U.S. Department of
Homeland Security

United States
Coast Guard

Reserve Resource Handbook

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RECORD OF CHANGES

CHANGE NUMBER	DATE OF CHANGE	DATE ENTERED	BY WHOM ENTERED
1	31MAY11	31MAY11	LT Dan Sopher

CONTENTS

Preface – Introduction

This Reserve Resource Handbook is a compilation of various project officer duties, and was developed by the Standardization Branch of the Reserve Readiness Division based on field level data gathered during an assessment of the 2010 mobilization to Deepwater Horizon. Its purpose is to provide project officers with a starting point and to explain the scope of certain assignments. The processes, forms, and guides are examples and samples that can be tailored to fit the project officer's assignment.

Included with this handbook are brochures that were developed to discuss many topics related to the Reserve program. They are located in the Appendix, and are embedded documents that can be distributed at all-hands meetings, and by the Reserve Force Readiness System staff.

This guide is for informational purposes. Always review current Commandant Instructions for up to date guidance.

CHAPTER 1 - All-Hands Meeting Resources

Section A - Introduction

This chapter provides general guidance on the roles and responsibilities for an all-hands meeting. The Senior Reserve Officer (SRO), the Senior Enlisted Reserve Advisor (SERA), and the project officer should work together to hold a successful all-hands meeting.

Routine all-hands meetings are an ideal forum for recurring topics, such as the state of the Reserve Program, facilitated mandated training (MT), and the presentation of awards.

At a high level, roles include:

Senior Reserve Officer (SRO)	***Project Officer***
• Select and direct Project Officer • Prepare agenda • Review proposed media for meeting • Coordinate invitations to Senior Officers/Enlisted	• Identifies meeting location • Reserves resources – logistics • Requests availability of Coast Guard (CG) workstation with CG network connectivity
Reserve Force Readiness System (RFRS)	***SELRES member***
• Provide SRO administrative support • IDT berthing support • Subject Matter Expert (SME) on Reserve Policy	• Submit request for orders and berthing • Complete online mandated training • Maintain medical and dental readiness

Section B – Roles

The process of facilitating a successful all-hands meeting requires coordination, communication, clear direction and defined roles and responsibilities. This job-aid is one example of how to prepare for an all-hands meeting.

Senior Reserve Officer Timeline/Guide:

Who	When	What
Senior Reserve Officer	90 days prior	• Select and assign Project Officer • Select date of meeting provide date to Commanding Officer • Determine scope of meeting (theme) create draft Agenda • Select off-site meeting location for social event (optional) • Notify administrative staff to prepare/organize awards for presentation, e.g., Good Conduct awards `
	60 days prior	• Review/update Agenda • Contact and coordinate with speaker(s)/trainer(s) • Contact special guest(s) • Request presentation media be provided 30 days prior to meeting
	30 days prior	• Review electronic media; review for suitability and provide feedback - content adjustments • Submit electronic media to Project Officer for compatibility testing with computer resources at All Hands event • Coordinate awards presentation; include on Agenda • Confirm off-site meeting location for social event (optional)
	3 days prior	• Finalize agenda • Submit agenda to RFRS staff for printing/posting
	2 days **after**	• Send memos of appreciation to: o Speaker(s)/Trainer(s) o Galley o Support staff, etc.

Project Officer Timeline/Guide:

<table>
<tr><th>Who</th><th>When</th><th>What</th></tr>
<tr><td rowspan="5">Project Officer</td><td>90 days prior</td><td>Contact RFRS, request support to manage general administrative duties: field phone calls, make copies, type general correspondence
Establish contact with personnel who will be presenting at meeting
Reserve:
Meeting room
Chairs
Podium
Microphone and sound equipment
Laptop, projector, screen, cables, and power cord</td></tr>
<tr><td>60 days prior</td><td>Various logistics
Coordinate with Base Support Unit:
Parking
Security</td></tr>
<tr><td>30 days prior</td><td>Solicit presenters for electronic media (PowerPoint files, video files, etc.) required for presentation
Test media on laptop and projector
Notify galley of event
Request coffee, thermos, cups (optional)</td></tr>
<tr><td>3 days prior (if possible)</td><td>Prepare meeting room
Ensure meeting room is clean; set up chairs and other furniture
Set-up and test projector, laptop, sound system
Remind galley of upcoming meeting</td></tr>
<tr><td>1 day prior</td><td>Retrieve printed agenda from RFRS</td></tr>
</table>

RFRS Staff Timeline/Guide:

Who	When	What

RFRS	90 days prior	• Assign RFRS staff member to provide SRO with:
		  ○ Suggestions for agenda
		  ○ List of required facilitated mandated training and points of contact to provide training
		  ○ Status on:
		    ▪ ICS training
		    ▪ Leadership training (LAMS, CPO Academy, etc.)
		    ▪ Upcoming end of enlistment contracts

	60 days prior	• Work with SRO and Project Officer as needed • Provide phone support, as needed • Assist with preparation and coordination of correspondence associated with meeting
	30 days prior	• Work with SRO and Project Officer • Provide phone support
	3 days prior	• Receive final agenda, print, and prepare for delivery

SELRES Member Timeline/Guide:

Who	When	What
Member	90 days prior	• Review Personal Readiness Measures in CGBI – Medical, dental, and skills: ○ Medical Readiness – make appointments as required ○ Complete Mandated Training on USCG Learning Portal, as required – Go Green 100% ○ Ensure currency of ICS training 100, 200, 700 and 800; 300 for officers ○ Complete general administrative homework – Statement of Intent to Reenlistment, Pending good conduct, current evaluation, request to participate in SWE (October annually) ○ Request leadership training (LAMS, CPO Academy, etc.) as required for advancement ○ Provide suggestions for all-hands meeting agenda ○ Volunteer to help with all-hands meeting
	60 days prior	• Plan to attend all-hands meeting ○ Request IDT orders ○ Request IDT berthing, if needed • Complete medical readiness appointments (provide documentation to base HSWL to update system)
	30 days prior	• Verify IDT orders are processed. Verify berthing, if needed • Verify uniform of the day for the all-hands meeting • Review Family Plan – Always Ready for Deployment Will, Power of Attorney, SGLI
	30 days after	• Verify facilitated Mandated Training has been updated in CGBI

Section C – Sample Agenda Forms and Handouts

Sample format for all-hands meeting agenda:

USCG SECTOR XXXX
Reserve All-Hands Meeting
DD MMM YYYY
Uniform of the day: ________

DD MMM YYYY (Saturday)

All sessions are in (ENTER LOCATION), unless otherwise noted.

0700:	Report time	
0700-0730:	Convene	
0730-0800:	Welcome and Introductions / SRO (Name)	
0800-1100:	Facilitated MT	
	Sexual Violence Prevention Training	60 MINUTES
	Break	10 MINUTES
	Sexual Harassment Prevention Training	30 MINUTES
	Suicide Prevention Training	30 MINUTES
	Break	10 MINUTES
	Work-life Representative	30 MINUTES
	Break	10 MINUTES
1100-1200:	Readiness metrics & Reserve issues discussion	
1200-1300:	Lunch break	
1300-1350:	Mobilization Preparedness (Name)	
1350-1400:	Break	
1400-1450:	USERRA Presentation / ESGR Representative (Name)	
1450-1500:	Break	
1500-1600:	Awards presentation / de-brief (SRO Name)	
1600:	Liberty	

SAMPLE

Sample Mandated Training (MT) Schedule:

The following schedule is provided to help manage Mandated Training (MT). ALCOAST 110/10 is the source document, and is subject to change by DHS. Most MT can be completed any time of the year on the Coast Guard E- Learning Portal. The best practice for readiness is to complete MT during the first few months of the year to remain “GREEN” on readiness metrics. Annual training completion date is reset on December 31st of each year.

Annual Mandated Training (MT)	Recommended Due Date	Date Completed
Information Systems Security (ISS)	JAN	
Suicide Prevention	JAN	
Security Education and Training Awareness (SETA)	JAN	
Privacy Awareness	FEB	
Sexual Harassment Prevention (SHP)	FEB	
**Records Management for Everyone	FEB	
Reserve Mobilization Demobilization	MAR	
DHS Emergency Preparedness	MAR	
Substance Abuse Free Environment (SAFE)	MAR	
Workplace Violence	APR	
Reserve Mob/Demob	APR	
DHS Government Travel Card	APR	

Permanent Mandated Training (MT) B One Time	**Recommended Due Date**	**Date Completed**
Constitution and Citizenship Day	OCT	
DHS Organizational and Employee Resilience	OCT	
Ethics Training	OCT	
ICS IS 100	NOV	
ICS IS 200	NOV	
ICS IS 700	NOV	
ICS IS 800	NOV	
Influenza Training **(If attached to ATON, MED, DOG annual training)**	DEC	
Uniformed Servicemen Employ/Reemploy Act	DEC	
Don't Ask, Don't Tell Tier 3 Policy Awareness Training	DEC	

Facilitated Mandated Training (MT)	**Recommended Due Date**	**Date Completed**
Human Relations Awareness	ALL HANDS	
Sexual Assault Prevention/Response	ALL HANDS	

Note: You may be able to ‘test out’ on some of the courses offered on CG Learning Portal.

** Training added after the ALCOAST issued.

Section D – Resources and Tips

Introduction: There may be blocks of time available in the all-hands meeting agenda which provide an opportunity for outside agencies to deliver useful and relevant information on mobilization and readiness. Some examples are:

- Coast Guard Institute
- Education and Career Development Center (ESO)
- Health Safety and Work-life
- Employer Support of the Guard and Reserve (ESGR)
- State Veteran Affairs Office
- Department of Veteran Affairs
- TRICARE
- See links below for listed agencies above

Coast Guard Institute

The Coast Guard Institute website: http://uscg.mil/hq/cg1/cgi/default.asp

Topics include:

- Advancements, End of Course Support and Testing
- GI Bill, Tuition Assistance, Scholarships and Grants
- Education Resources
- CGI Forms
- ESO Information
- Government and Military Education links: http://uscg.mil/hq/cg1/cgi/links/links_gov_mil.asp

Education and Career Development Center (ESO)

The purpose of the Career development center is to provide updated information related to the education and training aspects of personal and professional development. The Career Development Advisor (CDA) and ESO will tailor their advice to each member's interests and goals. Educational Service Officers are available at most commands to assist service members.

Health Safety and Work-Life (HSWL)

Websites: http://www.uscg.mil/HSWL/ and http://www.worklife4you.com (Screen name and password for USCG personnel is "USCG")

Work-Life Field Offices:

Work-Life field staffs are located in HSWL field offices in Alameda, Boston, Cleveland, Honolulu, Ketchikan, Kodiak, Miami, New Orleans, Portsmouth, San Pedro, Seattle, St. Louis, and Washington, DC. Work-Life specialists administer their respective programs in accordance with Commandant (CG-111) policy and other such directives. HSWL/Work-life staff conduct and present courses in Suicide Prevention, Sexual Assault Prevention and other Work-life related topics. To contact the Work-Life Staff closest to you, call 1-800-872-4957 followed by the extension listed next to the following BSU locations:

Alameda (252)	Ketchikan (317)	Portsmouth (305)
Boston (301) (Dial direct 617-223-3485)	Kodiak (563)	San Pedro (311)
Cleveland (309)	Miami (307)	Seattle (313)
Honolulu (314)	New Orleans (308)	St. Louis (302)
Washington, DC (932)		

"WorkLife4You" Resource and Referral Service and Employee Assistance Program - Toll-free number: (800) 222-0364

Employer Support of the Guard and Reserve (ESGR)

Local ESGR representatives are available to give presentations to reservists regarding Uniformed Services Employment and Reemployment Rights Act (USERRA) employment rights. Click on the corresponding state map to locate state and local ESGR representatives:

http://www.esgr.org/Site/Contact/StateLocalContacts/tabid/161/Default.aspx

State Veteran Affairs Offices

Use this site to find state VA representatives to discuss and present VA benefits.
Website Link to state VA offices: http://www.va.gov/statedva.htm

Department of Veteran Affairs, Benefits and Services (VA)

VA Representatives may be available to present information on the following topics:

- Burial
- Civilian Health and Medical Program of the Department of Veterans Affairs (CHAMPVA)
- Death Pension
- Dependency Indemnity Compensation
- Direct Deposit
- Directions to VA Benefits Regional Offices
- Disability Compensation
- Disability Pension
- Education
- Home Loan Guaranty
- Life Insurance
- Medical Care
- Vocational Rehabilitation and Employment

'VA Benefits in Brief' is a printable document that provides a summary of VA benefits, as well as contact phone numbers and locations:

http://www.vba.va.gov/pubs/forms/VBA-21-0760-ARE.pdf

Toll-free numbers and websites for contacting various departments of the VA:

- VA Benefits: 1-800-827-1000
- Beneficiaries in receipt of Pension Benefits: 1-877-294-6380
- Education (GI Bill): 1-888-442-4551
- Health Care Benefits: 1-877-222-8387
- Income Verification and Means Testing: 1-800-929-8387
- Life Insurance: 1-800-669-8477
- Mammography Helpline: 1-888-492-7844
- Special Issues - Gulf War/Agent Orange/Project Shad/Mustard Agents and Lewisite/Ionizing Radiation: 1-800-749-8387
- Find a local Veterans Administration representative to give VA a benefits presentation. To locate VA facilities throughout the U.S., go to http://www.va.gov/directory/

TRICARE Medical Benefits

TRICARE provides briefings for Reserve units. Education is the key to understanding your TRICARE benefits. Without this information, stressful problems can occur resulting in expensive out-of-pocket expenses for service members and their families. Each unit should ensure their assigned service members and their dependents are informed, and know who to contact for TRICARE needs. Examples of briefings are:

- One-hour annual briefing
- Briefings for specific groups or events
- Mobilization/Demobilization briefings
- Yellow Ribbon compliance briefings
- Briefings for Guard/Reserve Units (service members and their families)

All briefing requests should be submitted at least three weeks in advance of the desired briefing date. Use the online briefing request form for each region.

TRICARE North Region
The North region includes Connecticut, Delaware, the District of Columbia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, Vermont, Virginia, West Virginia, Wisconsin, portions of Iowa (Rock Island Arsenal area), Missouri (St. Louis area), and Tennessee (Ft. Campbell area):
Briefing request form: http://www.tricare.mil/tronorth/request.cfm
Health Net Federal Services, LLC
1-877-TRICARE (1-877-874-2273)
Behavioral Health Care Provider Locator and
Appointment Assistance Line: 1-877-747-9579
(*8 a.m.–6 p.m. Eastern Time*)
www.healthnetfederalservices.com
http://www.tricare.mil/tronorth/Reserve-Guard_Education.cfm

TRICARE South Region
The South Region includes Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, Oklahoma, South Carolina, Tennessee (excluding the Ft. Campbell area) and Texas (excluding the El Paso area):
Briefing request form: http://www.tricare.osd.mil/trosouth/request.cfm.
Humana Military Healthcare Services, Inc. 1-800-444-5445
Behavioral Health Care Provider Locator and
Appointment Assistance Line: 1-877-298-3514
(*8 a.m.–7 p.m. Eastern Time*)TRICARE South Behavioral Health: 1-800-700-8646
http://tricare.mil/trosouth/Reserve-Guard_Education.cfm
www.humana-military.com

TRICARE Medical Benefits (cont.)

TRICARE West Region:
The West Region includes Alaska, Arizona, California, Colorado, Hawaii, Idaho, Iowa (excluding Rock Island Arsenal area), Kansas, Minnesota, Missouri (except the St. Louis area), Montana, Nebraska, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Texas (the southwestern corner including El Paso), Utah, Washington, and Wyoming:
Briefing request form: http://www.tricare.mil/trowest/request.cfm
Tri-West Healthcare Alliance Corp
1-888-TRIWEST (1-888-874-9378)
Behavioral Health Care Provider Locator and
Appointment Assistance Line: 1-866-651-4970
(*8 a.m.–6 p.m. in all West region time zones*)
Tri-West Behavioral Health Crisis Line: 1-866-284-3743
http://www.tricare.mil/trowest/default.cfm

CHAPTER 2 – SELRES Pre-Mobilization, Mobilization, Demobilization

Section A - Introduction

Defining roles and responsibilities for recalling Selected Reserves (SELRES) is vital prior to responding to a contingency. The information in this document is provided to augment existing Commandant Instructions. Deepwater Horizon highlighted the importance of documenting processes and procedures. Personnel responsible for mobilizing SELRES should be familiar with the following references and CG applications.

References:

- Reserve Policy Manual, (RPM), COMDTINST M1001.28 (series)
- Personnel Manual, (PERSMAN), COMDTINST M1000.6 (series)
- Personnel, Pay and Procedures Manual, (PPPM), PSCINST M1000.2 (series)
- Obtaining Personnel Resources to meet surge requirements, COMDTINST 5400.1 (series)
- Coast Guard Manpower Mobilization and Support Plan, COMDTINST M3061.1

Applications:

- Direct Access (DA), also known as PeopleSoft
- Coast Guard Business Intelligence (CGBI)
- Mobilization Readiness Tracking Tool (MRTT)
- Microsoft Excel
- Web T-PAX
- TMT
- Homeport
- CGMS

Section B - Explanation of Title 10 and Title 14, (from the Reserve Policy Manual), COMDTINST M1001.28 (series)

Anyone responsible for the mobilization of SELRES should familiarize themselves with the authorities within U. S. Code Title 10 and Title 14. The Reserve Policy Manual provides guidance on the specific requirements to mobilization of SELRES. Changes to policy are sent via general message traffic in ALCOASTs to update the field. The Coast Guard Reserve draws status and mission authority from titles 10 and 14 of the U.S. Code:

10 U.S.C. 10101 identifies the Coast Guard Reserve as one of the seven Reserve components of the armed forces.

10 U.S.C. 10102 states the "purpose of each Reserve component is to provide trained units and qualified persons available for active duty in the armed forces, in time of war or national emergency, and at such other times as the national security may require, to fill the needs of the armed forces whenever…more units and persons are needed than are in the regular components."

14 U.S.C. 701 provides the basic operating authority for the Coast Guard Reserve, under the direction of the Commandant.

14 U.S.C. 704 specifically confers upon any member of the Coast Guard Reserve serving on active duty or inactive-duty training "the same authority, rights and privileges in the performance of that duty as a member of the Regular Coast Guard of corresponding grade or rating." This provision allows qualified reservists to enforce Federal law and make lawful arrests, when necessary, within the scope of their assigned duties. This authority allows reservists to function, interchangeably, with the same military and civil powers as their regular component counterparts, whether during inactive duty drills or while serving under active duty orders.

Notes:

- **No SELRES should be mobilized without orders.** Orders are required for starting pay, allowances, and to determine entitlements.

- Units may request SELRES to augment home unit to support contingency.

Section C – Mobilization Roles

Mobilizing reservists requires ongoing preparation, communication, and coordination with active duty personnel and full-time support (FTS) personnel on the Reserve Force Readiness System (RFRS) staff to ensure the necessary processes and procedures are executed correctly. Consideration for the personnel assigned primary responsibility for detailing reservists during a mass mobilization should be incorporated in the unit Standard Operating Procedure prior to a recall:

- Full-time support (FTS) personnel should be relieved of collateral duties during high recall surge
- Units should cross-train key personnel on mobilization procedures
- Leverage resources by exploring opportunities to include and use Auxiliarists
- Define/adjust local operations to accommodate for the mobilization of reservists who are typically used to augment unit

Section C – Mobilization Roles (cont.)

The list below is an example of some critical elements of mobilizing/demobilizing Reservists. Some units may not have personnel assigned, such as Reserve Force Readiness System (RFRS) staff or a Senior Enlisted Reserve Advisor (SERA). Adjust plans accordingly to fulfill the need.

- Liaison Officer/Contingency program management (SRO):
    - Implement unit Standard Operating Procedures for mobilization
    - Clearly define select and direct process/procedure
    - Liaison with unit department heads and Commanding Officer
    - Select Recall Officer
    - Report status of personnel to department heads and key players

- Recall Officer (RO)/Coordinate SELRES recall:
    - Identify Reservists for mobilization
    - Track status of reservists who are nominated for mobilization
    - Track status of demobilized Reservists
    - Report status to Liaison Officer
    - Corresponds with District (dxr) on select and direct process
    - Maintain access to CGMS

- Recall logistics management (SERA):
    - Maintain roster of Reservists primary and emergency contact information
    - During mobilization, gather training and readiness data from unit Reservists, and provide to unit
    - Communicate updates to unit personnel (uniform requirements, expectations, required items to bring for mobilization, etc.)
    - Track readiness
    - Track non-"green" members
    - Encourage the development of Reservists Family Plans
    - Stay informed of Reservists recall status (e.g., Title 10, Title 14, etc.) including pending recalls and RELADs

- Strategic Planning (Reservist):
    - Uniforms ready for mobilization
    - Completion and update Annual Screening Questionnaire (ASQ)
    - Maintained access to Web T-PAX, Direct Access
    - Legal aspects (power of attorney, will, etc.)
    - Family plan
        - Spouse active duty I.D. card (useful for base medical and other benefits)

Section C – Mobilization Roles (cont.)

- Management of planning logistics and processes (Admin/SPO/RFRS):
  - Verify roster of SELRES emergency contact information retrieved from Direct Access
  - Government travel credit card information (GTCC) for Reservists
  - Monitor GTCC balances
  - Notify Reservists of past-due balances
  - Travel orders (issuance, notes, entitlements, etc.)
  - Travel advances
  - Start/stop entitlements
  - Assist with Web T-PAX and travel claims
  - DEERS enrollment/dis-enrollment and verification
  - SGLI, VGLI
  - Determine follow-up for reservists unable to mobilize
  - Provide RO administrative support
  - Subject Matter Expert (SME) for Reservists
  - Execute orders
  - Implement 'Lessons Learned' program

- Management of injured personnel (OINC/RFRS):
  - Line of duty injuries
  - Refer to Reserve Policy Manual
  - Reservists should notify chain of command immediately for injuries incurred in field

- Management of augmentation or operational units that use Reservists (Unit):
  - Adjust unit operations to ensure support of contingency

Section D – Sample Forms and Tools

Lessons Learned Capture Form:
This form may be used during high operational-tempo operations to capture lessons learned during a mobilization/exercise. A periodic review, possibly weekly, can help streamline the mobilization process.
(This form may be copied, as part of a recall "go-kit," to account for contingencies that result in loss of power and limited workstation access.)

Who	***Stage***	***Date***	***Lesson Learned***
	Pre-mob		
User's Name / Position Title:	***Mob***		
	Demob		

Reservist Recall Tracking Form

Instructions: The sample form on the next page can be used to track the status of personnel nominated for mobilization. When using this tool, make edits as needed to the process and checklist.

(The form can be copied, and maintained as part of a recall "go-kit," to account for contingencies that result in loss of power and workstation access.)

In the following form, set status of a reservist by entering the date in the Status Flowchart.

Status definitions:

NOMINATED: Recall Officer (RO) has selected a Reservist and verified deployable status

RECALLED: Selection approved by unit and District (dxr)

AVAILABLE: Returned to the pool of available Reservists

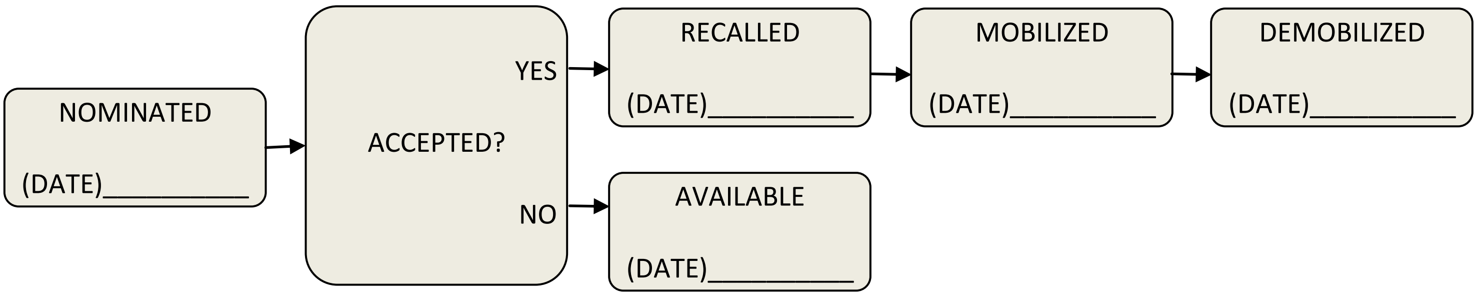
MOBILIZED: Received orders; successfully arrived and checked in, as dictated by orders

DEMOBILIZED: Successfully returned to unit, and completed final travel claim

MRTT RTN#: RTN # Job Title:

RANK/NAME:

STATUS FLOWCHART:



TASK	***DATE***
VERIFY INDIVIDUAL MEDICAL READINESS (IMR).	
NOTIFY RESERVE DEPARTMENT HEAD & CHAIN OF NOMINATION OF RESERVIST.	
NOTIFY ACTIVE DUTY DEPARTMENT HEAD & CHAIN OF NOMINATION OF RESERVIST.	
RECORD MRTT RTN #; ENTER DATE ABOVE TO SET STATUS TO ‘NOMINATED.’	
PRELIMINARY NOTIFICATION: CONTACT MEMBER AND VERIFY ALL CONTACT INFORMATION IN DIRECT ACCESS.	
SUBMIT NAME TO REQUESTING DISTRICT (DXR).	
NOMINATION DECLINED BY DISTRICT? ENTER DATE ABOVE TO SET STATUS TO 'AVAILABLE.’ NOTIFY MEMBER.	
NOMINATION ACCEPTED BY DISTRICT? ISSUE ORDERS. ENTER DATE ABOVE TO SET STATUS TO 'RECALLED.’	
VERIFY INFORMATION ON ORDERS.	
OFFICIAL NOTIFICATION. NOTIFY MEMBER & SUPERVISORS; SEND ELECTRONIC ORDERS TO RESERVIST’S USCG AND PERSONAL EMAIL ADDRESS.	
SEND HARD COPY OF ORDERS TO MEMBER'S ADDRESS.	
SUCCESSFULLY ARRIVED AT CHECK-IN STATION? ENTER DATE ABOVE TO STATUS CHANGE TO ‘MOBILIZED.’	
SUCCESSFULLY RETURNED TO UNIT? COMPLETE TRAVEL CLAIM.	
ENTER DATE ABOVE TO STATUS CHANGE TO ‘DEMOBILIZED.’	
VERIFICATION THAT GOVERNMENT TRAVEL CREDIT CARD BALANCE HAS BEEN PAID.	

Member Timeline/Guide:

Who	Stage	What

Member	Pre-mob	• Prepare and maintain Family Plan
		• Complete and maintain ICS competency
		• Familiarize and maintain access to the following resources:
		    o Direct Access (DA)
		    o T-PAX
		    o CGBI
		• Familiarize with 'The Mobilization Process' section of chapter 11 of the PPPM
		• Validate information in DA:
		    o Contact information
		    o Emergency recall information
		    o Annual Screening Questionnaire (ASQ)
		• Understand the Uniformed Services Employment and Reemployment Rights Act (USERRA)
		• Complete USCG e-Learning 'Reserve Mobilization/Demobilization' course
		• Prepare Will and Power of Attorney

	Mob	• Be ready
		• Obtain travel orders prior to traveling
		• Verify SGLI
		• Validate information in DA:
		    o Contact information
		    o Emergency recall information
		    o Annual Screening Questionnaire (ASQ)
		• Implement Family Plan
		• Notify employer of activation
		• Notify credit agencies (credit card companies, etc.)

	Demob	• Submit training certificates to unit Training Officer • Travel claim (First, Middle, Last) for SELRES • Pay off credit card balance

CHAPTER 3 – Training Officer Resources

Section A – Introduction

The information in this chapter is provided to augment the training officers resources listed below. As defined by the Performance, Training and Education Manual, COMDTINST M1500.10C:

"Training Officer (TO). A collateral duty position, unit Training Officers manage General Mandated Training, advanced training, and unit specific training, maintain training and educational information for individuals using the Training Management Tool (TMT), submit and manage electronic training requests (ETR) for individuals, maintain unit training equipment and aids, evaluate all training, and prepare short and long range plans."

Important Note:

Training: In CGBI, the training link provides a list of training courses required by the position being viewed. . It also lists non-required training that has been completed by unit personnel as documented in Direct Access.

Tasks: In CGBI, a task is the basic training element that an individual must perform. Tasks are the building blocks for competencies and are assigned to PEOPLE, not POSITIONS. Tasks have frequency cycles assigned to them because they have observable beginnings and ends. In some cases, it may take only one task to constitute a competency (e.g., Class C School). In other cases, it will take many tasks to constitute a competency (e.g., Boat Crew currency maintenance competencies).

Competencies: In CGBI, a competency is comprised of one or more tasks that must be performed to demonstrate proficiency. Competencies can be assigned at the unit level in the Training Management Tool (TMT).

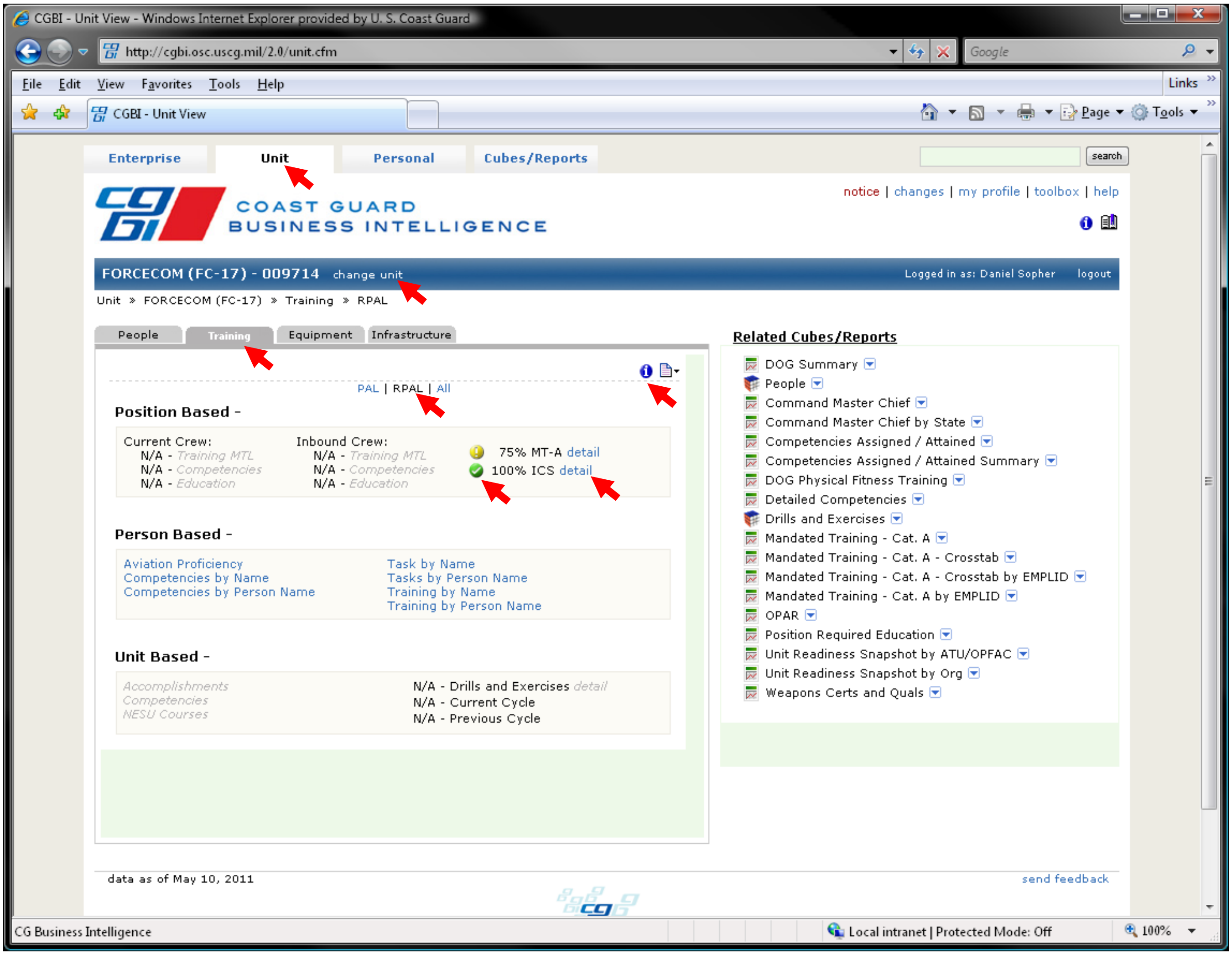
Training Officer Resources:

- Coast Guard Business Intelligence (CGBI)
- CGBI Training Course
- Training Management Tool (TMT)
- Performance, Training, and Education Manual, COMDINST M1500.10C
- U.S. Coast Guard Competency Management System Manual, COMDINST 5300.2
- Record of Professional Development, CG-4082
- ALCOAST and ALCGRSV Message Boards: http://uscg.mil/announcements/
- Training Quota Management Center Web Page: http://www.uscg.mil/hq/tqc/

Section B – CGBI Guide for Unit Data

***Coast Guard Business Intelligence (CGBI)*: http://cgbi.osc.uscg.mil/2.0/unit.cfm**

CGBI displays competencies, tasks, and training. Parts of the data is broken down by current requirements, pipeline (inbound) requirements, and unit requirements. The training tab displays values based on the selected department and all subordinate departments. Use the Unit Report to view details for a specific department only.



Usage:
Select 'Unit' tab to view unit data.
Select 'change unit' to choose your unit.
Select 'RPAL' to view Reserve Personnel Allowance List data.
Select 'detail' to view details about the respective measure.
Select the green, amber, or red icon to the left of a measure to view details on measurement.
Select 'detail' to the right of MT-A to view Mandated Training – A statistics per person.
Select the blue 'i' icon (top right of the Training frame) to view information about that frame.

Section C – Roles

The following role of a unit Training Officer (TO) may be reordered and reassigned according to available resources and needs of the unit. By initially completing a thorough assessment of the status of training at the unit, training goals can be set. An example of a process for planning training may be:

1. PLAN: Initially establish a baseline of current status, and develop a plan of action from which to show improvement over time.

2. EXECUTE: Implement the plan of action, and perform regular duties of a TO.

3. REPORT: Regularly report status towards plan completion.

4. ACT: Leverage resources to promote improvement.

A unit TO should actively manage the following categories of training:

- Mandated Training
- Reserve Personnel Allowance List Competencies
- Unit Assigned Competencies
- Additional Functions

Mandated Training (MT):

<table>
<tr><th>Who</th><th>Stage</th><th>What</th></tr>
<tr><td rowspan="4">Training Officer</td><td>Plan</td><td>Annually review latest ALCOAST or policy on required Mandated Training (MT).
Develop or annually review a schedule for SELRES to complete and maintain currency of MT:
When developing a schedule for completing MT, consider spanning the training across SELRES IDT drill weekends or ADT-AT drill duty.
Verify each MT course requirements on completion dates. Some may be unique.
Alternatively, check for current guidance on the use of Readiness Management Periods (RMP) as compensation for completing MT outside of drill duty.</td></tr>
<tr><td>Execute</td><td>Regularly monitor SELRES MT completion status:
Periodically, such as monthly, use Coast Guard Business Intelligence (CGBI) to monitor SELRES MT completion status.
On or after January 1 of each year, verify completion status in CGBI. Some MT may turn “red” at the beginning of the calendar year regardless of previous completion date.

Note: Training Management Tool (TMT) resets MT status annually to “red” every 31DEC.</td></tr>
<tr><td>Report</td><td>Report on status of MT completion. Periodically provide MT status reports to command cadre and Reserve Force Readiness System (RFRS) staff.</td></tr>
<tr><td>Act</td><td>Communicate, as necessary, with supervisors on deficiencies.</td></tr>
</table>

Reserve Personnel Allowance List (RPAL) Competencies:

Who	Stage	What
Training Officer	***Plan***	• Initially review RPAL competencies to verify alignment with current position description. • Develop plan of action to correct misaligned RPAL competencies in accordance with COMDINST 5300.2. • Coordinate with units to develop a training plan for completion of RPAL competencies.
	Execute	• Regularly review RPAL competencies to verify alignment with current position description. • Communicate unit priorities. • Advise applicants on process to complete training requests and applications. • Ensure reporting of RPAL-related data through the Individual Training Plan, when required.
	Report	• Periodically report status on: o RPAL competency completion. o Accuracy of RPAL competency alignment. o Status of RPAL competency alignment changes.
	Act	• As necessary, follow procedures U. S. Coast Guard Competency Management System Manual to correct inconsistencies with RPAL.

Unit Assigned Competencies:

Who	*Stage*	*What*
Training Officer	***Plan***	• Correspond with the XO to review competencies to determine if they are prioritized in alignment with unit requirements. • Initially review unit competencies in Training Management Tool (TMT) to verify alignment with current position description. • Ensure correction of misaligned unit competencies in TMT. • Guide units to develop a training plan for completion of unit competencies.
	Execute	• Periodically review unit competencies in TMT to verify alignment with current position description. • Communicate unit priorities. • Advise applicants on process to complete training requests and applications. • Ensure reporting of unit-related data through the Individual Training Plan, when required.

	Report	• Periodically report status on:
		    o Accuracy of unit competency alignment.
		    o Status of unit competency alignment changes.

	Act	• Identify training needs, and leverage resources to create bulk training opportunities (Example: Sector boat college, training events).

Additional Functions:

- Coordinate training with the Training Officer for active duty personnel.
- Provide support and knowledge on steps to advancement.
- Consult with Education Services Officer (ESO) on upcoming training opportunities.
- Regularly review Coast Guard Message Board for training opportunities for SELRES.

Appendix – Additional Resources

Section A – Quick Reference Brochures

The following quick reference brochures are available at: **http://www.uscg.mil/reserve/job_aid.asp** **Note: They are available in a printable flyer format as well as mobile format. You can bookmark the mobile versions in your computer or Smartphone.**
Reserve Active Duty for Training - Annual Training (ADT-AT)
Reserve Inactive Duty for Training (IDT)
Various Reserve Topics
Individual Medical Readiness (IMR)
Reserve Component Category (RCC) & Participation Standards
Reserve Retirement
Reserve Training Readiness Requirements
Reserve Mobilization
Reserve Demobilization
Reserve UCMJ

Section B – Resources from this Reserve Resource Handbook

Resources for this Handbook	
B.1	Sample all-hands meeting agenda
B.2	Sample Mandated Training (MT) Schedule
B.3	Lessons Learned Capture Form
B.4	Reservist Recall Tracking Form

Section B.1 - Sample All-hands Meeting Agenda

USCG SECTOR XXXX
Reserve All-Hands Meeting
DD MMM YYYY
Uniform of the day: ________

DD MMM YYYY (Saturday)

All sessions are in (ENTER LOCATION), unless otherwise noted.

0700:	Report time	
0700-0730:	Convene	
0730-0800:	Welcome and Introductions / SRO (Name)	
0800-1100:	Facilitated MT	
	Sexual Violence Prevention Training	60 MINUTES
	Break	10 MINUTES
	Sexual Harassment Prevention Training	30 MINUTES
	Suicide Prevention Training	30 MINUTES
	Break	10 MINUTES
	Work-life Representative	30 MINUTES
	Break	10 MINUTES
1100-1200:	Readiness metrics & Reserve issues discussion	
1200-1300:	Lunch break	
1300-1350:	Mobilization Preparedness (Name)	
1350-1400:	Break	
1400-1450:	USERRA Presentation / ESGR Representative (Name)	
1450-1500:	Break	
1500-1600:	Awards presentation / de-brief (SRO Name)	
1600:	Liberty	

Section B.2 - Sample Mandated Training (MT) Schedule

Mandated Training (MT) Schedule:

Note: You may be able to 'test out' on some of the courses offered on CG Learning Portal.
** Training added after ALCOAST issued.

Annual Mandated Training (MT):	Recommended Due Date:	Date Completed:
Information Systems Security (ISS)	JAN	
Suicide Prevention	JAN	
Security Education and Training Awareness (SETA)	JAN	
Privacy Awareness	FEB	
Sexual Harassment Prevention (SHP)	FEB	
**Records Management for Everyone	FEB	
Reserve Mobilization Demobilization	MAR	
DHS Emergency Preparedness	MAR	
Substance Abuse Free Environment (SAFE)	MAR	
Workplace Violence	APR	
Reserve Mob/Demob	APR	
DHS Government Travel Card	APR	
Permanent Mandated Training (MT) B One Time:	**Recommended Due Date:**	**Date Completed:**
Constitution and Citizenship Day	OCT	
DHS Organizational and Employee Resilience	OCT	
Ethics Training	OCT	
ICS IS 100	NOV	
ICS IS 200	NOV	
ICS IS 700	NOV	
ICS IS 800	NOV	
Influenza Training **(If attached to ATON, MED, DOG annual training)**	DEC	
Uniformed Servicemen Employ/Reemploy Act	DEC	
Don't Ask, Don't Tell Tier 3 Policy Awareness Training	DEC	
Facilitated Mandated Training (MT):	**Recommended Due Date:**	**Date Completed:**
Human Relations Awareness	ALL HANDS	
Sexual Assault Prevention/Response	ALL HANDS	

Section B.3 - Lessons Learned Capture Form

Lessons Learned Capture Form:

Who	*Stage*	*Date*	*Lesson Learned*
User's Name / Position Title:	*Pre-mob*		
	Mob		
	Demob		

Section B.4 - Reservist Recall Tracking Form

Instructions: The sample form on the next page can be used to track the status of personnel nominated for mobilization. When using this tool, make edits as needed to the process and checklist.

(The form can be copied, and maintained as part of a recall "go-kit," to account for contingencies that result in loss of power and workstation access.)

In the following form, set status of a reservist by entering the date in the Status Flowchart.

Status definitions:

NOMINATED: Recall Officer (RO) has selected a Reservist and verified deployable status

RECALLED: Selection approved by unit and District (dxr)

AVAILABLE: Returned to the pool of available Reservists

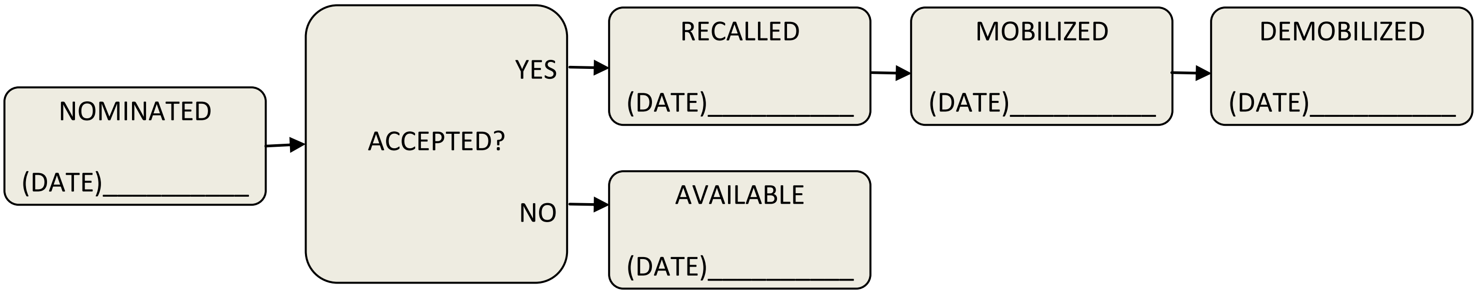
MOBILIZED: Received orders; successfully arrived and checked in, as dictated by orders

DEMOBILIZED: Successfully returned to unit, and completed final travel claim

MRTT RTN#: RTN # Job Title:

RANK/NAME:

STATUS FLOWCHART:



TASK	***DATE***
VERIFY INDIVIDUAL MEDICAL READINESS (IMR).	
NOTIFY RESERVE DEPARTMENT HEAD & CHAIN OF NOMINATION OF RESERVIST.	
NOTIFY ACTIVE DUTY DEPARTMENT HEAD & CHAIN OF NOMINATION OF RESERVIST.	
RECORD MRTT RTN #; ENTER DATE ABOVE TO SET STATUS TO 'NOMINATED.'	
PRELIMINARY NOTIFICATION: CONTACT MEMBER AND VERIFY ALL CONTACT INFORMATION IN DIRECT ACCESS.	
SUBMIT NAME TO REQUESTING DISTRICT (DXR).	
NOMINATION DECLINED BY DISTRICT? ENTER DATE ABOVE TO SET STATUS TO 'AVAILABLE.' NOTIFY MEMBER.	
NOMINATION ACCEPTED BY DISTRICT? ISSUE ORDERS. ENTER DATE ABOVE TO SET STATUS TO 'RECALLED.'	
VERIFY INFORMATION ON ORDERS.	
OFFICIAL NOTIFICATION. NOTIFY MEMBER & SUPERVISORS; SEND ELECTRONIC ORDERS TO RESERVIST'S USCG AND PERSONAL EMAIL ADDRESS.	
SEND HARD COPY OF ORDERS TO MEMBER'S ADDRESS.	
SUCCESSFULLY ARRIVED AT CHECK-IN STATION? ENTER DATE ABOVE TO STATUS CHANGE TO 'MOBILIZED.'	
SUCCESSFULLY RETURNED TO UNIT? COMPLETE TRAVEL CLAIM.	
ENTER DATE ABOVE TO STATUS CHANGE TO 'DEMOBILIZED.'	
VERIFICATION THAT GOVERNMENT TRAVEL CREDIT CARD BALANCE HAS BEEN PAID.	