducts the interview or puts together the chit or request. In subsequent interviews with other Counselors, the information should be quickly verified and added to as needed.

In automated offices, it is a good idea to also check the information entered into the system on the person at this time, particularly the work center assigned, phone numbers, etc.

**16. Separate "fact" from "inference".**

Your job as a Counselor at any level, no matter what, is to gather *objective* data. Guesswork will not do. Facts can be proven, inferences cannot. It is extremely important to recognize the difference and act accordingly.

**17. Provide for privacy.**

Privacy for Counselors is often a difficult proposition. Often, workspace offices are large, common areas. Counseling offices are usually shared with others as well.

Nonetheless, it is generally recognized that privacy is important to interviewing success. People, it has been found, tend to be more open and candid when they can relate to you and others on a one-to-one basis without "the whole world listening in."

For Divisional and Departmental Counselors, try to arrange to secure the break room or training room when you are doing your monthly interviews. When spontaneous interviews arise, perhaps you can step outside the work environment to find some privacy on the pier, in the library or such.

For Command Career Counselors, perhaps you have another Counselor or Command Master Chief in the office with you. Usually under these conditions, the office mate will simply step out to take care of business elsewhere during the interview.

Regardless of the limitations of your surroundings, you can still do a great deal by *the way you conduct yourself and your conversation* with the other person. That is, you *do* have the means of *suggesting* privacy in the way you talk, the loudness of your voice and the degree of intimacy you create by your manner and your attitude. Privacy is a skill well worth developing.

**18. Maintain an impartial attitude.**

Impartiality and preferential treatment have no place in the interview process. The Team's mission is service, no matter what.

To ensure impartiality and fair treatment, it is important to guard against strict yes and no positions. Remember, it is not the Counselor's job to judge the *person*, rather it is your job to *carefully weigh the qualifications* of that person for whatever request or program they may be interested in.

Granted, you may not like the person's attitude, but you cannot allow your personal feelings to overshadow the Team's mission -- service. Services provided *must* be made available to everyone irrespective of how you personally feel about them or their situation. You can only do this effectively by maintaining a detached, impartial attitude, free from preferential treatment. There are no exceptions.

**19. Do not hurry or rush.**

Granted, time is an unrelenting taskmaster, but the idea here is to take the time to be effective in your role as Counselor. When you hurry or rush, you're just liable to miss something. And your negligence could then waste more time than saved by undue hurry.

Often, though, there are ways to do things faster and more efficiently. You may not readily recognize ways to do this. But others may be in a better position to show you. When other Counselors or members of the command offer to help, it is a good idea to listen. And it's an even better idea to try the things they tell you and adopt them as standard practices, if you find that their ideas work.

Practice is also a way to do things faster with no loss in efficiency. As you learn a certain routine, you should become quicker at it. You will naturally be expected to do things faster as you gain in experience. Hurry and rush are actions a good Counselor avoids. You would be wise to not allow them into your workday.

**20. Do not imply the answers to your questions.**

Sometimes the temptation is great to hurry, rush or "force" the interview or business conversation by asking questions you know the person will answer as you would like. But seldom will that accomplish anything constructive in the long run. Often, in fact, that sort of practice will give you the wrong answers -- because from your implications, the other person is led to believe *that* is what *you* want to hear. And with wrong answers, of course, you will invariably find yourself looking foolish.

Rule of thumb: when you imply, you encourage folks to lie. And lies and half-truths are not useful to the Team's work.

**21. Be as frank as possible.**

Honesty is a two-way street and a cornerstone to good leadership. Seldom can objective assistance be given to Sailors or the chain-of-command without the truth being told. Facts must be used as much as possible to assure that workers are qualified to perform certain, specific tasks. Great pains must be taken to assure that Sailors are represented fairly and accurately.

Counselors can do no less than to be as honest and frank with others as they would want those people to be with them. It does little good to interview if you cannot "tell it like it is." It is not good business to hurt the feelings of people, but it is harmful to withhold information the other person needs in order to make a decision. So a good rule for yourself is to always be candid, honest, open and just as straightforward as you can possibly be; remembering that the Counselor walks a fine line between representing the Navy, the command and the Sailor.

**22. Let the other person tell their story -- then help them supplement it.**

As a Counselor, you have several excellent sources of information; the member's record, the chain-of-command and the member themselves. In the interviewing process, you will rely heavily on the information the member gives you. They know their personal facts, at least from their frame of reference. What they tell you may not agree with what someone else may tell you about the situation, but you would be wise to listen to the version of the person you are interviewing.

What the person tells you may not agree with the facts you already know about this or that. As you gain experience in counseling you will learn things about jobs, working conditions, ways of doing business and any other number of things concerning the command and the Navy. When the person tells

you something that does not agree with your experience, that is your clue to clarify and supplement the information through both the interview and through outside sources as well.

The primary reason for this advice, however, is to reinforce the notion that you should avoid appearing as an interrogator to the person you are talking with. When you allow the other person to tell their story, you are also giving them the freedom to explore their own personal situation in greater depth -- allowing them to "talk through" their problem. Often, in talking it through, they will solve their own problem or at least get started in the right direction with a little help from you.

Many well-meaning Counselors fail to see the value of people deciding their own destinies -- they feel their job is to *tell* people what to do. Don't make that mistake. Often, when you tell someone what to do, they will become dependent on you. Or if the plans you make for them fail, they will blame you for their failure. Worse, many will blame the Team because you are a representative of it.

Always try, as best you are able, to *allow* the other person to make their own decisions. You, of course, can suggest alternatives, provide information, talk of probabilities or point out facts concerning this or that; but leave the final decision on what action to take with their careers to the other person.

**23. Ask challenging questions if you must, but do it sparingly.**

*Challenging questions* can be described as attention-getters. They challenge the person you are talking with. In some cases they can be confrontational or abrasive, perhaps even harsh and demeaning.

Good interviewing demands that the person you are talking with does most of the talking, but sometimes they won't. Some people are timid, others are limited in their use of the language. Some people will be bewildered by you, your role or the environment in which they find themselves.

Challenging questions can be a way to help some people overcome their resistance or reluctance to talk. They can also help you subjectively measure their initiative, their willingness to cooperate, or their real desires.

Some examples and applications: young Sailors will often be inexperienced and timid. Rather than rushing immediately into career-related conversation, ask about the person's hobbies or personal interests. "Tell me about your hobbies" or "what do you do for fun" might be good challenging questions to get the conversation going.

Older Sailors may suspect you or the system. You might ease this situation by choosing to ask questions not related to the interview to help overcome their fears of your "bureaucratic" intentions.

If the other person is naturally introverted or in a sullen mood, a definite challenge may be in order. But be careful here -- this approach can hurt future interviewing sessions if not properly handled. As a Counselor, you would be wise to avoid using this sort of approach until you have had considerable experience in dealing with people.

Remember that challenging questions can sometimes hurt the feelings of people. When you use them, make sure you take the time to "heal all wounds" before the interview is over. In some cases, you might even need to make an

outright apology and take some of the blame for the things you said. In any event, whenever a challenging question is used, you would be well advised to follow through to make sure your challenge has not hurt the other person's feelings.

**24. Create a pleasant memory in the mind of the other person.**

No matter where you are assigned in the command's Career Information Team, you are a very visible representative of that Team. It is important that the people you talk with leave with a favorable impression of you and the Team.

Always strive for the creation of pleasant memories. Future dealings with that person may well depend on the pleasant memories you create now.

**25. Grant the other person strict confidence in reference to anything they might say.**

It is bad manners to relate the troubles of others. It is also bad business.

It may be amusing to poke fun at the other person's troubles in the break room with co-workers, but just suppose someone told the other person about that? Or suppose the other person overheard you making light of a situation similar to theirs. Or worse yet, suppose someone repeated a similar story about you. How would you feel?

In many respects, the people you talk with are much like you. For the most part, they don't want the whole world to know about their business. And your job as a Counselor at any level is to assure them that you *will* hold their situation in confidence as you assist them achieve their goals.

**26. Do not waste time -- push forward to the objective as rapidly as the other person can readily follow.**

Hurry and rush were previously described as wasteful, but *pushing forward* should be thought of as an efficient way to go about doing your job without hurrying and rushing.

Time should always be considered a factor in whatever job you are assigned to do. And the wise use of time must always be uppermost in your mind. Your speed of progress though, will often depend on your own good use of planning and organization. This in turn may well depend on the ability of the person you are talking with to share with you on an equal basis. To share, the two of you must be in step, attuned to one another. Make sure your pace is in harmony with the other person's, not too fast or too slow -- rather, work together at whatever pace is most comfortable for each of you.

**27. Understand your positional authority as a Counselor on the Team.**

As a Divisional, Departmental or Command Career Counselor you will most certainly be subordinate to many of the people you will serve and assist. It is *imperative* that you do not, at any time, overstep your place within the command and appear insubordinate to others. Improper use of your positional authority has a negative impact on every other Counselor in the Navy. It is a heavy burden that we all bear together. It is often a very thin line the Counselor may walk in the performance of their duties. If you always remember to deal in facts and qualifications and to present requests equally and without favoritism, you can't go wrong.

It is also strongly recommended that you actively cultivate a solid working relationship with your Command Master Chief, as well as the Leading Chief Petty Officers, the Leading Petty Officers, the Department Heads and Division Officers at your command. These leaders can greatly assist in the smooth performance of your duties. If you have credibility with these folks, you will find your job to be much easier.

You will have, as the Command Career Counselor, direct access to the Executive Officer and the Commanding Officer. *But do not abuse this privilege.* That direct access policy is established to better assist you with the effective and efficient completion of your normal career-related duties. It is not bestowed upon *you* as a specific person, it is bestowed upon *all* Command Career Counselors Navy-wide.

**28. Do not be impertinent, superior or overbearing.**

Remember, the other person is another human being much like you. The only difference between the two of you, just now, may be that you have a job within the command that allows you to assist this person in career-related matters.

Just as you probably do not like it when people act superior to you, so the other person might react unfavorably if you pretend you are something that you are not. From a Counselor's perspective, all people are equals. The Team provides all services based on equal opportunity considerations. You are expected to honor that commitment.

**29. Avoid any words or mannerisms that might distract the other person.**

Certain words or mannerisms can be upsetting. Curse words are particularly damaging, as well as words or phrases that carry a sexual connotation or hidden sexual meanings.

Some mannerisms people might find objectionable would include foot tapping, finger drumming, loud or abrasive talking, excessive gum chewing and many other mannerisms of a nervous or repetitive nature.

Often, you may be unaware that you do any of these sorts of things. They have simply become subconscious habits developed over a period of time. But you can make yourself aware of them simply by taking stock of yourself.

When talking with someone, check yourself out. Do that by making yourself aware of what you are saying or doing that could be upsetting to someone else. Rest assured, when the other person is distracted by the things you say or do, your interviewing effectiveness will suffer.

**30. When counseling, record all data at once.**

To put off making note of the facts is to run the risk of forgetting. And while it is generally not good practice to write extensively while the other person is trying to carry on a conversation with you, it is considered good practice to simply jot down short, one or two word notes to yourself about this or that. Then after the interview is over you can go back and put your notes into greater detail.

The important point is that memory is fickle. Few people can long remember small details. Many have a tough time remembering even the basic facts developed in the interview, particularly if the number of interviews

have been many or if other more essential tasks come your way during the course of the day.

**31. Sell, but don't "oversell" a Team service to the person you are talking with.**

It is generally good practice to think "selling" when offering a service to the other person. That means giving the person information about a program or career option in great enough detail to convince them it is a service from which they could benefit. Encouragement and motivation are also selling approaches.

But "overselling" too often borders on dishonesty. It can result in an attempt on your part to entice the person to do something they would not normally do. And in doing that, your well-intentioned efforts are liable to boomerang.

"Pie in the sky" promises are risky. "Glowing accounts" can get you into trouble. Stick to the facts as you know them and *allow* the other person to make their own decisions.

**32. Don't leave the other person "up in the air" at the end of the interview or business conversation.**

From your own experience, you should recognize the frustration of being left "up in the air" no matter what the situation. When it comes to career-related concerns, the frustration can be tremendous.

Rather than leaving people wondering, it is strongly suggested a better approach is to tell the other person exactly what your next step will be, what future actions or developments can be expected.

Cooperation is essential to most Team service successes. To maintain the cooperation you will need from the other person, you must be willing to share. Without sharing, little cooperation is likely.

It is generally not good enough to say, "Well, I'll see what I can do." This offers the other person nothing and usually implies you have nothing in mind. Rather, take the time to discuss alternatives, share possibilities and ask for suggestions. From that, a plan for future action should emerge upon which you both can act. A good Counselor will often provide the person with a written list of items they will be doing. But do not let the other person leave without some idea of what to expect from you next. Anything less will only discourage the other person with a sense of time wasted, potential rejection and despair.

**33. Use the other person's rank and name occasionally when talking with them.**

One of the most important thing to Sailors is their rank and name. They are, afterall, two of the most personal things about each of us.

When you use the rank and name of the person you are talking with, you are saying, "I am respectfully aware of you as an individual -- a *unique* individual." If you are unsure of how to pronounce a person's name, simply say so and let them teach you. Then use it during the interview situation. Ultimately, as a Counselor, you will know the names of just about everyone onboard the command.

Using the other person's rank and name when talking with them is a personal touch that few people can ignore.

**34. Never argue with the other person.**

Arguments will, invariably, lead to ill will and resentment. If you win the argument, you will often lose the respect and confidence of the other person. If you let the other person win, you will endanger your own self-respect.

Your job is to give information, correct misconceptions, redirect thought and explain procedures. But when the other person challenges you, it is best to "bow out" of the argument.

In bowing out, you don't have to agree, but you also don't have to argue any further. To do so invariably leads to a "no-win" situation for both of you.

**35. Do not preach or moralize in the interview or business conversation.**

Seldom will your views cause any real change in the other person's thinking, particularly when moral or social issues are involved. Stick with the things you know best: career-related concerns and leadership; and then remember to speak from a factual point of view.

When you rely on objective (factual) information, you avoid the vague generalities of subjective areas. Deal with the facts and leave the preaching to the clergy.

**36. When asking personal questions, carefully explain the reason for the question before asking it.**

Generally speaking, there is little need to ask personal questions in career-related interviewing. But when it is necessary, make sure to explain the reasons you find it necessary to ask. Should the person refuse to answer, drop it -- don't press the issue. As Counselors, there are many other ways to find information about an individual; the C/MC, service record, and so on.

**37. Always try to provide a "real" service for the person you are talking with.**

The "real" purpose of any interview or business conversation should always be service. Sailors who contact the Team are looking for help. You may speak with them in person or on the phone. But unless they leave your office or hang up the phone with a feeling that you have helped them, you really will have not fulfilled the Team's service mission. And sometimes, that's a hard task.

In almost every case some service can be offered, some help can be provided. Some people will not qualify for SEAL training, but you can suggest EOD. Some people will not have the skills for a schoolhouse instructor, but you can offer recruiting.

In other situations, the service you *can* provide is information -- things people may not know. You may not be able to get a Sailor their dream location on a set of orders, but you can put them in contact with the RAP/SITES database at the Family Service Center to learn about the new area they'll be transferring to. That is a service. You can almost always provide a meaningful service if you only try.

**38. Exercise your sense of humor.**

Career Information Team work need not be dreary drudgery. You can ease your work day and the day of those in your office with a sense of humor and a smiling face. True, what the Team does is serious business, but that serious intent can do more harm than good when carried to extremes.

Beyond that, a sense of humor can also make the interview or business conversation a pleasant experience for both you and the person you are talking with. In many ways, it should be encouraged.

Jokes, of course, are usually not appropriate. But just by being cheerful and alert, your sense of humor will often show through. When the other person senses it, tension and potentially sensitive situations will be relieved.

Laughter is contagious, someone once said. What better tonic for people who have come into the office looking for help -- often burned-out, dejected and ready to call the Navy quits -- than a professional office filled with happy people who are eager to assist? Try it. A good sense of humor can help you and the people you work with. It also makes the smile a little friendlier and helps everyone adjust a bit more readily to the notion that the Counselor's office *can* be a nice place to be.

**39. Learn to say "no" without reluctance or regret.**

For many Counselors, one of the toughest chores is to say "no." No is a negative, of course, but beyond that, it often means denying a Sailor something they desperately want.

Saying no is particularly difficult in counseling situations. When a Sailor hears of a program they believe they are qualified for, they then go to the Counselor expecting to be told yes. Quite often though, the program selected will be inappropriate -- the Sailor will not qualify to request. And then it becomes the Counselor's task to explain why the program selected is not appropriate, why they do not qualify.

And sometimes the Sailor will not take no for an answer. In their mind, they do qualify. "Just give me chance," they'll plead. Unfortunately many Counselors and commands find it hard to say no in situations like this. Some will even bend the rules and submit the request to let someone else, BUPERS or the program's selection board, be the one to say no.

Saying no can take many forms, but for Team purposes the best form is to simply say no. No deceit, no deception, no beating around the bush in an attempt to make things easier -- rather, just say no, politely and firmly.

More important, perhaps, is what the Counselor says and does after the no. An explanation of *why* you said no is always in order, but you can always do more. Doing more, as a matter of fact, will help you a great deal in dispelling your own feelings of reluctance and regret for having to say no. Doing more has to do with offering the person an alternative -- ideally something as good or better than what they did not qualify for.

Learn to say no and provide another meaningful alternative service. Rather than leaving you with negative feelings of reluctance or regret, that practice will leave you with a positive feeling of helping.

**40. Do not linger over the dismissal of the person you are dealing with.**

Counselors' offices are busy places. When talking to people, the temptation is often great to visit awhile for no good reason. This is particularly true if you have established a friendly rapport with the other person during the course of your business conversation. In most instances, you may not be able to afford that luxury.

In other cases you may tend to linger over the close of the interview because you really don't know how to end it. This could be particularly true in situations where you have failed to provide a meaningful service. Try as you might, there simply seems to be nothing you can do for the person on this visit, but you still hesitate sending them away empty-handed.

These are normal feelings. But you must learn to suppress them. When the interview is over, say goodbye. When you have developed all the facts you need to make good, sound, future decisions and the other person knows what to expect next, say goodbye. You will accomplish nothing by extending the interview further. So end it with a smile and good wishes and begin to mentally prepare for the *next* interview.

Conclusion

Most topics end with a conclusion, but that is not the purpose of this topic. The purpose here was to give you a basic foundation for working on the Career Information Team.

The list of effective interviewing items you have read through was a lengthy one and still, not everything was covered. You may think of other things, share them with other Counselors and add them to your list.

You may also find there are times when some of the means and methods discussed in relation to each item do not agree with how things are done at your current command. Maybe the people there relate to people differently. Maybe your chain-of-command is opposed to certain suggested practices. Maybe the Team has found a better way to handle many of the day-to-day tasks that confront them.

Conversely, maybe the people there refuse to try something different, resist efforts to make things better or daily defy those who subscribe to the Team's service mission. Maybe people are inflexible, slow to accept new ideas or do not understand the wants and needs of other people.

In any event, you will be expected to "fit in." You will be expected to take care of Sailors, their career-related issues and the command. You will make little progress trying to "swim upstream," trying to force your ideas on people who have been there much longer than you or trying to use all the methods and procedures described in this topic when the people you work with do not accept them as worthwhile.

Likewise, you may find from time to time that it will be to your advantage to disregard some of these ideas. And if that's the case with you, that's okay too. After all, now that you know some of the things *good* Counselors practice when interviewing, you are in a better position to "judge" what's right for you.

In a very real way, this is a beginning. You are a Counselor armed with new tools and will be expected to learn how to do your job best. What's best depends a great deal on you and how you relate to your command and the world and all the people in them.

For the most part, the ideas presented here are not *rules*, they are not "set in concrete." You will still have the latitude to do what's best in terms of your responsibility and the service needs of the Sailors you will talk with.

Rules, someone said, are made to be broken. When dealing with people, this is particularly true. What is "right" for one may not be good for another. For the most part though, the ideas you have reviewed *will* prove right more than wrong. Try to adopt as many of them as you can. Learn them. Practice them. Share them with other Counselors. And good luck in all your counseling assignments.

# 40 INTERVIEWING TECHNIQUES OF PROVEN EFFECTIVENESS

Deserve & gain the confidence of the client you are talking, interviewing or otherwise dealing with.

Have a plan for your interviews, but execute it as you would normal conversation with the client.

Be at ease & overcome shyness or self-consciousness on the part of the person you are talking with.

Speak clearly & phrase questions so you will be easily understood.

Extend a friendly greeting.

Do not let stereotypes, halos or biases make your decisions for you.

Encourage the other person to give detailed answers & help the person "stay on track".

Carefully examine your views & learn to control your prejudices.

Always be sincere.

Always remain calm & undisturbed during the interview or business conversation.

Give the other person your undivided attention.

Be courteous & professional.

Do not be too easily satisfied--be sure your questions are completely answered.

Make the interview or business conversation dealing with career-related concerns, a two-way affair.

Use your interviewing time to gather information not already on the request chit or interview form.

Separate "fact" from "inference".

Provide for privacy.

Maintain an impartial attitude.

Do not hurry or rush.

Do not imply the answers to your questions.

Be as frank as possible.

Let the other person tell their story--then help them supplement it.

Ask challenging questions if you must, but do it sparingly.

Create a pleasant memory in the mind of the other person.

Grant the other person strict confidence in reference to anything they might say.

Do not waste time--push forward to the objective as rapidly as the other person can readily follow.

Understand your positional authority as a Counselor on the Team.

Do not be impertinent, superior or overbearing.

Avoid any words or mannerisms that might distract the other person.

When counseling, record all data at once.

Sell, but don't "oversell" a Team service to the person you are talking with.

Don't leave the other person "up in the air" at the end of the interview or business conversation.

Use the other person's rank & name occasionally when talking with them.

Never argue with the other person.

Do not preach or moralize in the interview or business conversation.

When asking personal questions, carefully explain the reason for the question before asking it.

Always try to provide a "real" service for the person you are talking with.

Exercise your sense of humor.

Learn to say "no" without reluctance or regret.

Do not linger over the dismissal of the person you are dealing with.

# PUBLIC SPEAKING

## SUGGESTIONS FOR OVERCOMING FEAR OF SPEAKING BEFORE A GROUP

- Know the material well and be the expert
- Practice your presentation in front of others or videotape yourself
- Use participation techniques to allow the audience to be involved
- Learn participants' names and use them
- Establish your credibility early
- Use eye contact to establish rapport
- Take a course in public speaking
- Exhibit your advance preparation via handouts, etc
- Anticipate potential problems and prepare probable responses
- Check in advance the facilities and audiovisual equipment
- Obtain information about the group in advance
- Convince yourself to relax by breathing deeply, meditating or talking to yourself
- Dress comfortably and appropriately to manage your appearance
- Rest up so that you are physically and psychologically alert
- Use your own style, don't imitate someone else
- Don't read, use your own words
- Put yourself in the listeners' shoes, they're asking "What's in it for me?"

- Assume they are on your side and that they aren't necessarily hostile or antagonistic
- Provide an overview of the presentation by stating the end objectives
- Accept that some fear is good (energizing stress vs. destructive stress)
- Introduce yourself to the group in advance when possible via a social context
- Identify your fears, categorize them as controllable or uncontrollable and then confront them
- Give special emphasis to the first five minutes of your presentation
- Imagine yourself as a good speaker

# TAKING THE TERROR OUT OF TALK

by Michael T. Motley, Psychology Today, Jan88

## THINKING IN TERMS OF COMMUNICATION RATHER THAN PERFORMANCE HELPS US CALM OUR BIGGEST FEAR

Surveys show that what Americans fear most -- more than snakes, heights, disease, financial problems or even death -- is speaking before a group. This is surprising, in a way, since even a dreadful speech isn't as serious as illness, poverty or the grave. Yet about 85 percent of us feel uncomfortably anxious about speaking in public. Even professionals aren't immune -- many suffer extreme stage fright, or to use its more formal label, "speech anxiety."

While it's comforting to realize that such anxiety is almost universal, a magic formula to dispel it would be even more comforting. There is no such formula, but recent research that helps us understand speech anxiety better also suggests ways to control it.

The most familiar aspects of speech anxiety are its physical symptoms. Most people report some combination of sweaty palms, dry mouth, increased heart rate, shaky hands, weak knees, shortness of breath and butterflies in the stomach. Laboratory measurements add increased blood pressure and muscle tension to the list of symptoms. With all this going on, it's no wonder the experience is unpleasant for many -- for some, so unpleasant that they avoid public speaking completely, whatever the cost.

Physical symptoms are just one component of speech anxiety. More important is how people interpret those symptoms. A few speakers, the confident ones, see their physical reaction as a positive sign that they are emotionally ready for the speech. Most, however, interpret the feelings as fear. To justify this fear, we need something to be afraid of, so we begin to imagine what will happen if our speech is less than perfect. These imagined consequences are usually exaggerated and irrational. People say, for example, "The audience will ridicule me if I make a mistake. I'll be embarrassed to death," when in fact audiences usually ignore errors and awkwardness as long as they get something out of a speech.

These irrational fears and physiological symptoms often feed on each other -- the fears increase the symptoms, which in turn increase the fears -- until extreme physiological arousal combines with thoughts of catastrophe. Heart rates can approach 200 beats per minute in speakers convinced that they will make fools of themselves.

Excessive anxiety is especially common among people who view speeches as performances, in which they must satisfy an audience of critics who will carefully evaluate gestures, language and everything else they do. Though they can't describe precisely what these critics expect, people with a performance orientation assume that formal, artificial behavior is somehow better than the way they usually talk. Research has shown that expecting to be evaluated or being uncertain about the proper way to behave arouses anxiety in almost any situation.

A much more useful orientation, and a more accurate one, is to view speeches as communication rather than performance. The speaker's role is to share ideas with an audience more interested in hearing what they have to say than in analyzing or criticizing how they say it -- a situation not very different from everyday conversation.

Speech anxiety if a three-stage phenomenon that develops well before the speech is to be delivered: the performance orientation, the physiological arousal it triggers and the thoughts that justify interpreting the arousal as fear. Other aspects of anxiety develop during the speech itself. For example, performance-oriented speakers often assume that the audience sees how nervous they are, a belief that can have a snowball effect. An only slightly exaggerated scenario might go like this: "Oh my gosh, they can tell that my voice is quivering...now they know that my hands are shaking...now they know that my knees are shaking...now they can tell that I've fainted!"

Studies on how well an audience perceives anxiety should comfort nervous speakers. Researchers have found that most people report noticing little or no anxiety in a speaker. Even when individuals are trained to detect anxiety cues and instructed to look for them, there is little correlation between their evaluations and how anxious the speakers actually felt.

Most speakers are familiar with two phases of physiological arousal that go with making a speech. Arousal usually increases substantially in the few minutes before the speech, as we anticipate making it, and there is another even greater surge as we actually start speaking. Heart rates during the anticipatory phase usually range from around 95 beats per minute to somewhere in the 140s, compared to normal resting heart rates in the 70s. Then as we confront the audience and begin to talk, heart rates usually jump to somewhere between 119 to 190.

There is also a third phase of arousal many speakers aren't familiar with, one that should be comforting. The tremendous "confrontation" surge doesn't last long. Arousal begins to subside within about 30 seconds, gradually returning to anticipation levels or even lower. The confrontation reaction is so memorable, however, that many speakers don't perceive the drop off.

There are two lessons here for anxious speakers. First, it helps to realize that the confrontation reaction is short-lived. Preliminary studies suggest that speakers who consciously monitor this adaptation can make it happen even sooner -- a sort of "I'm better already...better yet...still better" reaction. Second, even people who aren't very anxious have these anticipation, confrontation and adaptation reactions. While they can't be eliminated completely, we can learn to modulate and accept them as normal signs that we are ready to do our best.

A number of techniques are being used successfully to control anxiety. One popular approach, systematic desensitization, is aimed specifically at lessening physiological arousal. The technique involves training in muscular relaxation, couple with visual imagery. People are taught to relax as they imagine giving a speech, the assumption being that psychological anxiety doesn't go with physical relaxation. Typically people start be imagining an event fairly remote from the planned speech, such as being in the audience of someone else's speech. Once they achieve relaxation with that image, they repeat the process while imagining events closer to giving the speech, until they finally visualize their own speech, still feeling fully relaxed.

Another popular approach, Rational Emotive Therapy (RET), works on irrational thoughts that contribute to anxiety. RET and its variations try, in particular, to get speakers to realize that many of their own fears are ill-founded. After people explain precisely what they fear, flaws are pointed out in the reasoning and then the speaker adopts a more realistic attitude.

Another effective approach shifts the speaker's orientation away from their performance and centers more on their level of communication.

Communicative Pragmatic Orienting (CPO), works to persuade people that effective public performance. Once people genuinely view making a speech as communication, they can think of it in terms of their normal, everyday conversation rather than in terms of past anxiety-ridden performances. With this approach, speech anxiety almost always subsides and the speeches almost always improve.

A nonperformance orientation helps a speaker realize that their real objective is to communicate. Unlike our school classmates who counted the number of times we said "uh" during oral book reports, most audiences are more interested in hearing what we have to say than in evaluating our speech skills.

By far the most important quality of a speaker's delivery is to make the members of the audience feel that they are truly being spoken with rather than spoken at. People who perform at concerts, plays or dance recitals are expected to have unusual skills and to show them off. But if a speaker's purpose is to communicate, all they need are the gestures, vocal inflections and facial expressions used in everyday conversation.

The primary differences between conversation and public speaking are simply that public speakers talk longer before their "time is up," and that they need to spend more time selecting, organizing and clarifying their thoughts before they talk. Preparing the content can be hard, but if it is done well, the actual speaking should be the easy part.

For us, giving a speech is an important event and it's natural and appropriate to feel some anxiety. A speaker's aim should be to keep this natural nervousness from cycling out of control -- not to get rid of the butterflies, but to make them fly in formation.

# TIPS FOR SPEAKERS

- Decide on your specific objectives first. Before you think about anything else, know one or two major points you want to communicate. Then plan the best way to get them across.

- Put yourself in your audience's place. Recognize how you and most of the audience differ in attitudes, interests and familiarity with what you are talking about. Then speak to them on their terms, using their language.

- Don't memorize, don't read. Except for a few carefully chosen gems -- memorable phrases or examples you know will work well -- be as spontaneous as possible. Don't rehearse to the point that you find yourself saying things exactly the same way each time. Use brief notes to keep yourself organized.

- Speak to one person at a time. Looking at and talking to individuals in the audience helps keeps you natural. It feels foolish orating to one person. Speak to each person as long as is mutually comfortable, usually no more than 15 seconds.

- Try not to think about your hands and facial expressions. Instead concentrate on what you want to get across and let your nonverbal communication take care of itself. Conscious attention to gestures leads to inhibition and awkwardness.

- Take it slow and easy. People in the audience have a tremendous job of information processing to do. They need your help. Slow down, pause and guide the audience through your talk by delineating major and minor points carefully. Remember that your objective is to help the audience understand what you are saying, not to present your information in record time.

- Speak the way you talk. Speak as you do in casual conversation with someone you respect. Expecting perfection is unrealistic and only leads to tension. The audience is interested in your speech, not your speaking.

- Ask for advice and criticism. For most people careful organization and a conversational style add up to a good speech. A few speakers, however, have idiosyncracies that distract an audience. Solicit frank criticism from someone you trust, focusing on what might have prevented you from accomplishing your objectives. Usually people can correct problems themselves, once they are aware of them. If you don't feel you can, take a course in public speaking or see a speech consultant.

# 10 KEYS TO EFFECTIVE LISTENING

These keys are a positive guideline to better listening. In fact, they are the heart of developing better habits that could last a lifetime.

| Keys to Effective Listening | The Bad Listener | The Good Listener |
|---|---|---|
| **Find areas of interest** | Tunes out dry subjects | Opportunizes & asks "What's in it for me?" |
| **Judge content, not delivery** | Tunes out if delivery is poor | Judges content, skips over delivery errors |
| **Hold your fire** | Tends to enter into arguments | Doesn't judge until comprehension is complete |
| **Listen for ideas** | Listens for facts | Listens for central themes |
| **Be flexible** | Takes intensive notes using only one system | Takes fewer notes. Uses 4-5 different systems, depending on speaker |
| **Work at listening** | Shows no energy output Attention is faked | Works hard, exhibits active body state |
| **Resist distractions** | Is distracted easily | Fights or avoids distractions, tolerates bad habits, knows how to concentrate |
| **Exercise your mind** | Resists difficult expository material; seeks light, recreational material | Uses heavier material as exercise for the mind |
| **Keep your mind open** | Reacts to emotional words | Interprets color words Does not get hung up on them |
| **Capitalize on the fact that thought is faster than speech** | Tends to daydream with slow speakers | Challenges, anticipates, mentally summarizes, weighs the evidence, listens between the lines to the tone of voice |

# THE DIFFICULT CLIENT

## Clients and Anger -- Suggestions for handling the situation

1 Try to understand what's behind the client's anger

2 Try not to be defensive or take it personally

3 Be careful not to talk down or above the client

4 Ask concrete questions; give direct answers

5 Offer simple, specific and practical help

6 Don't promise what you cannot deliver

7 Know your referral network; give specific name, number, address; even call the referral office to be sure they can see the client

8 Be specific in praising, offering direct reassurances and avoid direct disapproval

9 Remember that body language talks positively and negatively

10 Seek a fresh point of view or refer the client to another Counselor for a fresh point of view

# A GUIDE FOR DEALING WITH DIFFICULT CLIENTS

By ICESA Employment & Training Committee Aug88

This is intended to serve as a guide to not only recognize potentially dangerous situations, but how to effectively defuse each one at the very early stages of development.

Career Counselors often stand in the front line when it comes to handling difficult or irate applicants, clients or co-workers. Explosive situations can present themselves without warning. It is an accepted truth that Counselors tend to be professionals who enjoy keeping everyone happy, enjoy assisting others and receive job satisfaction from helping Sailors reach their career goals. Counselors who fit that personality profile are likely to experience extreme discomfort when they are confronted with acute anger. For that reason, Counselors should develop specific skills for handling angry people and mentally rehearse their role before the crisis occurs.

All confrontational conversations between Counselors and clients can be classified as either "complementary" or "crossed" transactions. Counselors should choose to use the specific human relation skill that will reduce the hostility and anger of the client. A "crossed" transaction results in arguments, hurt feelings and increased tension. A "complementary" transaction reduces tension and moves the conversation toward a positive resolution. Notice that "complementary" is spelled with an "e". This skill has nothing to do with complimenting the client. Rather, it has to do with tailoring your response precisely to the actions and words of the other person just as a complementary angle completes a circle.

Fitting a complementary response into a tense situation is almost like achieving harmony in singing. You must hit exactly the right tone. Correct timing is also essential. You can practice this skill in everyday conversation.

Success in dealing with angry people depends largely on choosing the proper response. If you habitually practice complementary responses in everyday conversations, that skill will be ready when you need it in a conflict situation.

Using complementary dialogue does not imply that you must agree to be manipulated by the anger of others, that you can never say "no" or that you will ultimately agree with the opinion of the other person. It does lower the emotional pitch of the situation, ease the way to getting the facts and defuses hostility that is inappropriately aimed at you personally.

In emotional situations, feelings almost always take priority over facts. Recognizing the person's feelings is more important in the first minute or two than getting the facts, solving the problem or referring the case to someone of higher authority.

The pace of your response is important. The angry person is attempting, through emotionalism, to communicate how urgent the problem seems to them. They want you to feel their urgency and respond to it with something equal to their own intensity.

Dealing with verbal abuse can be one of the most difficult areas for Counselors. If a client becomes verbally abusive, consider the following "DOs" and "DON'Ts":

**DO**

• Speak slowly and calmly in a firm, supportive tone of voice.

• Try to get the client to sit down, this has a calming effect. If they won't sit down, stand up so that you will be on the same physical level.

• Let the angry client talk.

• Get the client to begin to discuss their problems, then fill out whatever forms might be necessary and answer questions.

• Listen to the client, give them your undivided attention.

• Try to understand the client's problems.

• Maintain an objective position.

• State your purpose, offer to help and wait for the client to react.

• Remain vigilant in visually searching the client and reduce your focus off of their "toxic" or "gut language" words.

**DON'T**

• Overreact.

• Let the angry client set your mood -- stay in control.

• Give power to the client by showing your own frustration or anger with their situation.

• Show frustration or anger towards the client personally.

• Become defensive.

• Project a state of confusion and ask the client questions such as, "Why do you need to know?"

• Put the client down by belittling, embarrassing or challenging them.

# COMMUNICATION STYLE QUESTIONNAIRE

By The Kelwynn Group

Each of us has a set of general behavior patterns. These patterns express themselves in our personality and in the way we communicate with others. If we can identify how we communicate with others, it makes us aware of how we are perceived. We can then avoid unproductive behavior and learn how to control our communications.

In this questionnaire, you are asked to select the words and phrases that "best fit" how you communicate with others. Remember there are no right or wrong answers. Be honest with yourself and answer how you actually behave, not how you think you should behave.

Circle the letter of the response to each of the following situations which you think would describe your actual behavior on the Communication Style Questionnaire Score Sheet.

**1. When I talk to others, I like to:**

a. get to the point.
b. talk.
c. tell only what I want others to know.
d. go into great detail.

**2. At times I may be:**

a. blunt.
b. slow to give information.
c. overly strict in my interpretations.
d. very subjective in my description of things.

**3. Most of my communication is directed toward:**

a. being friendly with others.
b. precision.
c. cooperation.
d. getting results.

**4. I am sometimes accused of:**

a. being tentative.
b. not listening.
c. procrastinating.
d. talking too much.

**5. When I am in a discussion with people, they:**

a. know I desire the facts.
b. know I don't like surprises.
c. know where I stand.
d. know I am enthusiastic.

**6. I like communication which is:**

a. positive.
b. logical.
c. straightforward.
d. calm.

**7. I like conversations which are:**

a. stimulating.
b. optimistic.
c. sincere.

d. calm.

**8. I don't like conversations which:**
a. create stress.
b. are not cooperative.
c. don't accept my view.
d. I cannot control.

**9. I feel best when I am:**
a. listening to others.
b. following an agenda.
c. telling others what to do.
d. smooth and poised.

**10. My greatest weakness in communicating with others is when I:**
a. demand details.
b. react too quickly.
c. desire personal attention.
d. speak without adequate preparation.

**11. Most of the people I work with think of me as:**
a. neighborly.
b. cautious.
c. open to change.
d. sincere.

**12. My greatest need is to:**
a. be with people.
b. be given time to adjust to changes.
c. be encouraged.
d. be given frank direction and evaluation.

**13. The basic idea of communication is to:**
a. cooperate with others.
b. gain power over others.
c. persuade others.
d. bring things under control.

**14. When I use written communications, I tend to:**
a. be too brief or not write at all.
b. oversell an idea.
c. go by the book.
d. over-document or write long messages.

**15. I function best in an environment which:**
a. is free.
b. includes other people.
c. is organized.
d. is pleasant.

**16. Conversation which motivates me the most gives me:**
a. a challenge.
b. comfort.
c. friendly relationships.
d. recognition.

**17. When those around me are under stress, I tell them:**
a. about the positive.
b. what to do.

c. to adjust to the situation.
d. to stay calm.

**18. My greatest strength in talking to others is that I am:**
a. conscientious.
b. outgoing.
c. decisive.
d. willing to listen.

## Communication Style Questionnaire Score Sheet

Circle your selection to each question and total the number of circles in each column.

| QUESTION NUMBER | COLUMN 1 | COLUMN 2 | COLUMN 3 | COLUMN 4 |
|---|---|---|---|---|
| 1 | a | b | c | d |
| 2 | a | d | b | c |
| 3 | d | a | c | b |
| 4 | b | d | c | a |
| 5 | c | d | b | a |
| 6 | c | a | d | b |
| 7 | a | b | c | d |
| 8 | d | c | b | a |
| 9 | c | d | a | b |
| 10 | b | d | c | a |
| 11 | c | a | d | b |
| 12 | d | a | b | c |
| 13 | b | c | a | d |
| 14 | a | b | c | d |
| 15 | a | b | d | c |
| 16 | a | d | c | b |
| 17 | b | a | d | c |
| 18 | c | b | d | a |
| | ____ | ____ | ____ | ____ **TOTALS** |

## Interpretation

You have been asked to select words and term which "best fit" how you communicate with others. Identifying how you perceive your communications can help you understand how you come across to others and help communications be more productive.

When you have identified the column which has the most responses, you can determine your "communication style". The interpretation of each column is as follows:

**COLUMN 1 - Direct Style**

In communicating with others, you like to feel you are in charge. You like a challenge, difficult assignments and quick action. You can be very decisive in your conversations.

You may have need of improving your communications because you tend to be too brief, a one-way communicator, a poor listener and to sometimes come across as blunt.

You may want freedom, power, independence and quick results. Be sure that these things work for you and not against you in your communications with others.

**COLUMN 2 - Talkative Style**

In communicating with others, you like to feel you are successful in persuading them. You like to be around people, to look successful, be popular and to be positive. You can be very talkative.

You may have need of improving your communications because you tend to talk too much, speak without preparation, oversell an idea and give more information than necessary.

You may want popularity, influence, acceptance and public recognition. Be sure that these things work for you and not against you in your communications with others.

**COLUMN 3 - Sincere Style**

In communicating with others, you like to be sincere. You like to be a member of a group and you need appreciation, stability and time to adjust to new ideas. You may not want to tell all you know.

You may have need of improving your communications because you tend to respond slowly for information, need too much personal attention and may be turned off by an aggressive person.

You may want to build roots, to feel needed and to be asked -- not told -- what to do. Be sure that these things work for you and not against you in your communications with others.

**COLUMN 4 - Organized Style**

In communicating with others, you like to be thorough. You like to feel that you are in a low-risk situation, cooperative, organized and are using standard operating procedures. You can be very logical in your conversation with others.

You may have need of improving your communications because you tend to be excessively detailed, to write long memos, to overemphasize when putting things in writing and slow to trust others.

You may want thinking time, low-risk situations, cooperative relationships, organization and long explanations. Be sure that these things work for you and not against you in your communications with others.

# "WHAT YOU THINK IS...WHAT YOU ARE."

## A GUIDE ON HOW TO BALANCE TAKING CARE OF YOURSELF WHILE TAKING CARE OF OTHERS

By Steve Chapman and Priscilla Donovan

## Introduction

Have you ever thought about how much you like the type of work you are doing, but you're not sure you like what it's doing to you?

What about the constant pressure you feel to help others with their problems at work while you're facing problems of your own and never seem to have the time to take of them?

Have you noticed that most of the people you work with are facing the same situation? Either they are over extended or burned-out and have often given up and so are not really contributing (which adds to the burden of your workload).

Have you ever thought that there must be a better wy -- a better way to survive in this business and feel good about yourself, to feel that you're not being taken advantage of?

If you answered "yes" to any or all of the above questions, then this topic was written with you in mind. You can learn to take care of yourself while taking care of others.

The key word is learn. The ability to have and maintain a balanced personal and professional life can be learned, practiced and improved upon. The methods we will discuss here are not complicated.

## Our Thoughts Create The Imbalance

What gets in the way of maintaining the balance between work, home and oneself is the way we have learned to think about ourselves, our work and our world. From the time we get up in the morning until we go to bed at might, our minds are interpreting the events in our world based upon our understanding of the way things are. This process does not start anew each day, rather, it is an accumulation of attitudes we have learned over many years. We call upon the interpretations, learned in the past, to explain the present.

These interpretations come in the form of an inner dialogue called "self-talk". This self-talk goes on in our heads all the time. Self-talk may or may not be accurate. Since our interpretations have been learned, they may not have been based on objective reality and may be creating the imbalance in our lives.

Many of our learned beliefs about being able to help others are based upon outright misconceptions. For example, consider these statements:

**"My personal worth is dependent on how well I take care of others."**
**"It's wrong to think of myself or put my needs before the needs of others."**
**"I should always be able to meet the needs of others."**
**"I'm failing if I can't meet the needs of others who want my services."**
**"I must have approval from others before I can feel OK about myself."**

**"Others' success and happiness depends upon me."**

These "others" may include Sailors, the Chain-of-Command, co-workers, friends and family members.

## Who Is Responsible? You Are...

In order to maintain a balance in our lives, we must first understand why we behave the way we do. Our thoughts cause our behavior. Yes, our learned way of thinking, directed and controlled by us, is what causes us to behave and feel the way we do. In other words, we are responsible for how we react to any given situation because our reaction is based upon our thinking.

Most of us believe that the outside events in our lives are what causes us to react the way we do. Our reactions include both emotions and behaviors. We believe that something or someone else is responsible for how we feel and behave, that they cause us to act the way we do. We believe external events cause our reactions because our response almost immediately and directly follows the event. Since the reaction follows the event, we assume the event produces our feelings and behaviors. In reality, these outside events are only triggers. Events trigger our interpretations, which create our responses.

We probably learned to believe this way because it is easy to observe an immediate reaction to any event.

## Knowing The Framework

The framework below was developed to help explain the behavior process:

**First** there is the **SITUATION** or event

**Next** comes your **BELIEF** about the situation

**Finally** there is your **REACTION** to the situation

This understanding of behavior explains why people react differently to the same or similar situations, and why we don't always respond the same way to similar situations.

Once you accept that external events do not actually cause your behavior and emotions, and that your behavior is based upon the way you think; you have taken the first step in taking more control over building a balance in your life.

## Beliefs Can Be Changed

The good news is that our beliefs are always being modified as new information is presented to us. This explains why we change how we think and feel about things. We are not forever stuck with an inaccurate or out of date belief. We can all recall examples of things we used to believe very strongly about and reacted strongly to emotionally. But as things changed and we obtained additional information, we changed the way we thought and felt about the topic.

Since our beliefs, or self-talk, produce our behavior, it follows that if the self-talk is changed, the reaction will also change. You control the

self-talk, therefor, you are the only one who can change it. If you have concluded that you do have imbalance in your work and/or personal life, you will have to change the way you think about yourself and others in order to obtain a balance.

The next step in the process is to find the thoughts that create imbalances. The belief inventory that follows is designed to help you uncover ideas you hold which contribute to not taking good care of yourself. After you have answered the questions, score your responses and note where you may be out of balance.

## Beliefs Inventory

**Directions**

Read each statement as it relates to you and give the item a score of:

1 point if you seldom or never think this way

2 points if you sometimes think this way

3 points if you frequently or always think this way

Read each and circle the number which best represents your thinking on the statement. It is not necessary to think over any item for very long. Be sure to mark how you actually think about the statement -- not how you think you should think. And, to get a true picture, it is essential that your responses correspond with your behavior. So review your usual behavior when answering.

1. When I've taken good care of me, I can be at my best for others. 1 2 3

2. My personal value is based only upon how well I take care of others. 1 2 3

3. People ought to do as I wish. 1 2 3

4. It's wrong to think of me first or to ever put my needs in front of others. 1 2 3

5. Only my needs are important. 1 2 3

6. I like the respect of others, but I don't have to have it. 1 2 3

7. I can't stand the way others act. 1 2 3

8. I don't care what others think, I'll do it my way. 1 2 3

9. No one can possibly meet all the needs another person may have. 1 2 3

10. I must have approval from others or I am miserable. 1 2 3

11. Others' success and happiness depends on them, not me. 1 2 3

12. There is nothing more important than what I want. 1 2 3

13. Others' success and happiness depends upon me. 1 2 3

14. Only I can really take good care of me. 1 2 3

15. I must have things go my way. 1 2 3

16. Only you can really take good care of you. 1 2 3

17. I'm failing at my job if I can't solve all my client's problems. 1 2 3

18. I should help everyone who needs it. 1 2 3

## Scoring The Belief Inventory

The Belief Inventory is scored in three categories: Taking Care of Others, Taking Care of Me Only and Balance. Each of the three categories has six statements from the 18-statement Belief Inventory that pertains to that category. Record your numbers for the specified statements on the Belief Inventory as they are listed for each category, then add those six numbers for your total in the category.

**Category: Taking Care Of Others**

Scores on statement numbers

2. _____
4. _____
10. _____
13. _____
17. _____
18. _____

_____ Total

The higher your total score of the specified statements above, the more likely it is that you are out of balance and lean toward taking care of others before you take care of yourself.

A total score of 6 in this category is the lowest possible score, and the most desired.

If your total score in this category is 10 or more, you will put others first and yourself second. Since there's never a lack of people needing help, your turn never comes. While you are waiting you may become angry, resentful and burned-out. The more out of balance the scale becomes, the less effective you probably are in helping your clients.

**Category: Taking Care Of Me Only**

Scores on statement numbers

3. _____
5. _____
7. _____
8. _____
12. _____
15. _____

_____ Total

The higher your total score of the specified statements above, the more likely you are to be out of balance; tending to take care of yourself at the expense of others.

If your score in this category is 10 or more, you'll put yourself first while not considering others. Such thinking makes it unlikely that you would have good business and personal relationships. Also, such thinking is not conducive to being successful in the helping services. Only thinking of yourself is just as out of balance as never thinking of yourself.

**Category: Balance**

Scores on statement numbers

1. _____
6. _____
9. _____
11. _____
14. _____
16. _____

_____ Total

The higher your total score of the specified statements above, the more apt you are to maintain a balance in meeting the needs of yourself and others. In this category, the ideal answers are 2s and 3s.

Those who think along these lines are the least likely to have resentment and stress at work and at home. This balance helps improve work and personal relationships. People with this balance realize that there are times when you will choose to do things for others and times when you will choose to do things for yourself. They also take responsibility for their own well being and don't expect others to take care of them.

## Balanced Beliefs

1. When I take good care of myself, I'm better for others.
2. Taking care of others is one way of taking care of me.
3. I maintain a balance between pleasing others and pleasing myself.
4. Others feel better about me when I take good care of myself.
5. When I like myself more, I like others more.
6. Everyone wins when everyone takes care of themselves.
7. Before I can take good care of anything or anyone, I must first take good care of myself.
8. Unhappy, depressed people don't take care of themselves or others.
9. We are all our own caretakers, responsible for our own well being.
10. I encourage others to take better care of themselves.
11. I don't ask other people to take good care of me by doing as I wish.
12. Relationships improve when both parties are taking care of themselves.
13. I can be my best friend or my worst enemy, it all depends upon how I choose to think and what I choose to do.
14. Things don't upset me, I upset myself.

One Minute Manager author, Dr. Spencer Johnson, in his later book, One Minute For Myself, identifies the beliefs above as contributors to taking good care of yourself.

The more of these beliefs you hold or develop, the more likely you are to be able to maintain the balance you are looking for. These are the beliefs you want to use to replace those that take us out of balance.

When you counter an out of balance thought, and do so repeatedly, it becomes progressively weaker. Then is the ideal time to replace that out of

balance belief with a helpful, balanced one. This is how you can change your way of thinking for the better.

With practice, you will learn to identify troublesome beliefs you hold and replace them with more balanced thinking.

## Changing Your Beliefs

To be successful in replacing non-productive out of balance thinking, you need a daily commitment to work changing the beliefs previously identified. The following method has been successful for others and can be helpful for you when you follow each step.

1. Stop each time you feel out of balance and ask yourself **"Is there a better way for me to be thinking or behaving right now?"** By stopping and asking yourself this question, you are starting to build the habit of checking up on yourself. This can prevent emotions from getting out of control before you realize it.

2. When the answer to the above question is "yes", then take a few moments to review on a piece of paper these questions:

• What's going on? Write out in a few words an objective statement of the event or situation. Don't put in your own interpretation, just the facts.

• Describe what it is that you are saying to yourself -- out of balance self talk statements.

• Write out the balanced counter statements to your self talk.

• Finally, write out the answer to the question **"What is the best way for me to think and act right now?"**

# DO IT.

Keep track of your progress. Congratulate yourself, give yourself a reward. If you have problems, review this guide and pay special attention to the next section; Sabotages.

## Sabotages

A sabotage is anything that interferes with your ability to maintain balance in your life. Your biggest sabotage is going to be the way you think about taking care of yourself. Sound familiar? Yes, your own non-productive way of thinking can undermine your progress.

If you are aware of sabotages, you are better able to avoid them. Listed below are some that may get in the way of applying the concepts of the guide. Read them over and add some of your own.

• "Daily work is not necessary to be successful."

• "I'm not improving, so I'll give up."

• "Changing beliefs can't work for me."

• "This method doesn't apply to me, I'm different."

- "I'm too old to change."
-
-
-

## Understanding Your Clients

Now that you know how replacing your out of balance self talk can help you, think about how this applies to your clients. Much of the time, being a Sailor and not taking the appropriate steps to advance, excel and achieve is a problem for them because of the beliefs they hold. A primary reason Sailors have trouble with their careers is because of the beliefs they have about themselves.

When you evaluate the out of balance beliefs common to Sailors, you can see that they are often irrational, or at least non-productive, to their desired career path. Their out of balance beliefs limit their ability to take the positive action necessary to obtain their goals. Unless there is intervention to deal with this barrier, it will continue and grow worse. Changing the Sailor's irrational, non-productive thoughts is usually the most positive step to changing the situation.

And while we all have irrational beliefs, most of them are not devastating to our day to day living.

In this country we tend to base our self-worth on the job we have and the work we do. The irrational belief. "I'm worthless" contributes powerfully to how Sailors perform their duties. When a Sailor says that they're worthless and believes it, they will start to act worthless.

While you may not be able to spend the time needed with a Sailor to alter their counterproductive thoughts, just realizing this process clearly in your mind will alert you to their problems and enable you to be sensitive to the guidance they are seeking. Counselors are in a very key position to see Sailors at the very moment when they are most able to change. You are in the trenches with them, feeding them the ammunition. You are the shipmate they can count on. But you must first help yourself before you can help them. Caring for yourself first can make the difference!

## APPENDIX J - PRESENTATION METHODS AND TECHNIQUES

This appendix is provided to assist Counselors with the selection, preparation and delivery of oral and visual presentations.

# ORAL AND VISUAL PRESENTATIONS

In the course of your duties as a counselor, you will be required to make group presentations. They may be for a division's general military training (GMT), a wives club, or for required interviews. Whatever their purpose, the credibility of both your program and yourself can be either enhanced or degraded by the quality of your presentations. With this in mind, you should never go into a presentation unprepared. By preparation we mean the process of planning a talk before, during, and after the actual researching.

## CLASSES OF PRESENTATIONS

Every time you face a group of people, you must have a purpose in mind. This purpose is directly related to the response you want from the audience when you are through speaking. Presentations can be classified into several different types according to their general purposes and the desired audience reactions.

### Presentations to Stimulate

When a presentation is given to stimulate, you want your audience to be inspired, to be aroused enthusiastically, or to feel awe, respect, or devotion. This type of presentation may be given to the retention team to motivate them in taking a more active part in the retention program.

### Presentations to Convince

When the general purpose of a talk is to convince, you attempt to influence the beliefs or intellectual attitudes of your audience with evidence and proof. You use this type of presentation to urge belief in the commands retention policies, to attempt to convince people of the validity of your ideas, and to strive to convince listeners of the superiority of certain programs.

### Presentations to Inform

The object of a talk designed to inform is to have your audience know or understand something to increase or widen their knowledge of your subject. The group presentations for the required interviews are informative presentations.

### Presentations to Introduce

Occasions may arise that call for you to introduce a speaker, such as command briefings, training sessions, open houses, and retention team meetings. It may be necessary for you to write a speech of introduction. If so, it would be helpful to obtain a biography on the individual in advance. The object of an introduction is to create a desire to hear the speaker; everything else is subordinate to this aim. You may not use everything in the biography. The topic of the speech and/or the type of audience will determine the portions of the biography that you use for your introduction.

There are no hard and fast rules for introducing speakers, but it is important to use the proper title for the person you are introducing. Listed

below are a few general rules for using proper titles when introducing speakers:

- When you introduce officers by rank, give their position title if appropriate; for example, "Captain Joe Jones, Commanding Officer, Navy Education and Training Program Management Support Activity."

- Officers may be introduced as Mr., Mrs., or Miss up to and including the rank of Lieutenant Commander. They are introduced by rank from Commander and above.

- Use "The Honorable (name)" and position title when introducing Presidential appointees as well as federal and state elected officials; for example, "The Honorable John Smith, Under Secretary of the Navy."

- Navy chaplains are always introduced as Chaplain.

- Navy dentists or doctors are introduced as Doctor up to and including the rank of Lieutenant Commander. They are introduced by rank from Commander and above.

- Use Petty Officer First Class (name) and position title when appropriate; for example, "Master Chief Joan Smith, Fleet Career Counselor, Navy Education and Training."

## PRESENTATION PREPARATION

What steps do you take to assure a successful talk and to make it worth the time of the audience and yourself once you have scheduled a presentation or received a request to speak to a group.

### Analyze

Analyze your audience, occasion, and location and determine the purpose that can best be served in the talk.

1. Is it merely to inform?
2. Is it to convince the audience?
3. Is it to stimulate the audience?

### Outline

Prepare a complete, detailed outline of the entire presentation such as illustrated in figure 4-3, citing types of example material for each point to be made. Plan the type of audiovisual aids to be used and indicate on the outline where they are to appear during the presentation. Most large commands have access to a graphics or training aids section that can prepare almost any type of visual aid you may need as long as you can supply them with a rough idea of what you want. Most presentations with which you can expect to become involved will be supported or illustrated with the overhead transparency projector. Movies are also used quite often.

Any presentation is comprised of three parts: the introduction, the main body, and the conclusion.

In the introduction, you should identify yourself and make a positive statement that shows your interest in the group and the topic. You should also have some attention- or interest-getting statement. This statement can be an example, a presentation of data, an anecdote, or an assertion. Unless

you know each individual in the audience, jokes are not recommended as attention-getters. Starting off with a joke may offend or alienate part of your audience, and thus is a risky way to start any presentation. The introduction should also identify the purpose and objectives of the presentation and why it is important to the audience.

The main body should be assembled point by point in the order required. Each point should be supported by data or facts. If possible, you should limit any group presentation to not more than seven main points.

**NOTE:** The limitation of points does not necessarily apply to a classroom presentation. You should make every effort, however, to make any classroom presentation as uncomplicated as possible.

The conclusion should contain a brief review or summary of the points covered and some sort of inspiration for the audience to use the information you have passed on.

EXAMPLES: "Now I'd like for you to try it ..., it's up to you ..., it's your future..., and so on."

The conclusion should be ended by thanking the audience, complimenting them on their attitude or for their participation, and asserting your positive expectations of them; for example, "Thank you very much, I'm delighted to have been here. You have been extremely receptive, and I'm sure you will do well", and so forth.

## The Presentation Planning Checklist

A presentation planning checklist, like the one shown in figure 4-4, should be used to help you make sure your presentation will be effective and complete. The following are suggestions for improving your presentation skills:

Use a presentation planning checklist.

Use critiques to pinpoint any behaviors that need to be modified. Ask an ex-instructor, or someone with public-speaking experience, to sit in on a dry-run practice of the presentation for constructive criticism.

Improve your presentation skills with practice. It is best to practice with specific requirements such as time limit, audience composition, and so on, in mind.

Observe other speakers. Evaluate them and compare their presentation style and methods with how you would present the same material.

Dress according to the surroundings. For example, do not show up for a wives club presentation in dungarees, or in the engine room in whites.

Know who will be in your audience and aim your presentation at their level.

Tape or video tape, if possible, your practice sessions and actual presentations. Review them and evaluate yourself.

**NOTE:** SITE or AFRT personnel can assist you with access to video tape equipment.

Join the local Toastmasters or local equivalent. Most colleges offer public speaking at night classes; take advantage of them if possible.

## DELIVERY TECHNIQUES

Perhaps the most common dilemma faced by every speaker is that of nervousness. However, what most speakers forget is that this condition can be positive as well as negative. Of course, should you lose consciousness upon reaching the podium, your nerves are working against you. On the other hand, if you feel anxious and "keyed up" your nerves are doing just what they are supposed to do. The racehorse that is alert and spirited before a race is often the favorite; the one that is calm and somewhat sluggish is almost counted on to lose. The same applies to speaking; nerves can be an asset to a speaker by mentally preparing him or her for the presentation. Only when extreme nervousness or extreme nonchalance exists need the speaker concern himself or herself with the natural phenomenon of nervousness.

Nervousness is a natural and healthy thing. Speaking before a group for the first time doesn't come easy. By understanding the techniques necessary for building self-confidence, however, you will be well on your way to becoming a more effective speaker.

The first thing you must do is develop a positive attitude--convince yourself that you have the ability to improve. No one is a born speaker or instructor. Speaking well is a skill that is developed as a result of training and practice. Once you have convinced yourself you can improve, you are ready to begin.

The fastest method of developing self-confidence is to be thoroughly prepared. If you have carefully followed the steps in preparation described in this chapter, you should be confident that the material you have prepared is adapted to the needs and interests of your audience. You will have the points that you wish to make organized in logical sequence and you will be able to recall the key word outline from quick references to your notes. This is the most heartening feeling a speaker can have.

Once you are secure in your knowledge you'll almost want to get up and share it. This impulse to get your ideas across must be encouraged; you'll find that it will increase your interest and fun in all speaking situations. Wanting to say something so that your audience gets the point is one of the impromptu secrets of delivery.

Because of the personality differences of individual speakers and audiences, there are no ironclad rules or principles that can be given regarding the delivery of your presentation. The interest and understanding shown by an audience influence speakers in both what they say and how they say it. Speakers must adjust to suit their personality. Only general suggestions can be made at this point. Following are some pointers that may give you an idea of what the "how to say it" involves.

## Speaker to Audience Contact

Look at your audience. Good eye contact tells you what the reaction (feedback) of the audience is and it creates the impression that you're talking personally to each member of the audience.

Deliver your talk as if it were the most important event in your life. Make everyone within the audience understand exactly what you are trying to say. Talk to your listeners as if you expected them to stand up and talk right back to you. Vitality will produce effective delivery. There is nothing quite so dull as watching a speaker who is lethargic and seems to be on the borderline of sleep while delivering his or her talk. It is much easier to deliver your points effectively if you are enthusiastically concerned in getting ideas across.

Establish a sense of communication with your audience. Think of the members of your audience, not yourself, as you talk to them. Make every effort to express yourself with enthusiasm. Sincerity and interest in your audience warms the manner of delivery.

## Platform Appearance

Movement of a speaker has the effect of attracting the attention of the audience. If the movement is natural and easy it is valuable. Do not distract your audience by too much movement, but don't remain glued to one spot.

A gesture is the movement of any part of the body to convey some thought or emotion. Gestures should always be purposeful. They must be natural and seem to grow out of what you are saying. Avoid artificial gestures and mannerisms that do not help to express an idea.

Whenever you speak, you and the Navy will be judged by your appearance. Immaculate grooming will give you added confidence in facing your audience and will add emphasis to what you say.

## Voice Control

The quality of your voice has a direct bearing on the effect you will create. Make sure you are loud enough to be heard. Nothing is quite so exasperating as trying to read a speaker's lips. Volume should be increased so that the person in the last row can hear every word that you utter. Expressiveness is important too. An expressive voice varies the rate of speaking and appears to be conversational in tone.

## Delivery Rate

Some thoughts should be spoken slowly, some with feeling, and some with excitement. But above all, the rate should be natural for the idea expressed and should serve to emphasize important ideas. Of course, the choice of words and the selection of language to convey your ideas must not be overlooked. You will never have to contend with the criticism that you have a dull or faltering voice if you earnestly wish to get your point across and avoid sounding wooden and mechanical in delivery.

## BRIEFS

Briefings or "briefs" are short presentations and should be reinforced with audiovisual aids. They are usually used as tools to sell a program or inform seniors on a specific topic or closely related topics.

Always establish the goal of the brief first. Once you have determined the goal of the brief, work out an outline. The key words of the brief should work as triggers to remind you of what to say. Never plan a brief to last longer than 15 or 20 minutes.

The audiovisual aids should be composed of slides, large sheets (24 inches by 36 inches or larger) of paper mounted on a tripod or a wall/bulkhead, chalkboard, or any other appropriate aid that will assist you in presenting your brief.

**NOTE:** Development of audiovisual aids are discussed later in this chapter.

Try to keep the number of audiovisual aids down. After all, the presentation is called a brief. The following is a suggested format for the slides or pages:

Front or first page/slide: It should be eye-catching. It is primarily used to give the audience something to look at while you are giving the introduction. This gets the audience adjusted to the idea that you are going to show them something.

Second page/slide: Use a short title at the top with a list of the key words or items you are going to talk about.

Third page/slide: In outline format, list the key words of the reason you want, need, or require the program or change, or the reasons that the subject of the brief was developed by someone else.

Fourth page/slide: In outline format, list the key words that describe the subject of the brief (for example, what you are selling).

Fifth page/slide: In outline format, list the key words that identify what the audience should contribute to the program.

Sixth page/slide: Use an outline format to list the key words or show graphic representations, as required, to summarize the program or idea that you have given in the brief. Make the summary positive and convincing.

You should make an appointment for the brief and not just blunder in and say you want to present a brief. Items that should be addressed in the brief include but are not limited to the following:

- The major objective(s).
- How you plan or recommend to reach the objective(s).
- Costs (monetary, manpower, space, time, and so on).
- Resources required. (This could be considered as part of costs.)
- Who will be involved. (Again, this could be considered as part of the costs.)
- Time required to meet each objective.
- Advantage(s) of the proposal or subject of the brief.
- Reaction(s) to the idea(s) presented.
- Feedback. (Be on the alert for compromise or offers of an alternate method.)

While many people associate the idea of briefings with major staffs, this is an incorrect assumption as far as your job is concerned. Your CO expects you to provide updates on any changes that affect the retention arena. In the event of new programs or major changes to existing programs, you are expected to make it your business to inform the CO of any impact on the command, either positive or negative. The brief will not always be as formal as the one described above. Informal briefs can also be presented to the CO by memo or brief sheet.

## AUDIOVISUAL AIDS

It is a well-documented fact that the more of the senses (sight, hearing, taste, touch, smell) that you can affect, the better the message will be retained. In many cases, one picture is worth a thousand words and is less confusing too. You will find that audiovisual aids can help liven up a relatively dry topic such as service records or correspondence. For career counselor presentations, the audiovisual aids are mostly visual; you are the audio.

The first step in developing an audiovisual presentation is to determine what equipment and production facilities are available. A short conversation with one of the senior Photographers' Mates (PH) at the photolab or the local shore-based audiovisual facility will save you much wasted effort and provide you with guidelines and assistance in preparing material to be produced as slides. If your ship or station does not have a PH assigned, you will find a review of module 2 of the Photographers' Mate training series, NAVEDTRA 373-02-45-83, and the Journalist 1&C, NAVEDTRA 10295-B, to be of great

assistance. Requests for production of audiovisual aids are made on a Request for Audiovisual Services, OPNAV Form 5290/1.

Audiovisual equipment and materials fall into four general categories:

1. Directly shown graphics
2. Optically projected graphics
3. Actual objects and models
4. Audio or sound effects

In your speaking situation, you must decide which category (or combination) will serve you best in increasing your ability to communicate your information to a particular audience.

## Directly Shown Graphs

In this category, we have charts, graphs, posters, blackboards, and handouts.

**CHARTS.--**A chart may range from a simple list to a complex portrayal of function and structure of an organization. A well-made chart that is simple and uncluttered will add immeasurably to the interest and clarity of your presentation.

A chart frequently used is the outline chart. This is a chart that contains a brief outline covered with strips of paper. The strips are removed when the right word, symbol, or phrase is needed to reinforce the oral presentation. Of course, the words or phrases should be arranged in logical sequence, corresponding to your key word outline or prepared manuscript.

There are certain rules that should be kept in mind when you use a chart.

1. Use short phrases and short words and illustrate their meaning, if applicable.

2. Use type and lettering large enough to be easily seen.

3. Use highly visible colors.

4. Don't use too many colors.

5. Above all, keep it simple.

**GRAPHS.--**Graphs are an excellent means of presenting statistical information. Since statistics can tend to be dry and confusing, you will want graphs to make statistical information as clear, vivid, and interesting as possible. Graphs need very little special skill in presentation and are very effective for use in oral presentations. Generally speaking, all graphs fall into one of four categories.

- The line graph is used effectively to demonstrate trends and/or changes that take place in such topics as manpower, rate and/or rating or population levels, reenlistment/discharge trends, and monetary subjects.

- The bar graph is generally used to show single topic trends. It is plotted in the same manner as the line graph, but the bar graph displays values as bars or blocks. The major difference between the bar graph and line graph is that the bar graph need not show any passage of time.

- The pie graph or chart is excellent for showing a comparison of several related items. Pay breakdowns are probably the most commonly seen examples of the pie chart. The complete pie or circle represents 100 percent of the topic to be represented, and each item is shown in a proportional percentage slice or segment.

- The picture graph is the most interesting and striking of the four types of graphs. It is difficult to make without a template of the symbols used to represent data; however, there are a number of methods of making a template if you cannot locate the exact one you want. A short discussion with a Lithographer (LI) or an Illustrator Draftsman (DM) is helpful in determining what local services are available. Picture graphs can be used to show trends, comparisons, or combinations of the two. They are prepared in the same general way as bar graphs, except that the symbols replace the solid bar. By substituting whole and partial symbols for the bar(s), percentages or amounts can be indicated accurately.

**CHALKBOARD.--**Another audiovisual aid is the chalkboard which is primarily used for oral presentations. Its main advantages are that it requires no special artwork, you can place information on the board as it is developed orally, and it requires no electrical power. Some hints for the use of the chalkboard are as follows:

- Plan your illustrations in advance.

- Keep the board uncluttered and what you put there as simple as possible.

- Make sure everyone can see the board.

- Use a pointer to indicate an item on the board.

- Stand to one side of the chalkboard to avoid blocking the view of the board.

- Do not keep your back to the audience for prolonged periods (you are there to talk to them, not the board).

- Use an eraser (rather than your hands) for any erasures.

- Press hard on the chalk and print legibly.

- Use color for emphasis not decoration.

**HANDOUTS.--**You may use a mimeographed chart, drawing, data sheet, welcome-aboard brochure, and so on, as an aid to your talk. You must plan carefully the time of the distribution. Beware of the temptation to pass out handouts, outlines, or any printed matter during the presentation. Attention is diverted from what you are saying and continuity is lost. The principles involved are as follows:

- Motivate the audience to want to read the material.

- Have a system for smooth distribution.

- Maintain contact and continuity.

The best time to distribute handouts is at the end of the presentation, during which time you may ask for questions. An alternate time is before you begin, if the audience has previously been motivated to recognize the value of the material.

## Models or Actual Objects

Either models or actual objects may be used as visual aids. They can be very effective if you are arranging for a job fair or Navy Day. At times, the actual object to be displayed or discussed is small enough to be used as a visual aid to support your main points. The object used can be the specific object under discussion, or it can symbolize your ideas in a presentation or display.

When you use objects in a presentation, do not overuse them. Keep them out of the view of the audience until you are ready to discuss them, and once they have been used, put them back out of sight. By doing this, the display object will not distract the audience. Avoid the use of an item that will draw attention away from the primary message you are trying to convey. Use objects that enhance the display.

Models can be constructed to represent tangible objects or to symbolize intangible ideas that support your point, such as a scale to represent justice, a small Statue of Liberty to represent freedom, a model of an airplane, and so forth.

## Audiovisual Equipment

The Navy owns many types of audiovisual equipment. You will probably use 35-mm slides, pictures, video tapes, 16-mm motion pictures, and overhead transparencies. You should be well versed in the use of these audiovisual mediums and their supporting equipment as you will find them very useful in your duties as a Navy Counselor. Most bases have an audiovisual management point of contact (AVMPOC). The AVMPOC will assist you with equipment checkout, availability of viewing facilities and so on. See the Navy Audiovisual Management and Operation Manual, OPNAVINST 5290.1 for further information.

**VIDEO TAPE AND 16-MM MOTION PICTURES.--**The age of live and instant television production is here. Portable video tape systems have all but replaced 16-mm film. The video tape systems provide a cost-effective, instant, portable information gathering operation.

Sixteen-millimeter film is equally effective for large and small groups alike; whereas, video tape is more suited for small groups, unless you have multiple monitors placed throughout the viewing area.

A few suggestions for the selection of video tapes and 16-mm motion picture films are as follows:

- Select the tape or film carefully. Make sure it will add to your presentation.
- Preview the tape or film. This allows you to double-check the quality and appropriateness of the tape or film and choose important parts that you may want to highlight.
- Plan the introduction of the tape or film and the discussion after the presentation that will emphasize the key points.

- Make a final check of the tape or film and equipment before the presentation.

- Introduce the tape or film by telling the audience what they can learn by seeing it. Suggest the important points to look for during the presentation.

**OVERHEAD PROJECTOR.--**The overhead projector is used to project images from large sheets of transparent material with colored or opaque images. One of the best features of the overhead projector is that it may be used in a room without turning off the lights. Additionally, the sheets of transparent material are large enough to allow you to write directly on them as you are speaking. By writing on clear acetate with a grease pencil, you can develop the visual aid as the presentation develops.

Operation of the various types of overhead projectors is simple, and instructions are generally printed on the projector. Some copy machines can produce transparency-type projectuals from printed material. They make excellent audiovisual aids if you have access to them in your command.

**35-MM SLIDE PROJECTOR.--**The 35-mm slide projector most likely to be available to you is the carousel. The slides are fed into the projector from a top-mounted circular tray. These trays come in varied slide capacities and can contain up to 140 slides per tray.

Slide projectors and overhead projectors are very useful in training your retention team members. Rather than having to ask your audience to imagine a document or having to provide one copy for each member of the audience, you conserve funds and the time required to prepare the aids for the presentation. In addition, it carries more impact for you to be able to point at the area or item you are discussing than to have to say, "Now, if you'll look at the 13th line down, 5th block from the left, on page..."

The availability of audiovisual equipment depends on the mission and type of your command. Check with your AVMPOC for information about assets available at your duty station.

## STAGING AN AUDIOVISUAL PRESENTATION

The use of audiovisual aids to improve the communication process is only as effective as the preparation you apply before to their application. The more professional the presentation, the more credible the message, so it behooves you to be prepared. You can improve the staging of a presentation by controlling the environment. You can usually control the space arrangement, lighting, atmosphere, and mechanics of the presentation area.

Important factors to consider in space arrangement are the screen or viewing area and the audience's line of vision.

Two general types of screens are available for projection use: front projection screens that have opaque surfaces and rear projection screens that are made of translucent material.

- Front projection screens fall into three categories: beaded, mat finish, and lenticular. The lenticular screen is made up of tiny lens elements that confine the reflection of projected light and permit wide-angle viewing.

- Rear projection screens are of two general types: the translucent mat finish and the lenticular type. If the screen has a finish on one side and a polished surface on the other, turning the polished surface to face the viewer will give good contrast but will reflect room light and will probably require complete darkening of the room. If the mat finish side is turned to face the viewers, contrast will be slightly less but room lights can be used, which is a desirable feature.

Wide horizontal angles of vision should be avoided. In an oblong room, the screen should preferably be parallel to the shorter dimension. If the screen is set parallel to the longer dimension, the angle of vision at either side becomes too great for easy viewing.

For optimum viewing, the accepted standards for audience placement in relation to the screen are as follows:

- Distance to the closest viewer: two times the width of the screen

- Distance to the farthest viewer: six times the width of the screen

- Widest angle of view: based on the type of screen used

When faced with a situation where a screen is not available, you may project the image from the overhead projector directly on a wall. You may cover the wall with illustration board or some type of white material for good color viewing. If the wall is a light color, the covering is not needed.

Another important principle in planning the space arrangement is that the narrator should not stand in the line of vision. When a lectern is used, it should be set to one side of the screen, leaving two-thirds of the stage area unobstructed. On the opposite side of the screen from the lectern you can set up A-frames, flipcharts, portable chalkboards, and so on, for optimum visibility.

Proper lighting is important to relaxed viewing. Without question, the less the room light, the more brilliant the image on the screen and the greater the contrast. But brilliance and glare can be annoying and can cause eyestrain. A proper level of room light reduces the contrast and permits viewing with a minimum of strain. There should be enough light, but not so much as to distract the audience.

- Room light should have its source behind or, at least, to the rear of the audience. In this way, glare spots in competition with the screen are avoided, and the intensity of extraneous light on the screen, which would tend to reduce contrast, is also avoided.

- Front lights produce too much light on the screen and their glare is distracting. Also, never schedule an overhead projector presentation in a room that has windows that cannot be draped if the sun will be shining against the windows.

A well-set-up presentation area with smooth-working equipment can add much to the narrator's confidence and poise. At the same time, nothing can ruin a presentation more than equipment that malfunctions or audiovisual devices that cannot be seen or heard. The noise of a projector can be distracting and should be kept to a minimum.

Projectors should be set up with the lens parallel to the screen to prevent keystoning. Allow enough distance so that the image fills as much of the screen as possible while retaining sharp focus and good brilliance.

Front projection has certain advantages in that the narrator is able to operate the equipment, thereby eliminating the need for an assistant. When possible, the mechanical equipment used in a presentation should be kept in the background (behind the screen to the rear of the audience or in an enclosed projection booth) to eliminate a potential source of distraction. In the latter case, an assistant is needed.

The rear projection arrangement has several advantages. It hides the projector and its operator. Room light falling on the screen does not degrade or wash out the projected picture (assuming the mat finish side of the screen is facing toward the viewers). The narrator may work close to the projected picture without blocking the light from projector to screen.

When using more than one type of projector for a presentation (using the rear of audience or projection booth method), stagger the height of each projector.

After your projectors are in position, take the following steps:

- Connect power cords, making sure all connections are firm and cables are placed so people will not trip over them, causing possible injury to themselves and damage to the machinery.

- Turn on machines, check for proper operation, and get familiar with all controls. Always keep a spare lamp or bulb by each machine.

- Run through material to be projected, checking for relevance of material, quality of projection, and focus.

- Set each machine for immediate cue in.

Loudspeakers should be placed as far forward from the lectern as possible (while still remaining in front of the audience) to avoid microphone squeal or feedback.

The final area of control that you should consider is the atmosphere of the space to be used for your presentation. One of the most important concerns here is temperature and humidity. If, for example, the space is too warm and humid, your audience will become drowsy and inattentive. If it is too cool, your audience will be uncomfortable and restless. At times you may have difficulty in controlling the atmosphere because of inadequate ventilation or too large an audience. In this event, you should have the space well ventilated and slightly cooler than normal before you start your presentation. Body heat will soon warm the space up to normal.

Smoking is permitted in designated areas only and the classroom is not one of them. If the presentation is lengthy, you may wish to call a short break to give smokers a chance to satisfy their habit. In addition, this allows the ventilation system a chance to clear the room of stale air. Occasionally, feedback from your audience will give you an indication of what actions you must take to guarantee their comfort and attentiveness. Be receptive to these signs and use them to your best advantage.

By paying careful attention to the areas of control above, you can improve the success of your audiovisual presentations. But keep in mind that

the key word in using any kind of material or equipment is organization. Make sure each aid you use is ready when you need it. A speaker who fumbles around looking for an aid and then seems unsure of how to use it will lose the audience almost immediately. It is best to mark your key word outline at those points where you need an aid and organize your aids in that order. To keep the attention of your audience on you, keep aids out of their sight both before and after you use them. Keep in mind that you are the presentation. The aids you use are merely for support.

Another area that needs to be mentioned in relation to audiovisual support for an oral presentation is that of stage trappings. Many times you will want to dress up your stage area with items such as flags, posters, and so forth. You should use care in doing this. Do not use items that will distract the audience from you or your presentation. Make sure you display items, such as the national flag, properly. Well-thought-out stage trappings can add much to your presentation.

# CHARACTERISTICS OF INSTRUCTIONAL AIDS

All effective visual and audiovisual aids share common characteristics. For instance, they:

- provide structure and draw attention to critical points;
- simplify information and direct attention;
- stimulate learner interest;
- explain abstract ideas, illustrate relations, present sequence of procedures, magnify a small area or telescope a large area;
- allow observation/inspection by everyone in the instructional area;
- include only necessary written information;
- withstand heavy use and movement;
- illustrate scale, with parts in appropriate proportion and position;
- provide emphasis and interest through use of color; and
- save participant time and effort.

When using visual and audiovisual aids, consider the following guidelines:

- Plan: Develop objectives for use of instruction aids well in advance of the presentation to allow time to identify appropriate aids and find materials.
- Prepare: Always know the content of instructional aids before using them.
- Practice: Become familiar with the aids you plan to incorporate into your presentation.
- Preview: Introduce instructional aids before you use them so that participants know what to expect and can receive maximum benefit.
- Follow Up: As you review the lesson, refer to any instructional aids you may have used to clarify and reinforce the main points.

## Types of Instructional Aids

Following are descriptions and guidelines for use of five types of visual and audiovisual aids:

1. Handouts
2. Charts
3. Overhead Transparencies and Projectors
4. Audio Recordings
5. Videotape or Videotaping

## Handouts

Description:

• Printed information passed out to participants during a training session.

Use with:

• Groups of any size.

Where to use:

• Any instructional setting.

Use to:

• Provide an outline or points to follow, prevent the need for taking notes.

Advantages:

• Materials usually are easy and inexpensive to prepare, use and store.

• Participants receive their own, permanent copies of the materials.

• Handouts enhance recall and application of learning.

Limitations:

• Requires distribution time.

• Requires time and effort to create effective handouts.

• Improper use can be distracting.

Guidelines:

• Identify pertinent information for handout.

• Devise a system for organized use of handouts; code each handout with letter or number.

• Make handouts attractive, neat and accurate. Keep the original to make copies in the future. Avoid copying copies as they eventually become illegible.

• Restrict each sheet to a single purpose.

• Make enough copies to replace those that participants will misplace.

• Distribute handouts when you are ready for participants to use them.

• Avoid discussing critical information while distributing handouts.

• Explain the purpose of the information contained on the handout.

## Charts

Description:

• Charts are pads of paper generally 24"x36". The pad is displayed on an easel, and the trainer uses colored ink markers to record key points. Pages are turned over or torn off the pad and taped to the wall.

Use with:

• Groups of up to 30 people.

Where to use:

• In well-lit room, positioned where everybody can see.

Use to:

• Present simple diagrams or key words listed as the discussion proceeds. Note ideas or concepts to be referred to later.

Advantages:

• Inexpensive.

• Charts can be prepared in advance or drawn on the spot.

• Material is not erased so you can easily go back to it.

• Each page can be removed from the easel and taped on the meeting room wall to reinforce learning or collect data.

Limitations:

• Bulky to transport.

• Requires an easel or some type of stand or support.

• Marks may "bleed" through the lightweight paper.

• Dependent on presenter's ability to summarize and print clear and visibly.

Guidelines:

• Write key words rather than too much information.

• Print letters at least 1" high.

• Use broad tip markers and different colors.

• Test paper for bleeding and put blotter sheet between pages if necessary. Use water color markers rather than permanent ink markers to reduce the bleeding.

• Be sure to bring tape with you to hang pages on walls of training room. Test to ensure that tape will stick to, and will not damage, the wall.

• If possible, plan layout ahead and work from it.

• Avoid too much flipping back and forth.

• Stand to the side of the chart and talk to the group, not to the chart.

• Distinguish titles by underlining, changing color or using larger print.

• Ask questions about main points to ensure information is processed.

## Overhead Transparencies and Projectors

Description:

• Overhead transparencies are plastic (acetate) sheets used on an overhead projector. They are prepared by using a copy machine or transparency maker. You can also draw or write directly on the transparency during the presentation using a grease pencil or special pens made for this purpose. Their size is usually 8"x10". The original copy of your artwork or lettering can be typed, drawn on paper with regular markers or press-on letters, or you can use a photocopy of a picture, chart, photograph, etc. The transparency is made by copying the original onto the acetate transparency sheet appropriate for the type of copying machine you are using.

• Many commands also have computer software that will generate transparencies with various borders, backgrounds, fonts and graphics.

Use with:

• Groups of any size as long as the visual can be seen by everyone in the room.

Where to use:

• In any room where people won't feel crowded by the projector and the screen. The room need not be darkened depending on the brightness of the projector lamp, the quality of the screen and the quality of the transparency.

Use to:

• Break up a lecture by presenting key words visually, showing simple diagrams, charts or instructing how to fill out a form.

Advantages:

• Materials are permanent, they can be filed and stored.

• Transparencies are cheaper and easier to produce than slides.

• Handouts can be made directly from the transparencies using any photocopy machine.

• Usable in normal room lighting.

• Presenter can face and hold eye contact with the audience while talking.

• Visually reinforces verbal information.

• Focuses attention on what presenter is discussing. Can also be turned off to give full attention to presenter.

• Visual variety can easily be added through use of color and overlays.

• Successive layers (or overlays) of transparencies in blocks or colors or both can show progressive stages of development, sequences and sectional views, such as regions on a map.

Limitations:

• Some projectors are bulky and awkward to carry.

• Legibility of material (the presenter's handwriting, the size of print, etc.) must be carefully considered.

• The room arrangement must allow the screen to be seen by all students.

• Classroom ceiling must be high enough to project the images "over the head" of the instructor.

Guidelines:

• Prepare transparencies that are short and simple. Highlight only the most critical points. Be sure the print size is large enough to be seen throughout the room. Titles should be 1/2", test 1/4".

• Use the information on the transparency to make a point, then turn off the projector to bring attention back to you.

• Organize the sequence of the presentation and prepare notes about each transparency prior to the presentation.

• Mount your transparencies on cardboard frames and put your notes on the frame so that all the information you need for the presentation is in front of you.

• Be sure to have an extension cord as well as extra bulbs for the project. Do not touch the lamp with your fingers when replacing the bulb. Read directions on the lamp and the projector.

• Tinted transparencies are easier on the eyes than clear.

• Face the audience as you talk.

• Do not turn your back on the audience to read information off the screen or to point to the screen.

• Place a pencil or pointer on the transparency to call attention to specific information.

• Reveal items on the transparency one by one, keeping the remainder of the information covered with cards or paper until you are ready to discuss it.

• If you want your audience to take notes, make sure you have a bright enough image on the screen so that the room doesn't need to be darkened.

• When using an overhead transparency of a form or other material with a lot of information on one sheet, be sure to give handouts of the transparency for your audience to follow during the presentation.

• Turn off the lights of the projector when you won't be showing transparencies for awhile. A blank screen is glaring and leaving information on the screen when you are not referring to it is distracting.

• Avoid the "keystone effect" by ensuring proper placement of the projector and the proper angle of the screen and the projector head. Be sure that the screen is extended fully.

• When possible, use charts, diagrams, pictures, graphics, cartoons, etc., in addition to or instead of words.

**Audio Recordings**

Description:

• Reproduction of voice or other sounds used to bring information that would not otherwise be available to the participants in the classroom.

Use with:

• Groups of any size as long as everyone can hear the tape.

Where to use:

• Any instructional setting.

Use to:

• Present information, such as music, that is best received through hearing.

• Present speakers that are unable to appear in person.

Advantages:

• Easy and inexpensive to make and use.

• Improves listening skills.

Limitations:

• Can be confusing if not used in conjunction with additional materials.

• Can be boring or incomplete unless accompanied by visuals or prior applicable experience.

• Value is dependent upon the way you introduce and then follow up on the material.

Guidelines:

• Use only good quality recordings that can be clearly heard by the entire group.

• Stop the tape as appropriate to ask questions or make comments.

• Be aware of how the group is reacting. If it looks like people are losing concentration, stop the tape and briefly discuss the topic area.

• Do not turn the tape on and then leave the room while it is playing.

• Prepare overheads of charts to use in conjunction with the audio tape.

**Videotape or Videotaping**

Description:

• Videotape combines a visual and audio recording. Video equipment can be used to show prepared tapes or to record performance and provide immediate critique and feedback.

Use with:

• Size of the group depends on the availability of monitors or screens. A good rule is 20 students per monitor.

Where to use:

• In a room where all participants can see the monitor. For recording, use a facility with good lighting and plenty of room.

Use to:

• Supplement lesson and enhance learning. Capture behavior and provide immediate feedback on performance.

Advantages:

• Allows participants to critique their own behaviors.

• Showing playback of tape provides learning reinforcement.

• Videotaped presentations can "take" the speaker anywhere a playback machine is available.

• Lightweight, battery-operated camera and recorders can be carried and handled by one person.

• Videotape is reusable when material is obsolete.

Limitations:

• Trainer must be skilled in using the equipment.

• To use with a large audience, you must have either more playback sets or larger video screens.

Guidelines for use of pre-recorded tapes:

• Be sure that the subject relates directly to the lesson plan and the objectives.

• Preview the tape and plan the introduction and discussion of critical information and major points before using it in class.

• Set up and test equipment prior to the training session.

• Before showing a videotape discuss its objectives, define terms, present major points or questions and explain your expectations for learner performance.

• Attend to environmental needs of the audience such as lighting and seating.

• Through discussion or lecture after viewing, tie the major points to the training content. List critical points on chalkboard or chart as you review.

• Consider re-showing the tape immediately, or several days after the first showing, stopping the tape to review principal points and speeding it up through non-essential segments.

• Avoid showing a videotape immediately after lunch when participants are likely to fall asleep.

Guidelines for use of self-recorded tapes:

• Plan script, shooting site, objectives and all other critical information in advance.

• Set up and test all equipment ahead of time.

• Use good lighting and sound systems.

• For mock interviews or role playing, play the tape back for critique, stopping the tape or speeding it up when appropriate.

• Attend to environmental needs of the audience such as lighting and seating.