DEPARTMENT OF THE NAVY
BUREAU OF MEDICINE AND SURGERY
7700 ARLINGTON BOULEVARD
FALLS CHURCH, VA 22042

BUMED INSTRUCTION 5216.17A

From: Chief, Bureau of Medicine and Surgery

Subj: BUREAU OF MEDICINE AND SURGERY'S ENTERPRISE KNOWLEDGE
MANAGEMENT TASKERS BUSINESS RULES

Ref: (a) SECNAV M-5216.5 of June 2015
        (b) DoD 5110.04-M-V1, DoD Manual for Written Material: Correspondence
            Management, October 2010
        (c) BUMEDINST 5216.15B
        (d) SECNAVINST 5730.5J
        (e) OPNAVINST 5222.1
        (f) SECNAVINST 5211.5E

Encl: (1) Bureau of Medicine and Surgery Enterprise Knowledge Management Business
            Rules
        (2) Higher Authority Tasker process flowchart

1. Purpose. To designate Enterprise Knowledge Management (eKM) as the authoritative
correspondence management system for the Bureau of Medicine and Surgery (BUMED) and
provides policy for consistent usage and regulates all official transactions between BUMED
Headquarters (HQ), any external Government or private sector agency, and particularly within
Budget Submitting Office (BSO) 18. References (a) through (f) provide amplifying guidance.

2. Cancellation. BUMEDINST 5216.17.

3. Background. eKM is a U.S. Pacific Fleet (PACFLT) owned and managed public-key
infrastructure (PKI) enabled Web-based suite of software applications designed to streamline
workflow by making secure and immediate access to essential, interrelated information easily
available to everyone in an organization. In 2004, BUMED began using eKM for workflow
management and the use has expanded throughout BSO-18 to become the primary means to
request and share information between BUMED HQ and BSO-18 echelon 3 and below activities.

4. Scope. This instruction applies to all Navy Medicine activities assigned to BSO-18.

5. Definitions. For the purpose of this instruction correspondence is defined as any
communication exchange that may serve as a paper trail of events from creation to completion to
include, but not limited to, letters, memorandums, endorsements, briefs, directives (instructions
and notices), and e-mails.

a. <u>BUMED Front Office</u>. BUMED Front Office includes the offices of the Chief, Deputy Chief, and Executive Director.

b. <u>Secretariat</u>. For the purpose of this instruction, the BUMED Secretariat office (BUMED-M09B3) will be referred to as the Secretariat.

c. <u>Tasking Authority</u>. Tasking Authority is an agency, activity, or BUMED Code originating the request for information.

d. <u>External Activities</u>. External activities are any command or organization outside of BSO-18 (Navy Medicine).

e. <u>Internal Activities</u>. Internal activities include all BSO-18 (Navy Medicine) owned activities.

f. <u>Official Tasker</u>. All taskers managed and tracked by the Secretariat are considered official taskers. An eKM tasker does not become an official tasker until tasked to the assigned recipient(s) by the Secretariat. All official taskers have reporting and format processing requirements and are detailed in enclosure (1).

6. <u>Process</u>. All users of eKM will abide by the business rules set forth in enclosure (1). The Secretariat serves as the central authority for prioritizing, managing, coordinating, and tracking all eKM staff actions, tasking, and correspondence for BUMED.

a. All unclassified and classified naval correspondence will follow guidelines set forth in reference (a).

b. Correspondence being forwarded to the Office of the Secretary of Defense (OSD), the Joint Staff, and combatant commanders will follow reference (b).

c. All correspondence routed to the front office must be entered into eKM, unless the information is considered sensitive, i.e., commanding officer and executive officer slating, conference approval requests, legal documents, personal award recommendations.

d. BUMED HQ must also use eKM to staff correspondence to BSO-18 echelon 3 activities.

7. <u>Records Management</u>. Records created as a result of this instruction, regardless of media and format, must be managed per SECNAV Manual 5210.1 of January 2012.

8. <u>Review and Effective Date</u>. Per OPNAVINST 5215.17A, this instruction will be reviewed annually on the anniversary of its effective date to ensure applicability, currency, and consistency with Federal, Department of Defense, Secretary of the Navy, and Navy policy and statutory

authority using OPNAV 5215/40, Review of Instruction. This instruction will automatically expire 5 years after effective date unless reissued or canceled prior to the 5-year anniversary date, or an extension has been granted.

9. <u>Forms</u>. The BUMED 5216/20 Bureau of Medicine and Surgery Package Cover Sheet is available electronically at: https://navalforms.daps.dla.mil/web/public/home.

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Acting

Releasability and distribution:
This instruction is cleared for public release and is available electronically only via the Navy Medicine Web site at: http://www.med.navy.mil/directives/Pages/BUMEDInstructions.aspx

BUREAU OF MEDICINE AND SURGERY
ENTERPRISE KNOWLEDGE MANAGEMENT BUSINESS RULES

1. eKM Business Rules. BUMED and BSO-18 staff members are not authorized to respond to informal requests for information from external agencies. Requests for action shall be in writing (i.e., formal tasker, memoranda, letter, e-mail, etc.) and managed per the business rules established herein. Informal exchange of information with an external agency must be characterized as such to the requestor. It is not meant for use or publication as BUMED policy, position, or status.

2. Metrics and Late Rate. It is imperative that BUMED codes and BSO-18 activities are responsive to requests for information. In order to meet this requirement BUMED codes and BSO-18 activities are required to meet established deadlines or obtain an extension where possible. Deputy Chiefs and Assistant Deputy Chiefs (ADC) must be advised on all overdue taskers under their purview and be prepared to discuss with the Executive Director the circumstances related to overdue taskers.

3. Official Tasker. eKM taskers tracked by the Secretariat are official external or internal taskers. eKM taskers not tracked by Secretariat are unofficial taskers.

    a. External taskers. Taskers received from higher authority and tasked to BUMED for action. They are received in the Secretariat by, but not limited to: the Navy Tasker system, e-mail, phone, postal service, memorandum, or in person.

    b. Internal taskers. Taskers initiated within the Navy Medicine enterprise (BSO-18). The tasking authority falls within BSO-18 and can be tasked out to BUMED Codes, BSO-18 echelon 3 activities, and external activities.

    c. Unofficial tasker. eKM taskers not managed or tracked by Secretariat are taskers created by personnel, codes, commands, and organizations for their own tasking and information sharing. These taskers are not reported or held to the formatting and processing requirements of official taskers. However, it is the code and BSO-18 echelon 3 activity's responsibility to set internal administrative standards in regards to eKM unofficial tasker formatting, communications, and tracking. Taskers sent to the Secretariat for official release must be in official tasker format as directed by this instruction.

4. Tasking Authority. The originating organization, code, or activity assigning action, unless otherwise authorized. The tasking authority makes initial assignments, populates the eKM tasker description and file folder as needed, provides first-level suspense dates and any extensions thereto, and authorizes the Secretariat to close respective taskers.

5. Tasking Authority Process

    a. Release of tasker. ONLY the Secretariat can release official eKM taskers. Request for release of taskers will be submitted to the Secretariat in eKM in the comments section of the respective tasker after the code ADC or appointed representative's (see paragraph 6c of this enclosure) clearance.

    b. Chief, Deputy Chief, and Executive Director, BUMED may task BUMED Codes or BSO-18 echelon 3 activities with action items. All requests for action will be entered into eKM and the tasking managed by Secretariat from initial tasking until closure.

    c. BUMED Deputy Chiefs, BUMED Codes, and Office of the Corps Chief (M00C) with the approval of the respective ADC or code tasker supervisor are authorized to task action items to:

        (1) Staff within their respective codes, these taskers are not tracked by Secretariat.

        (2) Codes within BUMED Headquarters, these taskers are not tracked by the Secretariat unless specifically requested by the tasker authority and forwarded to the Secretariat for release to the appropriate activity.

        (3) BSO-18 echelon 3 activities, these requests must be submitted in eKM and forwarded to the Secretariat for release to the appropriate activity.

6. Routing of correspondence for signature. All correspondence routed to the front office must be entered into eKM by the originating Action Officer (AO), unless the information is considered sensitive, i.e., commanding officer and executive officer slating, conference approval requests, legal documents, personal award recommendations. This would include BSO-18 echelon 3 activities routing to BUMED.

    a. Correspondence to be signed by the Chief, BUMED must be routed via Secretariat, Executive Director, and Deputy Chief, BUMED with the exception of certain legal, Corps Chief matters, or at the discretion of the Chief, Deputy Chief, or Executive Director.

    b. Correspondence to be signed by the Deputy Chief, BUMED must be routed via Secretariat and Executive Director, with the exception of certain legal and Corps Chief matters or at the discretion of the Deputy Chief or Executive Director.

    c. Correspondence to be signed "By direction" is governed by reference (a).

7. Roles and Responsibilities

    a. Director, Secretariat. Responsible for establishing policy, guidance, and providing oversight and training in the use of eKM.

   b. <u>Deputy Director, Secretariat</u>. Serves as the BUMED eKM Program Manager, Correspondence Manager, higher authority liaison, and Navy Taskers system liaison and must:

   (1) Serve as BUMED's representative to PACFLT staff on all matters relating to eKM.

   (2) Serve as BUMED's entry point on requests for information from DoD, Joint Chiefs of Staff, SECNAV, Chief of Naval Operations, other Services, BSO-18 activities, and other activities outside BUMED HQ.

   (3) Ensure requests for information, data, or action directed to Navy Medicine activities are entered in eKM, assigned to the appropriate action office or activity, monitored, and responded to by the assigned due date.

   (4) Ensure all requests for information from BUMED's Chief, Deputy Chief, or Executive Director are entered into eKM, assigned to the appropriate action office, monitored, and responded to by the assigned due date.

   (5) Coordinate extension requests on external and BUMED front office taskers.

   (6) Coordinate with Tasking Authority on extension requests for internal BUMED HQ Taskers.

   (7) Publish a daily report to include all open official taskers, overdue taskers, and dashboard reflecting late rate percentage of external and internal taskers to front office, Codes, and BSO-18 echelon 3 activities.

   (8) Maintain the official record copy of correspondence signed by Chief, Deputy Chief, or Executive Director, BUMED.

   c. <u>Deputy Chief of Total Force, Readiness & Health, and Business Operations/Comptroller</u> <u>must</u>:

   (1) Enforce the roles, responsibilities, policies, and procedures contained in this instruction.

   (2) Designate a primary and secondary eKM manager to serve for their area of responsibility separate from that of the code eKM manager(s). This position is usually carried out by the Executive Assistant due to very few staff assigned to the Deputy Chief's.

   d. <u>ADC</u>. Responsible for overall product of their code correspondence packages, eKM tasker submissions and on time tasker deliverables and must:

   (1) Designate a primary and secondary eKM manager.

(2) Appoint a tasker supervisor and make notification to the Director, Secretariat.

(3) Maintain open communications with tasker supervisor and eKM managers to facilitate the completion of deliverables and closure of taskers.

(4) Have overall awareness of their code taskers to include possible overdue suspense dates, Congressional taskers, and taskers from higher authority.

(5) Ensure the management of code taskers is being tracked appropriately, up to date, and communicated to code leadership and AOs.

(6) Ensure requests for information, data, and action directed to external activities are entered in eKM properly, reviewed, and cleared by the ADC prior to submission to the Secretariat. This review authority may be delegated to the code tasker supervisor.

   e. Appointed tasker supervisor must:

(1) Oversee assignment of AOs.

(2) Ensure taskers assigned to respective code are routed to the appropriate director and AO.

(3) Coordinate with code eKM manager to ensure that all staff members have an eKM account and AOs have successfully completed the BUMED Action Officer Course.

(4) Maintain open communications with directors, eKM managers, and branch heads to facilitate the completion and closure of official taskers and taskers under their authority.

(5) Ensure collaboration with subject matter experts within their code, BUMED HQ, and external organizations to ensure a concise and thorough product is prepared.

(6) Ensure requests for information, data, and action directed to external activities are entered in eKM properly, reviewed, and cleared by the ADC prior to submission to the Secretariat.

   f. Code Director. Responsible for the assignment of AO to taskers and on time completion of all taskers that fall within their area of responsibility and must:

(1) Ensure AOs receive, respond, review, and take appropriate action for assigned taskers.

(2) Ensure responses to taskers are prepared in compliance with guidance provided in the eKM tasker, command templates, and reference (a).

(3) Ensure correspondence requiring review by Chief, Deputy Chief, or Executive Director, BUMED are entered into eKM prior to routing to the Secretariat.

(4) Ensure requests for extension on official taskers are submitted in a timely manner to the Secretariat via code chain of command when a determination has been made that the assigned due date will not be met.

(5) Maintains direct communication with tasker supervisor, AOs, and eKM manager to ensure timely tasker completion.

g. Action Officer. Responsible for the completion of tasker deliverables and must:

(1) Accept the assignment of the tasker within eKM.

(2) Prepare and complete hard copy tasker action package for routing (if applicable).

(3) Collaborate with subject matter experts and external activities to ensure a concise and thorough response or product is prepared.

(4) Ensure requests for information or informational correspondence directed to external activities and/or taskers requiring review by Chief, Deputy Chief, or Executive Director are prepared in eKM and forwarded through chain of command for review and clearance prior to submission to the Secretariat.

(5) Maintain correspondence version control and compliance by ensuring all files are up to date and uploaded in eKM.

(6) Ensure responses to taskers are prepared in compliance with guidance provided in the eKM tasker and reference (a).

(7) Ensure action taskers are completed by the assigned due date.

(8) Upon determination that assigned due date will not be met, ensure a request for extension is sent to the Secretariat via chain of command; in coordination with the respective eKM manager.

(9) Successfully complete Action Officer training course and maintain active eKM account.

(10) Ensure eKM taskers are created in the correct format and within the standards of this instruction before requesting release as an official tasker from code chain of command.

h. eKM Manager. The eKM and correspondence processing subject matter expert for the code is responsible for receiving, assigning, and tracking of all eKM taskers and must:

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(1) Be appointed by the code ADC.

(2) Serve as the liaison between the code and the Secretariat.

(3) Represents the code for receipt of taskers and release request of taskers.

(4) Maintains communication with code ADC or tasker supervisor, and directors to ensure tasker completion.

(5) Serve as the main point of contact (POC) for communication of all tasker related matters and represents the code for eKM coordination with the Secretariat.

(6) Maintains and manages an up-to-date internal tracking mechanism for the code. The tracking mechanism is to be briefed, shared or disseminated with ADC or tasker supervisor, code leadership, and AOs.

(7) Be proficient and knowledgeable in correspondence processing with a full understanding of the business rules as set forth in this instruction.

(8) Be responsive to tasker inquiries from the Secretariat and forward communications from the Secretariat to code personnel as necessary.

(9) Provide continuous guidance and training to AOs and staff members on eKM processes and procedures and assist in the coordination to support tasker completion.

(10) Ensure eKM taskers created by the code are in the correct format and within the standards of this instruction before requesting though the chain of command to be released as an official tasker.

(11) Ensure higher authority taskers assigned to the code are processed and tracked throughout the life cycle of the tasker as depicted in enclosure (2), higher authority tasker process flowchart.

   i. <u>Office of the Corps Chiefs and Special Assistants to the Chief, BUMED</u> have the same responsibilities as the BUMED codes and due to the unique personnel and organizational structure will have:

(1) One appointed primary and one secondary eKM manager for the:

   Medical Corps (BUMED-M00C1)
   Nurse Corps (BUMED-M00C2)
   Dental Corps (BUMED-M00C3)
   Medical Service Corps (BUMED-M00C4)

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(2) An appointed primary and one secondary eKM manager for the Hospital Corps (M00C5).

(3) The Deputy Corps Chief of each Corps Chief office assumes the responsibilities of the ADC and director as mentioned in paragraphs 7c and 7d of this enclosure.

(4) A Special Assistant to the Chief, BUMED will take on the responsibilities of the ADC, director, and eKM manager as mentioned in paragraphs 7d, 7f, and 7h of this enclosure.

j. BUMED HQ Staff must:

(1) Obtain and maintain an eKM account while assigned to BUMED HQ. The eKM account will be provided during the newly arriving staff members' check-in process.

(2) Contact the code eKM Program Manager or Secretariat prior to transferring to a different position within BUMED HQ or detaching from BUMED HQ.

k. BSO-18 echelon 3 activities must:

(1) Enforce the roles, responsibilities, policies, and procedures contained in this instruction.

(2) Designate a primary and secondary eKM manager.

(3) Ensure taskers assigned to their area of responsibility are routed to appropriate action office or subordinate activities.

(4) Collaborate with subject matter experts internal to and external to their activity to ensure a concise and thorough response or product is prepared.

(5) Ensure responses to taskers are prepared in compliance with guidance provided in the eKM tasker and per reference (a).

(6) Ensure action taskers are completed by the assigned due date.

(7) Ensure requests for extension on official taskers are submitted to the Secretariat when a determination has been made that the assigned due date will not be met.

(8) Ensure correspondence requiring review by BUMED are entered into eKM prior to routing to the Secretariat.

(9) Ensure actions taken on Congressional inquiries are received in eKM from the Secretariat only. Any inquires received directly from a Congressional office or from an outside activity may not be taken for action. The following steps must be taken immediately:

(a) A reply back to the Congressional office (formal or informal) or outside activity stating that all Congressional inquiries must be sent to the Navy Office of Legislative Affairs (OLA).

(b) Inform the BUMED Congressional Liaison Officer within the Secretariat.

l. BSO-18 echelon 4 and below activities must:

(1) Enforce the roles, responsibilities, policies, and procedures contained in this instruction.

(2) Designate a primary and secondary eKM manger.

(3) Ensure taskers assigned to their area of responsibility are routed to the appropriate action office.

(4) Collaborate with subject matter experts internal to their activity and outside their activity to ensure a concise and thorough response or product is prepared.

(5) Ensure responses to taskers are prepared in compliance with guidance provided in the eKM tasker and per reference (a).

(6) Ensure action taskers are completed by the assigned due date.

(7) Ensure requests for extension on taskers being tracked by BUMED are submitted to their respective BSO-18 echelon 3 activities upon determination that the assigned due date will not be met.

(8) Ensure correspondence and taskers requiring review by BUMED are entered into eKM prior to routing to their respective BSO-18 echelon 3 activity.

(9) Ensure actions taken on Congressional inquiries are received in eKM from the Secretariat only. Any inquires received directly from a Congressional office or from an outside activity may not be taken for action. The following steps must be taken immediately:

(a) A reply back to the Congressional office (formal or informal) or outside activity stating that all congressional inquiries must be sent to the OLA.

(b) Inform the BSO-18 echelon 3 activity eKM manager and the BUMED Congressional Liaison Officer within the Secretariat.

8. eKM Processing Rules

a. Non-concur response

(1) Formal Coordination. Only the Chief, Deputy Chief, and Executive Director are authorized to approve non-concur responses to external activities on request for formal coordination. Non-concur recommendations must be vetted through the appropriate Deputy Chief and ADC.

(2) Informal Coordination. The Deputy Chiefs may approve non-concur responses on taskers identified as informal or first review by the requesting activity.

b. <u>Content Rules</u>

(1) In compliance with reference (f), extreme care and diligence is required to protect privacy and sensitive information. Do not include privacy or sensitive information (e.g., social security number, date of birth, etc.) in the subject of the tasker, tasker description field, or when commenting or consulting within eKM. These fields appear on reports and e-mails that may not have the same focus on sensitivity as the tasker.

(2) Pay special attention to restrict all personally identifiable information (PII), protected health information (PHI), or sensitive issues to only those individuals who have a need to know. Taskers containing PII and/or PHI may only be included in the attached documents to prevent inadvertent disclosure to individuals without a need to know.

(3) Provide complete taskers. Packages must be as complete as possible, including any instructions for producing and completing the work product of the tasker.

(4) When requesting release of an eKM tasker to external activities:

(a) The eKM tasker must be approved for release by the ADC or tasker supervisor before submission to the Secretariat.

(b) The eKM tasker must be in the eKM standard format before submission to the Secretariat as established by reference (a) or the guidance contained in the tasker.

(c) Tasker release requests to the Secretariat will ONLY be accepted from the eKM manager or tasker supervisor and above.

(d) The action office requesting the tasker release must take into consideration the routing of the tasker (multiple echelons and external activities beyond BSO-18), holidays, operational commitments, levels of clearance within chain of command, and the amount of effort required of the recipients when assigning a due date. Ten working days is the minimum amount of time for normal deliverables. The timeline begins when the tasker is officially released by the Secretariat.

(e) The tasker creating AO (Tasker Authority AO) will monitor the eKM tasker throughout the life-cycle of the tasker to include follow up with code front office on request for release, inquiries from the field, and to address changes or edits to the tasker.

(f) The Secretariat will support and communicate directly with the AO and/or the code eKM manager of the tasker as needed, but will not change, edit or modify the tasker in any way that would impact the recipients' efforts unless approved or cleared by the code chain of command.

(g) Request for tasking to organizations outside of BSO-18 requires the Secretariat to create a tasker in the Navy Taskers system. The eKM tasker would still be created in the same format and the Secretariat will update eKM as the deliverables are received in the Navy Taskers system.

c. Receiving an official tasker

(1) Acknowledgment of tasker received is required in the comments section of eKM. There is no need to consult Secretariat unless specifically instructed to do so within the tasker.

(2) Review and assignment to the appropriate director(s) should be completed upon receipt of tasker to allow time for the AO to review and determine course of action to include:

(a) Acknowledging and accepting the tasker for action.

(b) Determine if coordination with external activities is required and requested as needed.

(c) Determine if the due date will be met and request an extension if needed.

(d) Prioritize work compared to current workload, schedule, and manning.

(e) Coordinate with subject matter experts, code front office, and leadership as needed to complete on time.

(f) Rejection of tasker due to not within scope of code or department responsibility. Reject acceptance of no equity taskers by commenting and consulting eKM manager, code leadership, and Secretariat via eKM immediately upon receipt. Rejecting to take the lead on a tasker must be communicated to the Secretariat via code chain of command and eKM manager (within 48 hours of normal taskers and within 24 hours of Congressional and White House Liaison Office (WHLO) taskers or as defined within the tasker). Justification for rejecting a tasker must be communicated within eKM through the code chain of command, code eKM manager, and to the Secretariat. A recommendation of who should take lead of the tasker should be provided when possible.

d. Reassigning Taskers

(1) A tasker assigned by the Secretariat to an action office that does not fall within their scope of responsibility shall be returned to the Secretariat for reassignment the same day or within 48 business hours for routine taskers and within 24 hours for Congressional or WHLO taskers, unless circumstances beyond control prevented timelier notification.

(2) Reassignment notifications to the Secretariat that fall outside 24 to 48 hours must be negotiated between the eKM manager of the original lead action office and the receiving action office eKM manager. The agreement shall be documented in the comments section of the eKM tasker by the original lead eKM manager, who shall submit a consult to the Secretariat and the receiving eKM manager.

(3) If a determination cannot be made at the eKM manager level, the negotiation will elevate up to the AO, director, tasker supervisor, and ADC as needed. If a resolution of accepting the tasker is not made at the code level, the Executive Director will make the final determination.

e. Extensions of Due Dates. Action Officers who cannot meet the assigned due dates must immediately submit an extension request via eKM as follows:

(1) Extension requests for action taskers assigned by Secretariat shall be submitted via the chain of command to the Secretariat. Secretariat staff will contact the requesting agency for an extension and notify all concerned of outcomes via an eKM consult using the "saved comment" feature. The request shall contain the following:

(a) Reason for extension

(b) Projected date the action tasker will be completed.

(2) Extension requests for action taskers not assigned by the Secretariat shall be submitted via the chain of command to the Tasking Authority.

f. Closing a tasker

(1) ONLY the Secretariat can close out an official tasker in eKM.

(2) For taskers in which the code is assigned as the only lead and have completed the deliverable of the tasker, a request to the Secretariat from the eKM manager, tasker supervisor or above is required. The AO is required to follow up throughout the life-cycle of the tasker until the tasker is officially closed out by the Secretariat.

(3) For taskers in which there is more than one lead, a comment in eKM stating the tasker completion of the deliverable has been met from the eKM manager, tasker supervisor or above is required to close the tasking for that respective code. No other action is required from the code unless requested from the Secretariat.

g. <u>Supplemental rules</u>

(1) ONLY the Secretariat can make changes to the following on an official tasker:

(a) Subject line

(b) Tasker Number

(c) Due date

(d) Routing

(e) Community Access

(2) The subject must be a short, self-contained description of the tasker. As previously mentioned in paragraph 8a of this enclosure, the subject must not contain any privacy or sensitive information. The subject must contain enough information to uniquely describe the tasker. This includes originating office code, the event or meeting with which the tasker is associated, and a description of the work product. Abbreviations or acronyms are not allowed in the subject field.

(3) The background information and description of a tasker within eKM should avoid redundancy and excessive elaboration. The subject line, tasker number, and description of each tasker is reflected in reports, spreadsheets, and e-mails. Utilize the files options by uploading documents to better communicate a more descriptive background and desired product.

(4) When consulting in eKM, provide comments tailored to the audience being addressed. All permanent comments are utilized as an official log of communication and coordination of that tasker. Example: CDR Joe Smith – Please upload your spreadsheet into eKM and consult the Secretariat when completed. Thank you.

(5) Do not conduct discussions in the comments of eKM. Utilize appropriate communication means such as e-mail and if deemed significant upload a copy of the e-mail into eKM for reference purposes.

(6) Do not over consult. Only consult those that have a need to take action at that time. The consult tool is an e-mail notification and therefore follows e-mail etiquette. When acknowledging the receipt of a tasker, there is no need to issue a consult unless specifically requested to do so. Submit the comment and the acknowledgment will be documented in the comments log.

Enclosure (1)

HIGHER AUTHORITY TASKER PROCESS FLOWCHART

Secretariat receives Higher Authority Tasker

Secretariat builds tasker in eKM

Secretariat Responsibilities

Secretariat reassigns tasker

Secretariat assigns tasker to code(s)

- Secretariat tracks official taskers

Code consults Secretariat
- Reason for deferral
- Recommended recipient

Accepted?

Code acknowledges receipt in eKM

eKM Manager Responsibilities

Not accepted OR deferred

Accepted

eKM manager assigns action officer

- AO assignment coordinated with Director
- eKM manager tracks taskers for code

AO Responsibilities

Action officer accepts tasker and acknowledges receipt in eKM

- Coordination and communication through eKM
- Tasker package creation
- Uploading of package files
- Request for extension through CoC and eKM manager
- Tracking tasker until closed out

Deliverable

Comments cleared in eKM by code

Tasker package for code level review/approval

Full tasker package for front office review

Consult Secretariat when cleared and completed

AO creates package and routes through CoC

AO creates package and routes through CoC

Routing:
Branch Head
Director
ADC
Deputy Chief

Routing:
Branch Head
Director
ADC
Deputy Chief

Upload and comment in eKM

Secretariat receives and comments in eKM; assessment changed to purple

Routing:
ED
Deputy Chief
Chief

Completed

Secretariat conducts final processing and eKM closeout

Enclosure (2)