BUMEDINST 5216.17B
BUMED-N02B2
10 Dec 2025

BUMED INSTRUCTION 5216.17B

From: Chief, Bureau of Medicine and Surgery

Subj: ENTERPRISE TASK MANAGEMENT SOLUTION SYSTEM BUSINESS RULES

Ref: (a) OPNAVINST 5222.1B
       (b) DoD Instruction 5200.48 of 6 March 2020

Encl: (1) Enterprise Task Management Solution System Process Flowchart
       (2) General Officer, Flag Officer, and Senior Executive Service Electronic Package
           Templates
       (3) Suspense Timelines

1. <u>Purpose</u>. Per reference (a), Enterprise Task Management Solution System (ETMS2) is the authoritative correspondence and task management system for the Department of the Navy and provides general guidance for consistent usage. All correspondence must be formatted and submitted per reference (a) and entered and tracked in ETMS2 for records management purposes. This instruction is a complete revision and should be reviewed in its entirety.

2. <u>Cancellation</u>. BUMEDINST 5216.17A.

3. <u>Scope and Applicability</u>. This instruction applies to all Navy Medicine activities assigned to Budget Submitting Office (BSO) 18.

4. <u>Definitions</u>. 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 notices, and change transmittals), and e-mails.

   a. <u>Bureau of Medicine and Surgery (BUMED) Front Office</u>. BUMED Front Office includes the offices of the Secretariat (BUMED-N02B2), Director, Headquarters (HQ) Operations (BUMED-N02B), Executive Director (ED) (BUMED-N02), Deputy Surgeon General of the Navy (DSG) and Deputy Chief, BUMED (BUMED-N01), and Navy Surgeon General (SG) and Chief, BUMED (BUMED-N00).

<u>Please Note</u>: For the purpose of this instruction, the BUMED Secretariat Office (BUMED-N02B2) will be referred to as the Secretariat.

b. <u>Tasking Authority</u>. An agency, activity, or BUMED Maritime HQ (BUMED-N03), Maritime Operations (BUMED-N04), BUMED Director, HQ Operations (BUMED-N02B), BUMED specialty codes, and the Regions (Naval Medical Forces Atlantic, Naval Medical Forces Pacific, Naval Medical Forces Development Command, and Naval Medical Forces Research Command) originating the request for information. Contact the Secretariat to delegate taskers to the Regions that require external coordination.

(1) External Activities. Any command or organization outside of BSO-18 (Navy Medicine). Contact the Secretariat to delegate taskers to the Regions that require internal coordination.

(2) Internal Activities. All BSO-18 (Navy Medicine) owned activities. Contact the Secretariat to delegate taskers to the Regions that require external coordination.

(3) Official Tasker. All taskers managed and tracked by the Secretariat are considered official taskers. All official taskers have processing requirements and are detailed in enclosure (1).

5. <u>Responsibilities</u>

a. <u>Secretariat</u>. Will provide oversight and management of all ETMS2 taskers within BSO-18 to include:

(1) Tasking and routing internal and external taskers within 24 business hours.

(a) Internal taskers are BUMED initiated taskers that are delegated to BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions for action.

(b) Official external taskers from higher authority include Secretary of the Navy (SECNAV), Congressional inquiries, Department of War (DOW), Joint Chiefs, and other higher authority tasking that are delegated to BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions for action.

(2) Assign Office of Primary Responsibility (OPR) and Office of Coordinating Responsibility (OCR) for responding to official internal and external taskers within specified suspense dates.

(3) Delegate taskers to BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions with a suspense of 10 business days. Tasker Managers for BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions will further delegate the tasker to their respective codes and areas of responsibility.

(4) Review Secret Internet Protocol Router (SIPR) taskers at least once per business day. Delegate to BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions as necessary. Secretariat will task a SIPR Action Tasker in Non-classified Internet Protocol Router (NIPR) ETMS2 to notify those assigned to review and complete the SIPR tasker.

(5) Request extensions for taskers that have less than a suspense of 10 business days. Secretariat will also route extension requests from BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions as they are requested. Secretariat will follow up with the originator for status updates of extension requests.

(6) Be the liaison between tasker originator and point of contact and BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions. Secretariat will update tasker instructions if unclear or ambiguous. Secretariat will clarify if a full electronic package is needed for flag level review (general officer, flag officer, and senior executive service (GO/FO/SES)).

(7) Electronic routing of official correspondence, directives, and documents.

(a) Set up the approval route in ETMS2 if the tasker requires flag level review (GO/FO/SES). N-Codes will be included in the approval route in order to provide official response.

(b) Liaison between BUMED Front Office and BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions. Secretariat will follow the Secretary of the Navy Manual 5216.5, Navy Correspondence Manual, in editing all documents sent for flag level review. If edits are requested before signature, Secretariat will inform the BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions, via the approval route, to make the requested edits.

(c) Upload the dated signed deliverable and close out the tasker.

(8) Provide updates to the Daily Operations Brief with taskers that are overdue and taskers that are coming due.

(9) Provide ETMS2 training during the monthly Command Indoctrination and as requested by BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions.

(10) Maintain an up-to-date list of active BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions Tasker Managers.

(11) Maintain up-to-date templates on the Secretariat SharePoint page in compliance with the Navy Correspondence Manual.

(12) Inform tasker managers on ETMS2 system updates or downtime in a timely manner.

b. <u>BUMED-N03, BUMED-N04, BUMED-N02B, Specialty Codes, and the Regions (Echelon 3); Commanding Officers (CO) and Officers in Charge (OIC) (Echelons 4 and 5)</u>. Responsible for completing and submitting assigned tasks in a timely manner.

(1) Ensure compliance of this directive within their departments.

(2) Assign a tasker manager to be responsible for tasker delegation.

(a) Delegate SIPR and NIPR taskers to the BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions under their organization.

(b) Assign an OPR and OCR for each tasker. OPRs need to consolidate the responses from OCRs. OPRs must wait until all responses are provided before closing the tasker.

(c) If the deliverable requires GO/FO/SES level coordination, delegate the tasker through their chain of command for review and approval.

(d) Taskers requesting GO/FO/SES level coordination will either state GO/FO/SES, formal, or principal coordination in the tasker instructions. All non-concur responses will require a deskside conversation with Chief, BUMED before uploading response.

(3) Ensure responses are properly formatted (to include orthographically correct and grammatically sound), answered, and approved at the appropriate level.

c. <u>BUMED-N03, BUMED-N04, BUMED-N02B, Specialty Codes, and the Regions Task Manager</u>. Each team within ETMS2 is required to have a Task Manager assigned as the point of contact for their organization's tasking. Task managers will:

(1) Ensure SIPR and NIPR taskers are accepted or rejected no later than 24 business hours after assignment by the Secretariat.

(a) Taskers assigned by outside entities will be rejected and recommend reassignment to "BUMED (FRONT OFFICE)" for proper delegation.

(b) Taskers received via email will need to be created in ETMS2 by the requesting entity for tracking and records management purposes.

(2) Ensure tasks are completed by suspense date or request extensions as required. Route extension requests from the action officer (AO) to Secretariat in a timely manner.

(3) Ensure the task, expected deliverable(s), and final signing authority are understood. If unclear or ambiguous, seek clarification as soon as possible. Secretariat will attempt to seek clarification prior to tasker delegation.

(a) Ensure all files are formatted properly and uploaded to the tasker. OPR will create a "BUMED Front Office Ready for Review" folder in the Supporting Documents library in ETMS2 prior to completing the tasker.

(b) Ensure letters are properly serialized before uploading to the ETMS2 tasker. Codes receive their serialization from the Secretariat at the start of every calendar year.

(c) Keep serialization log on the BUMED HQ Correspondence Serial Log Teams Channel up to date to ensure serial numbers are not used more than once. Contact Secretariat if there are any changes to the BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions Front Offices to ensure membership to the Teams Channel is current.

(4) Review all BUMED initiated taskers for completion, and ensure instructions are clear and correct before handing off the tasker to the Secretariat. Inform the Secretariat of any updates or changes to BUMED initiated taskers in a timely manner.

(5) Conduct monthly audits of the users and teams within their BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions or sub-codes. If users need to be removed from their BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions or sub-codes, reach out to the Secretariat to remove users.

(6) Conduct trainings or provide training resources as necessary for their users. Resources can be found with the Secretariat. BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions can request formal trainings from the Secretariat as necessary. First time ETMS2 users will need to complete the online ETMS2 training found on the ETMS2 Moodle site (available at: https://learn.atis.army.mil/moodle/my/courses.php/program/2911). After completion of the online training, users will request an account from the Army Enterprise Service Desk (AESD) support staff via a trouble ticket found on the AESD Web site: https://www.aesmp.army.mil/csm.

(7) Inform Secretariat of any changes in BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions tasker managers immediately.

d. <u>Action Officers will</u>:

(1) Review taskers within 24 business hours of receiving from their BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions Front Office to determine equity. Ensure suspense dates are correct (reject if blatantly erroneous (i.e., year due is previous year) or accept and request extension immediately, not the same day the tasker is due. As extensions are not guaranteed, AOs will continue to work on the tasker as if the extension was rejected.

(2) Ensure the task, expected deliverable(s), and final signing authority are understood. If unclear or ambiguous, seek clarification as soon as possible. Secretariat will attempt to clarify instruction prior to tasker delegation.

(3) Ensure proper and adequate coordination within BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions as soon as possible. Contact the Secretariat to delegate taskers to the Regions that require external coordination. BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions are not permitted to delegate to the Regions directly.

(4) Ensure that tasking is properly accepted or rejected within 24 hours of delegation from their respective Front Office.

(5) Create BUMED initiated taskers by using the default "BUMED Tasker Instructions Template" located in ETMS2. Ensure the instructions, OPR, OCR, background, deliverable, documents, final authority, and suspense are clear. If tasker contains personally identifiable information (PII) or protected health information (PHI), ensure "Is Private" is checked off in the General Section. Once created, hand off to their respective Front Office for review and approval before their Front Office hands off tasker to the Secretariat for further delegation.

(6) Ensure Controlled Unclassified Information (CUI) documents are properly marked, per reference (b). Proper marking of CUI material can be found on the DOW CUI Program site: https://www.dodcui.mil. Upon tasker initiation, if documents are CUI or contain PII, the classification must be changed to unclassified CUI or unclassified PII in ETMS2.

e. Executive Assistant (EA), Deputy Executive Assistant (DEA), Flag Secretary (FS), and Directors for Administration (DFA) will:

(1) Ensure compliance of this directive within their departments.

(2) Ensure responses are properly formatted (to include orthographically correct and grammatically sound) and answered at the appropriate level.

(3) Ensure primary and secondary ETMS2 task managers are assigned within their divisions, branches, or commands.

f. BUMED Front Office. Taskers requiring GO/FO/SES level coordination requires 5 business days to route through the Front Office. BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions are required to deliver an electronic package to the Secretariat. Electronic package components and routing procedures are defined in enclosures (2) and (3). GO/FO/SES level electronic packages will be signed by the lowest level unless stated otherwise in the tasker, e.g., formal and principal requires Chief, BUMED review.

6. <u>Templates</u>. All templates are available via the Secretariat SharePoint page at: https://esportal.med.navy.mil/bumed/ED/ED3/Secretariat/Pages/Templates.aspx.

7. <u>Records Management</u>

    a. Records created as a result of this instruction, regardless of format or media, must be maintained and dispositioned per the records disposition schedules located on the Department of the Navy Directorate for Administration, Logistics and Operations, Directives and Records Management Division portal page at https://portal.secnav.navy.mil/orgs/DUSNM/DONAA/DRM/Records-and-Information-Management/Approved%20Record%20Schedules/Forms/AllItems.aspx.

    b. For questions concerning the management of records related to this instruction or the records disposition schedules, contact the local records manager or the OPNAV Records Management Program (DNS-16).

8. <u>Review and Effective Date</u>. Per OPNAVINST 5215.17A, BUMED-N02B2 will review this instruction annually around the anniversary of the issuance date to ensure applicability, currency, and consistency with Federal, DOW, Secretary of the Navy, and Navy policy and statutory authority using OPNAV 5215/40, Review of Instruction. This instruction will be in effect for 10 years, unless revised or cancelled in the interim and will be reissued by the 10-year anniversary date if it is still required, unless it meets one of the exceptions in OPNAVINST 5215.17A, paragraph 9. Otherwise, if the instruction is no longer required, it will be processed for cancellation as soon as the need for cancellation is known following guidance in OPNAV Manual 5215.1 of May 2016.
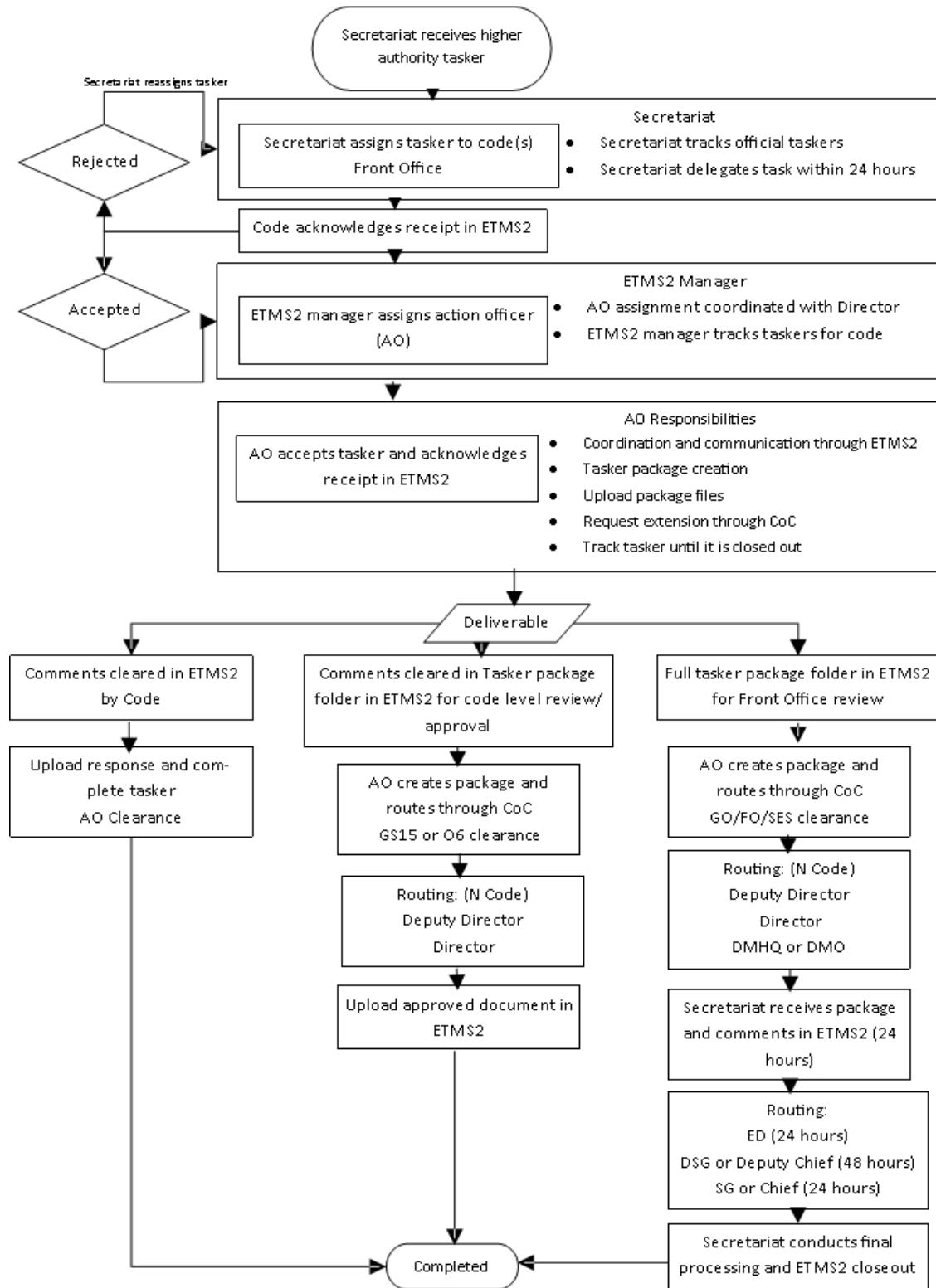
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Releasability and distribution:
This instruction is cleared for public release and is available electronically only via the Navy Medicine Web site, https://www.med.navy.mil/Directives/

Enterprise Task Management Solution System Process Flowchart

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                         ┌─────────────────────────┐
                         │  Secretariat receives    │
                         │  higher authority tasker │
                         └─────────────────────────┘
                                     │
  Secretariat reassigns tasker       ▼
        ┌──────────────────────────────────────────────────────────────────┐
        │                        Secretariat                                 │
    ◇ Rejected    Secretariat assigns tasker to code(s)  • Secretariat tracks official taskers
                  Front Office                            • Secretariat delegates task within 24 hours
        └──────────────────────────────────────────────────────────────────┘
                                     │
                         Code acknowledges receipt in ETMS2
                                     │
        ┌──────────────────────────────────────────────────────────────────┐
        │                        ETMS2 Manager                               │
    ◇ Accepted    ETMS2 manager assigns action officer  • AO assignment coordinated with Director
                  (AO)                                    • ETMS2 manager tracks taskers for code
        └──────────────────────────────────────────────────────────────────┘
                                     │
        ┌──────────────────────────────────────────────────────────────────┐
        │                        AO Responsibilities                         │
        │  AO accepts tasker and acknowledges  • Coordination and communication through ETMS2
        │  receipt in ETMS2                    • Tasker package creation
        │                                      • Upload package files
        │                                      • Request extension through CoC
        │                                      • Track tasker until it is closed out
        └──────────────────────────────────────────────────────────────────┘
                                     │
                               ╱ Deliverable ╲
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Left branch:
- Comments cleared in ETMS2 by Code
- Upload response and complete tasker — AO Clearance
- → Completed

Middle branch:
- Comments cleared in Tasker package folder in ETMS2 for code level review/ approval
- AO creates package and routes through CoC — GS15 or O6 clearance
- Routing: (N Code) Deputy Director, Director
- Upload approved document in ETMS2
- → Completed

Right branch:
- Full tasker package folder in ETMS2 for Front Office review
- AO creates package and routes through CoC — GO/FO/SES clearance
- Routing: (N Code) Deputy Director, Director, DMHQ or DMO
- Secretariat receives package and comments in ETMS2 (24 hours)
- Routing: ED (24 hours), DSG or Deputy Chief (48 hours), SG or Chief (24 hours)
- Secretariat conducts final processing and ETMS2 closeout
- → Completed

Enclosure (1)

GENERAL OFFICER, FLAG OFFICER, AND SENIOR EXECUTIVE SERVICE
ELECTRONIC PACKAGE TEMPLATES

1.   GO/FO/SES electronic package templates consist of the documents listed in subparagraphs 1a through 1d. Electronic package templates are available at: https://esportal.med.navy.mil/bumed/ED/ED3/Secretariat/Pages/Templates.aspx.

    a.   Final documents will be uploaded in a folder labeled "BUMED Front Office ready for review" in the Supporting Documents library in ETMS2.

        (1) Action memo.

        (2) Deliverable (Tab A).

        (3) Supporting documentation (Tab B, etc.).

        (4) Coordination Page (Final Tab).

SUSPENSE TIMELINES

1. Suspense timeline begins once Secretariat is tasked.

2. In the standard 10 business days suspense timeline, BUMED-N03, BUMED-N04, BUMED-N02B, specialty codes, and the Regions will receive 5 business days to respond to a tasker and provide an electronic package, via ETMS2, for flag level review (if required).

3. BUMED Front Office (Secretariat; ED; Navy DSG or Deputy Chief, BUMED; Navy SG or Chief, BUMED) will receive 5 business days to review and sign deliverables.

Task	Action	Suspense
Tasker assigned to Secretariat.	Delegate to BUMED N Codes and Regions.	24 business hours (same day)
BUMED N-Codes receive tasker.	Delegate to subcodes and areas of responsibility.	24 business hours (same day)
AOs receive tasker.	Begin working tasker.	4 business days
GO/FO/SES package arrives in Secretariat.	Secretariat reviews electronic package.	24 business hours
Electronic package routed to ED.	ED reviews electronic package.	24 business hours
Electronic package routed to Navy DSG or Deputy Chief, BUMED.	Navy DSG or Deputy Chief, BUMED review electronic package.	48 business hours
Electronic package routed to Navy SG or Chief, BUMED.	Navy SG or Chief, BUMED reviews electronic package.	24 business hours (same day)
Electronic package returned to Secretariat.	Secretariat uploads final signed document.	24 business hours (same day)