



## DCMA Manual 4501-02

# Correspondence Program

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| <b>Office of Primary Responsibility</b> | <b>Corporate Governance Capability</b>  |
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| <b>Approved by:</b>                     | David H. Lewis, VADM, USN, Director   |

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**Purpose:** This issuance, in accordance with the authority in DoD Directive 5105.64, "Defense Contract Management Agency (DCMA)," assigns responsibility to:

- Provide standardized mechanisms for capturing, assigning, tracking, reviewing, coordinating and managing correspondence and tasks to facilitate actions and decision-making in the Agency

- Ensure the quality, visibility, accountability, and timeliness of tasks and correspondence, and facilitates effective communications
- Implement policy established in DCMA Instruction 4501, “Administration”
- Implement procedures established in DCMA Manual 4501-01, “Policy Issuances Procedures”

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## **SECTION 1: GENERAL ISSUANCE INFORMATION**

**1.1. APPLICABILITY.** This issuance applies to all DCMA organizational elements.

**1.2. POLICY.** It is DCMA policy to:

a. Provide an overview of the basic concepts and principles concerning the correspondence program, and establish broad program policy.

b. Establish the scope of control for the various types and categories of Agency correspondence.

c. Execute this Manual in a safe, efficient, effective and ethical manner.

## **SECTION 2: RESPONSIBILITIES**

### **2.1. DIRECTOR, DCMA.** The DCMA Director will:

- a. Assign tasks, provide guidance, and issue policy to the workforce/Agency at large. These tasks are distributed via the Headquarters Tasker System (HTS).
- b. Review and approve all correspondence and tasks submitted for their review/approval signature.

### **2.2 DEPUTY DIRECTOR, DCMA.** The DCMA Deputy Director will:

- a. Assign tasks to the workforce/Agency at large, such as Council action items list (CAIL) and DCMA Requirements Oversight Council (DROC) taskers.
- b. Review and approve suspense actions on behalf of the Director or forward for the Director's approval.
- c. Review and/or approve correspondence submitted for their approval.

### **2.3. DIRECTOR, CORPORATE OPERATIONS DIRECTORATE (DC).** The Director, DC will:

- a. Review suspense actions and forward for Director or Deputy Director's decision.
- b. Manage the Agency correspondence program, including the tasking, processing, distribution, and electronic archival functions of Agency-level correspondence.
- c. Develop and publish Agency correspondence guidance.

### **2.4. DIRECTOR'S EXECUTIVE OFFICER (XO).** The XO will:

- a. Assign tasks on behalf of the Director.
- b. Review and approve extension requests for taskers such as Director's action items list (DAIL).

### **2.5. DCMA COMPONENT HEADS/CAPABILITY MANAGERS.** DCMA Component Heads/Capability Managers will:

- a. Assign work, manage and respond to tasks assigned to their respective organizations by the Correspondence Control Team (CCT) and provide coordination on Agency-level correspondence and packages in which they have a stake.

- b. Sign all correspondence addressed to the Director or Deputy Director from their Component/Capability Board. See Paragraph 3.3.b. for additional guidance on signature levels.
- c. Provide coordination on Agency-level packages as requested by other Components/Capability Boards. See Section 7 for guidance on coordination.
- d. Assign a minimum of one primary and an alternate for Component/Capability Board correspondence point of contact (POC).
- e. Provide updates and status reports on tasks and correspondence at staff meetings or in Agency discussions, as appropriate.
- f. Provide and update current contact information to CCT (Component/Capability Board Correspondence POC, Authorized Signers, etc.).
- g. Sign all official Component-level correspondence addressed to other Components/Capability Boards.
- h. Manage internal correspondence and tasks within their own Components/Capability Boards, but are encouraged to apply the principles set forth in this Manual.
- i. As required, approve and issue “Delegation of Authorities” that assign appropriate signatory permissions.

**2.6. FRONT OFFICE EXECUTIVE ASSISTANTS.** The Front Office Executive Assistants will:

- a. Be the final control point for correspondence moving into and out from the Director and Deputy Director’s office (this is also referred to as the Front Office).
- b. Provide feedback to CCT for correspondence-related issues and Front Office preferences.

**2.7. CORRESPONDENCE CONTROL TEAM (CCT).** The CCT will:

- a. Have overall management and oversight for the correspondence management program within the Agency.
- b. Serve as the policy and program office for operational aspects of correspondence management within the Agency.
- c. Receive, analyze, control, and task all correspondence addressed to the Agency and route appropriately.
- d. Control and route, as appropriate, all internal correspondence addressed to the Director or Deputy Director; review for compliance within established guidelines.

- e. Provide guidance and training on correspondence policies and processes to Components, Capability Boards, Action Officers, and Correspondence POCs.
- f. Publish reports and brief senior leaders, as required, on the status of the correspondence program.
- g. Serve as the principal liaison and POC for all correspondence involving DCMA and higher headquarters such as the OSD, DoD, or military organizations.
- h. Manage the dispatch of all official Agency-level correspondence to the workforce at large.
- i. Maintain a centralized repository of Agency and Component level "Delegation of Authorities" and of all Component/Capability Board Correspondence POCs.
- j. Control, publish and distribute appropriately submitted, signed Component-level memorandums.

**2.8. COMPONENT/CAPABILITY BOARD CORRESPONDENCE POC.** The Component/Capability Board Correspondence POC will:

- a. Be the Component/Capability Board's focal point for correspondence and tasks, and must ensure the Component/Capability Board's compliance with the Agency's correspondence policies and procedures.
- b. Serve as representative of their Component Head/Capability Manager in managing administrative aspects of correspondence management such as assigning tasks within the component, transmitting component coordination, and requesting suspense actions.
- c. Accept tasks for their organization and manage assignments of tasks within their organization.
- d. Track status of open cases within their organization and work with Action Officers to complete them.
- e. Review correspondence originating from their organization for compliance with established guidelines prior to submission.
- f. Serve as a liaison with CCT and other Component/Capability Board Correspondence POCs in transmitting coordination, requesting suspense changes, submitting correspondence, etc.
- g. Sign requests for changes to tasks via Suspense Action Form (SAF), as authorized. See Paragraph 5.3. for more information.

**2.9. ACTION OFFICERS.** The Action Officers will:

- a. Be the subject matter experts who actually accomplish the tasks and generate staff response packages.
- b. Conduct thorough research and analysis to provide leadership with accurate information.
- c. Prepare packages and correspondence in accordance with established guidelines.
- d. Seek guidance on tasks from their Component/Capability Board Correspondence POC.

**2.10. OFFICE OF THE GENERAL COUNSEL (GC).** The GC will provide coordination on all correspondence signed by the Director or Deputy Director that involves potential legal ramifications or could result in adverse outcomes or negative consequences for the Agency.

**2.11. DIRECTOR, LABOR AND EMPLOYEE RELATIONS (LER).** The Director, LER will obtain Union coordination, as appropriate, on all matters that may have an impact on bargaining unit employees.

## SECTION 3: CORRESPONDENCE STANDARDS

**3.1. CORRESPONDENCE STANDARDS.** Components/Capability Boards must adhere to principles set forth throughout this Manual when staffing, packaging, and routing correspondence. Written correspondence is the primary and preferred means of official communication within the Agency. Written correspondence includes the basic elements required to establish authenticity, and to appropriately reference, file, archive, and retrieve records.

**a. Component-level Correspondence.** Components/Capability Boards will use memorandums to transmit official Component-level correspondence (e.g., tasks, data calls, supplementary policy guidance) to other Components/Capability Board within the Agency. See Section 6 for more information.

**b. Agency-level Correspondence.** This Manual primarily governs Agency-level correspondence, defined generally as internal or external correspondence addressed to and/or from the Director or Deputy Director, or the Agency at large. CCT will control, manage, and distribute all Agency-level correspondence, suspense actions, and tasks. CCT will control, publish, and distribute Component-level memorandums accurately submitted for publication.

(1) CCT will control and task all Agency-level incoming correspondence via HTS. Incoming Agency-level correspondence includes any correspondence from outside the Agency (e.g., suspense actions, tasks or memorandums from higher headquarters, letters from members of Congress, companies or private individuals, or correspondence from other federal agencies) addressed to the Director or Deputy Director, or to the Agency at large.

(2) Outgoing Agency-level correspondence includes any correspondence addressed outside the Agency, signed by the Director or Deputy Director, whether in response to incoming correspondence or self-initiated.

(3) Internal Agency-level correspondence includes any correspondence between Components/Capability Boards and the Director.

(a) Action and Information Memorandums (Action and Info Memos) (transmittal items) are the standard means of official correspondence from the Components/Capability Boards to the Director. CCT will control and route all Action and Info Memos addressed to the Director from Component Heads/Capability Managers. See Paragraph 6.5. for information and guidance on Action and Info Memos.

(b) In addition to incoming taskings, the Director will issue tasks to the workforce either directly or through the Director's designated tasking authorities. These are the Deputy Director, DC Director, and the XO. Examples of such tasks include DAIL, CAIL, and DROC taskers. CCT will control and track such tasks in HTS. See Section 4 for further information on tasks.

(c) The Director will also use standard memorandum to assign work, provide guidance, issue policy, or otherwise communicate with the workforce. These memorandums are

published on the DCMA Published Memorandums homepage. CCT will control and dispatch Front Office-signed correspondence.

(d) Components/Capability Boards will use their own methods and processes for communicating internally or with other Components/Capability Boards. This Manual provides guidance primarily on those aspects of Component-level correspondence dealing with the control and publication of inter-Component memorandums and Component-signed correspondence addressed outside the Agency.

1. If a Component/Capability Board receives correspondence from outside the Agency (incoming Component-level correspondence) CCT must be informed immediately so that the correspondence may be tasked properly within the HTS.

2. Component-level correspondence addressed outside the Agency (outgoing Component-level correspondence) must adhere to the guidelines set forth in this Manual. See Section 6 for approved formats and guidelines. CCT does not dispatch outgoing Component-level correspondence. The only exception is outgoing correspondence being submitted through the Correspondence and Task Management System (CATMS) used by external agencies.

3. Components/Capability Boards must use the standard memorandum format for official correspondence with other Components/Capability Boards or Agency elements (to assign work, data calls, provide supplementary policy guidance, etc.). CCT will control and publish or distribute properly submitted Component-to-Component memorandums. See Section 6 for memorandum formats and requirements. See Paragraph 6.6. for guidelines on using memorandums to assign work. See Paragraph 3.2. on Tasking Authorities.

4. Components/Capability Boards may establish other methods to communicate with the workforce (e.g., “Messenger” communiqués), but issuing Component Heads/Capability Managers are responsible for their content.

### **3.2. TASKING AUTHORITY AND MECHANISMS.**

#### **a. Director Tasking Authority.**

(1) Agency-level tasks are issued under the authority of the Director, DCMA. The Director’s designated tasking authorities are the Deputy Director, DC Director, and the XO. They may also assign work and manage suspense actions for Agency-level tasks issued via the HTS.

(2) CCT may also issue HTS tasks as directed by the Director or the Director’s designated tasking authorities. An example of these are DAIL issued taskers.

(3) The Director may designate tasking or suspense management authority to other individuals, as necessary.

(4) Components/Capability Boards may prepare memorandum for the Director's signature to assign work to other Components/Capability Boards, the scope of which is broader than the initiating Component or Capability Board's sole authority. See Paragraph 6.6. for guidelines on using memorandum to assign work.

**b. Component-level Tasking Authority.** Components/Capability Boards may assign work to other Components/Capability Boards by memorandum. For issues and assignments broader in scope than a Component or Capability Board's sole authority, Components/Capability Boards must have coordination from affected stakeholders. Components/Capability Boards may also prepare a memorandum for the Director's signature to assign work, as appropriate. See Paragraph 6.6. for guidelines on using memorandums to assign work.

**c. Agency-level Tasking Authority.** The Agency uses the HTS to assign certain Agency-level tasks. Section 4 of this Manual establishes processes for assigning tasks in HTS.

(1) Agency-level tasks issued via HTS are normally short-term tasks with specific suspense dates, assigned to individual Components/Capability Boards. Frequently, the requirements of tasks entered into HTS are either self-explanatory or detailed in the correspondence initiating the task.

(2) HTS tasks are assigned to individual organizations. Tasks requiring input from multiple components are assigned to a single lead component, the office of primary responsibility (OPR), with other components designated as the office of coordinating responsibility (OCR).

(3) CCT tracks and manages tasks in HTS and reports status to the Director and DCMA Senior Leaders on a weekly basis.

(4) Components may use HTS for Component-internal task management or other proprietary inter-Component tasks. Contact CCT for requirements.

(5) Tasks issued by memorandum are normally broader in applicability and scope and are issued either by the Director, or by individual Components/Capability Boards, based on their tasking authority. See Paragraph 6.6. for guidelines on using memorandums to assign work.

**3.3. CHAIN OF COMMAND.** Depending on scope, subject, and existing authorities, official correspondence between Components/Capability Boards or between the Director and the Components/Capability Boards will generally follow the chain of command. See Table 1 for a list of Agency Component Heads and Table 2 for the list that includes the Capability Boards.

**Table 1. Agency Components and Component Head Official Titles**

| <b>Component Head Title</b>                                       | <b>Component</b> |
|---|------------------|
| Director  | DCMA-D           |
| Deputy Director   | DCMA-DD          |
| General Counsel   | DCMA-GC          |
| Director, Corporate Operations                                    | DCMA-DC          |
| Executive Director, Contracts Directorate                         | DCMA-AQ          |
| Executive Director, Financial and Business Operations             | DCMA-FB          |
| Executive Director, Information Technology                        | DCMAIT           |
| Executive Director, Portfolio Management and Business Integration | DCMA-PI          |
| Executive Director, Quality Assurance                             | DCMA-TD          |
| Executive Director, Technical Directorate                         | DCMA-TD          |
| Commander, Central Regional Command                               | DCMAC            |
| Commander, Eastern Regional Command                               | DCMAE            |
| Commander, Western Regional Command                               | DCMAW            |
| Commander, International Command                                  | DCMAI            |
| Executive Director, Cost and Pricing Command                      | DCMAP            |
| Director, Special Programs Command                                | DCMAS            |
| Director, Aircraft Operation Directorate                          | DCMA-AO          |
| Director, Human Capital Directorate                               | DCMA-HC          |
| Director, Office of Internal Audit and Inspector General          | DCMA-DM          |

**a. Organizational and Capability Inboxes.** Each Component and Capability Board will establish and maintain an inbox to receive notifications of tasks and other official correspondence.

**b. Signature Levels.** DCMA will adhere to these signature levels for office correspondence.

(1) All correspondence addressed from the Agency to the Secretary of Defense or the Office of the Under Secretary of Defense for Acquisition and Sustainment (OUSD(A&S)) must be signed by the Director, DCMA, or, as authorized, by the Deputy Director for the Director.

(2) All official correspondence from Components/Capability Boards to the Director or Deputy Director must be signed by the Component Head/Capability Manager or their Authorized Signer.

(3) Official controlled Component-level correspondence between Components/Capability Boards are addressed to Component Heads/Capability Manager and signed by the issuing Component Head/Capability Manager. See Section 6 for guidance on preparing and issuing inter-component memorandums.

(4) Signature levels for direct correspondence or other documents (i.e., contracts, Memorandum of Agreement/Understanding, etc.) is determined by the program, policy, or guidance governing the subject. DCMA officials at any level may sign direct correspondence on

issues or programs for which they have authority and responsibility, but must consider factors such as equivalent rank and grade in determining the appropriate signature level and addressee.

(5) In the absence of a Component Head/Capability Manager, their Deputy or other Authorized Signer may sign “for” the Component Head/Capability Manager. Components Heads/Capability Managers must provide the names of Authorized Signers to CCT.

(6) When signing “for” a Component Head/Capability Manager, the signature block must include the typed name and title of the Component Head/Capability Manager and the signature of the person signing for them (Authorized Signer). The word “for” must be included in an appropriate place to clearly indicate that the signer is signing for the principal (e.g., immediately before the typed name of the Component Head/Capability Manager).

**c. Protection of Information.** All personnel involved in the management of correspondence and tasks will appropriately safeguard sensitive information, including Classified information, Controlled Unclassified information, information For Official Use Only or Personally Identifiable Information (PII), in accordance with applicable rules and regulations.

## SECTION 4: TASK ASSIGNMENT

**4.1. TASK TYPES.** This section explains the procedures for analyzing, generating and assigning Agency-level tasks in the HTS. HTS tasks are normally short-term tasks with specific suspense dates, assigned to individual Components/Capability Boards. See Paragraph 3.2. for guidance on tasking authorities, and Paragraph 6.6. for guidance on assigning more complex tasks by memorandum.

**a. Agency-level Tasks.** CCT assigns official Agency-level tasks to responsible Components within the Agency on behalf of the Director. Agency-level tasks include:

(1) Higher headquarters tasks from OUSD(A&S), OSD, or other higher headquarters elements.

(2) Tasks assigned to DCMA through the CATMS or via the CCT Inbox.

(3) External correspondence addressed to the Director, Deputy Director, or to the Agency at large. This includes all external correspondence sent directly to Components.

(4) Tasks initiated by the Director or Delegated Tasking Authorities. This may include tasks generated at Performance Reviews, Council meetings, Town Halls, or other such venues that warrant Agency-level tasking or Front Office visibility (i.e., DAIL, CAIL, DROC taskers).

**b. Component-level Tasks.** Components/Capability Boards can use standard memorandum to assign work outside their Component/Capability Board. See Paragraph 6.6. for guidance on assigning tasks by memorandum. Components/Capability Board may use HTS for Component-internal task management or other proprietary inter-Component tasks (e.g., Freedom of Information responses, Congressional responses, Inspections and Evaluation Team). Contact CCT for requirements and access.

**4.2. ANALYSIS.** Upon receipt of Agency correspondence or a Front Office task, CCT will analyze the requirements to determine the appropriate organization to answer the task and any appropriate mandatory, coordinating offices, as well as the appropriate response type(s) and timeframe for completion.

**a. Task Placement.** CCT will assign tasks to Components/Capability Boards based on the suitability of the Component/Capability Board to answer the task, or as directed by the tasking authority.

(1) CCT will use general knowledge of Component/Capability Board functions in making determination of assignments.

(2) CCT may consult with Component Correspondence POCs to determine the most appropriate assignment.

**b. Component-level Correspondence.** CCT will neither analyze nor control incoming correspondence addressed to specific organizations or individuals within the Agency but will route such correspondence directly to the addressed organization.

**c. Classified Correspondence.** CCT will handle the assignment of classified tasks on a case-by-case basis.

**4.3. TASK GENERATION.** CCT will generate a case in HTS for each task. Each task will provide instructions that are as specific as possible and will include all of these elements:

a. Control numbers are assigned by CCT.

(1) Each task is assigned a unique control number consisting of the letters “CCT” followed by two digits representing the calendar year, followed by a four-digit serial number (e.g., CCT-10-0001). Some may include an “(IN)” after the four-digits which indicates tasks internal to DCMA; such as Congressional draft replies, Audit responses, and Director’s travel preparations.

(2) The “CCT number” is the primary identifier for the task within DCMA, but other control numbers may be associated with the case (e.g., “Office of Secretary of Defense [OSD] number” or “Correspondence and Task Management System [CATMS] number”).

(3) Other elements of the Agency may use HTS for task tracking purposes, including DAIL, CAIL, and DROC taskers.

b. CCT will include a subject line either from the originating correspondence or otherwise, as appropriate to the task.

c. Tasked Components/Capability Boards:

(1) CCT will assign tasks to the organization best suited to answer the correspondence or task based on the organizational charters, knowledge of Component/Capability Board functions, or as directed by the Front Office. CCT may also consult with Component/Capability Board Correspondence POCs in determining the appropriate assignment.

(2) Tasks are assigned to top-level, direct-report organizations (i.e., Components or Capability Managers) only. See Paragraph 3.3. for guidance on Chain of Command. Component Heads/Capability Manager will make assignments to sub-Components as necessary.

(3) Only one Component/Capability Board is assigned per task. If a task requires input from multiple Components/Capability Boards, one is assigned as the OPR, based on suitability to compile the response and other Components/Capability Boards are assigned as mandatory OCRs. If tasks require separate responses from multiple Components/Capability Boards, each will receive its own unique task in HTS.

(a) The OPR will serve as the single lead Component/Capability Board for the task. They are primarily responsible for submitting the response for closure.

(b) An OCR will serve as the coordinating Component/Capability Board, which may include one or multiple Components. They will coordinate with the OPR to close the task assigned.

d. Requirements:

(1) CCT will assign a standard task response from the following list in Paragraph 4.3.d(1)(a) through 4.3.d(1)(f). This list is also seen in Figure 1.

(a) Prepare a Reply for the Director's Signature (PRD). The Component/Capability Board will prepare a letter, memorandum, or other correspondence as appropriate for the Director's signature (or Deputy Director's signature, as specified) and submit it to CCT under cover of an Action Memo. Accompanying SAF requests closure.

(b) Reply Direct (RD). The Component/Capability Board will respond directly to the POC in the tasker and will submit a copy of the response to CCT via SAF for closure.

(c) Comments and Recommendations (CR). The Component/Capability Board will analyze and research subject correspondence or issue and submit CR via Action or Info Memo, as appropriate, for closure. Accompanying SAF requests closure.

(d) Provide Interagency Coordination (PIC). The Component/Capability Board will review and provide coordination at the appropriate level, based on requirements of the request. The Component/Capability Board will provide documentation of signed coordination achieved to CCT via SAF for closure.

(e) For Appropriate Action (FAA). The Component/Capability Board will take appropriate action and will provide documentation of task completion via SAF to CCT for task closure.

(f) For Information Only (INFO). A tasker sent out for information only that requires no response from the Component/Capability Board.

(2) Unspecified Requirements. For tasks with specific requirements not outlined in the standard tasks listed in Paragraph 4.3.d(1)(a) through 4.3.d(1)(f), CCT will assign FAA and will specify the desired action and the requirements to achieve closure.

(3) Higher headquarters Requirements. CCT will identify special requirements for higher headquarters tasks (e.g., 24-hour identification of Action Officer for certain OSD tasks, OSD suspense changes, transfers, periodic status updates) and will work with Component Correspondence POCs to ensure compliance.

e. Documentation and attachments.

(1) CCT will attach an electronic copy of the source document (i.e., incoming correspondence or task) to the case in HTS and will provide additional guidance, information, documents, and requirements as appropriate, with these exceptions:

(a) CCT will not attach documentation containing PII to the case in HTS, but will attach such information, appropriately marked and/or encrypted, to a separate notification email to the Component Correspondence POC of the tasked organization only (encrypted emails cannot be sent to Component organizational or Capability Board inboxes).

(b) CCT will not attach or include any classified or sensitive correspondence or material to the case in HTS or in any other system not authorized for classified material. CCT may generate a case in HTS for tracking tasks that involve classified material, but will route any classified material through approved classified channels only.

(c) Attachments too large for email can upload the files to the CCT Document Library.

(2) CCT will include a blank SAF to be completed and signed by Components/Capability Boards when closing the task.

f. Suspense date.

(1) CCT will assign a specific suspense date for each Agency-level task based on the task requirement, tasking authority direction. The suspense date indicates the deadline for completion of the task and submission of materials to CCT for closure.

(2) Unless otherwise indicated, tasks are due no later than (NLT) 5:00 p.m. Eastern time (ET) on the suspense date listed in the CCT task.

(3) When a task requires various suspense dates, CCT will indicate such in the task detail and set the task suspense at the earliest suspense date, to be extended to succeeding dates upon completion of intermediate requirements.

(4) Components/Capability Boards may request extensions to assigned suspense dates through the SAF that is provided in the tasker. See Paragraph 5.3. for guidance on requesting changes to tasks.

#### **4.4. ASSIGNMENT NOTIFICATION.**

**a. Notification Method.** HTS will notify tasked Components/Capability Boards and coordinating offices (if applicable) by email to the Component's organizational or Capability Board's inboxes.

(1) HTS will send a notification that will include the subject of the tasker, and in the body it will include a direct link to the tasker in HTS.

(2) Each OPR and OCR (if specified) will receive a notification email in their organizational inbox.

**b. Timeframe.** Depending on workload and case complexity, CCT will analyze and assign tasks within 24-hours of receipt. In situations where multiple cases appear simultaneously, CCT will prudently apply this prioritization:

(1) Higher headquarters tasks (tasks with OSD numbers or CATMS numbers, or memorandums signed by the Secretary of Defense).

(2) DAIL.

(3) CAIL/DROC.

(4) Other correspondence.

## **SECTION 5: SUSPENSE MANAGEMENT AND TASK COMPLETION**

**5.1. GENERAL.** This chapter sets forth the requirements and processes for managing and completing Agency-level tasks within the HTS. It outlines the various aspects of receiving tasks, as well as requesting changes and achieving closure for tasks.

### **5.2. TASK RECEPTION, ACKNOWLEDGMENTS, AND STATUS UPDATES.**

**a. Reception.** Components will receive official tasks through their organizational inbox and are responsible for tasks upon reception.

#### **b. Acknowledgements and Status Updates.**

(1) Tasks received from higher headquarters via CATMS normally require identification of the Action Officer within 24 hours of receipt and periodic status updates thereafter. CCT will inform Components/Capability Boards of this requirement for each task requiring such notification.

(2) CCT will periodically request from Components/Capability Boards status updates on other cases, as directed by higher authority.

**5.3. SUSPENSE CHANGES.** As subject matter experts, Components/Capability Boards are responsible for requesting changes to tasks in order to provide realistic expectations regarding the response (e.g., timeliness, appropriate response mechanism). The SAF is the appropriate mechanism for requesting and documenting all changes to assigned CCT, DAIL, CAIL, and DROC tasks. Coordination changes are handled differently. See Section 7 for further information on coordinations. Component/Capability Board must submit the SAF to CCT in order to request transfer, extension, cancellation, and closure of assigned tasks. CCT will upload a copy of the signed SAF and any accompanying documentation into the HTS.

**a.** All requests for changes to tasks can be endorsed by the Component Head/Capability Manager, their Authorized Signer, or the Correspondence POC.

**b.** To ensure timely action, Components/Capability Boards must make requests for changes to tasks as soon as the need for the change becomes apparent.

#### **c. Standard Suspense Actions.**

(1) Component/Capability Board must submit an SAF providing justification for the requested extension and details of the plan of action to complete by the newly requested suspense date. Components may attach documentation to support their request, if applicable. The purpose is to document task completion, to justify their request, and facilitate the approving authority in making a determination for a change to the suspense.

(2) Components may request that a task be transferred to a different organization.

(a) If requested within 24 hours of assignment, and with a reasonable rationale, CCT will approve requests for transfers of tasks via SAF.

(b) After the initial 24-hour period, Components/Capability Boards must coordinate the transfer with the receiving organization, and must provide the name and contact information of the person accepting the task in the justification via SAF.

(3) If the task becomes obsolete or is otherwise overcome by events, Components may request cancellation via SAF.

d. Changes to higher headquarters tasks require additional work. Components will work with the CCT to request changes to such tasks and the rationale behind the requested change. This may also include completing Secretary of Defense (SD) Form 391, "Correspondence Action Report." A blank copy of this form is available on the Manual resource page.

**5.4. TASK CLOSURE.** While completion of the task ultimately depends on the substance and quality of the response, specific elements serve to "close out" a task in the HTS.

a. Responses to tasks must contain the required materials, be properly formatted, with appropriate signatures and coordination, and include the SAF. Appropriate responses to tasks will include documentation of action taken to complete the task (e.g., copy of signed correspondence, copy of email sent) or a response package (Action or Info Memo) addressed to the Director, if applicable. See Section 6 and 7 for guidance on staffing, coordination, formats, package assembly, etc. All submissions requesting closure must include a completed SAF. The SAF must be either a scanned, signed copy of the SAF, or a digitally signed portable document format (PDF). A fillable PDF version of the SAF is included with each tasker and is also available on resource page.

b. To be counted as "on time," responses must be submitted by 5:00 p.m. ET on the suspense date specified in the task.

c. Components may submit responses in hard copy or electronically to CCT. CCT will forward responses when tasker comes through CATMS.

**5.5. RETURNS.** Packages can be returned and tasks reopened at any time after submission due to incomplete submission, errors in format or package assembly, or an otherwise unsatisfactory response to the task. These guidelines apply to returns:

**a. Explanation for Return.** Returns will include a clear explanation of the reason the package is being returned, with references to policy and other guidance or instructions for correction.

**b. Routing.** Returns are routed through CCT for appropriate tracking and notifications. Electronic packages are sent back to Action Officer, if applicable, with a copy to the Component/Capability Board inbox. An email notification is sent to the Component/Capability Board inbox for hard copy package pick up.

**c. Extensions.**

(1) In cases where additional work is requested beyond that specified in the original tasking, the tasking authority may reset the suspense date.

(2) Suspense dates for packages returned due to incomplete submission or errors in format or package assembly will not normally be extended.

## SECTION 6: DOCUMENT TYPES AND FORMATS

**6.1. OFFICIAL CORRESPONDENCE.** This section defines the official document types used in DCMA correspondence and sets forth the required formats and submission procedures. The standardized document types used in DCMA correspondence promotes good communication and establishes important correspondence elements that strengthen accountability, allow efficient processing, and facilitate decision making.

a. Standard Agency-level correspondence are documents addressed to the Director from a Component Head or an external Agency that relay information or solicit an action. Some examples are Info Memos, Action Memos, and awards.

b. Component-level correspondence are documents that are addressed to the workforce.

**6.2. OFFICIAL DCMA LETTERHEAD.** Official DCMA letterhead is the approved stationery for general Agency correspondence. The letterhead, in conjunction with the signature block, officially identifies the office and authority of the signer. Letterhead is required for all correspondence. DCMA internal correspondence must be on black letterhead. DCMA external correspondence must be on blue letterhead. Official electronic letterhead and templates are available on the resource page. Use DCMA letterhead that reflects the office of the signing official.

**a. Headquarters Use.** All headquarters organizations will use the official headquarters letterhead that indicates the address of their specific location.

**b. Field Use.** DCMA field offices including regions, Contract Management Offices (CMOs), streamlined CMOs, Centers/Regions, and Groups may customize letterhead for their use.

(1) Using approved templates with “DEFENSE CONTRACT MANAGEMENT AGENCY” centered in 12-point Times New Roman typeface, written in all capital letters. On the three lines directly below the Agency name enter the official name and address of the field in 8-point Arial typeface, all capital letters. (Line 1: Field Office Name; Line 2: Address and Room Number; Line 3: City, State, and ZIP code.).

(2) Offices located separately from CMOs will use letterheads of their sponsoring Region or CMO.

**c. Signature.** To avoid redundancy, omit from the signature block any part of the signer’s title that is established in the letterhead. See Paragraph 3.3.b. for additional guidance on signature levels.

**6.3. SIGNATURE ITEMS.** Agency-level signature items include any document prepared for the signature of the Director or Deputy Director. Commonly used document types in this category include Memorandums, Letters, General Orders, Memorandum of Agreement or Understanding, and Agency Policies. An OUSD(A&S) Action or Info Memorandum addressed

to higher headquarters to be signed by the Director or Deputy Director is also considered an Agency-level signature item. For other Agency-level signature items, Components/Capability Boards must follow existing guidance governing the subject or consult with CCT. Components and Capability Boards must adhere to guidelines provided when generating Component-level correspondence addressed outside their Component.

**6.4. MEMORANDUMS.** Use memorandums for correspondence within the Agency or for correspondence addressed to other outside Agencies in the conduct of routine Government business where the relationships and responsibilities of the organizations are clearly established with regard to the subject.

**a. Stationery.** All memorandums must be on official letterhead. Memorandums addressed within the Agency must be placed on black letterhead. Memorandums addressed outside the Agency must be placed on blue letterhead. Letterhead must reflect the office or Agency of the signing official. Templates are available on the resource page.

**b. Margins.** Use 1-inch margins on the left, right, and bottom. The top margin must be 1.5-inches to accommodate letterhead, and use 1-inch margins to the left, right, and bottom. Any subsequent pages must have 1-inch margins to the top, left, right, and bottom and include the subject line in the header. The templates on the resource page are already established with these margins.

**c. Font.** Use Times New Roman, 12-point typeface.

**d. Paragraphing.** Organize material logically, using paragraphs. Use complete sentences. Only use bullets for lists.

**e. Indentation.** Indent the first line of each paragraph one half-inch from the left margin.

**f. Spacing.** Single line space within a paragraph for all memorandums containing two or more paragraphs. Place two lines space between paragraphs and bullets.

**g. Date.** The date must reflect the date that the memorandum was signed. Due to the time lapse and textual changes occurring between the drafting and actual signing of a memorandum, the date must not be included during the Front Office approval process. This is placed using a date stamp once the memorandum is signed.

(1) The date must be placed approximately two lines space below the letterhead, ending at the right margin. Use month-day-year format (e.g., January 1, 2018).

(2) Do not date memorandums to be signed by the Director or Deputy Director; Front Office staff or CCT will affix the date by date stamp upon signature.

**h. Address Line.** Two line spaces below the date and aligned at the left margin, type “MEMORANDUM FOR” followed by the name or title of the addressee(s), as appropriate, in all capital letters.

(1) For memorandums addressed outside the Agency, include enough information in the address line to ensure the memorandum reaches its intended recipient(s) (e.g., office symbol, agency name).

(2) If more than one line is needed for an addressee, indent the run-over line an additional three spaces (0.25 inches).

(3) For memorandums addressed to multiple addressees, list each addressee on a separate line, aligned with the first addressee in order of precedence. See Table 2 for correct title of Components and Directors.

**Table 2. DCMA Multi-addressee Group**

| Group Addresses  | Individual Addresses  |
|--|---|
|  | Deputy Director   |
|  | General Counsel   |
|  | Director, Corporate Operations Directorate                                    |
|  | Executive Director, Financial and Business Operations Directorate             |
|  | Executive Director, Technical Directorate                                     |
|  | Executive Director, Contracts Directorate                                     |
|  | Executive Director, Portfolio Management and Business Integration Directorate |
|  | Executive Director, Quality Assurance   |
|  | Executive Director, Information Technology Directorate                        |
|  | Commander, Central Regional Command   |
|  | Commander, Eastern Regional Command   |
|  | Commander, Western Regional Command   |
|  | Commander, International Command  |
|  | Director, Special Programs Command  |
|  | Executive Director, Cost and Pricing Regional Command                         |
|  | Director, Aircraft Operations Directorate                                     |
|  | Director, Human Capital Directorate   |
| Director, Office of Internal Audit and Inspector General |   |
| Other DCMA Organizations & Centers                       | Director, Equal Opportunity Employment  |
|  | Director, Business Operations Center  |
|  | Director, Small Business Office   |
| Capability Boards  | Corporate Governance  |
|  | Contract Maintenance  |
|  | Contractor Effectiveness  |

**Table 2. DCMA Multi-addressee Group, Continued**

| <b>Group Addresses</b>  | <b>Individual Addresses</b>  |
|---|--|
| Capability Boards   | Facilities Management  |
|   | Indirect Cost Control  |
|   | Integrating  |
|   | Information Technology Management  |
|   | Negotiation Intelligence   |
|   | Product Acceptance and Proper Payment  |
|   | Stewardship  |
|   | Talent Management  |
| CMO Commanders/Directors<br>(are now addressed under the Regions) | List Individual Primary and Secondary CMOs in an order appropriate to the subject of the correspondence. |

(4) For memorandums addressed within DCMA, use group address “Component Heads” or “Capability Managers” for simplicity and to conserve space. Remember to address memorandums through the chain of command, as appropriate. See Table 1 for list of Agency Component Heads.

(5) If listing addresses more than 12 lines, type in all capital letters “MEMORANDUM FOR: SEE DISTRIBUTION” and include a separate sheet titled in all capital letters “DISTRIBUTION” as an attachment to the memorandum. On the distribution sheet, list each addressee on a separate line beginning at the left margin. If more than one line is needed for an addressee, indent the run-over line must be under the third character.

(6) If a memorandum is being sent to the attention of a specific person within an organization, in parentheses, type “ATTN: ” in a capital letters, followed by two spaces after the colon, then person’s name or title. This must be placed one line space below the “MEMORANDUM FOR” line and under the third character.

**Table 3. Sample Attention Line**

|  |
|--|
| MEMORANDUM FOR DIRECTOR, CORPORATE OPERATIONS<br>(ATTN: MS. SMITH) |
| MEMORANDUM FOR SECRETARY OF DEFENSE<br>(ATTN: MR. DOE)             |

**i. Subject Line.** Two line spaces below the address line, type in all capital letters “SUBJECT:” followed two spaces after the colon, then a concise description of the memorandum’s content and purpose. If more than one line is required, align succeeding lines with the first word of the subject.

**j. Body.** Insert the body of the text two line spaces below the last line of the subject.

(1) Length. Keep all memorandums to one page, if possible. If the information cannot be restricted to a maximum of three pages, summarize the main points in the cover memo and provide additional information as an attachment to the memorandum. For all memorandums longer than one page, place the subject in the header margin for all pages subsequent pages after page one. Place a page number centered in the footer for all subsequent pages after page one.

(2) Style. Use concise, straightforward language, and organize material into paragraphs. Bullet points can only be used for lists. Use complete sentences and maintain parallel construction in bullets, if used. Detailed processes or lengthy technical information must be included as attachments to the memorandum. Use a format best suited to presenting the information.

(3) Citing Attachments. All attachments must be listed at the end of the memo in the "Attachment(s):" section two line spaces below the signature block. As appropriate, attachments can be referenced within the body text using all capital letters (e.g., attached at TAB A is a copy of the report).

(4) Assigning Work. See Paragraph 6.6.a. for guidance on using a memorandum to assign work, also known as a Tasking Memo.

**k. Complimentary Close.** Do not include a complimentary close on a memorandum.

**l. Signature Block.** Type the name and official title of the signing official four line spaces and start at the fifth line below the last line of body text, beginning at the center of the page (3.25 inches from the left margin).

(1) As much of the signing official's title that is reflected in the letterhead may be omitted from the signature block. See Table 1 for a list of official titles for the Agency Component Heads, and see Table 2 for a list of the Capability Boards. For example, on items that the Director will sign, type the Director's name and "Director" on separate lines. For others, type the official's name and full title (including office) on separate line. For military signature block, please follow the appropriate standards.

(2) Immediately above the signer's name and title, the signer places their signature in black or blue ink. Memorandum can also be signed with digital signature.

**m. Attachments.** All attachments must be listed at the end of the memo. Two line spaces below the signature block, beginning at the left margin type the word "Attachment(s):" regardless if the memorandum contains attachments. Beginning on the next line, list each attachment as a "TAB" in all capital letters on a separate line using letters as identifiers beginning with "A" and continuing alphabetically (e.g. TAB A., TAB B., TAB C.). If the package does not contains attachments, type "None." See Table 4 for Sample Attachment Lines.

(1) The first TAB must always be the document that needs to be signed (e.g. TAB A. Letter for Director's signature).

(2) The coordination sheet, if applicable, must always be the last TAB.

**Table 4. Sample Attachment Lines**

|  |
|--|
| <p>If the package does not contain attachments, indicate “None.”</p> <p>Attachment(s):<br/>None</p>  |
| <p>If the package contains attachments, list each document in a separate TAB.</p> <p>Attachment(s):<br/>TAB A. DCMA Director’s Letter to Senator Brown<br/>TAB B. FY18 Budget Report<br/>TAB C. Coordination</p> |

**n. Links.** Hyperlinks cannot be used within the body text; all hyperlinks must be listed in the links section at the end of the memorandum. Two line spaces below the Attachments list, beginning at the left margin type the word “Link(s):” regardless if the memorandum contains links. Beginning on the next line, list each link on a separate line using numbers as identifiers. If the package does not contain links, type “None.” See Table 5 for Sample Link Line.

**Table 5. Sample Link Line**

|   |
|---|
| <p>If the package does not contain links, indicate “None.”</p> <p>Link(s):<br/>None</p>   |
| <p>If the package contains hyperlinks, they must only be listed at the Links list.</p> <p>Link(s):<br/>1. URL address<br/>2. CCT Manual resource page</p> |

**o. Courtesy Copy.** If the the memorandum was sent as a courtesy copy to any organizations other than addressee or coordinating offices, type “cc:” two line spaces below the attachments line, followed by the titles or office symbols of any Components/Capability Boards receiving courtesy copies, in alphabetical order beginning on the next line.

**p. Miscellaneous.** Certain packages will require specialized formats or information elements (e.g., policy change notice, award nominations). Format the body of the memorandum including any elements required by the signature/approval item, or in accordance with policy governing the subject.

**6.5. TRANSMITTAL ITEMS (ACTION/INFO MEMOS).** The two primary purposes for official correspondence between a Component/Capability Board and the Director are to provide information and elicit a decision. Accordingly, Components will use Action or Info Memos to the greatest extent practical in communicating information to the Director or Deputy Director, and in soliciting and documenting their decisions. Templates for these memos are available on the resource page. The exception to this are Read Aheads. See Paragraph 6.8. for specific guidance on these.

a. The Info Memo is used to convey information to the Director that does not contain recommendations for specific immediate actions. An Info Memo may be generated in response to a task or self-initiated by the Component/Capability Board. The Info Memo template is available on the resource page.

b. The Action Memo is used to convey information to the Director with a recommendation for action, approval or signature. An Action Memo may be generated in response to a task or self-initiated by the Component/Capability Board, and often contains a document for the addressee to sign (signature item). The Action Memo template is available on the resource page.

c. Action and Info Memos follow the memorandum format as stated in Paragraph 6.3. Apply the additional guidelines as stated here in Paragraph 6.5.c(1) through 6.5.c(13).

(1) Style. Use concise, straightforward language, with logical organization and flow. Writing must demonstrate thorough staff work while facilitating quick decision-making.

(2) Length. Keep Action and Info Memos to one page, if possible. If the information cannot be restricted to a maximum of three pages, summarize the main points in the memo and provide additional information as an attachment to the package.

(3) Header. Type “**ACTION MEMO**” or “**INFO MEMO**” as appropriate, in all capital letters, centered, and in **boldface** type two line spaces below the last line of the letterhead.

(4) Deputy Chop Block. Type “DepDir\_\_\_\_\_” a single line space below the header and aligned at the right margin. This element is for the Deputy Director to indicate their review.

(5) Address line. Type “FOR:” in all capital letters, a single line space below the Deputy Chop Block and aligned at the left margin, followed by the title of the addressee in all capital letters (e.g., FOR: DIRECTOR, DCMA).

(6) From line. Type “FROM:” in all capital letters, two line spaces below the address line, followed by the name and title or office symbol of the sender.

(7) Signature. The sender signs the memorandum immediately above or to the right of the sender’s name in the “FROM” line. This can be done electronically or by hand.

(a) Only Component Heads or their Authorized Signers may address official correspondence directly to the Director. See Paragraph 3.3.b. for guidance on signature levels.

(b) If an Authorized Signer signs “for” the Component Head/Capability Manager, this must be indicated when signed. See Paragraph 3.3.b.(6) for further guidance.

(8) Recommendation Line and Approval Block (Action Memo ONLY). Type “RECOMMENDATION:” in all capital letters two line spaces below the last line of body text in an Action Memo, followed by the specific action the sender recommends the Director take. See Table 6 for samples of appropriate recommendation lines.

(a) For recommendations that require the Director’s approval of a specific course of action spelled out in the Action Memo, include an approval block with options for “Approve,” “Disapprove,” and “Other,” two line spaces below the recommendation line.

(b) For packages with multiple recommendations, each must be spelled out separately, with separate approval blocks.

**Table 6. Sample Recommendation Lines**

|   |
|---|
| <p>RECOMMENDATION: Director approve realignment of function X from Component Y to Component Z.</p> <p>_____ Approve      _____ Disapprove      _____ Other:</p>   |
| <p>RECOMMENDATIONS:</p> <p>Director approve alignment of function X from Component Y to Component Z.</p> <p>_____ Approve      _____ Disapprove      _____ Other:</p> <p>Director approve alignment of function P from Component Q to Component R.</p> <p>_____ Approve      _____ Disapprove      _____ Other:</p> |

(9) Attachments line. Insert the Attachments line two line space below the Approval block. Beginning on the next line, list each attachment as a “TAB” written in capital letters on a separate line using letters as identifiers (e.g., TAB A., TAB B., TAB C.). If the package does not contain attachments, type “None.” See Table 4 for sample attachment lines.

(10) Coordination Sheet. This will always be included as the final tab of the package, as applicable.

(11) Links line. Insert the Links line two line spaces below the Attachments line. List each link on a separate line, using numbers as identifiers. Hyperlinks cannot be included in the

body of a memorandum, they must be listed in the Links list. If the package does not contain links, type “None.” See Table 5 for a sample link line.

(12) Courtesy Copies (Info Memo ONLY). If the Info Memo is sent as a courtesy copy to any organization other than addressee or coordinating offices, type “cc:” two line space below the attachments line, followed by the titles or office symbols of any Components receiving courtesy copies beginning on the next line. Do not send official courtesy copies of Action Memos to offices other than the addressee before it has been approved by the approving/signing official.

(13) Prepared By line. Type “Prepared by:” two line spaces below the Link line, aligned with the left margin, followed by the name, office symbol, and telephone number of the Action Officer who prepared the memorandum.

d. Package Assembly and Submission. All transmittal packages addressed to the Director must be routed through CCT. Packages submitted directly to the Front Office will be returned for appropriate routing. Components may submit packages electronically or in hard copy. Read Aheads are not controlled by CCT and can be submitted directly to the Front Office. See Paragraph 6.8. for further information.

(1) Package Submission. Package submission to CCT may be made electronically or in hard copy. For packages submitted electronically include any explanatory information in the body of the email (e.g., notification of urgency, special handling requirements). All packages must be assembled as stated in Paragraph 6.5.d(1)(a) through 6.5.d(1)(b).

(a) Attachments. Assemble an Info or Action Memo package with the memorandum first and supplemental or background information subsequent at tabs beginning with “A” and continuing alphabetically.

1. Identify all attached material on the attachments line using all capital letters for identification of tabs (e.g., “TAB A. Letter,” “TAB B. Coordination,” etc.). Begin with “A” and continue alphabetically. Attachments may also be identified in the body text.

2. For Action Memos, if the package includes an item to be signed or approved by the Director, always attach that item as TAB A.

3. For Info or Action Memos that are responses to tasks, include a copy of the task as a separate tab in the package. See Paragraph 6.5. for guidance on responding to tasks.

4. Attach supplemental or background information as separate tabs.

5. Include the coordination sheet, if applicable, as the final tab.

(b) Flagging for Urgency. If the package requires immediate attention, notify CCT, mark the package as “URGENT” and indicate a suspense date.

1. Include language in the text of the Action or Info Memo explaining the urgency.

2. Only flag items as urgent if the material requires the Director's immediate attention.

**6.6. DCMA INTERNAL MEMORANDUMS.** Standard and tasking memorandums are the appropriate medium for conducting official correspondence within the Agency and are generally used to assign work, supplement policy, or provide other information.

**a. Using Tasking Memos.** Component Heads/Capability Manager can use a tasking memorandum to assign work to another Component, either under their own authority or in coordination with other stakeholders, as appropriate. Components/Capability Boards may also prepare memorandums for the Director's signature to assign work throughout the Agency. Examples of such assignments include data calls, registration requirements, required training, etc. Tasking memo templates are available on the resource page.

(1) In order to avoid duplication of effort or other unnecessary work, authoring Components must consider previously-issued tasks or other Components/Capability Boards' similar requirements when issuing tasks.

(2) Tasking memos must be coordinated prior to release. See Section 7 for further information.

(3) Format and Required Elements. Components/Capability Boards must use the Tasking Memo template are available on the resource page. The specific required elements are:

(a) Address Line. Address tasking memos to Component Heads/Capability Managers. Tasking memos may also be addressed to specific Components or Capability Boards.

(b) Subject Line. Include these elements in the Subject of a tasking memorandum.

1. Tasking Tag. Identify the memorandum as a task by including the word "**TASKING:**" in all capital letters, bolded, followed by two spaces after the colon then the subject.

2. Suspense Date. Immediately below the tasking tag, insert the word "**Suspense:**" bolded, followed by two spaces after the colon then the date by which the task must be complete. If more than one suspense, indicate "Multiple".

3. Target Audience. Immediately below the suspense, insert "**Target Audience:**" bolded, followed by two spaces, then identify the specific offices, individuals or groups required to actually perform the work. If the "FOR" line and the "Target Audience" are the same, then the "Target Audience" line may be omitted.

(c) **Body.** In the body of the memorandum, clearly introduce the task with appropriate background information, citations and any other contextual information to facilitate the accomplishment of the task. Use paragraphs and complete sentences. Clearly reference any attachments and do not use hyperlinks.

(d) **Requirements Summary.** Following the introductory material, include a “Requirements Summary” section that clearly summarizes the requirements of the task, identifying specifically WHO is to perform WHAT work, and by WHEN.

(e) **Resource Impact.** Below the Requirements Summary, include a “Resource Impact” section that states the estimated time required for personnel to perform the task.

(f) **Administrative Information.** Below the Resource Impact statement, include an “Administrative Information” section with information necessary to completing the task (e.g., system requirements, task parameters, funding or training details). These administrative elements are mandatory:

1. **Labor Code.** Include accurate requirements and codes for reporting to the Defense Agencies Initiative (DAI), in coordination with the DCMA DAI Service Center. For further information, see the resource page.

2. **Operational Coordination Statement.** Include this statement: “This tasking memo has been coordinated with the appropriate components.” Ensure that coordination is accomplished with the Components that have a stake in the work being performed. The signed coordination sheet must be submitted when providing a tasking memo to CCT for publishing. See Section 7 for more information on Coordination done via the Agency Coordination Tracker (ACT).

3. **POC.** Provide the name, email address and telephone number of the Action Officer or POC for the tasking memo.

(g) **Signature.** Tasking Memorandums must be signed by the Component Heads/Capability Managers or their Authorized Signer. See Paragraph 3.3.b. for guidance on signature levels.

(h) **Hyperlinks and Electronic Attachments.** Components/Capability Boards must list all attachments and/or hyperlinks after the “Attachment(s):” and “Link(s):” line below the signature block. See Table 7 for examples. CCT will activate these links in the published version of the memorandum.

**Table 7. Listing Hyperlinks (website address/URLs) in the Attachment Line**

|   |
|---|
| Attachment(s):<br>TAB A. Information Sheet<br>TAB B. List of required materials<br><br>Link(s): |
|---|

1. URL address
2. Correspondence Control resource page hyperlink

In this example, TABs A and B are electronic documents to be linked; the other attachments are hyperlinks to existing webpages or portal sites.

**b. Using Standard Memorandums.** Component Heads/Capability Managers can use a standard memorandum to provide information to the Agency or specific Component/Capability Board. Components/Capability Boards must use the Standard Memo template available on the resource page. This type of memorandum does not require coordination.

**c. Publications.** Components/Capability Boards may submit official memorandum to CCT via email for publication on the DCMA Published Memorandums homepage. CCT will publish memorandum in PDF format and attachments in the format received. Memorandums submitted after 3:00 p.m. ET are posted the next business day.

(1) Component-level memorandums (signed by a Component Head/Capability Manager or Authorized Signer).

(a) Identify the email as a request for publication by beginning the subject line of the email with “Publication Request:” followed by the subject of the memorandum.

(b) Attach the memorandum either as a digitally signed PDF or as a scanned copy of the original, signed document.

(c) Include attachments to the memorandum as separate files, identified according to their tab (e.g., “TAB A – Report,” “TAB B – Coordination,” etc.). Components/Capability Board must seek to minimize file sizes of attachments by attaching files in their original formats (e.g., Word, Excel, PowerPoint or PDF), rather than scanned images, when possible.

(d) Include any explanatory information in the body of the email (e.g., notification of urgency, special handling requirements).

(2) Agency-level memorandums (signed by the Director). Components will submit all memorandums for the Director’s signature to CCT under cover of an Action Memo in accordance with Paragraph 6.5. If the submission of the Action Memo is made in hard copy, components must provide any electronic documents to CCT. CCT will publish Agency-level memorandums once approved.

(3) Email Notifications. CCT will make notification through the Daily DCMA Official Document Posting email. Components/Capability Boards must use judgment in determining whether to submit a memorandum for publication or to dispatch it to specific addressees only. All published memorandums are available on the DCMA Published Memorandums homepage.

**6.7. LETTERS.** Letters are used for most correspondence addressed to individuals or organizations outside the Agency. Letters may also be used for more personal purposes (e.g., congratulatory letters, thank-you letters, etc.). Use these guidelines in setting up letters.

**a. Letterhead.** Letters must always be printed on official letterhead. Letterhead reflects the office or agency of the signing official.

(1) Personal letters (e.g., congratulatory letters, thank-you letters, etc.) may be printed on short or custom stationery.

(2) Business letters must always be printed on full-size official Agency letterhead. Some businesses may require their own template be followed.

**b. Margins.** Use 1-inch margins on the left, right, and bottom. The top margin must be 1.5-inches to accommodate letterhead, and use 1-inch margins to the left, right, and bottom. Any subsequent pages must have 1-inch margins to the top, left, right, and bottom. The templates on the resource page are already established with these margins.

**c. Font.** Use Times New Roman, 12-point typeface.

**d. Paragraphing.** Organize material logically using paragraphs. Avoid the use of bullet points in letters.

**e. Indentation.** Indent the first line of each paragraph one half-inch from the left margin.

**f. Spacing.** Single line space within a paragraph for all letters containing two or more paragraphs. Place two line spaces between paragraphs.

**g. Date.** The date must reflect the date that the letter was signed. Because of the time lapse and textual changes occurring between the drafting and actual signing of a letter, the date must not be included prior to the signing of the document. The Front Office EAs or CCT will affix the date by date stamp upon signature. If a memo needs to be signed on a specific date, this must be explained in the Action Memo and the signature memo can be dated. The date must be placed approximately two line spaces below the letterhead, ending at the right margin. Use month-day-year format (e.g., January 1, 2018).

**h. Address Block.** Two line spaces below the date (four spaces below the letterhead) and aligned at the left margin, type the name and address of the recipient of the letter. The proper forms of address must be used in accordance with DoD Manual 5110.04-M Volume 1.

**i. Salutation.** Two lines spaces below the address block, type the salutation, followed by a comma. For most addressees, use “Dear” followed by the addressee’s honorific title (Mr., Mrs., Ms., Dr., etc.) and last name (e.g., “Dear Dr. Jones,”; “Dear Mrs. Brown,”). The appropriate salutations for public and private officials and Service members must be used in accordance with DoD Manual 5110.04-M Volume 2.

**j. Body.** Two line spaces below the salutation, begin the body of the letter, aligned at the left margin with the first line of each paragraph indented a half-inch.

(1) **Style.** Letters are more formal than memorandums and must be written in standard American English using developed paragraphs and complete sentences. Whereas memorandums often communicate routine information, letters may be more specialized and require thorough and explanative language. Do not use bullet points in letters and speak directly to the addressee, maintaining a professional tone and avoiding jargon.

(2) **Length.** The length of a letter must be determined by the material to be covered. Long letters should be avoided. Lengthy information can be included as a separate enclosure

(3) **Enclosures.** As appropriate, clearly reference any enclosures in the body of the text. Enclosures must be listed on the second line below signature in chronological order. Also reference “Enclosure(s):” at the end of the letter.

**k. Complimentary Close.** Two line spaces below the last line of body text, type “Sincerely,” beginning at the center of the page (3.25 inches from the left margin).

**l. Signature Block.** Four line spaces below and starting on the fifth line, aligned with the complimentary close at the center of the page, type the name and official title of the signing official. See Paragraph 3.3.b. for guidance regarding signature levels.

(1) As much of the signing official’s title that is reflected in the letterhead may be omitted from the signature block. See Table 1 for a list of official titles for the Agency Component Heads. For example: on items that the Director will sign, type the Director’s Name and “Director” on separate lines. For others, type the official’s name and full title (including office) on separate lines.

(2) Immediately below the complimentary close, the signer places their signature.

**m. Enclosures.** If the letter contains an enclosure, type “Enclosure(s):” two line spaces below the signature block, beginning at the left margin. Beginning on the next line, list each enclosure on a separate line. Enclosures must be listed on the second line below signature in chronological order.

**n. Courtesy Copies.** If a copy of the letter is being sent to any individual or organization other than addressee, type “cc:” two line spaces below the enclosure line, if any, or below the signature block, followed by the names and titles of the recipients beginning on the next line.

## **6.8. READ AHEADS.**

**a. Format and Content.** Construct a Read Ahead in the same general format as an Info Memo, substituting the Header with the title “READ AHEAD.” The template is available on the resource page. In the body of the Read Ahead, describe the purpose of the meeting, providing any relevant background information and including these items as a bulleted list.

- (1) Location. Enter the location where the meeting is going to be held.
  - (2) Date and Time. Enter the date and time that the meeting is going to be held.
  - (3) Attendees. List names and titles of all attendees. Attach biographies for non-Agency attendees. Identify who will conduct the meeting.
  - (4) Agenda. Outline the key points of the meeting and a basic schedule of events or topics.
  - (5) Point of Contact. Enter the name, title, and phone number of the Action Officer with primary subject matter expertise regarding the meeting.
- b. Attachments.** Attach background information, slides, bios, etc., as tabs.
- c. Signature.** The Component Head/Capability Manager, or in their absence the Authorized Signer, must sign and date the Read Ahead above or immediately following the “From” line.
- d. Submission.** Submit Read Aheads directly to the Front Office at least 48 hours prior to the scheduled meeting. This does not need to go through CCT.

## SECTION 7: COORDINATION

**7.1. GENERAL.** Effective coordination is a core element of staff work and is essential to ensuring that correspondence, policies, and other decisions properly account for the broad spectrum of Agency interests. Authoring and coordinating components share responsibility for thoroughly coordinating on Agency-level packages. The ACT is the tool that DCMA uses to process internal coordination requests. These requests are submitted to the CCT Inbox for processing.

**a. Informal Coordination.** Components may request informal coordination of packages at the Action Officer level (e.g., working groups, Integrated Product Team, Action Officer-to-Action Officer) via the ACT. This request is for comments only and does not require signature from Component Head/Capability Managers or authorized signer.

**b. Formal Coordination.** These requests must reflect the signature of the Component Head/Capability Managers or authorized signer.

**7.2. SUBMISSION REQUIREMENTS.** Authoring Components/Capability Boards must provide complete and thorough coordination requests for processing to the CCT Inbox. Exceptions are formal coordination for instructions and manuals which remain the same process as outlined in the DCMA Instruction 501-01, "Policy Issuance Procedures."

a. The coordination request package must include the documents requiring review, the DCMA Comments Matrix, and the DCMA Coordination Sheet (for formal coordination requests only). In addition, the Component/Capability Board must provide a brief description of the request, the POC for the coordination, Components/Capability Boards with whom to coordinate, a proposed suspense date, and, if needed, a waiver request.

(1) Suspense dates can be provided by requesting Component/Capability Board to CCT inbox. The date must be 7 to 10 business days out to give ample and reasonable time to coordinate. The coordination is reviewed to confirm adequate time for review and strategic release. In some cases, a coordination cannot be released immediately therefore a new date for release is provided to the requestor.

(2) Components/Capability Boards that require a suspense date less than 7 to 10 business days must submit a waiver request. A waiver request must be submitted when providing CCT with all other requested information.

b. Components/Capability Boards coordinating on Agency-level correspondence must provide timely, relevant, and clear-cut coordination with positions that support their area of responsibility and the overall interest of the Agency. Components/Capability Boards must attempt to accommodate coordinating Components/Capability Boards requests for additional time.

c. CCT will review packages submitted for compliance with coordination requirements as set forth in this section, and will return packages for correction.

**7.3. COORDINATION REQUIREMENTS.** Components/Capability Boards may achieve coordination in the manner that best accommodates their situation or in accordance with coordination requirements of the program or subject being coordinated, but must meet the following general requirements on Agency-level packages.

**a. Material Requiring Coordination.**

(1) Components/Capability Boards must obtain coordination on Agency-level packages involving programs, decisions or issues over which they do not exercise sole authority or which significantly affect other Components/Capability Boards.

(2) Components must obtain coordination as specified in an official HTS task or as otherwise directed by the Director, Deputy Director, or Tasking Authority.

(3) Components must obtain coordination on Agency-level packages that warrant input or review from other Components, either in their own estimation or as requested by another Component.

(4) Components must obtain coordination on Agency-level packages whose programs require coordination.

**b. Formal Coordination.**

(1) Packages addressed to the Director or Deputy Director must reflect the coordination of the Component Head or their Authorized Signer “for” the Component Head/Capability Manager. Lower-level coordination (i.e., Action Officer-level) will not be accepted.

(2) The coordinating Component’s Correspondence POC may provide coordination that specifically indicates by-name concurrence of the Component Head/Capability Manager or Authorized Signer. Authoring Components/Capability Boards must be able to substantiate cited coordination with documentation indicating principal-level coordination.

(3) Final and clear-cut Coordination. While the coordination process may involve extended discussions, negotiations or changes, the final coordination cited on an Agency-level package can be “Concur,” “Nonconcur,” or “No stake” and must indicate coordination on the final package to be submitted to the Director.

(a) Changes made to the package after requesting coordination (other than minor formatting or typographical edits) must be re-coordinated with any affected stakeholder.

(b) Components/Capability Boards providing a final coordination of “Nonconcur” must provide the requestor with a statement explaining their objection to be included in the final package.

(c) If a coordinating Component/Capability Board has no stake in the issue being presented for coordination, they may make a statement of “No Stake.” This statement indicates that they have reviewed the package and verify that their organization has no stake in the issue and no comments.

(d) Conditional concurrence (e.g., concurrence “with comment”) is not an acceptable final declaration. Authoring and coordinating Components/Capability Boards must resolve critical issues and obtain a final declaration (“Concur” or “Nonconcur”).

(4) Explicit Coordination. Coordinating Component/Capability Board must provide explicit coordination (i.e., silence does not indicate concurrence). If attempts to obtain explicit coordination from a Component fail, the authoring Component must indicate “No Response” on the coordination citation and provide documentation of attempts made to coordinate. In some cases, failure to obtain coordination after reasonable attempts may not prevent submission of a package.

(5) Standing Mandatory Coordination Requirements.

(a) General Counsel. Components/Capability Boards must coordinate with General Counsel on all correspondence to be signed by the Director or Deputy Director that has legal implications or possible adverse reflection on the Agency. Components/Capability Boards must obtain positive legal coordination on all Agency policies.

(b) Union Coordination. Components/Capability Boards must coordinate with the Director of LER via the Director for Human Capital (HC) on any correspondence or policy with Union-related implications. LER will ensure union coordination is accomplished as appropriate.

(c) Specialized Requirements. Components/Capability Boards will adhere to any specialized coordination requirements as set forth in Agency policy or as directed by the Director.

**7.4. CITING COORDINATION.** All coordination must be submitted as the final tab of the Agency-level package. Include all of the required coordination elements stated in this Paragraph. See Paragraph 6.5. for guidance on setting up Action and Info Memos.

**a. Required Elements.** The final coordination cited on an Agency-level package must contain the elements in Paragraph 7.4.a(1) through 7.4.a(4):

(1) Component/Capability Boards. List the name of the coordinating Components/Capability Boards. Do not list the originating/authoring Component/Capability Board as a coordinating office.

(2) Coordinating Official Name and Title. List the name or signature of the Component Head/Capability Manager providing coordination, and their title.

(3) Concurrence (“Concur,” “Nonconcur,” or “No Stake”).

(a) List whether the Component/Capability Board concurs or nonconcur with the package.

(b) Any “Nonconcur” response must be accompanied by a statement from the dissenting Component Head/Capability Manager explaining their objection to the package, attached to the package immediately behind the coordination summary sheet.

(c) For coordination attempted but not received, enter “No Response” and provide documentation of attempted coordination immediately behind the coordination summary sheet.

(4) Date. List the date that the coordination was achieved.

**b. Internal Coordination.** Component/Capability Board must not include Component-internal coordination in Agency-level packages unless directed. List coordination of the Component Head/Capability Manager only.

**Figure 1. Standard Task Matrix**

| <b>Task Abbreviation</b> | <b>Task Title</b>                            | <b>Description</b>  | <b>Required Response (Provide to CCT for closure with SAF)</b>      |
|--------------------------|--|---|---|
| RD                       | Reply Direct                                 | The Component will respond directly to the incoming correspondence at the appropriate signature level within the Component. | Component-signed letter, memo, etc.                                 |
| CAIL                     | Council Action Item List                     | The Component will complete as specified in the requirements and will report completion of task using the SAF               | Closing documents depend on what is required by the Deputy Director |
| DAIL                     | Director's Action Item List                  | The Component will complete as specified in the requirements and will report completion of task using the SAF.              | Closing documents depend on what is required by the Director        |
| DROC                     | DCMA Requirements Oversight Council          | The Component will complete as specified in the requirements and will report completion of task using the SAF               | Closing documents depend on what is required by the Deputy Director |
| CR                       | Comments and Recommendations                 | The Component will analyze and research the subject correspondence or issue and submit comments and recommendations.        | Action Memo or Info Memo  |
| PIC                      | Provide Interagency Coordination             | The Component will provide coordination at the appropriate level, based on requirements of the request.                     | Copy of coordination sheet provided.                                |
| FAA (#1)                 | For Appropriate Action (with suspense)       | The Component will take appropriate action.   | Documentation of action taken                                       |
| FAA (#2)                 | For Appropriate Action (without suspense)    | The Component will take appropriate action.   | None  |
| INFO                     | For Information Only                         | The material is forwarded for information purposes only. No action is required  | None  |
| PRD                      | Prepare a Reply for the Director's Signature | The Component will prepare letter, memorandum, or other correspondence as appropriate for the Director's signature.         | Action Memo for Director with letter, memo, etc.                    |

## GLOSSARY

### G.1. DEFINITIONS.

**Action Memo.** A memorandum addressed from a Component Head/Capability Manager to the Director recommending a course of action (i.e., soliciting a decision or approval on an issue, or forwarding a piece of correspondence or other document for signature). Paragraph 6.4. provides guidance on setting up Action Memos. Components/Capability Boards may also use the Action Memo format to transmit decision items within their Components/Capability Boards.

**Action Officer.** The Action Officers are the subject matter experts who accomplishes the tasks within their Components and generate the response packages. They prepare packages and correspondence in accordance with established guidelines.

**Agency-level Correspondence.** Internal or external correspondence addressed to or from the Director or Deputy Director, or the Agency at large. This includes incoming correspondence, incoming tasks from higher headquarters, tasks generated by the Director or their designated tasking authorities, Action or Info memos addressed to the Director or Deputy Director, or any piece of official correspondence signed by the Director or Deputy Director. Agency-level correspondence is controlled by CCT.

**Agency-level Package.** An Action or Info Memo addressed to the Director or Deputy Director from a Component Head/Capability Manager, whether responsive to a tasking or self-initiated.

**Authorized Signer.** An individual authorized to sign “for” a principal officer or Component Head/Capability. See Paragraph 3.3.b.(6) for guidance on Authorized Signers.

**Capability Board.** The cross-functional governance entity responsible for policy (instructions and manuals), tools and training for one of the 11 major services required by our internal and external customers. Although each Capability Board has a specific mission capability (major service) as its focus and concern, it is comprised of technical experts and representatives from each of the other ten Capability Boards, in order to foster cross-functional collaboration and transparency, as part of the overarching Business Capability Framework.

**Capability Manager.** The leader of the Capability Board. See Table 2 for a list of all Capability Boards.

**Component.** An organization within DCMA whose leader reports to the Director. See Table 1 for a list of all Components and Component Heads.

**Component Head.** The leader of an organization reporting to the Director, DCMA. See Table 1 for a list of all Components and Component Heads.

**Component-level Correspondence.** Correspondence addressed within or between Components/Capability Boards, or from a Components/Capability Boards to an individual, business, or organization outside the Agency.

**Designated Tasking Authority.** The individual(s) with authority to issue tasks on behalf of the Director. The Deputy Director, Executive Officer (XO), and the Corporate Operations Director are the designated tasking authorities, and the Director may designate other officers, as needed. The Designated Tasking Agent also authorizes changes to tasks, including closure.

**Correspondence POC.** The Component/Capability Board's focal point for correspondence and tasks, usually the senior administrative officer. See Paragraph 2.8. for specific responsibilities.

**Info Memo.** A memorandum addressed from a Component Head to the Director or Deputy Director, used to convey information that does not contain recommendations for specific immediate actions. An Info Memo may be generated in response to a task, or self-initiated by the Component. Paragraph 6.4. provides guidance on setting up Info Memos.

**Transmittal Item.** Standardized memorandums addressed to the Director from a Component Head that transmit information or solicits an action. The Action Memo and Info Memo are the Agency's authorized official transmittal items.

## GLOSSARY

### G.2. ACRONYMS.

|           |   |
|-----------|---|
| ACT       | Agency coordination tracker                                       |
| CAIL      | Council action item list  |
| CATMS     | Correspondence and Task Management System                         |
| CCT       | correspondence control team                                       |
| CMO       | Contract Management Office  |
| CR        | comments and recommendations                                      |
| DAI       | Defense Agencies Initiative                                       |
| DAIL      | Director's action item list                                       |
| DC        | Corporate Operations Directorate                                  |
| DROC      | DCMA Requirements Oversight Council                               |
| ET        | eastern time  |
| FAA       | for appropriate action  |
| GC        | Office of the General Counsel                                     |
| HC        | Human Capital Directorate   |
| HTS       | Headquarters Tasker System  |
| INFO      | information   |
| LER       | Labor and Employee Relations                                      |
| OCR       | office of coordinating responsibility                             |
| OPR       | office of primary responsibility                                  |
| OUSD(A&S) | Office of Under Secretary of Defense, Acquisition and Sustainment |
| PDF       | portable document format  |
| PIC       | provide interagency coordination                                  |
| PII       | personally identifiable information                               |
| POC       | point of contact  |
| PRD       | prepare a reply for the Director                                  |
| RD        | reply direct  |
| SAF       | suspense action form  |
| SD391     | SD form 391 - Secretary of Defense correspondence action form     |
| XO        | Executive Officer   |

## **REFERENCES**

DoD Directive 5105.64, "Defense Contract Management Agency (DCMA)," January 10, 2013  
DoD Manual 5110.01-M Volume 1, "Correspondence Management," October 26, 2010  
DoD Manual 5110.01-M Volume 2, "Examples and Reference Material," October 26, 2010