

**BY THE ORDER OF THE COMMANDER
NORTH AMERICAN AEROSPACE
DEFENSE COMMAND (NORAD) AND
UNITED STATES NORTHERN COMMAND
(USNORTHCOM)**

**NORAD AND USNORTHCOM
INSTRUCTION 90-125**



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Special Management

CORRESPONDENCE MANAGEMENT

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

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This instruction implements North American Aerospace Defense Command (NORAD) and United States Northern Command (USNORTHCOM) policies and guidance on the preparation and processing of written and electronic administrative communications within the headquarters. This instruction applies to all personnel within NORAD, USNORTHCOM and subordinate units for submission to either headquarters. It does not apply to Air Force Reserve Command (AFRC) or National Guard units. This publication may be supplemented at any level, but all direct supplements must be routed to the Office of Primary Responsibility (OPR) of this publication for coordination prior to certification and approval. A link to this instruction is available on the commands' publication website and the Action Officer Toolbox (AOTB) on each of the NORAD and USNORTHCOM networks. Send recommendations to change, add or delete information in this instruction to NORAD and USNORTHCOM, ATTN: Secretary to the Joint Staff (SJS), 250 Vandenberg St Ste B016, Peterson AFB, CO 80914-3804, using AF Form 847, **Recommendation for Change of Publication**; route AF Form 847 from the field through the appropriate functional's chain of command. The use of the name and mark of any specific manufacture, commercial product, commodity, or service in this publication does not imply endorsement by NORAD and/or USNORTHCOM. The glossary of references and supporting information are located within **Attachment 1**. Maintain and dispose of records created as a result of prescribed processes in accordance with the Chairman Joint Chiefs of Staff Manual (CJCSM) 5760.01A, **Joint Staff and Combatant Command Records Management Manual: Volume I (Procedures)** and **Volume II (Disposition Schedule)**.

SUMMARY OF INTERIM CHANGE

Incorporates Policy Memorandum 1 (PM1), Official Correspondence for the Commander, dated 8 May 2013, within **Section 5., Business Rules**. The information from the memorandum is listed at **Paragraph 5.1., Official Correspondence**, all other paragraphs within Section 5 have been renumbered.

SUMMARY OF CHANGES

This document has been substantially revised and must be completely reviewed. The significant changes in this instruction include the changing of the instruction title, removal of the paragraph containing Task Management System (TMS) and addition of the paragraph containing Task Management Tool (TMT). I

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1. Responsibilities:

1.1. Chief of Staff (CS). The CS serves as the focal point for NORAD and USNORTHCOM regarding all information management actions. Information from both commands must be routed through the CS. The CS directs the SJS, Assistant SJS, and Office of the SJS (OSJS).

1.1.1. The SJS receives, processes and tasks all information management actions originating from the command group. This includes all actions levied on NORAD and USNORTHCOM by external organizations.

1.1.2. As the administrative center for the command, OSJS is responsible for receiving and managing all correspondence submitted to the command group for action.

1.2. Directorates, Special Staff, Components, Subordinate Commands, Supporting Commands and Regions. Organizations are responsible for ensuring documents are staffed in accordance with this instruction. Organizations not utilizing TMT due to technical limitations will acknowledge receipt of the tasking and email the request for coordination to the appropriate Directorate or Special Staff Organizational Mailbox (OMB). Directorate and Special Staff OMB managers will obtain coordination and respond via email to the OPR.

1.3. Executive Officer (XO). The XO serves as the focal point for all staffing activities within the organization. They are responsible for keeping the SJS apprised of any issues regarding command group tasks. Only XOs (not Action Officers (AO)) and directorate OMB managers can request an extension to a command group task or request transfer of the OPR role. For offices that do not have an XO, they must appoint an individual to fulfill this function.

1.4. AO. The AOs coordinate staff actions with other AOs across directorates and often with AOs from outside organizations. Specific responsibilities include but are not limited to the following:

1.4.1. Prepare and coordinate staff packages in accordance with this instruction.

1.4.2. In the event of a short notice tasking, packages are hand-carried throughout the approval chain. The AO must be available in order to provide clarification or additional information as required.

1.4.3. Track tasking package throughout the approval chain. Immediately notify leadership about potential missed suspenses and the resultant impact.

1.4.4. Work extensions for command group tasks through the XO and/or directorate OMB manager.

1.5. OPR. The OPR consolidates and formulates a response to a task, based on inputs from Office(s) of Collateral Responsibility (OCRs). The assigned AO may perform many of the OPR's responsibilities, since they often overlap. Task originators will only assign one OPR to each task. Specific responsibilities include but are not limited to the following:

1.5.1. Ensure the timely submission of packages to meet assigned suspense dates.

1.5.2. Monitor a package throughout its life-cycle. Alert the SJS of potential missed suspenses and impact.

1.5.3. Distribute signed or approved documents to the appropriate offices or organizations.

1.5.4. Scan supporting documents with completed packages, with signatures where applicable, and attach to the TMT task as an indexed text and not as a picture. When this is completed, only then can the task be considered closed. Directorate level and Special Staff signatory packages should be completed in TMT per **paragraph 5.4**. Reference **paragraph 5.4** for additional information regarding the NORAD and USNORTHCOM Records Management Program.

1.5.5. The SJS assigns OPRs to command group tasks based upon an office's functional mission. To transfer the OPR role to another office, the directorate XO, OMB manager, or O-6 from the gaining office must first accept responsibility for the task from the XO, OMB manager, or O-6 from the losing office. Forward the requested transfer to the NORAD USNORTHCOM SJS - OMB. In the request, state what office and individual agreed to accept the OPR role.

1.6. OCR. The OCR provides coordination or information to the OPR. Upon receipt of a task, the OCR is responsible for contacting the OPR if further guidance is required.

1.7. OMB Manager. Review and take appropriate action on OMB contents throughout each day and ensure information is disseminated and acted on in a timely manner.

2. Types of Tasks:

2.1. Command Group Tasks. Tasks are identified as 4-Star, 3-Star, 2-Star and Request for Information (RFI). These tasks originate from the CDR, ND, DC, or CS. Request for extensions to command group tasks and RFIs will be coordinated through the Deputy Chief of Staff (CSD) prior to OSJS changing a suspense date. Email requests will include the subject, background, purpose, OPR assignment, OCR assignment and suspense timeline. Provide justification for the extension request, a new suspense timeline and courtesy copy the NORAD USNORTHCOM SJS - OMB.

2.2. Internal Tasks. Tasks developed within a directorate or special staff office are routed through TMT as a staff package. Request for extensions to internal tasks will be coordinated through the Primary OPR or initiator of a task.

2.3. External Tasks. Tasks received from agencies outside of NORAD and USNORTHCOM. Request for extensions to external tasks will be coordinated by the Primary OPR through the agencies (i.e., Joint Staff (JS)) AO.

2.4. Trip Tasks. Tasks received from the Commander's Integration Group (CIG) that supports the CDR's travel. The trip book process can be found on the unclassified share drive at \\nc.ds.mil\HQ\NORTHCOM\CDR PREP MATERIALS FOR TRIPS\OPERATIONAL LEVEL VIEW OF CDR TRIP BOOK PROCESS. Trip tasker notifications are made by email from the NORAD USNORTHCOM CIG - OMB and are not processed through TMT.

2.5. Distinguished Visitor (DV) (0-7 and above to include civilian equivalents) Tasks. Command Protocol (CP) orchestrates and manages the DV approval process. For DV process procedures, refer to NNCHOI 90-185, *NORAD and USNORTHCOM Distinguished Visitors (DV) Visits and Events*.

3. Suspense Timelines:

3.1. 4-Star, 3-Star and 2-Star Tasks. Timelines are established based on command group requirements. Each office in the command group is afforded one duty day to review staff packages. Tasks containing an external suspense date are due to the last office in the coordination chain five duty days prior to the external suspense date.

3.2. RFI Tasks. Timelines are determined by the CS and are generally due one to two days from date of assignment. Detailed instructions for completing the RFI will be included in the task.

3.3. Internal Tasks. Timelines are established by the initiator of a task. The AO of a staff package needs to be aware of the suspense timeline stated in **paragraph 3.1.** when a staff package will be routed through the command group for coordination.

3.4. External Tasks. External tasks requiring command group coordination will have the suspense dates adjusted in accordance with **paragraph 3.1.**

4. AO Tools:

4.1. Computer Networks.

4.1.1. The Secure Internet Protocol Router Network (SIPRNET) is a classified network for U.S. personnel only. Authorized for transport of all classified or unclassified information up to and including "SECRET." All tasks within the commands are distributed over the SIPRNET via the NORAD and USNORTHCOM TMT. The Secure Internet Protocol Router-Releasable (SIPR-Rel) is a segregated enclave within the SIPRNET and is viewable by personnel from the U.S., Australia, Canada and United Kingdom.

4.1.2. NORAD Enterprise Network (NEN) is a classified network for U.S. and Canadian personnel. Authorized for transport of unclassified information and information classified up to and including "SECRET:RELEASABLE TO CANADA or any tetragraphs including Canada, such as REL ACGU and REL FVEY."

4.1.3. The Non-Secure Internet Protocol Router Network (NIPRNET) is an unclassified network for all NORAD and USNORTHCOM personnel.

4.1.4. Griffin Mail Guard allows NORAD and USNORTHCOM network users to send email to other networks without having to transfer information across an "air gap." Instructions for sending email across the mail guard are posted on each network Internet portal under the Service Desk's Customer Self-Help site.

4.1.5. Physical transfer of data between networks should be done with great caution and only when absolutely necessary. Transfer agents are the only personnel authorized to transfer data between networks. Transfer agents will run Document Detective on each document requiring transfer. These instructions are posted on each network under the Service Desk's Customer Self-Help site.

4.2. OMB. An electronic mailbox established for receiving and transmitting office email. OMBs enable a group of people access to a common mailbox. TMT is linked to SIPRNET OMBs.

4.3. AOTB. The location of the AOTB is on the home page of NIPRNET, SIPRNET, NEN portals and TMT. It provides examples and formats for many of the documents used in the commands.

4.4. TMT Software. TMT is a web-enabled database that integrates with *Microsoft* Outlook® and *Microsoft* SharePoint® used for tracking command group tasks and correspondence. The SJS is the overall TMT manager. See **paragraph 6.** for a detailed description of TMT.

4.5. Electronic Staff Summary Sheet (eSSS):

4.5.1. The eSSS is used for command group and internal tasks to coordinate all official staff actions within the NORAD and USNORTHCOM staff, regions, subordinate and supporting commands. The cover document for all staff packages routed to the command group. Coordination on the staff package will be within the last 30 days. It should be a concise summary of the staff package.

4.5.2. Create an eSSS using *Microsoft* Word®. An example is available on all networks in the AOTB. Delete irrelevant information (red text and offices not coordinating) before sending it to the command group. Do not embed attachments in the eSSS.

4.5.3. Attachments will be uploaded to the applicable task document library.

4.5.4. Portion markings identify proper classification and caveat markings for information For Official Use Only (FOUO) or higher.

4.6. The Defense Message System (DMS) and Automated Message Handling System (AMHS). DMS and AMHS is the approved DOD systems for sending and receiving organizational message traffic. NORAD and USNORTHCOM use AMHS to interface with DMS. AMHS training information can be accessed through the Learning Management System (LMS); procedural documentation and account setup are located on the NIPRNET under the Service Desk site.

4.6.1. Directorates and special staff offices are responsible for drafting, staffing (via TMT), transmitting and filing messages. For messages requiring command group release, directorates and special staff will send the approved message to the appropriate command group Release Group via AMHS.

4.6.2. Prepare messages in AMHS Online format. Submit a Staff Package, to include an eSSS and a copy of the AMHS Message in the Tabs document library. The command group will approve the Staff Package to signify the message is approved for release. The directorate will then send the message to the designated Release Group via AMHS (CDR, ND, DC or CS).

4.6.3. Personal For Messages are typically reserved for GO/FOs. If there is more than one addressee, list them in order of precedence, or seniority. First person plural pronouns (we, our) are encouraged; do not use singular references (I, me, or my) unless necessary. If a point of

contact (POC) is specified in a flag level message, the POC should be a director or director-level equivalent vice the AO. Keep messages brief, if possible. Personal For messages can be found in the AOTB. Reference **paragraph 5.4.** for records management requirements.

4.7. Broadcast Messages. Distribute time-critical/operational announcements of command-wide interest quickly. The Director of Mission Support in the CS office is the approval authority. The SJS will release the messages on SIPRNET and NIPRNET networks. Directorate-level offices will forward proposed messages for approval, processing and courtesy copy the NORAD USNORTHCOM CS - OMB. The message will be text only with links to attachments. Broadcast message templates can be found on all networks in the AOTB.

4.8. Training on Correspondence Management. The N-NC/J7 provides familiarization of correspondence management in the Introduction to NORAD and USNORTHCOM course (view the N-NC/J7 website for the course schedule and registration). At the request of geographically separated units, SJS will conduct training via Video Teleconferencing (VTC) or other agreed-upon means.

4.9. Microsoft® Outlook Distribution Lists (DLs). The DL is a collection of email contacts. It provides an efficient method to send messages to a group of people. Recipients see the DL name versus their own name and the names of others on the "TO" line. The CS office maintains the DL for secretaries. The SJS maintains DLs on directors, deputy directors, XOs and top level OMB managers. All DLs are maintained on NIPRNET and SIPRNET with the exception of NORAD USNORTHCOM TMT and OMB Managers – DL which resides on SIPRNET. The DLs are authorized for anyone's use and are titled: NORAD USNORTHCOM Directors – DL; NORAD USNORTHCOM Deputy Directors – DL; NORAD USNORTHCOM Exec List – DL; NORAD USNORTHCOM Secretaries – DL; and the NORAD USNORTHCOM TMT and OMB Managers - DL. Organizations must contact the CS or SJS in order to add or remove personnel from these lists.

5. Business Rules:

5.1. Official Correspondence. All official correspondence forwarded for the CDR's signature shall reference the specific law, regulation or policy that requires CDR approval. If law, regulation or policy does not require CDR signature, then it shall be forwarded to the appropriate deputy commander or director for action. Where the appropriate signature authority is unclear, the action shall be forwarded to the CS for review and action.

5.2. Administrative Notes. Refer to **Attachment 2** for additional writing and briefing guidelines.

5.2.1. The command standard for fonts on all correspondence is Arial 12.

5.2.2. Pen and ink changes are authorized for expediency, minor administrative changes (spelling, grammar, punctuation, etc.) instead of returning the document to the originator for rewrite. There may be exceptions to this rule, such as legal documents and documents signed by the command group.

5.2.3. Unless otherwise directed, OSJS will date stamp documents and return to the originator for dispatching and filing.

5.2.4. Include the recipient's complete mailing address when corresponding with an organization outside of NORAD and USNORTHCOM, non-government agencies and on all personal letters. The regional, subordinate and supporting commands are considered part of

NORAD and USNORTHCOM. Do not use distribution designators such as “Distribution F” for memoranda. Instead, type “SEE DISTRIBUTION” in MEMORANDUM FOR line and type “DISTRIBUTION:” in uppercase, flush with the left margin, three line spaces below the signature element or two line spaces below the attachment or courtesy copy (depending on which are used). Below “DISTRIBUTION:” type the organization(s) abbreviation and office symbol for addressees. Include the mailing and return address in upper case on the mailing envelope or container. Include “Official Business” below the return address on the mailing envelope.

5.2.5. There are three types of letterhead utilized in the commands: NORAD and USNORTHCOM, NORAD only and USNORTHCOM only. Use electronic generated letterhead for all correspondence. Electronic letterhead can be found on all networks in the AOTB.

5.2.5.1. Single-logo letterhead is used for correspondence pertaining solely to one command.

5.2.5.2. Dual-logo letterhead is used for dual-position directors, special staff, CS and CDR when the correspondence affects both commands.

5.2.6. Time sensitive packages may be walked through the command group after notifying the SJS or OSJS office. Directorates must make every effort to enter the package into TMT prior to the package entering the command group for routing. If the package is not entered into TMT, the final completed package must be scanned and entered into TMT as a FOR RECORD copy for records management purposes.

5.2.7. A signature elements list is located in the AOTB on each portal for use when preparing correspondence for command group signature. For correspondence requiring dual signatures, place the senior ranking official’s signature three spaces right of page center. Place the junior ranking official’s signature flush with the left margin on the same line as the ranking official’s signature. For command group signatures, use the two-line signature for personal letters; use the three-line signature for all other correspondence. For all other offices, the signer of the document determines whether to use the three- or two-line signature.

5.3. Coordination:

5.3.1. Coordination is the process of gaining approval, information or a position from an OCR. It enables the OPR to present or recommend a consolidated command position.

5.3.2. There are three levels of coordination in the commands: *(Exception: Components, Subordinate Commands, Supporting Commands and Regions will obtain coordination in accordance with paragraphs 5.3.2.1. – 5.3.2.3. In the event the dynamics of the organization don’t meet the criteria in paragraphs 5.3.2.1. – 5.3.2.3., the equivalent Components, Subordinate Commands, Supporting Commands and Regions structure can be followed (i.e., O-5 filling a division chief or O-4 filling a deputy division chief position.))*

5.3.2.1. General Officer/Flag Officer/Senior Executive Service (GO/FO/SES)/Director involves responses from a GO/FO/SES or equivalent, or O-6/GS-15 filling a director or deputy director position. An eSSS seeking GO/FO/SES or equivalent coordination must be signed by a director or deputy director. The CSD will sign any eSSS originating from the CS support offices.

5.3.2.2. Planner (O-6/GS-14/15) involves responses from a division or deputy division chief. An eSSS seeking planner level coordination must be signed by a division or deputy division chief.

5.3.2.3. AO (all ranks below O-6/GS-15) involves responses from below the division level.

5.3.3. Offices seeking GO/FO/SES coordination from the staff must submit the request through their directorate. The directorate will forward a staff package to SJS for release. The SJS will validate the request by converting the staff package to a task. The SJS will assign the requesting office the Primary OPR role and coordinating offices the OCR role. Requests for planner and AO coordination are released at the directorate level or below but can only be assigned to the top level directorate OMB manager in another directorate. Follow internal business processes when releasing staff packages.

5.3.4. Staff Package Development:

5.3.4.1. Directorate staff packages routed to the command group will have an eSSS attached and a hardcopy provided to OSJS. The director or deputy director (or equivalent) must sign the eSSS.

5.3.4.2. All offices will use TMT to provide coordination on TMT tasks. Proper coordination consists of the name, rank and duty title of the coordinating official, the date of coordination (e.g., Smith/COL/Network Operations Division Chief/06 Aug 11) and any comments. TMT will automatically generate email to the Primary OPR's OMB. Components, Subordinate Commands, Supporting Commands and Regions will forward email responses to the OPR listed on the eSSS if TMT is not available.

5.3.4.3. Determine OCRs by considering who has a vested interest or is involved with the subject. Do not list every directorate just because it is not known who should coordinate. If in doubt, contact the directorate XO for assistance.

5.3.4.4. The order of coordination is the order listed on the eSSS template located in the AOTB. The Judge Advocate (JA), CS, DC and/or ND will coordinate on all packages going to the CDR. Obtain JA coordination prior to these packages being sent to the command group in hard copy format.

5.3.4.5. Disagreements should be worked at the lowest level possible. When disagreements cannot be resolved, elevate the issue to the next level in the chain of command. The OPR and OCR(s) will make every attempt to reconcile a nonconcur. When differences cannot be reconciled, enter "Nonconcur" on the coordination line of the eSSS. Attach the background documents from the disagreeing office with the reason for the nonconcur. The OPR will address the outstanding issues in the eSSS and provide rationale for forwarding the eSSS to the command group without resolving the disagreement.

5.3.4.6. The OCRs may agree with a position, but need to provide additional information to the Primary OPR. In TMT, enter "Coord with Comment" and reference any documents uploaded to the Public Workspace library. For hard copy packages, write "see comments" next to the coordination and attach the comments to the package. Use of the Comments Resolution Matrix (CRM) is the command standard for providing comments. The CRM provides a clear, concise means of presenting, comparing comments, tracking and justifying changes. The CRM template is located in the AOTB.

5.3.4.7. The OPR should make every effort to address coordination issues with OCR(s) and if needed elevate to the XO. The SJS is the liaison between the NORAD and USNORTHCOM staff and other organizations for coordination not received. The Primary OPR should contact the SJS and request they intervene with delinquent OCRs to obtain necessary coordination. Staff packages not containing OCR coordination will be returned to the OPR.

5.3.4.8. Assign JA as an OCR in the initial and final stages of your staff action. JA reviews actions for possible legal considerations or interest to the commands. Internal command thank you letters, retirement letters, awards/decorations and strictly personal items do not require JA coordination, unless otherwise directed.

5.4. Command Records Management Program. Everyone has a responsibility for adhering to records management tenets. Refer to CJCSM 5760.01A Vol I and Vol II, NNCHOI90-123, *Records Management*, or your Records Officer for guidance pertaining to the Command Records Management Program. Once the Command Group takes final action on a document, they will forward it back to the originating office for filing. OPRs are responsible for ensuring the final, signed/complete package is in TMT, to include supporting documentation. Copies may be maintained by the Action Office, or by any office for reference.

5.5. Hard Copy Staff Packages. Packages for the command group will be entered in TMT by the originating office. Hyperlinks will be printed and provided as part of the hard copy package.

5.5.1. Do not include extraneous reference messages, background documents or historical references unless the information is vital to the required action. Remove all internal notes and file copies.

5.5.2. The folder type must be a dark blue, two pocket folder with the appropriate coversheet attached to the front and back. The coversheets are located in the AOTB. For packages over 50 pages, the documents will be placed in a binder.

5.5.3. Place the eSSS on the left side of the folder. Packages returned for correction, should have the changes folded in half and placed behind the eSSS when returned to SJS.

5.5.4. Include only directorate, special staff, region, subordinate or supporting component commands coordination on the eSSS when routed to the command group. The level of coordination required is no lower than director or deputy director.

5.5.5. Tabs are placed on the right side of the folder in the order they are referenced in the eSSS. Insert numbered tabs from the top down starting with the number two tab. Do not tab the first attachment.

5.5.6. The OSJS reviews all staff packages before they are sent to the CDR, ND, DC, or CS.

5.6. Classified and Other Required Markings. Originators of classified documents and controlled unclassified information must follow the guidelines set forth in DOD Manual 5200.01, Vol 2, *Information Security Program: Marking of Classified Information* and Executive Order (E.O.) 13556. In accordance with E. O. 13526, personnel should use Information Security Oversight Office (ISOO) Implementing Directive No. 1, *Marking Classified National Security Information*, for classified marking guidance. Classification markings include classification headers, portion markings, classified by, derived from, declassify on, downgrading instructions, warning notices and originating office and date on all classified correspondence.

5.6.1. Documents containing information with various levels of classification or various handling caveats will be handled at the highest level of classification and using the most restrictive handling guidelines. The term NOFORN will only be used on intelligence information or where use of NOFORN sources requires the caveat.

5.6.2. Regardless of the media type, a Privacy Act Statement is required when an individual is requested to furnish his/her personal information. Reference DOD 5400.11-R, paragraph C2.1.4.1. "*Department of Defense Privacy Program*," for the Privacy Act Statement requirements and other Privacy Act related questions.

5.6.3. Foreign Disclosure authority is required for all classified and controlled but unclassified (i.e., FOUO and Law Enforcement Sensitive (LES), etc.) documents if the document is destined to be shared with foreign nationals orally/visually, by electronic means, or by hard copy. Such authority can be obtained by direct correspondence with the Foreign Disclosure Office (FDO) or via delegated authority. The NORAD Agreement has been treated by this Command for over 50 years as delegated authority to disclose and/or release to cleared Canadian personnel who have a need-to-know classified material that is marked by an Original Classification Authority for release to Canada, when all of the information directly relates to one or more of the NORAD Agreement's mission sets: aerospace warning, aerospace control, and maritime warning. Any foreign disclosure related questions, including use of the NORAD Agreement as delegated authority, should be posed to the appropriate organization's Foreign Disclosure Representative, or to the Command FDO.

5.6.4. Mark classified electronic mail in accordance with DODM 5200.01, Vol 2 and ISOO Implementing Directive No. 1.

5.7. Preparation of Publications, Forms and Policy Memorandums. The first step in the publications, forms and policy memoranda development process is to email noradusnorthcomst@northcom.mil or call N-NC/CST, (719) 554-3936 (DSN 692) for a consultation. Refer to the N-NC/CST Publishing Process Procedures located on the NIPR portal for more information.

5.8. Canadian Forces Correspondence. Documents written by, addressed to and signed by Canadian personnel acting in a Canadian national capacity should be drafted in accordance with the *Manual of Staff and Writing Procedures for the Department of National Defence and the Canadian Forces*. Additional guidance may be sought from the Canadian Forces Support Unit (CFSU), (719) 556-8251 (DSN 834), Building 880, Wing 1. Canadian personnel acting in a NORAD capacity will prepare correspondence in accordance with the policies in this document.

5.9. Taskings Sent to/From NORAD and USNORTHCOM. The staff will redirect tasks received directly from external organizations to the SJS for processing. The staff requesting GO/FO coordination from external agencies (i.e., JS, Services or Combatant Commands) will forward the request to the SJS office for release. Provide the email addresses for all offices listed on the eSSS. If the request is to be released by the JS, include the JS Form 136 in the staff package. Requests for AO and O-6 coordination will be released by the directorate to the external agencies' SJS office equivalent or JS AO equivalent.

5.10. Ranks and Titles. Differ among the military services. Reference **Attachment 3**, Rank Abbreviations and Titles, for the proper rank abbreviation and associated title.

5.11. Tasks Sent AMHS/DMS. Recipients of AMHS messages must notify the SJS to have the task created in TMT for tracking purposes.

5.12. NORAD and USNORTHCOM Packages for Chairman of the Joint Chiefs of Staff (CJCS). Once approved, the directorate will route packages destined for CJCS to the JS AO for processing through the Pentagon tracking system.

5.13. Printing. Directorates and subordinate commands must limit publication and printing of hard copy documents. In an effort to reinforce a “cost culture,” directorates and subordinate commands will:

5.13.1 Use electronic distribution for internal and external communications whenever possible.

5.13.2. Encourage less printing and copier usage in day-to-day operations.

5.13.3. Encourage dual-sided printing.

5.13.4. Use printing of only executive summaries for GO/FO/SES level document reviews.

5.13.5. Whenever possible, print slide presentations utilizing a handout format with a minimum of two slides per page.

5.13.6. Print in black and white to the maximum extent possible.

5.14. Read Ahead Packages. Requirements and products for internal staff meetings, briefings, phone calls, interviews, etc., with the CDR, ND, DC, or CS can take the form of *Microsoft* PowerPoint® presentation, point paper, or eSSS. Email or deliver all RAH packages to the applicable OMB and XO two days in advance of the briefing.

5.15. Signature Block Policy for Official Email. All official electronic messages will include a signature block sent from individual or organizational accounts. Do not add slogans, quotes, or other personalization to an official signature block. Signature blocks consist of name, rank, service affiliation, duty title, organization name, phone numbers (DSN and/or commercial as appropriate), and email address.

6. TMT:

6.1. Purpose. TMT provides a standardized, single data source for tracking and routing correspondence, tasks and staff packages.

6.2. Command Policy. Directorates and special staff will use TMT for processing all correspondence, tasks and staff packages. In the event there is a TMT outage, new tasks and existing tasks will be processed through email to OMBs. The SJS office will make notifications through the NORAD USNORTHCOM TMT and OMB Managers – DL on the requirement for manual tracking. Offices will update TMT once services are restored.

6.3. Accessing TMT. All SIPRNET users can access through the portal; there is no software load required.

6.4. TMT Training. Training is mandatory for all SIPR users and will be assigned through LMS. In addition, OSJS staff conducts monthly TMT training sessions. No registration is required for the monthly SJS training sessions.

6.5. TMT Administrators. There are two types of administrator roles assigned in TMT.

6.5.1. The TMT System Administrator (SA) role is assigned to members of the Collaborations team in N-NC/J6. These individuals have full administrator rights within TMT.

6.5.2. The TMT Admin role is assigned to the SJS office. Individuals assigned to the SJS office have permissions to create new user accounts and make organizational changes in TMT. Requests are forwarded to the NORAD USNORTHCOM SJS - OMB.

6.6. Organizational Structure. Directorates will be identified by either the two, three or four letter designation. OMBs are required for each organizational account.

6.7. User Records. Each individual with a SIPRNET account will have a TMT account created as a “Core” user or as an “Edge” user.

6.7.1. Core users have full functionality in TMT and will be able to create, search, accept, reject, manage assignment, respond, be part of an approval route and upload documents to the applicable document library.

6.7.2. Edge users have limited functionality in TMT and can only accept, reject, respond and upload documents to the applicable document library.

6.8. Service Desk Work Orders. A trouble ticket will need to be opened with the Service Desk to create new organizational accounts and OMBs, to promote an Edge user to a Core user, and to reactive individual user records within TMT.

6.9. TMT Roles:

6.9.1. The “Initiator” identifies the organization that released the task or staff package and assigns the Primary OPR and OCRs. For staff packages generated within the Directorate or Special Staff office, do not assign a Primary OPR role outside of your organization. The exceptions to this rule are: The Inspector General (IG) is authorized to assign an organization as Primary OPR to answer IG inquiries and CP is authorized to assign an organization as Primary OPR on tasks involving DV visits.

6.9.2. The “Primary OPR” identifies the lead within an organization. A Primary OPR must be assigned to a task or staff package. The Primary OPR may assign an OPR and additional OCRs.

6.9.3. The “OPR” if selected, identifies the organization or individual responsible for consolidating OCR inputs. If an OPR is not delegated on a task or staff package, then the Primary OPR will consolidate OCR inputs. The OPR may further delegate the OPR role down or assign to an AO.

6.9.4. The “OCR” on a task will provide inputs to the OPR or Primary OPR. The OCR role may further delegate to an OPR-C or OCR-C.

6.9.5. The “OPR-C” identifies the OPR within the OCR chain.

6.9.6. The “OCR-C” identifies the OCR within the OCR chain.

6.10. The TMT Task. A request for coordination or a downward directed request for action within an assigned timeframe. It has one Primary OPR and may have several OCRs. The objective of the Primary OPR is to answer the task using the “Complete Tasker” function.

6.10.1. For each task issued, the office managing assignments will assign an OPR and required or requested OCR(s).

6.10.2. Each OMB manager will review and accept the task if there are directorate equities.

6.10.3. Assigned offices have the ability to reject a task. The rejecting office will either recommend reassignment to the correct organization or indicate their office has no equities in

the assigned task. If the Primary OPR believes the task was assigned in error, follow the process outlined in **paragraph 1.5.5.** to change it.

6.10.4. After a task or staff package is accepted, it can be further delegated to an OPR, OCR(s), OPR-C or OCR-C. When requesting input from an external organization, select all TMT accounts associated with the organization (TMT and Non-TMT). Not all external organizations have a TMT account but they will have a Non-TMT account.

6.10.4.1. When the “For Release” box is checked, the task initiator grants release authority to the OPR. The task remains on the Initiator’s task list for monitoring until closed by the OPR. (**NOTE:** Release authority can be granted down the primary OPR chain but **MUST** begin with the initiator. A break in delegation terminates the ability to further delegate release authority.)

6.10.4.2. When a subordinate (to the initiator) checks “For Response” when assigning a task to their subordinate, they grant the ability to respond to the initiator on their behalf. When the subordinate completes the task, it will also complete their immediate parent’s task and deliver the response to the initiator.

6.10.4.3. To look up records and add assignees, click on the magnifying glass (search) icon and a “Look Up Records” window will appear allowing you to search for and select an Org, Individual, or Distro List for assignment.

6.10.4.3.1. Distribution lists created for an organization will be available for selection.

6.10.4.3.2. Individuals with a TMT account as a “Core” user or “Edge” user will be available for selection.

6.10.4.3.3. Organizations established in TMT will be available for selection.

6.10.4.3.4. The “People Search” is intended for adding new Edge Users to TMT. Existing Edge Users should be located using Individual Search. To search, use a last name, first name entry format.

6.10.4.4. When an organization creates a new task or staff package, it can be saved as a draft prior to sending. This functionality will no longer be available once the task or staff package has been sent.

6.10.4.5. “Send” will forward your current package to all individuals identified in the OPR and OCR assignment field.

6.10.4.6. “Hand-off draft” will be used if the organization does not have the authority to send the package. Reference **paragraph 5.3.3.** for additional information regarding release authority.

6.10.5. Regardless of the role in TMT, a comment must be entered in the “My Response” field to coordinate on a task. This ensures comments and coordinations are in one location and viewable by all in the “Consolidated OCR Coord field.”

6.10.6. To complete a task, the Primary OPR or OPR consolidates comments or coordination from the OCR(s), prepares the appropriate response, uploads the eSSS and documents to the Tabs library and closes/finishes it in TMT using the “Complete” command.

6.10.7. To complete an external task (i.e., JS), the Primary OPR or OPR is required to reply directly to the JS POC for tasks. To properly complete the action in TMT, the OPR must

upload the response in Outlook message format to the Tabs document library. This preserves any attachments sent in the email, provides documented proof of NORAD and USNORTHCOM's response and allows quick access by the command group for reference. For tasks that require command group action, the directorate will upload documents to the Tabs document library, complete the task in TMT and OSJS will process the task through the Senior Leader Approval Process (SLAP). When the command group has completed the SLAP, OSJS will return the package back to the Primary OPR for release.

6.10.8. To return a task, use the email function within Tasker Status to return a task back to the originator without completing it. There are several reasons for using the email function.

6.10.8.1. Request a change in OPR after a task has been accepted.

6.10.8.2. Request an extension to a suspense date.

6.10.8.3. When an OPR would like to have additional OCRs added to the task.

6.10.8.4. The originator will reissue the task and either grant or deny the request.

6.10.9. "Tasker Status" shows the location of any task or staff package and is located at the bottom of each task. It is the area where AOs may research the current status of a task or staff package.

6.10.9.1. A task in "New" status has been created and organizational or individual assignments have not been made.

6.10.9.2. An "Assigned" task or staff package has been assigned to an organization or individual.

6.10.9.3. An "Accepted" task indicates the organization or individual has accepted the task.

6.10.9.4. "In OPR/In OCR" indicates the task or staff package is currently being worked.

6.10.9.5. "OPR/OCR Complete" indicates the task or staff package is complete and is ready to be processed by the tasking organization.

6.10.9.6. "In SLAP" indicates the act of obtaining approval for a task or staff package. Any organization can use SLAP by selecting "Submit for Coord and Approval". The organization will build the approval route by selecting the organizations or individuals required to approve a package for release. When the task or staff package has been approved for release, the assigned organization can complete the task in TMT. There are six approval action pairs available for selection:

6.10.9.6.1. "Approve with Release/Disapprove" will release the email that was prepared in the "Proposed Email Coord" when approved is selected. Selecting disapprove will stop the approval route. If used, this should be identified in the last stage of the approval route.

6.10.9.6.2. "Approve with Complete/Disapprove" will approve the task when approved is selected and automatically complete the task with no further action required by the task manager. Selecting disapprove will stop the approval route. If used, this should be identified in the last stage of the approval route.

- 6.10.9.6.3. “Approve/Disapprove” will approve the task when approved is selected. The task manager will need to complete the task in TMT. Selecting disapprove will stop the approval route.
- 6.10.9.6.4. “Concur/Nonconcur” will forward a concurrence on the task when concur is selected. Selecting nonconcur will not stop the approval route and continue on to the next stage.
- 6.10.9.6.5. “Information Only,” when selected, will forward the package for information purposes only. This stage will not require acknowledgement unless it is the only step in a stage.
- 6.10.9.6.6. “Approve/Send Back to Previous Stage” will approve the task when approved is selected. Selecting send back to previous stage, routes the SLAP to the selected stage.
- 6.10.9.7. “Coord Complete” signifies the package has been approved in the SLAP process.
- 6.10.9.8. “Coord Disapproved” signifies the package has been disapproved during the SLAP process.
- 6.10.9.9. “Coord Cancelled” signifies a package in SLAP had the route cancelled.
- 6.10.9.10. “Rejected” signifies the package has been rejected by an organization.
- 6.10.10. “Document Libraries” displays the documents that are associated with a particular task and will not display until a new task has been saved.
- 6.10.10.1. “Original Documents” will contain the eSSS and any documents requiring review. This area is reserved for the initiator of a task.
- 6.10.10.2. “Tabs” contains the official response to a task and is where emails to external AOs will be saved. Documents and attachments included as part of a hardcopy staff package will be saved to this location. This area is reserved for the Primary OPR and OPR of a task.
- 6.10.10.3. “Public Workspace” contains the response for OCR(s), OPR-C(s) and OCR-C(s). Divisions and Branches will save responses to the respective directorate folder. Consolidated directorate responses will be saved to the root of public workspace. Use a standard naming convention of organization and document title (i.e. J4 - CRM.)
- 6.10.10.4. The “Discussion Board” allows further collaboration on a task response through a linked discussion group automatically created per task.
- 6.10.11. Other Actions:
- 6.10.11.1. “Cancel Tasker” is used to cancel a task.
- 6.10.11.2. “Lateral COORD” is used to assign the proper release authority if an organization doesn’t have release authority on a task.
- 6.10.11.3. “Close Tasker” will close the task and move it from the Active Taskers list to the Inactive Taskers list.

6.10.11.4. “Create Recurrence/Template” automatically creates a task at the time designated (i.e. daily or weekly). The task will show as new in TMT until managed to the assignees.

6.10.11.5. “Provision Workspace” is an area where the AO can start saving documents to answer the staff action. When a task is completed in TMT, the documents located in the provisioned workspace will be moved to the Tabs document library automatically. The Primary OPR and OPR are the only assignees that will have this feature.

6.10.11.6. “Submit for Coord and Approval” is used to initiate the SLAP process.

6.10.11.7. “Provision Discussion Board” is used to create the discussion board for a task where the discussion board was not created properly.

6.10.11.8. “Reopen Approval Route” is used to reopen a SLAP route that was previously disapproved.

6.10.11.9. “Reset Tasker Status” can only be run by a TMT SA. The SA will be able to perform all actions without actually being the assigned owner of a Tasker. This will help in scenarios where Taskers get stuck (e.g. user doesn’t have proper permissions or the user didn’t COORD before going on vacation, etc).

6.10.11.10. It is now possible to use the “Handoff” action at any level as opposed to the Initiator level only. This means that Taskers at lower levels can be re-assigned after they are released for action. Use “Handoff” to route packages to the proper release authority. This action is only allowed if the current user is the assigned party or a TMT SA. Handoff should only be done when directed.

7. Common Correspondence and Formatting. The following documents are some of the most common correspondence.

7.1. The Official Memorandum and Personal Letter. Used to communicate with DOD and federal agencies. Also, used to conduct official business outside the government when personalized letters are inappropriate. Personal letters are official correspondence prepared to convey warmth and sincerity. Personal letters are appropriate for welcome letters, letters of appreciation, letters of condolence, or any other occasion when a situation might be better handled in a personal manner. Templates for the official memorandum and personal letter can be found in the AOTB. Use the following instructions when preparing official memoranda and personal letters.

7.1.1. Prepare memoranda on 8 ½” x 11” letterhead appropriate to the signing official and audience. Use 8 ½” x 11” bond paper for succeeding pages. Print on only one side of the page. Appropriate letterhead can be found under the AOTB on each network.

7.1.2. Margins have a 2 ½ inch top margin and one-inch side and bottom margins on the first page. One-inch margins on all sides for succeeding pages. Do not justify right margins.

7.1.3. The command standard for fonts is Arial 12.

7.1.4. Do not use a salutation or complimentary close in a memorandum. For personal letters use “Dear” then the title and surname for the salutation. Provide the “go-by name” in the eSSS if the Commander will sign the letter. Use “Sincerely” for the complimentary close.

7.1.5. Single space the body. Double space between main and subparagraphs; single space between tertiary paragraphs. Indent subparagraphs five spaces using a., b., c., etc. designators. Indent tertiary paragraphs ten spaces using “(1), (2), (3)” designators.

7.1.6. Do not date correspondence prepared for the command group. Unless otherwise directed, date the original and all copies of the correspondence the day it is dispatched using the day, month and year format. Place the date 2 inches from the top of the first page flush with the right margin. Once signed, OSJS will date and return documents to the originator for dispatching and filing.

7.1.7. Type “MEMORANDUM FOR” in uppercase, 2 ½ inches (or 14 line spaces) from the top of the page and flush with the left margin. After “MEMORANDUM FOR,” allow two spaces followed by the addressee’s organization name and office symbol in uppercase. Separate the office symbol with a virgule (/) (i.e., N-NC/J1).

7.1.8. Type “FROM:” in uppercase, flush with the left margin, two line spaces below the last line of the MEMORANDUM FOR element. After “FROM:” allow two spaces followed by the organization abbreviation and office symbol of the individual signing the document. Use the full mailing address in the “FROM:” if the document is addressed to organizations outside the headquarters.

7.1.9. Type “SUBJECT:” in uppercase, flush with the left margin, two line spaces below the last line of the “FROM:”. After the “SUBJECT:”, allow two spaces followed by the subject title. Capitalize the first letter of each word except articles, prepositions and conjunctions. If a second line is required, align it under the first word of the title.

7.1.10. Cite a single reference in the subject line. For example “(Your Memo, 27 Dec 04).” For two or more references, use the “References:”. Type “References:” flush with the left margin, two line spaces below the last line of the “SUBJECT:”. Capitalize the first letter of every word except articles, prepositions and conjunctions. Identify each reference by the originator, type of communication, date and subject. Indicate if the reference is attached and the classification of all references in parentheses at the end of the reference title.

7.1.11. The signature block is located five lines below the last line of text and three spaces to the right of page center (4 ½ inches from the left edge of the page). For correspondence requiring dual signatures, place the senior ranking official’s signature three spaces right of page center. Place the junior ranking official’s signature element flush with the left margin and on the same line as the ranking official’s signature element

7.1.12. Type “Attachment:” or “Attachments:” flush with the left margin, two line spaces below the last line of the signature. Do not number a single attachment. When there are two or more attachments, list each by number and in the order mentioned in the memorandum. Describe each attachment by citing the office of origin, type of communication and its date. Include the subject of the attachment if the subject is not referenced in the text of the memorandum. For classified attachments, show the assigned classification symbol in parentheses.

7.1.13. For courtesy copies, type “cc:” flush with the left margin, two line spaces below the attachment element (or two line spaces below signature if the attachment is not used). Below “cc:” type the organizations abbreviation and office symbol of offices to receive copies.

7.1.14. Type “SEE DISTRIBUTION” when used in the MEMORANDUM FOR. Type “DISTRIBUTION:” in uppercase, flush with the left margin, three line spaces below the

signature element or two line spaces below the attachment or courtesy copy (depending on which are used). Below "DISTRIBUTION:" type the organization(s) abbreviation and office symbol for addressees.

7.2. Letters of Appreciation, Congratulations or Retirement for CDR, ND, DC, or CS Signature. Flag writers will ensure these documents are formatted correctly and print them on the appropriate stationery. Format the letters in Arial, 11.5, bold. An example of a retirement letter can be found under the AOTB on each network. Use the retirement letter template for letters of appreciation and congratulations. Reference **paragraph 5.4.** for records management requirements.

7.3. Letters of Instruction (LOI). Use the LOI to provide direction and guidance to the staff for a specific action or event. The CS will sign all LOIs using the "FOR THE COMMANDER" authority line. Use the Official Memorandum format but include the titled paragraphs: 1. PURPOSE; 2. GENERAL; 3. OBJECTIVES; 4. CONCEPT OF OPERATION; 5. RESPONSIBILITIES; and 6. ADMINISTRATIVE INSTRUCTIONS. LOIs can be found under the AOTB. Reference **paragraph 5.4.** for records management requirements.

7.4. Trip Reports. Use the following format to document the TDY/TAD purpose and outcome for trips where command group awareness is needed. Use the Official Memorandum format but include the titled paragraphs: 1. PURPOSE; 2. TRAVELERS; 3. ITINERARY; 4. DISCUSSION; and 5. CONCLUSIONS/ RECOMMENDATIONS. Trip Reports can be found under the AOTB. Reference **paragraph 5.4.** for records management requirements.

7.5. Point Papers. Memory ticklers used as a quick reference during meetings or to pass information quickly to another person or office. Point papers can be found under the AOTB. Reference **paragraph 5.4.** for records management requirements.

7.6. Position Papers. Provide rationale to support a decision or position. Position papers can be found under the AOTB. Reference **paragraph 5.4.** for records management requirements.

7.7. Information Papers. Provide clear, concise statement of the issue(s) to be addressed. Information papers can be found under the AOTB. Reference **paragraph 5.4.** for records management requirements.

7.8. Command Briefings. Are located in the AOTB. Reference **paragraph 5.4.** for records management requirements.

7.8.1. Do not use quotes from senior leadership to make a point. Make your point from the facts and logical conclusions. Do not use photos of the Commander in briefings unless the briefing is about the Commander.

7.8.2. Ensure the briefing slides are sized for an "On-screen Show." In *Microsoft PowerPoint®*, click on File, Page Setup and under the "Slides sized for", select the "On-screen Show" setting.

7.8.3. For title slides, use the Arial Bold Italic font, size 48.

7.8.4. For individual slides, use Arial Bold Italic font, size 32. Use the Arial font size 24 for main bullets, 22 for sub-bullets and 20 for second sub-bullets.

7.8.5. For classification markings, use Arial Bold, size 12. Use red to identify SECRET; use blue for CONFIDENTIAL classifications; use green for UNCLASSIFIED classifications. Originators of classified documents must follow the guidelines set forth in DOD Directive

5200.1R. In accordance with Executive Order 13526, as amended, personnel should use ISOO Implementing Directive No. 1, for classified marking guidance until DOD 5200.1-PH is published.

7.8.6. For briefer information, use Arial, Bold, size 20 for the briefer information block. Include name, rank and organization.

7.9. Quad Charts. The quad chart is mandatory for all briefings being staffed to the command group for decision and any VTC where the command group will be in attendance. Quad charts can be found under the AOTB. Reference **paragraph 5.4.** for records management requirements.

CHARLES D. LUCKEY, MG, USA
NORAD and USNORTHCOM Chief of Staff

Attachment 1

GLOSSARY OF REFERENCES AND SUPPORTING INFORMATION

References

Executive Order 13526, *Classified National Security Information*, 29 December 2009

Executive Order 13556, *Controlled Unclassified Information*, 4 November 2010

CJCSM 5760.01A Vol I, *Joint Staff and Combatant Command Records Management Manual – Procedures*, 7 February 2008, Change 2, 13 July 2009

CJCSM 5760.01A Vol II, *Joint Staff and Combatant Command Records Management Manual – Disposition Schedule*, 13 July 2012

JSM 5711.01D, *Joint Staff Correspondence Preparation*, 1 June 2008

DODM 5200.01, Vol 1-4, *Department of Defense Information Security Program(s)*, 24 February 2012, Change 1, 21 March 2012

DODM 5200.01, Vol 2, *Department of Defense Information Security Program: Marking of Classified Information*, 24 February 2012, Change 1, 21 March 2012

DOD 5400.11R, *Department of Defense Privacy Program*, 14 May 2002

AFH 33-337, *The Tongue and Quill*, 1 August 2004

ISOO Implementing Directive No. 1, *Marking Classified National Security Information*, 22 September 2003

NNCHOI90-123, *Records Management*, 1 April 2005

NNCHOI 90-185, *NORAD and USNORTHCOM Distinguished Visitors (DV) Visits and Events*, 31 May 2012

Terms

Action Officer (AO)—An individual responsible for preparing, assembling, coordinating and monitoring assigned tasks by the assigned due date.

Automated Message Handling System (AMHS)—Software used to prepare organizational messages.

Command Group—Encompasses the following offices and their respective support staffs: CDR, ND, DC, CS and CSEL.

Coordination—The process of gaining approval, information, or a position from an office with collateral responsibility. There are three levels of coordination:

GO/FO/SES/Equivalent: Coordination from a GO/FO/SES or equivalent, or O-6/GS-15 filling a director or deputy director position.

Planner: O-6/GS-15 level.

AO: Action Officer level (all ranks below O-6/GS-15).

Date Time Group (DTG)—The date format assigned to organizational message traffic. The DTG consists of the date, Greenwich Mean Time (Z), month and year (for example, 240915Z DEC 05).

Defense Messaging System (DMS)—The approved DOD system for sending and receiving organizational message traffic.

Distinguished Visitor (DV)—Any individual in the grade of or equal to O-7 and above, political appointees, elected officials, or senior federal, state or local appointed officials.

Due Date—The assigned date by which an action must be completed.

Electronic Staff Summary Sheet (eSSS)—The cover document for staff packages. Preferably a one page, stand-alone document that provides the decision maker the purpose, background, discussion and recommended course of action.

Office of Collateral Responsibility (OCR and OCR-C)—The office(s) indirectly responsible for completing a task. The OCR(s) is charged with providing the necessary coordination or information to the OPR.

Office of Primary Responsibility (OPR and OPR-C)—The office responsible for completing a task by the due date. Actions may include coordinating, compiling staff inputs, staff package preparation and monitoring.

Organizational Mailbox (OMB)—An electronic mailbox established, in *Microsoft Outlook*®, to support a given organization or group of people.

Organizational Mailbox Manager—The individual or group of individuals responsible for daily management of the office's OMB.

Primary Office of Primary Responsibility (Primary OPR)—A designation used strictly in TMT to identify the OPR.

Special Staff—Encompasses the following organizations: CP, Command Chaplain, Command Historian, Inspector General, JA, Legislative Affairs, Public Affairs, Assistant to the Commander on National Guard Matters, Special Assistant for Reserve Matters, Command Surgeon and Director of the Washington Office.

Staff Package—Correspondence directed up the chain of command for action or information. It consists of the eSSS and attached documents. Staff packages are typically entered electronically in TMT but can also be in hard copy form due to sensitivity issues, personal for or trip books.

Suspense (or Task)—A downward directed request for action normally associated with a due date. The originator of the suspense will assign one office (or AO) as the OPR. The originator may assign several or no OCRs to the suspense.

Task Management Tool (TMT)—A web enabled, SQL Server database, on the USNORTHCOM SIPRNET used for tracking tasks and staff packages generated throughout the commands.

Attachment 2

COMMAND WRITING AND BRIEFING GUIDELINES

A2.1. Correspondence:

- A2.1.1. Use Active Voice to shorten your information and make your meaning clear.
- A2.1.2. Keep writing style simple and straight forward—“write as you would talk.” Put most important points up front.
- A2.1.3. Most correspondence for the Commander’s signature should be warm, brief, have a positive tone and rarely longer than one page. Consider using a cover letter or memo with point paper/briefing attachments if more space is needed. Eliminate redundancy to shorten correspondence.
- A2.1.4. Double-check details: seniority of recipients, go-by names, addresses.
- A2.1.5. Avoid “word echo” (use of same word in paragraph or sentence).
- A2.1.6. Use “-ly” words sparingly, e.g. write “We are grateful for your dedicated service” rather than “We are extremely grateful for your completely dedicated service.”
- A2.1.7. Always spell out acronyms on first use if there is any possible doubt about the reader knowing them. Do not put the acronym in parentheses if it is used only once.
- A2.1.8. List attachments in order. For example, the order can be chronological, alphabetical, or by priority. eSSS attachments must be listed in the order they are referenced.
- A2.1.9. Use “USNORTHCOM,” not “NORTHCOM.”
- A2.1.10. In addition to the AOTB, JSM 5711.01D, *Joint Staff Correspondence Preparation*, and AFH 33-337, *The Tongue and Quill*, includes good advice and tips on military writing.

A2.2. Briefings:

- A2.2.1. Same rules apply for acronyms as with correspondence.
- A2.2.2. Ensure there is a reason for the order of any lists on slides: importance, chronological or alphabetical orders, for example.
- A2.2.3. Follow font type and size guidelines as stated in **paragraph 7.8**.
- A2.2.4. For dates, use either 6 Aug 11 or 6 August 2011, not 6 Aug 2011 (if the month is abbreviated, so is the year).
- A2.2.5. Capital letters are often overused on slides—only capitalize first word of bullets in addition to proper nouns, operation names, etc.

A2.3. Speeches:

- A2.3.1. You may be asked to provide input to the Commander’s speechwriters for a variety of his speaking engagements (presentations, awards, promotions, etc.) based on your areas of expertise. This is a good opportunity to have the boss say what you would like him to say about a subject.
- A2.3.2. Sometimes, requests for input will come in the form of a tasking. More often, speechwriters will contact you informally to provide specific input. Even if you are not contacted, please tell the speechwriters if you know of anything that would enhance a speaking engagement.

Attachment 3

RANK ABBREVIATIONS AND TITLES

A3.1. Officer Abbreviations.

Officer Rank	Canadian Army/AF	Canadian Navy	Army	Navy	Marine Corps	Coast Guard	Air Force
O-10	Gen General	Adm Admiral	GEN General	ADM Admiral	Gen General	ADM Admiral	Gen General
O-9	LGen Lieutenant General	VAdm Vice Admiral	LTG Lieutenant General	VADM Vice Admiral	LtGen Lieutenant General	VADM Vice Admiral	Lt Gen Lieutenant General
O-8	MGen Major General	RAdm Rear Admiral	MG Major General	RADM Rear Admiral	MajGen Major General	RADM Rear Admiral	Maj Gen Major General
O-7	BGen Brigadier General	Cmdre Commodore	BG Brigadier General	RDML Rear Admiral Lower	BGen Brigadier General	RDML Rear Admiral Lower	Brig Gen Brigadier General
O-6	Col Colonel	Capt(N) Captain	COL Colonel	CAPT Captain	Col Colonel	CAPT Captain	Col Colonel
O-5	LCol Lieutenant Colonel	Cdr Commander	LTC Lieutenant Colonel	CDR Commander	LtCol Lieutenant Colonel	CDR Commander	Lt Col Lieutenant Colonel
O-4	Maj Major	LCdr Lieutenant Commander	MAJ Major	LCDR Lieutenant Commander	Maj Major	LCDR Lieutenant Commander	Maj Major
O-3	Capt Captain	Lt(N) Lieutenant	CPT Captain	LT Lieutenant	Capt Captain	LT Lieutenant	Capt Captain
O-2	Lt Lieutenant	Slt Sub-Lieutenant	1LT Lieutenant	LTJG Lieutenant Junior Grade	1stLt First Lieutenant	LTJG Lieutenant Junior Grade	1st Lt First Lieutenant
O-1	2Lt Second Lieutenant	A/SLt Acting Sub-Lieutenant	2LT Second Lieutenant	ENS Ensign	2ndLt Second Lieutenant	ENS Ensign	2d Lt Second Lieutenant
Warrant Officer Rank							
W-5			CW5 Chief Warrant Officer 5		CWO5 Chief Warrant Officer 5		
W-4			CW4 Chief Warrant Officer 4	CWO4 Chief Warrant Officer 4	CWO4 Chief Warrant Officer 4	CWO4 Chief Warrant Officer 4	
W-3			CW3 Chief Warrant Officer 3	CWO3 Chief Warrant Officer 3	CWO3 Chief Warrant Officer 3	CWO3 Chief Warrant Officer 3	
W-2			CW2 Chief Warrant Officer 2	CWO2 Chief Warrant Officer 2	CWO2 Chief Warrant Officer 2	CWO2 Chief Warrant Officer 2	
W-1			WO1 Chief Warrant Officer 1		WO1 Warrant Officer 1		

A3.2. Enlisted Abbreviations.

Enlisted Rank	Canadian Army/AF	Canadian Navy	Army	Navy	Marine Corps	Coast Guard	Air Force
E-9	CF CWO Canadian Forces CWO	CF CPO1 Canadian Forces CPO1	NA	NA	NA	NA	NA
E-9	CCWO Command CWO	CCPO1 Command CPO1	SMA Sergeat Major of the Army	MCPON Master Chief Petty Officer of the Navy	SgtMajMC Sergeant Major of the Marine Corps	MCPOCG Master Chief Petty Officer of the Coast Guard	CMSAF Chief Master Sergeant of the Air Force
E-9	BCWO or WCWO Base or Wing CWO	BCPO1 Base CPO1	CSM Command Sergeant Major	MCPO Fleet or Command Master Chief Petty Officer	SgtMaj Sergeant Major	MCPO Fleet or Command Master Chief Petty Officer	CCM Command Chief Master Sergeant
E-9	CWO Chief Warrant Officer	CPO1 Chief Petty Officer First Class	SGM Sergeant Major	MCPO Master Chief Petty Officer	MGySgt Master Gunnery Sergeant	MCPO Master Chief Petty Officer	CMSgt Chief Master Sergeant
E-8	MWO Master Warrant Officer	CPO2 Chief Petty Officer Second Class	1SG First Sergeant	SCPO Senior Chief Petty Officer	1stSgt First Sergeant	SCPO Senior Chief Petty Officer	SMSgt Senior Master Sergeant
E-8	NA	NA	MSG Master Sergeant	NA	MSgt Master Sergeant	NA	NA
E-7	WO Warrant Officer	PO1 Petty Officer First Class	SFC Sergeant First Class	CPO Chief Petty Officer	GySgt Gunnery Sergeant	CPO Chief Petty Officer	MSgt Master Sergeant
E-6	Sgt Sergeant	PO2 Petty Officer Second Class	SSG Staff Sergeant	PO1 Petty Officer First Class	SSgt Staff Sergeant	PO1 Petty Officer First Class	TSgt Technical Sergeant
E-5	MCpl Master Corporal	MS Master Sergeant	SGT Sergeant	PO2 Petty Officer Second Class	Sgt Sergeant	PO2 Petty Officer Second Class	SSgt Staff Sergeant
E-4	Cpl Corporal	LS Leading Seaman	CPL Corporal	PO3 Petty Officer Third Class	Cpl Corporal	PO3 Petty Officer Third Class	SrA Senior Airman
E-4	NA	NA	SPC Specialist	NA	NA	NA	NA
E-3	Pte Private Trained	AB Able Seaman	PFC Private First Class	SN Seaman	LCpl Lance Corporal	SN Seaman	A1C Airman First Class
E-2	Pte Private	OS Ordinary Seaman	PV2 Private Second Class	SA Seaman Apprentice	PFC Private First Class	SA Seaman Apprentice	Amn Airman
E-1	NA	NA	PV1 Private	SR Seaman Recruit	Pvt Private	SR Seaman Recruit	AB Airman Basic