

CATMS INSTRUCTIONS FOR ISSUANCE COORDINATION

Note: Use with the CATMS Addresses Document for the Specific CATMS addresses and POCs

STAGE 1 & 2-DRAFTING

- Step 1.** Ensure that you visit the DoDEA Policy webpage to ensure you are using the current templates and tools.
- Step 2.** Share draft to any stakeholders that are significantly/directly related to the Issuance. This will help to ensure a more completed product when entering coordination.
- Step 3.** If including a “form/template” in Appendix, you must talk with James Revell to ensure that the form/template is current and approved and the correct reference number for it. Inform OPLP if it is cleared.
- Step 4.** It is highly advised that AO have conversation with LMER to determine what could be bargainable with the unions. LMER will ask for a list of what is being changed in the document (template on DoDEA Policy webpage).
- Step 5.** Verify correct type and number of the Issuance with OPLP before creating a CATMS tasker.
- Step 6.** If there are questions on formatting/structuring, please reach out to OPLP or visit their office during their standing Office Hours (Tuesday 0900-1100).
- Step 7.** Create an action and task in CATMS using the normal procedures. The CATMS action and task should title it by using the type, number and short name of issuance (e.g., DoDEA AI 1234.01, DoDEA Policy). It is advised to name the word document with at least the type and number and date it (e.g., AI 1234.01-01012018) or similar manner so people know the latest version.

STAGE 3-OPLP REVIEW

- Step 1.** When Issuance is completed and ready to move forward for review, task in CATMS and email to OPLP the following: Issuance (clean version – no track changes), completed Metadata Sheet, Action Memo, copies of any issuances being incorporated or cancelled, summary of changes (applicable) and AO Tracking sheet with GS15 signature for Stage 2 completion and review.
- Step 2.** Any edits will be communicated back and forth via email to AO and OPLP.
- When Stage 3 review is completed, OPLP will upload their coordination sheet, last approved version, and provide any necessary instructions.

STAGE 4-DoDEA COORDINATION/ STAGE 5-ADJUDICATING

- Step 1.** The AO will task the action in CATMS with a clean issuance (no tracked changes or comments) and copy of the DoDEA Signature Memo and DD Form 818-1) with the issuance number, type, and name filled in on the DoDEA Signature Memo and the DD Form 818-1. Include coordination instructions with the tasking. The AO tasks the action to ALL Division offices and Regional Chief of Staff as indicated in the Issuance Stages document **NOTE: Include these instructions when tasking in CATMS to the coordinating offices:**

Regional COS and individual offices: Each element must return edits and comments via the provided signed signature memo and DD Form 818-1 (if making comments and edits) and review according to your internal processes. All signed coordination document shall be added to the Supporting Document section of the CATMS Task page.

- Step 3.** The AO will email all of the individuals (advisable to receive a “read receipt” in response for tracking purposes). Provide them with instructions and deadline and provide the UPR #, copy of the Issuance, DoDEA Signature Memo and DD Form 818-1. OPLP should be cced on all emails.
- Step 4.** The AO will monitor the accepting of taskers and will send reminders throughout the tasking period to ensure that coordination is happening. Upon return, the AO will receive the completed/signed DoDEA Signature Memo by the **GS15** (concurring or non-concurring) on the Issuance being reviewed and the DD Form 818-1 matrix (if making comments and edits). **Note:** LMER, OPLP, and OGC provide separate coordination documents.
- Step 5.** The AO will adjudicate/address all comments and edits provided and edit the document per accepted input.
- Step 6.** Receipt of a signed DoDEA Signature Memo from all offices is mandatory before tasking to General Counsel. All updated DD Form 818-1 with AO comments should be added to the CATMS Task page

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(Supporting Documents) when completed and before moving to the next stage. Revised Issuance should be uploaded. Exercise version control during coordination.

NOTE: Contact OPLP if coordination is not received in a timely fashion.

NOTE: Otherwise all others in Stage 4 should be providing at minimum a signed (GS15) memo with their type of concurrence selected. If comments provided must be in the Matrix.

STAGE 6-OGC COORDINATION/STAGE 7-ADJUDICATING/GS15 APPROVAL

Step 1. Task in CATMS and email POCs when AO has received all coordinations and all comments are adjudicated in the matrix and uploaded in CATMS.

Step 2. Receive legal review signed off (usually they use the CATMS cover sheet with comments on bottom is the format that OGC will respond).

STAGE 8-OPLP, EXEC SERVICES AND DIRECTORS APPROVAL

Step 1. Task in CATMS to both OPLP and Executive Services. All completed coordinations should be, final Issuances, and completed and signed Action Tracking Sheet by GS15 at Stage 7 should all be uploaded.

Step 2. Email OPLP that the tasker has been sent with the Action Tracking Sheet and Final Issuance on the email.

Step 3. Tasker is **not officially tasked** until OPLP receives the hardcopy package. The package should be in a folder with the following items:

- CATMS cover page (front of package)
- Inside Left Cover:
 - Action Tracking Sheet (completed and signed through Stage 7)
 - MetaData Sheet
- Inside Right Cover:
 - Action Memo-ensure if it is not fully coordinated that a statement is provided on what actions were taken to ensure all coordination and what is missing
 - *Tab A*
 - Final Clean Version of Issuance
 - *Tab B (as applicable)*
 - Copies of Issuances that are being incorporated, revised or cancelled by this Issuance
 - *Tab C*
 - All coordinations. Ensure that the correct number and name is on each memo and matrix (if provided), that the GS-15 signed and selected the appropriate action, and that you have responded in how you adjudicated the comments. If an individual coordination is more than one page-STAPLE the pages together.

Step 4. Respond via email to OPLP on any edits that need to be done.

Step 5. Closed the CATMS tasker when OPLP has completed it and notified the AO that the Issuance was signed.