

Department of the Army
Pamphlet 700-142

Logistics

Instructions for Type Classification, Materiel Release, Fielding and Transfer

Headquarters
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UNCLASSIFIED

SUMMARY of CHANGE

DA PAM 700-142

Instructions for Type Classification, Materiel Release, Fielding and Transfer

This major revision, dated 1 July 2014--

- o Adds developmental line item number process (fig 2-1).
- o Updates the type classification process and sample formats in chapter 2 (figs 2-1, 2-3, and 2-4).
- o Adds figures for Total Package Fielding coordination (fig 4-1).
- o Adds a figure for Materiel handoff procedures (fig 5-1).
- o Adds follow-up timelines for materiel transfers open in the Property Book Unit Supply Enhanced System (chap 6).
- o Incorporates Property Book Unit Supply Enhanced procedures previously published as Standard Operating Procedures (chap 6).
- o Updates instructions for Department of the Army Form 5106 (Mission Support Plan) and Department of the Army Form 5682 (Materiel Requirements List) instructions (app B).
- o Updates references, forms, and format of required documents (throughout).
- o Makes administrative changes (throughout).

Logistics

Instructions for Type Classification, Materiel Release, Fielding and Transfer

By Order of the Secretary of the Army:

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General, United States Army
Chief of Staff

Official:



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History. This publication is a major revision.

Summary. This publication outlines procedures for the policy contained in Army Regulation 700–142.

Applicability. This pamphlet applies to the Active Army, Army National Guard/Army National Guard of the United States and the U.S. Army Reserve, unless otherwise stated. This pamphlet is applicable to

all organizations and personnel involved in type classification, materiel release, fielding and transfer, product improvement, or displaced materiel systems developed, acquired, or used by the Army. During mobilization, procedures in this pamphlet may be modified to support policy changes as necessary.

Proponent and exception authority. The proponent of this pamphlet is the Assistant Secretary of the Army for Acquisition, Logistics, and Technology. The proponent has the authority to approve exceptions or waivers to this pamphlet that are consistent with controlling laws and regulations. The proponent may delegate approval authority, in writing, to a division chief within the proponent agency, direct reporting unit, or field-operating agency in the rank of colonel or the civilian equivalent. Activities may request a waiver to this pamphlet by providing justification that includes a full analysis of the expected benefits and must include formal review by the activity's senior legal officer. All waiver requests will be endorsed by the commander or senior

leader of the requesting activity and forwarded through higher headquarters to the policy proponent. Refer to Army Regulation 25–30 for specific guidance.

Suggested improvements. Users are invited to submit comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to Deputy Assistant Secretary of the Army (Acquisition Policy and Logistics), 103 Army Pentagon, Washington, DC 20310–0103.

Distribution. This publication is available in electronic media only and is intended for command levels C, D, and E for the Active Army, Army National Guard/Army National Guard of the United States, and U.S. Army Reserve.

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Glossary

Chapter 1 Introduction

1-1. Purpose

This pamphlet provides procedures for policy set forth in AR 700-142. It contains instructions, process flows, reporting formats, and schedules used to carry out the policies of the Army's type classification, materiel release, fielding, and transfer processes. These procedures are intended to ensure that materiel is acceptable for Army use prior to procurement. Army materiel must be safe, suitable, and supportable. All necessary coordination for and documentation of the orderly and effective deployment and redeployment of Army equipment, including all necessary logistics support, and must be completed.

1-2. References

Required and related publications and prescribed referenced forms are listed in appendix A.

1-3. Explanation of abbreviations and terms

Abbreviations and special terms used in this pamphlet are explained in the glossary.

1-4. Applicability

The guidance and procedures in this pamphlet apply to all materiel developed, acquired, used, and/or managed by the Army as defined in AR 700-142.

Chapter 2 Type Classification Instructions

2-1. General

a. The Type Classification (TC) actions will be reviewed as part of the Materiel Developer's (MATDEV's) Integrated Process Team (IPT) in accordance with AR 700-142, chapter 2.

b. Logistics Control Codes (LCC) and definitions are prescribed in DA Pam 708-3.

c. The Army Milestone Decision Authority (MDA) for TC actions is the applicable Program Executive Officer (PEO).

2-2. Process

This section provides the TC process flowchart and related instructions.

a. All non-expendable materiel authorized by Modification Tables of Organization and Equipment (MTOE), Common Table of Allowances (CTA), and Table of Distribution and Allowances (TDA) will be type classified. See AR 700-142, table 3-3 for TC requirements.

(1) MTOE authorized materiel requires a Basis of Issue Plan (BOIP) in accordance with AR 71-32, paragraph 1-7.

(2) CTA authorized materiel requires a BOI in accordance with AR 71-32, paragraph 7-14.

(3) TDA authorized materiel not previously listed in Supply Bulletin (SB) 700-20; chapter 2 or 8 requires a Letter of Authorization (LOA). This is normally base-level commercial equipment.

b. Figure 2-1 describes the Developmental Line Item Number (ZLIN) to line item number (LIN) process.

c. Figure 2-2 describes the TC processes.

ZLIN to LIN Process

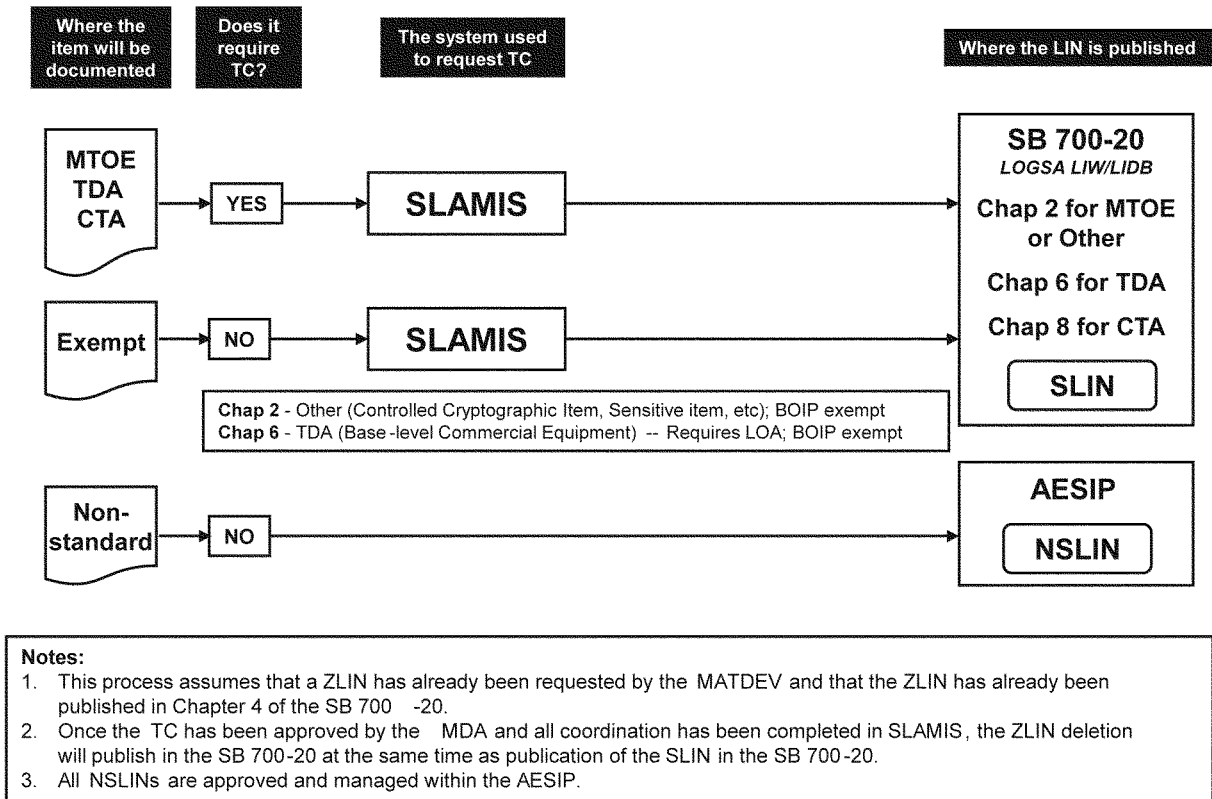


Figure 2-1. Developmental Line Item Number Process

Type Classification Process

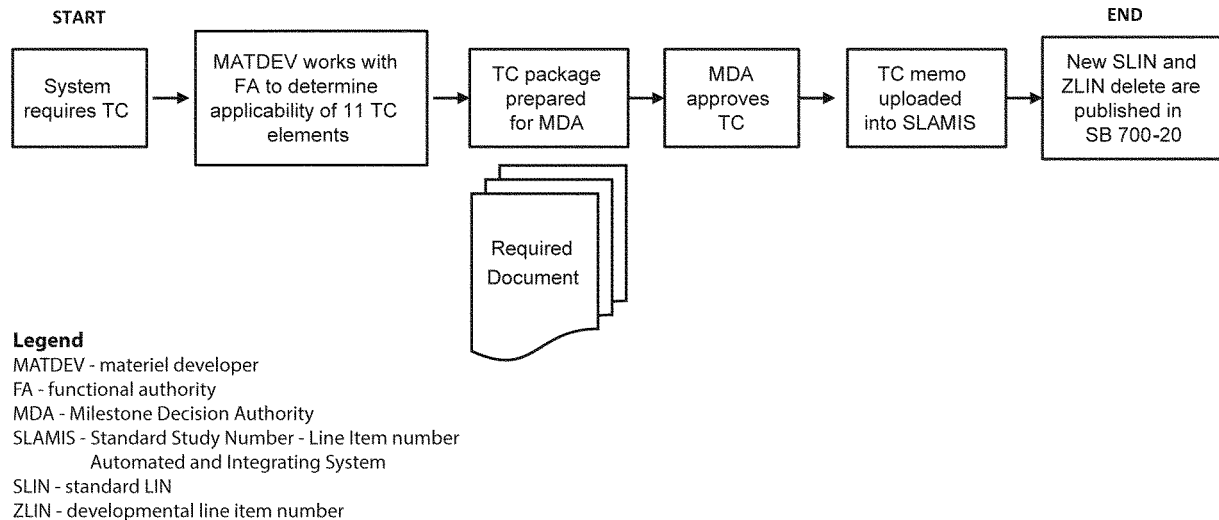


Figure 2-2. Type Classification Process

d. Other materiel (BOIP exempt) may include non-expendable Components of End Items (COEI) authorized on MTOEs or Class V munitions. These items do not have their own BOIP but must be called out on property books to ensure that monthly serial number inventories can be accomplished. Refer to AR 71–32 for a listing of BOIP exemptions. All SB 700–20 chapter 2 and 8 are documented in the systems BOIP as Associated Items of Equipment (ASIOE). A LOA will be used to TC these items. The letter must reference the BOIP as well as statutory or regulatory requirements that necessitate a assignment of a Standard Line Item Number (SLIN).

e. The TDA exempt items are non-expendable materiel that have not been previously listed in either chapter 2 or 8 of the SB 700–20 and are required to support a mission for a TDA activity. TDA exempt items are typically base-level commercial equipment such as a locomotive, non-tactical vehicle, and so forth.

f. ZLINs will only be used for acquisition programs.

2–3. Type classification instructions

a. TC standard (TC–STD) applies to those materiel items determined to be acceptable for the mission intended, capable of being supported in their intended environment and acceptable for introduction into the Army Inventory.

b. The PM will—

(1) Conduct required activities outlined in AR 700–142, table 3–3 throughout the Materiel Solution Analysis, Technology Development and Risk Reduction, and Engineering and Manufacturing Development phases to ensure proper integration.

(2) Prepare the TC package for consideration by the MATDEV IPT.

(3) Request TC approval from the Milestone Decision Authority (MDA).

(4) Assign TC in accordance with AR 700–142, chapter 3.

(5) Ensure MDA approves TC assignment is an enclosure to the Acquisition Decision Memorandum (ADM).

(6) Forward a copy of the TC documentation with the MDA memorandum approving TC decision to the supporting Life Cycle Management Command (LCMC). Figure 2–3 is a sample of a milestone decision authority type classification decision memorandum.

(7) Complete automated Materiel Status Record (MSR) submission into Standard Study Number-Line Item Number Automated Management and Integrating System (SLAMIS) for publication in SB 700–20. Include the TC designation (standard or limited procurement) with appropriate LCCs, ZLIN, National Stock Number (NSN), and supply class for type classified materiel and separately type classified components.

(8) Submit the request for reclassification in SLAMIS where it will go through coordination with the appropriate stakeholders.

c. TC is complete when the LCMC receives the SLAMIS generated e-mail notification with SLIN assignment.



DEPARTMENT OF THE ARMY
SEA LIFT SYSTEMS COMMAND
2001 BOAT AVENUE
FORT EUSTIS, VIRGINIA 22306

DARZ-BOA

MEMORANDUM FOR Assistant Secretary of the Army, Acquisition, Logistics and Technology

SUBJECT: Type Classification Approval for the High Mobility Pontoon Boat (HMPB).

1. I have reviewed the recommendation from my staff that conducted an in process review on the HMPB on 21 December 2007. The recommendation presented to me states that the HMPB.
 - a. Is acceptable for the mission intended
 - b. Meets regulatory guidelines for entry into the Army Inventory.
 - c. Is safe for all aspect of use.
 - d. Is logistically supportable in its intended environment.
 - e. Meets technical performance requirements
 - f. Has an approved Basis of Issue Plan
 2. Based upon the recommendation provided. I approve the High Mobility Pontoon Boat to be Type Classified Standard and direct the assignment of the logistics control code of "A".
 3. Use the following detailed information for the type classification action:
 - a. Nomenclature: High Mobility Pontoon Boat
 - b. ZLIN: Z00789
 - c, NSN: 2405-01-900-0020
 - d. RIC: 7
 - e. Type Classification Standard
 - f. LCC: A
 - g. BOIPDF No: K24567
 - h. Requirement High Mobility Pontoon Boat Capability Production Documents (CPD). Approved 22 June 2006.
 4. This materiel replaces the Low Speed Row Boat, LIN S12360, NSN 2450-01-909-1800. Assign a logistics control code of "B" to this materiel in conjunction with this action.
 5. Identify the High Mobility Pontoon Boat as a major system in AR 700-138, Army Logistics Readiness and Sustainability.
- MILESTONE DECISION AUTHORITY

Encl

Patrick L. Atwater
MG, USA
Program Executive Officer
Sea Lift Systems Command

Figure 2-3. Sample of a Milestone Decision Authority type classification decision memorandum

2-4. Basis of Issue Plan deferment

Some programs, especially accelerated acquisition programs, may require deferment of Headquarters, Department of the Army (HQDA) approval of the BOIP prior to TC. This deferral does not eliminate the requirement for BOIP Feeder Data (BOIPFD) submission to the U.S. Army Force Management Support Agency (USAFMSA).

a. Request for a BOIP deferral will be approved in writing by the MDA and included in the TC package. Figure 2-4 is a sample of a BOIP deferral memorandum.

b. The PM provides copies of the deferral to the Deputy Chief of Staff, G-8 (DAPR-FD), DCS, G-3/5/7 (DAMO-FM), and USAFMSA.

c. Deferral requests should include the following information:

- (1) The title of the approved capability requirements document.
- (2) Catalog of Approved Requirements Documents System (CARDS) reference number.
- (3) LIN.
- (4) Justification for TC approval prior to BOIP approval.
- (5) Negative impacts (address support capability and training base).

d. The BOIP deferral memorandum will be included in the SLAMIS request for TC.



DEPARTMENT OF THE ARMY
SEA LIFT SYSTEMS COMMAND
2001 BOAT AVENUE
FORT EUSTIS, VIRGINIA 22306

DARZ-BOA

MEMORANDUM FOR Commander, U.S. Army Force Management Support Agency (USAFMSA), ATTN: MOFIFMR, 415 Sherman Avenue, Fort Leavenworth, KS 66027-2300

SUBJECT: Basis of Issue Plan (BOIP) Deferral Request for Future Combat System

1. Reference DA Pam 700-142, paragraph 2-4.
2. The purpose of this memorandum is to coordinate my request to defer the BOIP/QQPRI prior to type classification
3. I request deferral of the BOIP for NAME OF SYSTEM

a. The title of the approved capability production document: NAME OF SYSTEM

Capabilities Production Document (CPD) approved May 2009.

b. Catalog of Approved Requirements Documents (CARDS) Number (s): F1234

c. Developmental line item number (ZLIN)/LIN: X24578.

4. Justification to defer:

a. Awaiting HQDA approval of BOIP. USAFMSA states that the tentative approval date is May 3, 2010. This date does not support the necessity to field NAME OF SYSTEM to meet current operational requirements. The NAME OF SYSTEM BOIPFD was originally submitted and accepted in August 2005. The BOIP # is 87564.

b. TC and materiel release approval is required for the NAME OF SYSTEM. The Program Management office needs to execute scheduled fieldings to Command(S).

c. Key actions accomplished:

- (1) Equipment and manpower requirements identified.
- (2) All stakeholders identified.
- (3) Manpower, special tools, ASL, COEI, TMDE identified and on hand to support fielding.
- (4) MARC/BOIP feeder data/ASOIE/AAL completed.
- (5) Total Package Fielding (TPF) requirements identified and on hand.
- (6) Gaining command budgeted for Operation and Maintenance.
- (7) Materiel Fielding Agreement (MFA) signed between PM, FORSCOM, USAR and National Guard Bureau.
- (8) Materiel Fielding Plan (MFP) completed and accepted.

Figure 2-4. Sample of a basis of issue plan deferral memorandum

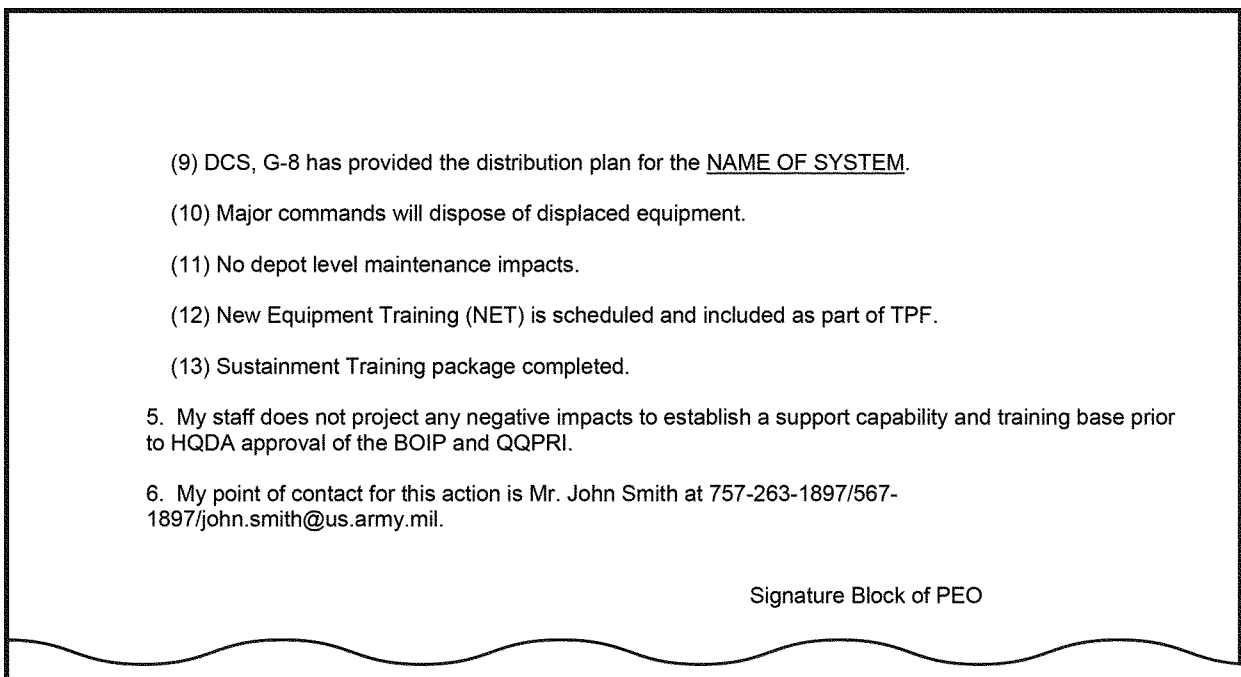


Figure 2-4. Sample of a basis of issue plan deferral memorandum (continued)

2-5. Type classification-limited procurement instructions

- a. Items will only be TC-limited procurement (LP) in accordance with AR 700-142, table 3-1.
- b. The TC-LP is authorized for items required for low rate initial productions (LRIP), initial quantities for Operational Test and Evaluation (OT&E), and demonstrations.
- c. For non-developmental items entering the life cycle at milestone (MS) C (LCC-P) see DA Pam 708-2, table 3-22.
 - (1) TC-LP designation may be approved based on a performance specification(s) or a functional purchase description to select a manufacturer(s) and model number(s).
 - (2) Assign a national stock number (NSN) once necessary data, model number(s), and performance specifications, is available.
 - (3) Type classify the capability as TC-LP (LCC-P).
 - (4) Once the manufacturer is selected and all TC-STD requirements are met, the PM will reclassify the item as TC-STD.
 - (5) These procedures alleviate the need for a ZLIN. Use of SLIN is accepted for non-developmental items that enter at MS C.
- d. For LRIP (LCC-T) see DA Pam 708-2, table 3-22.
 - (1) The TC-LP is the minimum TC requirement for LRIP. LRIP quantities are used to establish the production base, ramp up to the full rate production (FRP), and produce systems for initial operational testing and evaluation.
 - (2) Items type classified TC-LP must be reclassified as TC-STD no later than the FRP decision.
- e. For urgent operational needs (LCC-U) see DA Pam 708-2, chapter 3-22.
 - (1) TC-LP is the minimum TC requirement for any urgent operational need item which is not already type classified.
 - (2) Criteria for TC-LP of an item required for urgent operational use should include the following:
 - (a) Designated as an acquisition program.
 - (b) An approved Joint Capability Integrated Development System (JCIDS) capabilities document.
- f. The recommendation for TC-LP must meet the requirements in AR 700-142, table 3-1.
 - (1) PMs requesting TC-LP (LCC-T) should identify the plan for all materiel in the acquisition strategy.
 - (2) The PM and LCMC will annually review all TC-LP materiel to reclassify materiel to TC-STD, extend the conversion to TC-STD date or eliminate the materiel.
 - (3) The specified quantities of items procured under the TC-LP classification will not be obtained with the intent of

additional procurement. However, additional quantities of TC-LP (LCC-U) items may be procured with the approval of DCS, G-3/5/7.

2-6. Instructions for contingency, training, and/or homeland defense items

a. The MDA may designate a major item for contingency, training, and/or homeland defense (LCC-F) that was previously TC-STD. Requests for reclassification of materiel to LCC-F must be submitted in SLAMIS with supporting documentation.

b. Redesignation of a major item for contingency should not occur until the replacement item has been identified.

c. Contingency items will not be re-produced. Existing assets may be redistributed and are normally supported with repair parts and components on-hand in the supply system or by controlled substitution.

d. Contingency items should not be overhauled without specific program approval by DCS, G-4 in coordination with the Assistant Secretary of the Army (Acquisition, Logistics and Technology) (ASA (ALT)). Exceptions are authorized for support of approved international logistics programs.

e. Contingency items are not documented on BOIPs, tables of organization and equipment (TOEs), MTOEs and/or TDAs. They may be treated as an authorized substitute (if in SB 700-20 as such) or an in-lieu-of item.

2-7. Type Classification-obsolete instructions

a. A type classified item will be reclassified to obsolete (TC-OBS) when it is no longer required or acceptable for the intended mission, due to absence of requirement or authorization; it has been replaced by another TC-STD item; or it has become too costly to repair and support and has been replaced by another TC-STD item or no replacement is required.

(1) Reclassify materiel to LCC-S when it is no longer acceptable for the intended missions, and issue disposition instructions for the retrograde or removal of materiel.

(2) Reclassify materiel to LCC-O when all assets have been removed from active, Army National Guard (ARNG), and United States Army Reserve (USAR).

(3) Submit a request for reclassification in SLAMIS with supporting documentation where it will go through coordination with the appropriate stakeholders.

b. Once the approved reclassification request (LCC-O) is received by the Logistics Support Activity (LOGSA), the TC-OBS item (NSN level) is removed from SB 700-20.

2-8. Special Type Classification instructions

a. *Item modification.*

(1) An improved or modified item should be separately type classified when the modification or conversion involves one or more of the following:

(a) Necessitates special management because it incorporates or requires stockage of major components such as, circuit card assemblies, engines, or consumable items that are different from those required for the basic item (in other words, change in form, fit, or function or adds new capability that may require a new LIN, NSN, or model number).

(b) Changes functional and physical characteristics affecting the quality of personnel and/or ASIOE-required to support the end item.

(c) Negatively alters the safety or health characteristics.

(d) Causes personnel changes or new Military Occupational Specialties (MOS) are identified.

(e) Requires a new BOIP per AR 71-32.

(f) Results from changes to the program's Capabilities Production Document (CPD).

(g) Changes in the configuration result in a change in transportability characteristics or requirements.

(2) The functional authority (FA), in coordination with the MATDEV and the logistician, determines whether or not separate TC (as a distinct new item) is required for the modified item. The agency notes this in the documentation supporting the proposed modification.

(3) Type classification of sets, kits, outfits, and tools (SKOT).

(a) SKOT should be type classified as a single entity and treated like any other type classified item of equipment. The MATDEV may replace components of the SKOT without requiring a reclassification action, provided the item continues to meet military requirements of the generic description of that LIN in the SB 700-20, and the changes do not significantly affect safety or performance characteristics or require special management of the item. When component changes do not meet this criteria, the FA must record the replacements in the automated MSR and submit changes to update the supply catalog. The circumstances, evaluations, and support considerations leading to the change should be explained in the record.

(b) All components of SKOT, including computer programs that are not separately authorized or issued, automatically assume the highest TC designation assigned to any SKOT of which they are a component. All components of the SKOT are type classified when the SKOT is type classified.

(c) If an item is a component of more than one SKOT, and is an item of separate issue, the item should be identified as having the highest TC designation awarded.

(d) When the need for a SKOT no longer exists due to consolidation or end-item elimination, the item manager should initiate the action to reclassify the SKOT LIN as obsolete, and remove the item from the SB 700–20 and supply catalog in accordance with DA Pam 25–30. Removal may be done by completing the same process required for TC–OBS.

(e) Items developed jointly or by other military Services or agencies when acquired for U.S. Army use require TC. Army TC–STD requirements remain applicable to this materiel.

(f) Army testing should be limited to performance and supportability requirements not already demonstrated by prior developmental and operational testing.

(g) When applicable, use of other service or agency activity or documentation is encouraged. See AR 700–142.

b. Commercial and/or non-developmental items. Many requirements for TC–STD may be satisfied by commercial activities (for example, environmental, quality, safety, catastrophic and critical hazards, and transportability evaluations). Additional testing requirements may be significantly reduced (tailored) prior to TC, based on contractor data and the MATDEV surveys of user experience. The results of this data, to include surveys, are evaluated and addressed in the Army Test and Evaluation Command (ATEC) Operational Test Agency Milestone Assessment Report (OMAR) developed to support the MDA TC decision.

Chapter 3

Materiel Release Instructions

Section I

Instructions

3–1. General

This chapter outlines instructions, procedures, and formats used in the Army’s management of the materiel release (MR) process. The MR process is intended to ensure that Army materiel is safe, operationally suitable, and supportable before release or issue to users. The process is applicable to all materiel, except that which is exempt as identified in AR 700–142.

3–2. Materiel release process

a. The PM identifies a new system development (program) to the LCMC and initiates a MR package in sufficient time to support FRP and fielding events. The MR coordinator provides a MR process briefing to the PM who begins forecasting the MR.

b. The PM determines the appropriate MR for the materiel system.

c. The PM coordinates with the FAs to determine the necessary MR activities. The PM should propose which activities are applicable based upon the scope of the program and request concurrence of the FAs. FA’s are listed in AR 700–142, table 4–3.

d. The FAs should tailor the MR requirements and provide a memorandum documenting the necessary MR activities to the PM with an information copy provided to the Materiel Release Office (MRO).

e. The PM plans the necessary MR activities in the Acquisition Program Baseline (APB), conducts necessary MR activities based upon a tailored plan, and provides documentation to the MRO when the MR activities are complete. The FA provides assurance to the PM that certification requirements have been met.

f. The MRO verifies activities based upon the documentation provided and assembles the MR packet that is forwarded to the Materiel Release authority (MRA) with a recommendation.

g. The MRA approves the MR full (FMR), conditional (CMR), training (TMR), software (SMR) or urgent materiel release (UMR). The MRO notifies the PM of the decision and enters it into the Materiel Release Tracking System (MRTS).

3–3. Materiel release process and responsibility

To ensure that the requirements for MR are met, the PM will give careful consideration to MR requirements during all activities and proactively seek a MR decision prior to Full Rate Production (FRP).

a. The PM will—

(1) Analyze the program when developing the support strategy for the system and determine which MR requirements are necessary to achieve a FMR using AR 700–142, table 4–1, 4–2, and 4–3 for hardware, and table 4–5 for software materiel release.

(2) Prior to pursuing CMR for a system entering FRP, obtain concurrence from the Army Acquisition Executive (AAE), unless it is intended to CMR LRIP assets only.

(3) Propose MR activities to the FAs and seek their concurrence. Resolve any issues when there is a non-concurrence.

(4) Plan MR Activities as part of the APB.

(5) Complete MR activities during the course of program development and submit documentation to the FAs to provide for a FMR decision.

(6) Provide a MR get-well plan for every system requiring a CMR. Use table 3–1 to categorize the issues in the get-well plan.

(7) Notify the user (Army command (ACOM), Army service component command (ASCC), direct reporting units (DRUs), and other affected program participants) whenever the Get-Well Dates (GWD) are revised, and post changes into MRTS. The PM shall demonstrate that all issues were clearly articulated to the gaining command(s) (GC) prior to formal notification.

(8) When it is determined the projected GWD will not be met, submit a detailed explanation for the failure to meet that date no later than 30 days prior to the GWD. Request should be submitted to the MRO for review and action to obtain approval or disapproval. If disapproved, the PM must schedule a meeting with the approving authority of this action. The request will include—

(a) Item name and date of release approval.

(b) Name of user, and quantities fielded to date.

(c) Description of the condition(s) preventing full release.

(d) Old and new GWD with impact(s).

(e) Reason for failure to achieve original GWD.

(f) Action taken to preclude recurrence.

(g) An updated get-well plan and status report in MRTS.

b. The FAs will—

(1) Review MR activities proposed by the PM with emphasis on elimination of those activities that are not necessary for the MR of the system.

(2) Document those activities (within their functional areas) necessary to achieve a FMR and provide the memorandum to the PM and MRO.

(3) Provide necessary documentation to the PM to render a MR decision.

c. The LCMC MRO will—

(1) Brief the PM on the MR process at program initiation, facilitate coordination between the PM and FAs and ensure that a timely MR decision is provided to the PM.

(2) Enter or approve the required information into the MRTS in accordance with AR 700–142, paragraph 4–13. Users must request access to MRTS. The MRTS is at <https://acqdomain.army.mil>. Once in the AcqBiz portal, select the Applications tab, and then click on MRTS. The system will be listed on the MRTS forecast using the NSN, official nomenclature, and model number.

(3) Process request for MR approval.

(4) Process GWD extension requests.

(5) Process closure of conditions for CMR.

(6) Monitor CMR until FMR is achieved.

(7) Manage UMRs in MRTS until closed.

Table 3–1
Get well plan issue categories

Category	Description
1	Safety - major mission impact
2	Funding - minor mission impact
3	Test - insufficient data requiring further testing
4	Performance - issues negatively affecting performance
5	Supportability - issues negatively affecting supportability (shortfalls of spares: tools, test, measurement, and diagnostic equipment (TMDE); interim contractor support (ICS))
6	Other - includes any other pertinent issues

3-4. Materiel Release packages and initiation

A MR package consists of documentation provided to the MRA to approve a MR decision. This package may include all or some documentation outlined in AR 700-142, a summary of the activities necessary to make the decision or a combination of both. Each LCMC MRO may tailor the MR package to best serve the command. The package must at a minimum contain FA certifications defined in AR 700-142.

a. Developmental system MR requests should be initiated no later than 180 days before the scheduled first unit equipped date (FUED) or handoff date, so that approval is secured 30 days prior to FUED.

b. Commercial and non-developmental items (C/NDI), should initiate the MR request no later than 120 days before handoff so that approval can be obtained 30 days prior to FUED.

3-5. Materiel release offices

Table 3-2 outlines coordination points of contact for each LCMC and separate organizations.

Table 3-2
Materiel release offices

Organization	Address	Phone	E-mail
AMCOM LCMC	Building 5400 Flower Rd Redstone Arsenal, AL 35898	(256) 842-2774 (256) 842-9009	acom.mrts@amredec.army.mil
CECOM LCMC	Building 6001, Combat Drive, Aberdeen Proving Grounds, MD 21005	(443) 861-6049	usarmy.apg.cecom.mbx.lrc-leo-materiel- release@mail.mil
TACOM LCMC	6501 E. 11 Mile Warren, MI 48397-5000	(586) 282-5817	usarmy.detroit.tacom.mail.lcmc-materiel-release- program@mail.mil
ARDEC	Building 62N Picatinny, New Jersey 07806	(973) 724-4924	usarmy.pica.ardec.mbx.materiel-at-ardec@mail. mil
JM&L LCMC JMC	Building 350 Rock Island, IL 61299	(309) 782-6501	usarmy.RIAjmc.mbx.materiel-release-inbox@mail. mil
USA PEO STRI, SFAE-STRI-PS-Q	12350 Research Parkway Orlando, FL 32826	(407) 384-3737 (407) 384-5367	materielrelease@peostri.army.mil
INSCOM	U.S. Army Intelligence & Security Command 8825 Beulah St. Ft. Belvoir, VA 22060-5246	(703) 706-2451	usarmy.belvoir.inscom.list.g3nw-rd@mail.mil
JPEO CBD, ATTN: SFAE-CBD	5101 Hoadley Road Bldg E5101 Aberdeen Proving Ground, MD 21010	(410) 436-3000	usarmy.apg.jpeo-cbd.mbx.jpeo-cbd-hq@mail.mil

Note: PMs are encouraged to contact their supporting MROs at program initiation or as early as possible.

Section II

Supporting Functional Authority Instructions

3-6. Safety office instructions

The supporting LCMC safety office is responsible for formulating a safety position and certifying that the materiel is safe to the MRA.

a. The PM will coordinate with the supporting LCMC safety office who will tailor the activities necessary to complete this certification, reference AR 700-142, table 4-1.

b. The PM should provide the supporting safety office with the required documents or certifications that summarize these activities at the conclusion of the activity.

c. The supporting safety office will provide a formal recommendation to the MRA that summarizes the documentation and may include such documentation as part of the MR package.

3-7. Supportability instructions

The supporting LCMC is responsible for formulating a supportability position and certifying that the materiel is supportable to the MRA.

a. The PM will coordinate with the supporting FA who will tailor the activities necessary to complete this certification, reference AR 700-142, table 4-3.

b. The PM should provide the supporting LCMC with the required documents or certifications that summarize these activities at the conclusion of the activity. Emphasis will be placed on measuring the supportability of the program using the approved Supportability Strategy (SS) or Life Cycle Sustainment Plan (LCSP), focusing on the integrated product support elements as outlined in AR 700-127.

(1) The supporting LCMC will tailor the requirements based upon the specifics of the program.

(2) An Army logistician assessment will be provided to the PM for inclusion to the MR package. This assessment provides the MRA an independent evaluation of the program and its supportability.

(3) The Army logistician may request information from the LCMC that is working the supportability certification to help provide the assessment.

(4) The Army logistician may comment on other aspects of safety and suitability as part of their assessment if these aspects are relevant to the supportability of the materiel in the field.

c. As the supportability FA, the supporting LCMC will provide a formal recommendation to the MRA that summarizes the documentation and may include such documentation as part of the MR package.

Section III Procedures

3-8. Procedures for Readiness for Issue Certification

An abbreviated MR action, or a Readiness for Issue Certification (RFIC), can be used for items that will have follow-on releases or ammunition that undergo continuous testing in the production environment. Materiel systems that are unchanged since the last FMR, with no degradation in performance, logistics support, quality, and safety, may also use a RFIC, provided that all applicable requirements below are met. Otherwise, a FMR process must be pursued.

a. *Availability of materiel.* The proponent must present evidence of availability of materiel. A minimum of three lots must be available for release. (Fewer than three lots can be released at the discretion of the MRA with strong rationale). The following documents are acceptable as evidence of availability of materiel.

(1) A signed DD Form 250 (Material Inspection and Receiving Report).

(2) A statement from the contracting officer or system item manager attesting to the availability of materiel.

b. *Design activity certification.* The proponent must present certification from the appropriate supporting design activity that the following statements are true:

(1) The item to be released does not represent a new design (in the event that items are procured using a performance specification). Otherwise, the RFIC procedure will not apply.

(2) There are no changes affecting form, fit, or function of the items since the last FMR.

(3) The design activity concurs with the RFIC action.

c. *Safety certification.* The proponent must obtain a safety certification from the supporting safety office that certifies the following:

(1) The risk for all identified safety hazards associated with the item being released in its operational system configuration have been eliminated or accepted by the appropriate authority.

(2) New final hazard classifications have been obtained (in the event that items get broken out into sub-components).

(3) A new Army fuze safety review board certification is not required (in the event that items are procured using a performance specification).

(4) The safety office concurs with the RFIC action.

d. *Configuration and reliability, availability, and maintainability (RAM) certification.* The proponent must obtain a configuration and RAM certification from the supporting quality and/or system manager that certifies the following:

(1) There are no unresolved quality issues or deficiencies affecting the MR.

(2) Adequate test and evaluation were conducted and no deficiencies or shortcomings were identified in the process.

(3) The lots passed first article and lot acceptance testing. RAM requirements were met.

(4) The quality engineering office concurs with the RFIC action.

(5) The stockpile surveillance plans are adequate and in place, if applicable.

e. Logistics support certification. The proponent must obtain a logistics support certification from the supporting logistics support office that certifies the following:

- (1) Required support equipment, including spare and repair parts, technical manuals and other publications, are both available and current within the wholesale supply system or will be available with the fielding of the item.
- (2) There are no issues affecting integrated product support elements.
- (3) There are no unresolved malfunction investigation files pertaining to the item being released.
- (4) The logistics support office concurs with the RFIC action.
- (5) Coordination and approval of the host nation are obtained as required.

f. Explosive ordnance disposal (EOD) certification. The proponent must obtain an EOD certification from the U.S. Army Materiel Command (USAMC) EOD Staff Officer, through the supporting EOD office (RDAR-MEX, Building 91N, Picatinny Arsenal NJ 07806-6234) at the U.S. Army Armament Research, Development and Engineering Center (ARDEC). A new EOD certification is required in those cases in which there have been design changes that will have any impact on EOD procedures. The USAMC EOD Staff Officer will certify the following:

- (1) Required updates to EOD Technical Manual (TM) 60-series publications have been prepared and submitted to the Joint Service EOD Publications Activity (U.S. Naval EOD Technology Division, Indianhead, MD) for incorporation into the EOD TM 60-series publications.
- (2) EOD tools and equipment are either available or will be available with the fielding of the item.
- (3) There are no issues affecting the EOD supportability of the item.
- (4) The USAMC EOD staff officer concurs with the RFIC action.

g. Environmental supportability certification. The proponent must obtain an environmental supportability certification from the supporting environmental office in those cases in which there have been design changes that would have any impact on the environmental status of the item in question. It must certify the following:

- (1) There are no outstanding environmental concerns since the last FMR.
- (2) All environmental documentation has been prepared and approved, in accordance with AR 200-1.
- (3) The environmental office concurs with the RFIC action.

3-9. Procedures for follow-on Materiel Conditional Materiel Releases

An abbreviated MR process will be used for the follow-on CMR that occurs when there is an increase in quantity, a change in location, change in command or a change in application. A follow-on CMR may be approved at the LCMC MR Coordinator level as a follow-on CMR in accordance with AR 700-142. It will use a “delta” supporting data package (SDP). The delta SDP requires—

- a.* The initial release approval memorandum.
- b.* Status of each issue on the MR get-well plan.
- c.* A user command urgency of need and acceptance of conditions statement signed by a general officer or designated representative.
- d.* Any available updated ATEC independent evaluation and Army logistician status on supportability issues.
- e.* Updated FA position that requirements in Safety, Suitability, and Supportability that have not been adversely changed from the initial CMR.

3-10. Procedures for urgent materiel releases

a. The DCS, G-3/5/7 will validate urgent requirements for additional capabilities identified by units in accordance with Operational Needs Statements (ONS) procedures. Equipment authorized by HQDA approved or validated MTOE, TDA, mission essential equipment list (MEEL) ONS, or any DCS, G-3/5/7 approved authorization or validation memorandum, message, letter, order, or HQDA sanctioned tests and demonstrations do not require additional validation of urgency to support the MR process. Materiel which is not a component of a program of record will only be authorized and/or sustained for the purpose of the military operation, training, or readiness need identified unless additional DCS, G-3/5/7 guidance is issued. Upon completion of the operation, training, readiness need, or earlier if the ACOM and/or Combatant Commander determines there is no longer an operational need for the system and/or materiel, DCS G-8 (DAPR-FD) will provide guidance to the PM to withdraw the system and/or materiel, close out the UMR, and provide the appropriate disposition instructions to the field to regain control of the UMR system and/or materiel.

b. An Occupational, Safety, and Health Administration (OSHA) 1910-1200 compliant Safety Data Sheet (SDS) summarizing all known safety and health hazard issues and their mitigation plans will be conducted by the appropriate AMC LCMC Safety Office and be coordinated with the U.S. Army Public Health Command (PHC) and ATEC for their input. This assessment will be revisited when configuration changes are made, when the operational mission profile is changed, when an operational safety incident occurs, or at least annually to assess any safety risk. These safety assessments will be tracked in MRTS and updated accordingly.

- (1) The PM will notify the appropriate LCMC Safety Office on any configuration changes or safety incidents during

operations to allow an update to the assessment. The reviews and any reassessment of safety will be coordinated with ATEC AEC.

(2) The PM will track and identify safety hazards in a hazard tracking system.

c. System and software requiring interoperability certification, for example the Army Interoperability Certification (AIC) will undergo an initial interoperability analysis by the Army's Chief Information Officer (CIO)/G-6 to identify shortfalls and limitations. Approval for a UMR is not an exemption from the requirement to obtain AIC certification. The system's AIC certification requirement must be completed within one year of obtaining the UMR or the system will be subject to removal from the field. The AIC certification requirements will be tracked in MRTS and updated accordingly.

d. Upon receipt of the DCS, G-3/5/7 or Joint Urgent Operational Needs Statement (JUONS) validation documentation, the PM will request an acceptance statement from the GC and/or requestor. The PM's written request will notify the GC of the support strategy and all known equipment and supportability issues. This statement must include all known environmental, safety and health hazards, operational and support limitations, interoperability limitations, and user restrictions. The GC will provide an acceptance statement, signed by a general officer, or civilian equivalent, accepting the system and/or materiel with all known safety risks and supportability issues.

e. Documentation required for supporting UMR actions.

(1) The DCS, G-3/5/7 ONS validation decision, directed requirement, JUONS is required to initiate the UMR procedure. DCS, G-3/5/7 validation will take the form of either an ONS validation memo or message traffic communication results of the Army Requirements and Resourcing Board (AR2B) process prepared by DAMO-CI. A HQDA generated requirement to acquire, field, and sustain capabilities will be documented in the Directed Requirement Memorandum. However, DCS, G-3/5/7 validation is not required if the unit is already authorized the equipment on its MTOE.

(2) Equipment Common Operating Picture (ECOP), the Army's ONS database will specify the following information to facilitate coordination of the UMR action: requiring quantity, gaining unit, geographic location, application, and point of contact at the system's and/or materiel's destination.

(3) An OSHA 1910-1200 compliant safety data sheet with Globally Harmonized System (GHS) labeling prepared by the AMC LCMC Safety Office summarizing all known issues and their mitigation plans.

(4) Airworthiness statement, if applicable.

(5) EOD statement from the USAMC EOD Staff Officer confirming positive EOD support and/or coverage for the requested UMR action, if applicable.

(6) The PM's written request for acceptance statement from the GC and/or requestor and the acceptance statement signed by a general officer or civilian equivalent.

(7) Once approved, UMR actions will be entered by the appropriate MR coordinator into MRTS.

(8) Following approval of a UMR, ATEC AEC, the LCMC safety office USAPHC, and the Survivability/Lethality Analysis Directorate of the Army Research Laboratory (SLAD/ARL) will recommend issues in need of further testing or assessment, to the PEO. Within restraints of materiel availability, the further assessment of testing will be performed concurrent with UMR fielding.

f. Future requirements, broader applications.

(1) The DCS, G-3/5/7 (DAMO-CI), in coordination with the US Army Training and Doctrine Command (TRADOC) and ATEC will determine if systems and/or materiel, including software, fielded to support urgent requirements have broader application within the U.S. Army. If there is broader application, DAMO-CI, will provide guidance to initiate or modify capability requirements documentation, authorization documents, and acquisition strategies.

(2) The DCS, G-8 (DAPR-FD), will coordinate with the PM to take necessary steps to continue system development and move to TC and FMR for materiel produced within acquisition programs, including new or modified acquisition programs initiated because of DCS, G-3/5/7 guidance.

(3) In some cases where an acquisition program will not be established, the DCS, G-8 will authorize and resource, type classify and MR equipment that remains in the Army inventory. Generally, the Army shall type classify and MR any materiel that—

(a) Remains a critical platform to maintain a required capability.

(b) Has been fielded to more than one brigade with a quantity of greater than 1,000 units.

(c) Has a planned useful service life greater than five years.

(d) Has a support plan that will expire before the item is removed from the field.

(e) Conforms with the applicability outlined in AR 700-142.

g. Transfer of UMR Systems and/or Materiel. The operational situation may dictate that UMR system and/or materiel in a unit must remain deployed as the unit rotates out and a new unit rotates in. This Theater Provided Equipment (TPE) will be identified to the losing and gaining units by HQDA message (DAMO-CI). The PM will be an info addressee on these messages. Accountability for TPE equipment will transfer from losing to gaining unit as governed by AR 710-2. Other Inter-theater transfers of TPE equipment are prohibited unless approved by DCS,

G-3/5/7. The PM will notify the appropriate MR coordinator of any change in ownership in order to update the MRTS database. A change in ownership does not constitute a new MR action.

Section IV

Evaluation and assessments

3-11. Procedures for risk management

This paragraph provides a framework for using risk management (RM) for MR.

a. The MATDEV shall coordinate with the MRO to schedule a Risk Management Board (RMB) that includes members from the FAs identified in AR 700-142, tables 4-1 through 4-3. Additional members may be added if approved by the MRO on behalf of the MRA. The MATDEV and MRO must ensure that personnel with the requisite knowledge to conduct the assessment and evaluate the risk of each MR activity or document participate in the RMB.

b. RM can be used when evaluating any JCIDS supported materiel (munitions, weapon system, software, or other item of military materiel) for use in the Army that has been previously fielded by another military Service or Agency. This applies to materiel that the Army is evaluating for use without modification, and materiel that will be modified for Army use. RM should also be used when evaluating materiel that has been part of the Army's inventory and was used by Soldiers prior to implementation of MR policy.

(1) The RMB can only recommend the materiel under evaluation for a conditional or full MR. This policy cannot be used to recommend an urgent or training MR.

(2) The MATDEV will also obtain a CARDS number in order to get a SLIN assigned in accordance with AR 700-142, as appropriate.

(3) A FMR can be inferred for materiel that has been part of the Army's inventory and was used by Soldiers prior to 1973. If there have been any reported safety incidents against the materiel, it cannot be used until the safety risks have been reassessed in accordance with the risk assessment methodology in MIL STD 882-E and DA Pam 385-16.

(4) RM process steps: The RMB will apply the following steps for each MR activity or document outlined in AR 700-142, tables 4-1 through 4-3 as appropriate. Additional details can be found in Risk Management Guide for DOD Acquisition, August 2006.

(5) Identify hazards. Each MR activity or document will initially be evaluated as a potential hazard. The required MR activities or documents range from a minimum of 16 to a maximum of 32, however, they may not all apply to the materiel under evaluation. Eliminate those activities or documents that do not apply and ensure that the functional authority for the element also concurs with that assessment.

(6) Assess hazards. Assess the risks of having or not having: a completed activity or document; similar or partial data from use in theater or another military Service or Agency; similar or partial data from the manufacturer; or no data at all. The goal is to optimize existing data so the materiel starts the Army's MR process with as much information as possible.

(7) Develop a hazard management plan. The risk and probability of not having the information contained in the completed MR activity or document likely have a high impact on the Soldier. Develop a hazard management plan that addresses a risk mitigation strategy for each applicable hazard. This could mean recommending a conditional MR while missing information is being developed, or utilizing the available information to recommend a full MR. It could also mean that there is not enough available information to support a MR position and the materiel should undergo the complete evaluation required for each element in the Army MR process.

(8) Develop a MR recommendation. Complete the analysis, develop the recommendation for a full or conditional MR, and present the MR recommendation to the MRA for approval.

c. RM assessment. MIL-STD-882-E provides a Risk Assessment Matrix at table III as well as definitions of severity categories and probability levels in tables I and II. This provides a common framework to use when conducting the assessment. RMBs must document the associated risk for each hazard using the risk assessment matrix as well as initial risk level, controls, residual risk, implementation, supervision and effectiveness. DD Form 2977 (Deliberate Risk Assessment Worksheet) will be used to document the hazards, initial risk level, controls, residual risk, implementation, supervision, and effectiveness.

d. RMB findings and recommendations: The MATDEV will present the RMB findings and recommendation for a FMR or CMR to the MRA for approval in accordance with current MRO procedures. If the analysis recommended a CMR, the MRO will monitor correction of the conditions to close the conditional MR and convert it to a full MR in accordance with AR 700-142 and current MRO procedures. It is the MATDEV's responsibility to ensure closure of all conditions identified in a CMR. All RMB findings and recommendations will be documented with the MR packet and archived in the MRTS.

3-12. Explosive ordnance disposal supportability assessment

a. A statement of supportability from the USAMC EOD Staff Officer is required if the following items are involved:

(1) Ammunition .50 caliber and below that contains explosives, depleted uranium, or reactive material; excluded are propellant charges and tracers.

(2) Ammunition larger than .50 caliber including artillery, missiles, and rockets, recoilless rifle systems and rounds, demolition items, firing devices, signals, pyrotechnic devices, dropped, propelled, or thrown munitions, dispensers, clusters, launchers, explosive armor tiles, mines, scatterable munitions, channeling munitions, grenades, smoke generating ordnance items, components (classified or not) for munitions, and explosive devices, fuzes, trainers, and nonlethal munitions.

(3) Army vehicles and systems with integral explosive components (for example, explosively activated ejection seats and/or cabins, explosively formed barrier shields, integral reactive armor, cutters, disrupters, and their components). Vehicles with on-board ordnance storage in a lockable compartment (for example, a main battle tank or infantry-fighting vehicle), guided missile launcher, and troop transport vehicle with lockable compartment (for example, armored personnel carriers or Mine Resistance Ambush Platform (MRAP)). EOD requires unique written vehicle access procedures to support the safe and efficient recovery and disposal of battlefield ordnance remains during Battle Damage Assessment and Depot level Repairs (BDAR). EOD must be able to enter a combat vehicle after it has been damaged in order to safely remove explosive ordnance. Towed artillery that does not have on-board storage, does not require power-down procedure, and are covered by general stuck-round procedures are excluded from this requirement.

b. The accomplishment and/or the availability of the following items are required to obtain a supportability statement from the AMC EOD staff officer per DODD 5160.62:

(1) Validated and verified joint Service render-safe and disposal procedures and Joint Service publications for the items involved will be available to Army EOD units at least 30 days prior to MR.

(2) Training aids as specified by the U.S. Army EOD Technology Directorate, (RDAR-MEX).

(3) EOD unique tools and equipment (as appropriate), must be fielded 30 days prior to MR, as specified by the EOD Technology Directorate (RDAR-MEX), to fulfill DODD 5160.62 and AR 700-142 responsibilities.

(4) Technical Source Data describing the munitions functioning characteristic, energetic constituents, physical configuration and recommended Render Safe Procedures as specified by the U.S. Army, ARDEC EOD Technology Directorate (RDAR-MEX).

3-13. Army Test and Evaluation Command assessment

The ATEC will evaluate and prepare an independent evaluation (see AR 73-1) using the following procedures:

a. The PM will provide program and schedule information to the ATEC as early in the life cycle as possible (prior to MS C) so that a Test and Evaluation Master Plan (TEMP) can be formulated and testing resources obligated.

(1) Once requirements are finalized, the fielding PM will form an IPT to coordinate test and evaluation activities in support of the production decision and MR.

(2) Prior to MR, the PM will send a memorandum to ATEC requesting a Operation Evaluation Report (OER) or a OMAR.

b. The ATEC will prepare an OER or OMAR, and supporting Environmental, Safety, Occupational Health (ESOH) confirmation to document evaluation results.

(1) The OER or OMAR will be provided with a memorandum that present a position relative to the proposed MR and list the factors, if any that would prevent a FMR.

(2) The OER or OMAR will address the RAM of the system to include the following factors—

(a) The ability of the system, when fielded, to fulfill the requirements as stated in the approved capability requirements document and specification, from the standpoint of—

1. The performance of the system.

2. The RAM of the system.

3. The logistics supportability aspects of the system, as exhibited by the system support package.

4. The adequacy of the system software.

5. The adequacy of the human factors engineering design and manpower and personnel integration (MANPRINT) issues of the system.

6. The adequacy of system interoperability within the intended concept of operation.

(b) The degree to which the system complies with special directions or requirements (if any) issued by the decision review body at MS C.

(c) The sufficiency of corrections to previously disclosed deficiencies, shortcomings, and problem areas.

(d) The ESOH assessment of the system's operating and maintenance procedures.

(3) The PM will establish a date for receipt of the OMAR and/or OER in coordination with ATEC.

(4) The PM will provide the following information to the ATEC as it becomes available prior to the MR action:

(a) Description of hardware and/or software design changes effected subsequent to the OMAR and/or OER.

(b) Results of all contractor or Government production systems-level testing not conducted by ATEC.

(c) Results of the MC C production decision review.

(d) Approved system requirements documents (for example, Initial Capabilities Document (ICD) or Capability Development Document (CDD)).

(e) A system level specification used in contracts and approved changes to them that cover system-level testing.

(f) Prior to completion of the MR action, the PM will provide a written statement to ATEC attesting that all critical or major test incidents during Government or first-article testing have been resolved, or provisions have been made for their resolution.

3-14. Test Measurement and Diagnostic Equipment and Automatic Test Equipment Supportability Assessment

a. A U.S. Army TMDE Activity (USATA) TMDE or ATE statement of supportability is a requirement for MR (see AR 700-142, table 4-3) only when TMDE is applicable. If the system requires no TMDE or ATE, then a TMDE supportability statement is not required.

b. Coordination with USATA and the Product Director (PD) for TMDE should begin as early as possible and include the following information:

- (1) The SS or LCSP.
- (2) A complete listing of proposed TMDE and ATE.
- (3) A DA Form 3758-R (Calibration and Repair Requirements Worksheet) for each item of TMDE and ATE, in accordance with AR 750-43.

c. PMs will verify with PD TMDE prior to procuring specialized TMDE in support of their systems or equipment.

3-15. Transportability assessment

A statement of transportability approval is a requirement for MR (see AR 700-142, table 4-3) only when the system meets the definition of a transportability problem in accordance with AR 70-47. The statements from the Surface Deployment and Distribution Command Transportation Engineering Agency (SDDCTEA) are for all modes of movement specified in the requirements document (AR 70-47, para 1-4e) for any equipment that meets the definition of a transportation problem item:

- a. The item is wheeled or tracked.
- b. The item overloads a designated transport medium.
- c. The item requires special handling or specialized loading procedures.
- d. The item has inadequate ramp clearance for ramp inclines of 15 percent.
- e. The item contains hazardous materiel.
- f. The item exceeds any of the following conditions:
 - (1) Length of 20 feet or 6.100 meters.
 - (2) Width of 8 feet or 2.438 meters.
 - (3) Height of 8 feet or 2.438 meters.
 - (4) Weight of 10,000 pounds or 4,535 kilograms.
 - (5) Weight per linear foot of 1,600 pounds or 726 kilograms.
 - (6) Floor contact pressure of 50 pounds per square inch (344.75 kPa).
 - (7) Maximum axle load (pneumatic tires) of 5,000 pounds or 2,268 kg.
 - (8) Maximum wheel load (pneumatic tires) of 2,500 pounds or 1,134 kg.
 - (9) Tire pressure of 90 psi (620.55 kPa), based on air transport limits given by MIL-HDBK-1791.

3-16. Army acquisition logistician assessment

The Deputy Assistant Secretary of the Army for Acquisition Policy and Logistics (DASA (APL)) is the Army's senior Acquisition Logistician. The DASA (APL) (SAAL-LC) is responsible for providing an Army level position on MR for Acquisition Category (ACAT) I through III programs and appoints an Army acquisition logistician to prepare an independent logistics assessment in support of MR. The PM provides the necessary information and required documentations to facilitate the evaluation process. It is essential that all requests for the Army Acquisition Logistician review be received not less than 60 days prior to a MR decision. The assessment will include an analysis of how the program supports the 12 integrated product support (IPS) elements as outlined in AR 700-127 as well as the adequacy of the LCSP. The assessment will be conducted in a timely manner that allows the logistician to identify any deficiencies and the PM to make necessary corrections. DASA (APL) prepare an assessment for the MRA at the request of the PM, as required by AR 700-142, table 4-3.

a. The assessment will include an evaluation of the materiel with emphasis on the adequacy of the—

- (1) LCSP using the IPS elements outlined in AR 700-142.
- (2) Logistics demonstration report.
- (3) Core logistics analysis, core depot assessment, and source of repair analysis.
- (4) The PM will provide the Army Acquisition Logistician the following certifications to aid in the formulation of the assessment:

- (a) Safety office certification.
- (b) The ATEC OMAR and/or OER.
- (c) The ATEC MR position.

- (d) Lead LCMC ILS certification.
- (e) Statement of Transportability Approval from Surface Deployment and Distribution Command (SDDC).
- b. The assessment will validate each condition of the draft get-well plan and may make recommendations or adjustments as necessary when program has been approved as a CMR and/or TMR.

Chapter 4 Materiel Fielding

Section I Introduction to Materiel Fielding, documentation and team

4-1. General

The GC outlined in chapter 4 must be an ACOM, ASCC, DRU, Federal agency, or a foreign government. The USAMC LCMCs, Defense Logistics Agency (DLA), General Services Administration (GSA), and other Armed Services and Federal agencies that provide materiel support to the MATDEV are considered support commands in chapter 4.

4-2. Materiel fielding documents and coordination process

The Memorandum of Notification (MON), Materiel-Fielding Plan (MFP), Materiel Fielding Agreement (MFA), DA Form 5106 Mission Support Plan (MSP), and DA Form 5682 Materiel Requirements List (MRL) are the five basic documents associated with materiel fielding. They provide the detailed plans and actions the MATDEV and GC will accomplish to successfully field and deploy a materiel system, to include training and personnel. Sample formats and detailed instructions for these documents are found in appendix C. Distribution of fielding documentation must be in accordance with table 4-1 and the needs of the GC.

a. A MON is an eight-paragraph memorandum (see AR 25-50) that initiates the Materiel Fielding process between the MATDEV and the GC. The eight paragraphs include—

- (1) References.
- (2) Intent.
- (3) Milestones.
- (4) System description and/or uses.
- (5) Receiving units.
- (6) Justification.
- (7) Preliminary distribution plan.
- (8) MATDEV point of contacts.

b. The MFP provides details on how the MATDEV will field the new materiel to the Army, addresses any materiel it replaces and describes how it will be transferred or retrograded. Data in the MFP originates in other source documents, program documents, and the LCSP. The MFP requires the most current, complete, and accurate information concerning the system fielding. The MFP will have an executive summary and at least eight sections that build on the eight paragraphs contained in the MON.

(1) The MATDEV prepares and coordinates MFPs with the GC. A system with little or no support impacts may only require a MON. A MON and other accompanying documentation (a fielding circular or a fielding bulletin) must address all areas required in a normal MFP, but in a much more abbreviated form. It must include enough information to allow the GC to plan, budget, and execute the fielding of the system.

(2) The MATDEV provides the draft MFP no later than 240 days before the FRP contract award for developmental systems. For commercial and non-developmental items, the draft MFP must be submitted no later than 170 days before FRP contract award. Deviations from these timelines are acceptable as long as they are coordinated and agreed to by the MATDEV, GC, and other organizations from which support is expected.

(3) The MFP will be finalized and a signed MFA will be obtained (see AR 25-50). The GC will ensure the applicable unit and U.S. Army Installation Management Command (IMCOM) personnel attend any New Materiel Introduction Briefs (NMIB) or pre-coordination meetings. The MFP will be appended to the LCSP at MS C and FRP reviews.

(4) The MFP will provide information on security classification guides, OSHA 1910.1200 compliant SDS with GHS labels, and the physical and operational security requirements of all items in the fielding effort. Noted, The Army Modernization Training Automation System will only have the header information for classified new equipment training plans (NETPs) stored in their database.

(5) A separate MFP must be prepared for each GC, or the MATDEV should have separate appendixes that tailor the MFP to each GC. Initial fielding to the training base or to Army pre-positioned stocks require a separate MFP or appendixes tailoring the basic MFP.

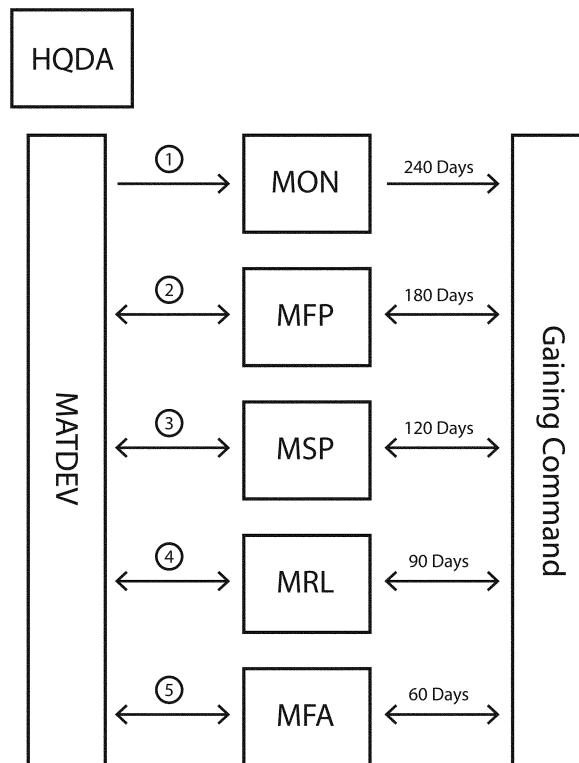
c. The DA Form 5106 defines the planned maintenance and supply support structure for the new system or equipment. This is the GC's response to the MFP. It outlines how the GC intends to support the new materiel to include how the system and/or equipment should be fielded. The DA Form 5106 is provided to the MATDEV by the GC.

d. The DA Form 5682 is a comprehensive list of every item needed to support the fielding. It distinguishes between those items provided by the MATDEV and GC.

e. The MFA and subsequent agreements from fielding coordination meetings must be appended to the MFP to keep it current and complete.

f. Figure 4-1 outlines Total Package Fielding (TPF) coordination process.

Total Package Fielding Coordination Process



Legend

HQDA: Headquarters Department of the Army
 MATDEV: Materiel Developer
 MON: Memorandum of Notification
 MFP: Materiel Fielding Plan
 MSP: Mission Support Plan
 MRL: Materiel Requirement List
 MFA: Materiel Fielding Agreement

Notes:

¹ Step 1. MATDEV notifies GC of new materiel fielding at least 240 days prior to fielding (before LRIP or production contract is awarded).

² Step 2. MATDEV provides initial MFP to GC no later than 180 days prior to fielding.

³ Step 3. GC provides DA Form 5106 to MATDEV 120 days prior to fielding.

⁴ Step 4. MATDEV DA Form 5682 to GC no later than 90 days prior to fielding.

⁵ Step 5. MATDEV provides MFA to GC no later than 60 days prior to fielding. MATDEV and GC agree to MFA no later than 30 days prior to fielding.

Figure 4-1. Total package fielding coordination

4-3. Materiel fielding team

a. The MFP and MFA will identify any requirements for a materiel fielding team (MFT), and will describe the scope of the assistance to be provided by the MFT. The MFT will not perform GC functions, but it will help to ensure an efficient and effective fielding operation. The structure of the MFT is determined by the complexity of the system being fielded, an assessment of the facilities to be used for the processing and handoff, and by the amount of assistance provided by the GC.

b. The MATDEV will coordinate with all participants, to ensure the skilled personnel, facilities, and materiel needed for consolidation, shipment, processing, inventory, handoff, and new equipment training are provided as planned for in the MFP and MFA. The MFT's functions include—

- (1) Processing that requires partial or complete assembly needed to put all equipment in an operational condition.
- (2) Complete technical inspection prior to new equipment training and issue of equipment to GC.
- (3) Joint inventory with the gaining units' commander, or designated individuals (AR 710-2) and transfer and acceptance of property using an approved Accountable Property System of Record (APSR) that is, Property Book Unit Supply-Enhanced (PBUSE) or Defense Property Accountability System (DPAS) is mandatory.
- (4) Verification of all major item Unique Item Identifiers (UII) to ensure the UII is readable, registered, and will correct all UII defects prior to handoff.
- (5) Appropriate processing and equipment improvement recommendations of warranty claims on Standard Form (SF) 368 (Product Quality Deficiency Report (PQDR)), DA Form 2407 Maintenance Request.
- (6) Preparation and submission of MFT After Action Report (AAR).

c. The MFT will document all problems, shortages, and deficiencies encountered during the fielding operation to each unit. The MFT chief will submit a MFT AAR and provide it to the gaining unit 30 days after completion of the fielding.

d. The fielding to Army prepositioned stock requiring a MFT will be accomplished at the Army prepositioned stock location if practical. The MATDEV will be responsible for fielding unless otherwise negotiated.

Section II

Total Package Fielding Coordination

4-4. The Total Package Fielding coordination process

TPF is the Army's standard materiel fielding process designed to provide Army materiel systems to the using units as a coordinated package of end items, support items and technical documentation. This process has the MATDEV, rather than the GC, budget for and provide the new system and its initial support. The actions needed to accomplish TPF will vary based on the system complexity and the TPF category of fielding. See table 4-1 for a listing of MFP and TPF coordination offices.

Table 4-1

Materiel fielding coordination offices

Organization	Mailing Address
Headquarters, Department of Army (HQDA)	U.S. Army TPF Policy Proponent (SAAL-LP) 2800 Crystal Drive, Suite 500, Arlington, VA 22202
Headquarters, United States Army Forces Command (FOSCOM)	HQ FORSCOM, Chief Equipment Readiness Division (AFLG-LER), 4700 Knox Street Fort Bragg, NC 28310-5000
Headquarters, United States Army Training and Doctrine Command (TRADOC)	ATBO-HS, 950 Jefferson Avenue Fort Eustis, VA 23604-5700
Headquarters, United States Army Materiel Command (AMC)	Chief, Equipment Readiness and Integration Branch ATTN: AMCOPS 4400 Martin Road Redstone Arsenal, AL 35898
Headquarters, United States Army Aviation and Missile Command (AMCOM)	AMSAM-MRE Redstone Arsenal, AL 35898-5230
United States Army Communication-Electronics Life Cycle Management Command (CE LCMC)	AMSEL-LC-RE-FM Aberdeen Proving Ground, MD 21005
United States Army Tank and Armament Command- Life Cycle Management Command	AMSTA-LC-LF, 6501 E. 11 Mile Road Warren, MI 48397-5000
401st Army Field Support Brigade-Southwest Asia	Building 752 (Bagram, AF & Kandahar, AF) APO AE 09366-5000

Table 4-1
Materiel fielding coordination offices—Continued

403rd Army Field Support Brigade-Korea	S-4, Seoul SASKO-LG Unit 15599 APO AP 96205-5599
404th AFSB Joint Base Lewis-McChord	404th AFSB Joint Base Lewis-McChord, WA 98443-9500 (Western US, AK & HI)
405th U.S. Army Field Support Brigade-Europe	AFSB-EUR MFSEU-MS Unit 29331 APO AE 09266
Headquarters, U.S. Army North (USARNORTH)	2108 Wilson Way JBSA-Fort Sam Houston, TX 78234
Headquarters, U.S. Army Pacific (USARPAC)	USARPAC (APLG-MMS), Bldg T- 01, Room 1113 Fort Shafter, HI 96858-5100
Headquarters, USARSOUTHCOM	G-3 FMD JBSA-Ft. Sam Houston, TX 78234
Headquarters, USAREUC, G-3 (AEOP-FMD-F)	Unit 29351, Box 101 APO AE 09014
Headquarters, U.S. Army Corp of Engineers	CELD 441 G Street NW Washington, DC 20314-1000
Headquarters, Eighth U.S. Army	ATTN: ACofS G4 (EAGD-SO-MI) Unit 15236 APO AP 96205-0009
Headquarters, USALAO-Pacific	ATTN: AMXLS Fort Shafter HI 96858-5400
United States Army Intelligence & Security Command	G-3 FM 8825 Beulah Street Fort Belvoir, VA 22060-5246
United States Army Installation Management Command	Logistics Branch (IMPW-L), G-4 HQ, US Army Installation Mgt Command 2405 Gun Shed Rd, Bldg 2261, Rm 2-54 Joint Base San Antonio, TX 78234-1223
United States Army Criminal Investigating Command	ATTN: G-4 Russell Knox Building 27130 Telegraph Road Fort Belvoir, VA 22134-2253
Special Operation Command (USSOCOM)	SORDAC J4-M 7701 Tampa Point Boulevard MacDill AFB, FL 33261-5323
United States Army Special Operations Command (USASOC)	DCS, G-4 (AOLO-SS), Bldg E2929 Fort Bragg, NC 28310
United States Army National Guard	ATTN: NGB-ARQ 111 South George Mason Drive Arlington, VA 22204-1382
United States Army Network Enterprise Technology Command	ATTN: NETC-LO 2133 Cushing Street Fort Huachuca, AZ 85613-7070
United States Army Reserve Command (USARC)	ATTN: ARRC-FDS-M HQDA, OCAR (DAAR-LO) Washington, DC 20310-2414
United States Army Medical Command (DASG-LOZ)	5109 Leesburg Pike Falls Church, VA 22041
United States Army Medical Materiel Agency	ATTN: MCMR-MMO-SF Fort Detrick, MD 21707-5001
United States Army Corrections Command	2800 Army Pentagon OMPG/RM DIV Washington, DC 20310-2800
United States Army Military District of Washington	103 3rd Avenue Fort Lesley J. McNair, D.C SW Washington, DC 20024

4-5. The Materiel Requirements List coordination package

The DA Form 5682 is a list of all materiel to be fielded with the end item. Use DA Form 5682 (Materiel Requirements List) to develop DA Form 5682 (see app B for instructions).

- a.* The MATDEV submits DA Form 5682 to the GC identifying all items to be provided—
 - (1) Primary system and associated Basic Issue Items (BII).
 - (2) Conventional ammunition (class V) (See AR 5-13).
 - (3) ASIOE and BII.
 - (4) Organizational support equipment and deployable CTA (for unit activation and conversions).
 - (5) Test measurement and diagnostic equipment.
 - (6) Special tools and test equipment (STTE).
 - (7) Initial issue spare and/or repair parts.
 - (8) Special mission kits and outfits.
 - (9) Equipment technical publication (starter set).
- b.* The GC provides—
 - (1) Communication security requirements.
 - (2) Petroleum and chemicals (class III, bulk and packaged).
 - (3) Medical materiel requirements (class VIII).
 - (4) Additional authorization list (AAL) items.
 - (5) List of recommended field and sustainment reparable spares and related shop stock requirements to support the maintenance mission.
 - (6) List of limited procurement items needed. The GC provides these items unless specifically negotiated with the MATDEV and outlined in the MFA.
- c.* The MATDEV prepares DA Form 5682 for coordination and concurrence with the GC at the appropriate times. This coordinated document substantiates fielding requirements and determines fielding shortages. The GC receives a final copy of the agreed-upon DA Form 5682 as part of the DA Form 5682 coordination process.
- d.* The MATDEV develops a supplemental DA Form 5682 when the MTOE of the gaining unit changes between the signing of the initial DA Form 5682 and day of handoff (as negotiated). Handoff of the materiel on the supplemental DA Form 5682 occurs when the materiel becomes available.
- e.* Coordination and introductory briefings NMIBs are accomplished by visit or video teleconference (mandatory for ACAT level I, and II) or through written communication with the responsible GC personnel. The coordination meeting between the MATDEV and GC, when required, occurs 210 days prior to handoff date, or at a mutually agreeable time.
- f.* The U.S. Army Communications Security (COMSEC) Logistics Agency (USACSLA) separately develops support for COMSEC materiel as a result of coordination with the Project Director Communications Security and the GC. COMSEC equipment is provided in separate fieldings. Classified COMSEC materiel is shipped to a designated COMSEC account. All controlled cryptographic items (CCI) and other unclassified COMSEC materiel is shipped to the GC staging area and is secured as sensitive materiel pending handoff to the designated property book account.
- g.* The gaining unit property book officer (PBO) obtains COMSEC and/or CCI items from the unit's COMSEC Account Manager (CAM). The PBO then adds the property to the APSR transfer from the PM to include UII transfer. If there is a problem with the UII, the PBO should contact the MATDEV for resolution.

Section III

Total package fielding

4-6. Procedures

MATDEV actions to ensure successful TPF includes—

- a.* Coordinating with the GCs quarterly on all planned fielding with the command over the next two years.
- b.* Coordinating with the appropriate supporting command, Army Sustainment Command, and Army Field Support Brigade (AFSB) after a MFA is in place to establish outside of the Continental United States staging sites.
- c.* Furnishing disposition instructions for any TPF materiel on hand at the unit materiel fielding point (UMFP) or staging sites for more than one year. (This can be as simple as stating that all materiel under a given project code will be used for future fielding or a statement identifying materiel that can be returned to depot mission stock because the fielding is completed.)
- d.* Providing a DA Form 5682 to the GC no later than 90 days prior to the FUED and at least 30 days before a planned DA Form 5682 coordination meeting.
- e.* After the DA Form 5682 “scrub” with the GC, informing DLA or applicable contractor location of package build and expected release dates.
- f.* Requisitioning all end items, ASIOE, TMDE, ASL class IX repair parts and a starter set of technical publications. Provide a copy of all class II, class III, and VII requisitions to the GC PBO within 30 days of delivery or handoff.

- g. Establishing and maintaining accountability and visibility records for all assets until handoff.
- h. Coordinating with PD COMSEC and the GC to ensure availability and arrange for COMSEC fielding, as appropriate. Ensure a designated COMSEC account is established to receive any needed classified COMSEC materiel.
- i. Coordinating with USATA for load testing, calibration requirements, and new equipment training personnel (as required). Medical NET personnel are coordinated through the U.S. Army Medical Agency NET manager.
- j. Coordinating with the GC and appropriate commodity managers to ensure that adequate quantities of class V, bulk class III, and class VIII will be available. This support must be planned concurrent with the MATDEV providing the draft MFP to the GC and the other organizations from which support is expected.
- k. Coordinating a joint supportability assessment with the GC, at least 90 days before outside Continental United States (OCONUS) fielding. Advise the GC of the fill percentage for the fielding, identify back ordered items and give their expected date of availability. Furnish a list of unavailable items and items required outside of the Dynamic Army Resource Priority List (DARPL) (for GC review and redistribution decision). Obtain GC call forward concurrence prior to movement of materiel to a GC facility. Identify to the GC the scope and duration of the services being provided by the MATDEV before, during, and after fielding to ensure user satisfaction. Assemble an appropriate MFT to provide the agreed-on support and services.
- l. Providing the document number for all unavailable items and submit requisitions by MATDEV and DLA to ensure free issue of those items to the GC if a follow-on package is not planned.
- m. Verifying handoff schedules, locations, and support needs with the staging sites and gaining units.
- n. Allocating space and resources for Logistics Assistance Representative (LAR) and Lifecycle Software Engineering Center (SEC) field support personnel participation in NET operator and maintenance training, as appropriate.
- o. Providing the NET activity a support package to include end items, major assemblies, spare and/or repair parts, special tools, TMDE, and TMs. The package will support the new equipment-training plan (NETP) (see AR 350-1) for timely and effective training.
- p. Provide shipping instructions to the UMFPS, staging sites, storage depots, and contractors as appropriate. In cases where systems must be installed, the MATDEV will ship to the site of installation.
- q. Ensuring that MR is approved prior to issuing equipment to the gaining unit.
- r. Processing, inventorying, handoff, and conduct NET.
- s. The NET function is done in close coordination with TPF actions.
- t. Ensuring all master component lists (MCLs) are provided to the unit prior to handoff.
- u. Processing materiel systems to ensure that all are operationally ready at the time of handoff.
- v. Conducting a joint inventory of all materiel with the user before handoff, and document all shortage items owed to the user.
- w. Processing all receipts for materiel within the Logistics Modernization Program (LMP) using D6S process before issuing all end items and secondary items using APSR Transfer procedures. Provide assistance to the GC to ensure establishment of user receipt, asset accountability, and visibility for all TPF materiel.
- x. Providing a starter set of technical publications as negotiated with the GC and specified in the DA Form 5682. The MATDEV will request a starter set of publications through LOGSA (AMXLS-AP), Redstone Arsenal, AL 35898. LOGSA will forward the request to Army Publishing Directorate (APD). The organization responsible for total package fielding will use the total package fielding budget line item number in the appropriate procurement appropriation to fund locally reproduced equipment publications for the starter set when publications are not available through normal publication supply channels.
- y. Tracking initial fielding discrepancies and deficiencies so they can be monitored, analyzed, and summarized by—
 - (1) Receiving unit's identification code and support unit DOD Activity Address Code (DODAAC).
 - (2) End item NSN.
 - (3) MATDEV.
 - (4) Geographical area and GC.
- z. Coordinating with the Supporting Command (SC) and GC to ensure the NET requirements for all systems involved in the fielding are coordinated and accomplished.
 - aa. Tracking the status of TPF, shortages until the shortages are filled or the gaining unit no longer requires the item.
 - ab. Ensuring that transaction discrepancy reports DD Form 361 (Transportation Discrepancy Report (TDR)) from receipt at staging or handoff sites are submitted through proper channels and are summarized in MFT AARs.
 - ac. Preparing and submitting Quality Deficiency Reports (QDRs) and equipment improvement recommendations (EIRs) result from processing, handoff, and NET, and summarize them in the MFT AARs.
 - ad. Requesting and documenting all repairs and fixes required during processing, handoff, and NET. Summarize the maintenance in the MFT AAR. The MATDEV funds all repairs and fixes during processing, handoff, and NET.
 - ae. Validating all backordered TPF shortages with the GC no later than one year after package handoff.
 - af. Forwarding a copy of all materiel fielding after action reports to the GC and PEO.

4-7. Total Package Fielding contingency procedures

- a.* TPF procedures outlined in paragraph 4-6 may be tailored by the MATDEV to meet the timelines and requirements of the contingency. MATDEVs should strive to provide a TPF during all contingency operations.
- b.* The DA Form 5106 will identify the activity designation of the unit(s) identification code (UIC) level as authorized by the MTOE scheduled to receive the TPF end item, support items, and repair parts.
- c.* TPE will be transferred from the current unit PBO to the AFSB as governed by AR 710-2.

Section IV Actions

4-8. Gaining Command Total Package Fielding actions

The following actions by the GC (along with the functions identified in AR 700-142) ensure a successful TPF.

- a.* Validate the correct MTOE and TDA for gaining units at least 240 days prior to the FUED and assist the MATDEV in determining end items authorized by the system being fielded.
- b.* Review DA Form 5682 coordination packages and sign DA Form 5682. Identify any items not issued to be resolved before the joint supportability assessment. Verify all DODAACs receiving materiel version of retail accounting system is used by each DODAAC. (See app B for instructions for completing DA Form 5682.)
- c.* Provide a complete and accurate DA Form 5106 depicting the distribution of the materiel and the GC maintenance and supply structure. Identify the UIC and DODAAC for the recipients of operational readiness float assets. (See app B for instructions for completing the DA Form 5106.)
- d.* Requisition all materiel that the GC is responsible for on the DA Form 5682.
- e.* Conduct a joint supportability assessment with the MATDEV to determine if the GC is prepared to go ahead with fielding.
- f.* Receive, inventory, and secure equipment in anticipation of MFT arrival.
- g.* Provide Soldiers (operators and maintainers) for NET classes as agreed in the MFP.
- h.* Conducts joint inventory with the MATDEV; acknowledge receipt using DA Form 3161 (Request for Issue or Turn-In) and DA Form 2062 (Hand Receipt/Annex Number) in accordance with AR 710-2.
- i.* Complete turn-in and redistribution of excess assets in accordance with the ACOM guidance.
- j.* Initiate or update technical publications accounts at <http://www.apd.army.mil> (Order/Subscriptions) outlined in AR 25-30.
- k.* Request NET funds required to bring Soldiers on Title 32 (T-32) Active Duty Operational Support orders (ARNG only).
- l.* Accept OSHA compliant SDS and GHS label information during handoff of materiel.

4-9. Support Command Total Package Fielding actions

- a.* Provide input to MFP and ensure a MFA between GC and MATDEV is approved prior to providing TPF assistance.
- b.* Inform MATDEV of supply availability for all materiel in support of fielding.
- c.* Compute and transmit initial issue support lists to the MATDEV 280 days prior to fielding.
- d.* Ensure applicable stakeholders (unit, INSCOM, ATSC, DOL, and so forth) attend coordination and/or new materiel introductory briefing team meetings and other agreed upon events in support of TPF and NET.
- e.* Provide materiel and maintenance support in accordance with MATDEV MFA.

Section V

Total Package Fielding supply support

4-10. Master Component List

The MCL consists of COEI, BII, and AAL. MCL are required for all materiel fieldings.

- a.* The MATDEV will develop and publish the electronic component list in PBUSE and Global Combat Support System-Army (GCSS-A).
- b.* The MCL will be provided using an APSR (PBUSE and GCSS-A or DPAS) during handoff to the GC.

4-11. Processing Total Package Fielding requisitions

- a.* The supply source will process TPF requisitions according to the uniform materiel movement and issue priority system and furnish the normal supply and shipment status indicated by the media and status code.
- b.* Assets requisitioned for TPF will be shown in ownership purpose code 9 and the applicable system project code on the MATDEV accountability record. These assets will not be released to satisfy other requirements.

4-12. Materiel consolidation and shipment for Total Package Fielding (within Continental United States)

- a.* The MATDEV will coordinate with DLA, assigned UMFPs, and staging sites for the consolidation, packaging, shipment, staging, and handoff of all TPF materiel.
- b.* Surface transportation will be used for initial materiel shipments.
- c.* Follow-on shipments that are needed for the initial handoff, which did not arrive at the fielding site, may be shipped by air. Remaining follow-on packages will use surface transportation.

4-13. Technical publication procedures for total package fielding

a. The MATDEV will provide a starter set of authenticated publications as part of TPF. The starter set is a one-time issue of two copies of each publication to the user (unit) and field maintenance level. The starter set will only be provided for the end items that have not been previously used or supported by the GC. The publications for the starter set to each DODAAC will be indicated on the materiel requirements list. Starter set usually includes—

- (1) Operator's manual and/or a crew checklist.
- (2) Lubrication Order (LO).
- (3) Supply catalog (if not a supply catalog 999-01-Sets, Kits, and Outfits (available through the Logistics Information Warehouse (LIW)) under "Sets Kits Outfits Online" in "Electronic Sets, Kits, and Outfits").
- (4) Repair parts and special tools list (RPSTL).
- (5) Hand receipt.
- (6) Appropriate Electronic Technical Manual (ETM) or Interactive Electronic Technical Manual (IETM) and TM-10, -13, -13P, -13&P, -23, -23P, -23&P.

b. Each MATDEV will make a yearly survey of publications required to support planned TPF. These requirements and timely ordering will be coordinated with LOGSA (AMXLS-AP) and APD.

c. The MATDEV will provide any needed authenticated equipment publications using local reproduction services, coordinated through the appropriate equipment publications control officer. This will be done only if the equipment publication control officer determines the publications cannot be printed in time to meet the required FUED for the first command to be fielded. (See AR 25-30 for provisions and restrictions on printing.)

d. When an official DA publication exists but is not available from APD, the MATDEV will request the equipment publication control officer to obtain the needed copies through local reproduction services.

e. In forecasting requirements for C/NDI, each MATDEV and LCMC will arrange for the technical and equipment element to evaluate manufacturer's publications using MIL-PRF-32216 before signing a production contract, to determine whether the manufacturer's publications are usable and adequate to support the C/NDI, and, if usable and adequate, to determine what supplemental materials must be contracted for. If the manufacturer's manuals are not adequate, the MATDEV will prepare or procure the required technical publications that meet the appropriate military specifications. (See AR 25-30 for provisions on commercial manuals.)

f. The GC will submit publication requests. The primary way to obtain DA publications, including initial issue quantities for new systems, along with updates and changes, is through APD. Publication requisitions can be submitted via the Army Publishing Directorate Web site, www.apd.army.mil and the status of the requisition is automatically provided.

Section VI Staging

4-14. Materiel consolidation and staging for Total Package Fielding

a. The staging, processing, and handoff requirements will be coordinated as required with both CONUS and OCONUS staging sites. The CONUS staging sites will be selected based on the area being supported. Army depots and installations will be used as necessary to accommodate fielding and storage requirements.

b. To support TPF OCONUS, AMC operates two sites in Korea, and other temporary sites as necessary. OCONUS staging sites play a key role in keeping track of materiel shipped overseas and have reduced "lost" items significantly. Besides reducing the risk of materiel loss, the staging operations can also provide administrative support for MFTs and new equipment training teams (NETTs). They can provide office space, training classrooms, secure storage, processing facilities, and services. All services provided to the MATDEV are on a reimbursable basis.

c. The United States Army Europe (USAREUR) New Equipment Staging Activity is located at the Germersheim Army Depot. The staging, processing, and handoff sites in the U.S. Europe vary and must be coordinated individually due to units extended geographical locations.

d. In Korea, AFSB Far East has two staging sites. One staging site is at Camp Market in the North near Inchon, and in the South, the Pusan Support Facility serves as the other central staging site.

e. Annual workload projections should also be provided to and coordinated with the AFSBs.

f. The staging, processing, and handoff sites in U.S. Army Pacific Command (USARPAC) vary and must be coordinated individually due to the limited availability and constant use by active, reserve, and ARNG units.

4-15. Unit material fielding point Total Package Fielding procedures

a. The Transportation Officer will provide transportation and shipping information to the MATDEV, staging site (if applicable), and to the gaining unit.

b. MATDEV will ensure assets received will be entered into the appropriate MATDEV APSR account.

c. Materiel receipt must include the OSHA SDS and GHS labels for the material to be entered into the Army Wholesale System (LMP) before the material is received at the UMFP and inspected for damage, quantity discrepancies, and proper documentation or identification in accordance with local standard procedures.

d. The materiel will be stored in locations designated for each unit. It will not be commingled with other mission stock.

4-16. Staging site procedures for Total Package Fielding

a. Perform all functions and tasks related to receiving, moving, locating, palletizing, packing, sorting, and segregating all incoming TPF materiel.

b. Offload all materiel from commercial and Government carriers within 24 hours of arrival at the staging site and sign the transportation control and movements' documents.

c. Report any physical damage to the materiel to the MATDEV or the MFT chief within 24 hours of receipt. Fill out and promptly submit all appropriate discrepancy reports that is, SF 364 (Report of Discrepancy (ROD)), through proper channels.

d. Verify the bill of lading, inventory the multi-pack containers, and repack as required to store, process, and issue materiel.

e. Segregate and store materiel by unit and provide the materiel fielding team chief the status and packing list.

f. Issue materiel at the direction of the MFT chief.

g. Conduct or assist with processing for handoff to put materiel in "operational use" condition as previously agreed to in MFP.

4-17. Total package fielding direct shipment

Non-centrally staged end items will be scheduled with the SDDC and shipped to gaining units under standard transportation policy. The OCONUS shipments require notification to SDDC six months prior to movement. Coordination with the gaining units is required to ensure proper receipt and accountability of TPF end items that are shipped directly to the units. An agreed upon consolidation point for joint inventory and handoff will be used for receipt of materiel (class IX, publications). USAMC staging sites to GC supply support activity locations may vary based on commodity and end items. The MATDEV resources the transportation costs to handoff sites, regardless of location.

4-18. Joint supportability assessment and call forward

a. Under TPF, a joint supportability assessment coordination meeting will address all issues identified during the DA Form 5682 coordination meeting. Subsequently, not later than 60 days before CONUS and 90 days before OCONUS FUED, the MATDEV and GC will coordinate and approve the final fielding and handoff schedule. GCs will report on their readiness to conduct the fielding and will mutually agree that the projected materiel percent of fill, end item availability, personnel, and facility support is adequate to conduct the fielding as scheduled. Either the final FUED will be agreed upon or a new fielding and joint supportability assessment date scheduled.

b. The joint supportability assessment will address all materiel, personnel, facility, publications, and training requirements needed for fielding. Pipeline reports from LIW, previous coordination checklists and reports, and subsequent corrective and preparatory actions will be used to determine total system supportability.

c. Final details for processing, inventory, and handoff will be agreed on prior to moving the materiel to the staging or handoff sites.

4-19. Unit Set Fielding

Unit Set Fielding (USF) is a disciplined, synchronized approach that focuses on fielding a system of systems configuration to provide a fully integrated operational capability. USF will—

a. Shift from fielding "stand alone" systems to "systems of systems" configured in an integrated unit set.

b. Synchronize processes to ensure that the integrated fielding of systems of systems is accomplished to give the unit a full operational capability.

c. Support modernizing a unit with the minimum disruption to unit readiness.

d. Ensure all materiel is present and integrated during fielding; for example, major end item, digital hardware and software, support facilities, Training Aids, Devices, Simulators and Simulation (TADSS), personnel, and ASIOE.

e. Require the corresponding installation infrastructure, training base, and training center modernization be integrated to ensure success.

f. Not replace TPF and other materiel fielding processes but will capitalize on the strengths of these programs to discipline unit modernization.

g. Be sequenced according to Army operational priorities.

4-20. Maintenance

The MATDEV ensures all equipment requiring field level maintenance is added to the Maintenance Master Data File (MMDF) located at USAMC LOGSA prior to fielding.

Chapter 5 Transfers and Redistribution

5-1. General

Materiel transfers or redistribution covers a wide range of situations, such as intra- and inter- command including ACOMs, ASCCs, and DRUs that will be referred to as, "command" throughout this chapter, transfer of end items governed by AR 700-142, paragraph 6-1, and redistribution of excess and replaced end items governed by AR 710-2. It can also include fielding of a major weapon system and all its support from one command to another command that has never used the system, or displaced (cascaded) equipment fielding using TPF methods. This can be more complicated than new system fielding. Transfers require coordination with the DCS, G-8, National Inventory Control Point (NICP) and between the losing and gaining commands.

5-2. Displaced Equipment Fielding

When the displaced equipment will remain within the command, the command will direct the transfer of displaced equipment, from owning (losing) unit to the gaining unit. The planning, programming, and budgeting, as well as the coordination and reallocation of resources are done within the command. The supporting command (SC) item managers or the MATDEV will provide disposition instructions as necessary, as well as logistics support, data, or other assistance when requested. Assistance requiring travel by depot or National Maintenance Point (NMP) personnel is provided on a reimbursable basis. The command will coordinate internal command transfers with HQDA in accordance with AR 710-1. Materiel transfers or redistribution covers a wide range of situations, such as:

- a. Materiel Transfer governed by AR 710-2.
- b. Excess materiel redistribution is governed by AR 710-2.
- c. Fielding of a major weapons system and all its support from one command to another command that has never used the system, or displaced (cascaded) equipment fielding using TPF methods.

5-3. Transfer between commands

- a. After receipt of the MON from MATDEV, a Memorandum of Agreement (MOA) between the losing command (LC) and GC(s) will be used to plan the transfer of displaced equipment when either of the following conditions exist:
 - (1) The GC presently uses and supports the displaced equipment.
 - (2) The displaced equipment is self-contained, such as power generators, trailers, or vans, which will not have a significant resource impact on the GC.
- b. A formal Materiel Transfer Plan (MTP) will be prepared by the MATDEV of the displaced equipment, and coordinated with the LC and GC(s), SC, and other participants when either of the following conditions exist:
 - (1) The displaced equipment must be transferred directly from one command to a different command that has not previously used or supported the system.
 - (2) The displaced equipment must be transferred to a depot level activity for refurbishment in conjunction with transferring the system to a command that has not previously used or supported the system. Under these circumstances, a tailored Displaced Equipment Plan (DEP) must be used to field the system.
- c. In accordance with AR 710-1, the LC shall coordinate transfer of all displaced equipment with HQDA before transferring.

5-4. Planning Guidelines

- a. The principles and techniques of integrated product support management must be applied for planning, tracking, and evaluating the transfer of displaced equipment. The integrated product support planning and preparation of the MOA or MTP will be conducted in conjunction with the MFP for the new or improved system causing the displacement. The goal of displaced equipment planning is to provide delivery of a supportable system.
- b. All systems requiring a MTP will—
 - (1) Designate displaced equipment manager.
 - (2) Address all integrated product support elements except design interface in the MTP.
 - (3) Establish transfer procedures and schedules.

c. Displaced equipment transfer and fielding coordination meetings and checklists will be used to ensure that all participants understand their responsibilities and can support the schedules for the transfer and/or fielding. Displaced equipment may, with advance planning, programming, and funding be routed through depot level activities for refurbishment, planned overhaul, application of required modifications, or conversions prior to fielding.

5-5. Documentation for Displaced Equipment Fielding

a. As with a new system fielding, displaced equipment fielding (DEF) will use the MON and MFP process. Transfer between commands will be planned and coordinated with HQDA, the MATDEV, and the GC through an MOA or MTP. A displaced equipment MON will accompany or precede the MOA or MTP. The content of the MOA or MTP will be adapted to the complexity and condition of the system, its resource impact on the GC, and the specific needs and capabilities of the GC. The GC will provide comments on the MOA or MTP to define their requirements and will provide a DA Form 5106 to fully describe the maintenance and supply support structures. A formal Materiel Transfer Agreement (MTA) will be required for transfers.

b. The MTP will contain all the same sections as an MFP used for a new system. Whether a MOA or MTP is used to transfer or field the system, the following areas will be addressed—

- (1) Command, control, and coordination data, schedules, and procedures.
- (2) Total system description including all associated and supporting equipment.
- (3) Transfer or fielding logistics procedures.
- (4) Maintenance support.
- (5) Supply support.
- (6) Transportation and handling.
- (7) Technical data and publications, OSHA SDS and GHS labels.
- (8) Facilities (mobile and fixed).
- (9) Training, training devices, and materiel.
- (10) Computer resources and software support.
- (11) Other logistics support to include ESOH assessment and controls required.

5-6. Displaced Equipment Training

a. USAMC, the Army's designated displaced equipment trainers will determine GC training requirements for displaced equipment. The existing training base will be used to the maximum extent possible. When a formal Displaced Equipment-Training Plan (DETP) is necessary, it will be an appendix in section 9 of the MTP or appended to the MOA. When no formal DETP exists, all training requirements needed to train the staff planners, trainers, support personnel, and users will be documented in the MOA or MTP.

b. TRADOC and other Capability Developers will initiate DETPs and conduct Displaced Equipment Training (DET) for active component units. FORSCOM and USARPAC will plan and conduct DET for USAR units, while the NGB will establish plans and conduct DET for Army National Guard units (see AR 350-1). Displaced equipment trainers will coordinate with USAMC trainers.

5-7. Supporting command materiel transfer plan procedures

a. The MATDEV will plan and direct transfer of displaced equipment to a GC not previously supported, using a MTP. A MTP will also be used if the system is to be cycled through a depot and fielded to the GC via TPF.

b. The MTP will be coordinated with the LC, GC, SC, and other participants, and will be prepared and staffed in conjunction with the MFP for the new or improved system causing the displacement. All systems requiring a MTP will have milestone schedules. The following activities are required to complete the MTP—

- (1) Adequate DETP has been accomplished.
- (2) Facilities and ESOH requirements are available or planned.
- (3) Personnel requirements are identified and planned.
- (4) Appropriate Logistic Assistance Offices (LAOs) have been included in the coordination actions.

c. All materiel requirements have been identified. This includes—

- (1) The items that will be provided by the LC, GC, and SC.
- (2) Transfer of materiel.
 - (a) Shipped directly from the LC to the GC.
 - (b) When stored and cycled through a depot, a TPF will be used to field the system to the GC.
- (3) Establish transfer standards and methods for all materiel, support items, and repair parts. The LC, GC, and SC need to agree on the planned procedures for transfer of all materiel.
- (4) A determination of how initial support for each end item will be computed (SC computations, or based on present support stockage in another unit).
- (5) Identify a MFT of skilled personnel and sources to provide initial support, when required.

- (6) Develop a schedule that will not conflict with other planned operations needing the same personnel or facilities.

5-8. Losing command Materiel Transfer Plan procedures

a. When displaced equipment is transferred using a MTP, the LC will appoint a displaced equipment manager who will use a materiel transfer plan to manage displaced equipment transfers. This manager will plan and coordinate the transfer in conjunction with the MATDEV responsible for the MTP and the managers of the new system causing the displacement. The appropriate LAOs will be coordinated with their input and assistance.

b. The LC will provide direct input to the MTP and be a signatory for the MTA.

c. The input to the MTP will cover all areas of system support and may include the latest actual support costs and procedures for the displaced equipment, current condition and status of the materiel. This information will be used in determining what can be transferred directly to the GC and what will need to be refurbished or what items will be supplied from Army wholesale stocks. This information will be used to establish milestones and schedules for the displaced equipment fielding.

d. For transfers accomplished by MTPs, the LC will execute the following procedures:

(1) Identify the needed DET requirements and coordinate and schedule them with the displaced equipment trainers, GC(s), and the appropriate SC(s).

(2) Ensure the timely change to MTOE and/or TDA authorizations allowing for the expedited turn-in of the displaced equipment and its related support equipment and materiel.

(3) Ensure the timely turn-in and transfer of the system and its related support as specified in the MTP.

(4) Achieve agreed-upon equipment transfer standards. Inform the SC and GC immediately of all shortages or condition deficiencies of materiel planned to be transferred.

(5) Ensure all staging, processing, and handoff requirements have been coordinated with the MATDEV, UMFP, staging site, and LC.

(6) Package and ship all displaced materiel and support items to the GC, depot, or staging site in accordance with the MTP.

5-9. Gaining command Materiel Transfer Plan procedures

When a MTP is used to transfer displaced equipment, the coordination is between the MATDEV, GC, and LC. The GC will ensure that their information going into the MTP results in a clear and complete description of their present and projected personnel, facility, and materiel assets. This information will result in establishing all resources required for each gaining unit to receive, operate, maintain, and support the displaced equipment. The following procedures will help ensure a successful transfer:

a. Appoint a displaced equipment manager for the planning, coordination, and execution of the transfer.

b. Ensure the MFP is prepared in accordance with appendix C.

c. Ensure that a fielding checklist is used.

d. Ensure the DET and personnel requirements are coordinated and planned for in accordance with AR 350-1.

e. Plan, program, and budget for the receipt, operation, maintenance, and support of displaced equipment.

f. Validate authorization documentation (MTOE and/or TDA).

g. Provide DA Form 5106 identifying the maintenance, and supply support units and/or environment.

h. Identify all support considerations that should be addressed in the coordination of the MTP and transfer procedures.

5-10. Use of a Memorandum of Agreement for transfer

a. When a MFP for a new system is received, making a system available for displacement or transfer, the LC will determine if redistribution procedures are required for the replaced system.

b. If the system will remain in the command, then the transfer will be planned, programmed, budgeted for, and controlled within the command. Normal logistics support channels and methods will be used. However, if the system is to be transferred to another command, an MOA will be initiated by the LC to plan, coordinate, and affect the transfer to the GC.

c. The LC must identify the materiel condition and quantity of the support equipment available for transfer. The condition will be reviewed to determine if it is necessary to route all or part of the system and its support equipment to a repair or overhaul facility prior to transfer to the GC. Coordination with SC may be necessary to identify the related support equipment and spares or repair parts to be included in the transfer.

d. When a specific end item is replaced from MTOE or TDA (see AR 710-2), there are tools available to identify the repair parts that are unique to the end item being displaced and no longer needed by the organization. These tools can be found in the Web Logistics Information Database (WEBLIDB), which can be accessed from LOGSA's home page using the LIW interface.

e. After receipt of the MON stating that displaced equipment will be transferred directly to a GC that uses and supports the system, the LC will take the following steps:

- (1) Jointly formulate, coordinate, and execute displaced equipment's MON with the gaining command addressing all the areas of paragraph 5-7.
- (2) Identify needed DET requirements and coordinate and schedule them in coordination with the designated displaced equipment trainers and the GC (see para 5-6).
- (3) Ensure the timely change to MTOE and/or TDA authorization documents allowing expedited turn-in of the displaced equipment and related support equipment and materiel.
- (4) Coordinate and document the requirements and responsibilities of the transfer in a displaced equipment checklist.
- (5) Ensure timely turn-in and transfer of the system and related support equipment and materiel as specified in the MOA.
- (6) Achieve agreed-upon equipment transfer standards, and document any standards deviation.

5-11. Losing Command, Gaining Command, and Supporting Command Memorandum of Agreement procedures

a. When a command is informed that it will receive displaced equipment from another using command and they already use and support that system, a MOA will be used to transfer the system from the LC to the appropriate GC. The MOA will address all the areas called for by paragraph 5-7. The GC will determine all the training, personnel, facilities, materiel, and supply support needed to support the system in the gaining units. Then, based on present or projected personnel, facilities, and assets, they will determine what additional resources are needed to use, maintain and support the system.

b. The LC through an MOA, will develop plans that coordinate the transfer of displaced equipment with displaced equipment trainers, and SCs, using the following:

- (1) Materiel and assistance provided by the LC.
- (2) The additional skills and training needed and their source.
- (3) The condition and quantities of materiel provided by the LC.
- (4) Status of additional requirements to be provided, and their source.
- (5) Documentation that each end item being transferred will have initial support from one of the following: mandatory parts list, an approved computed initial support list, or a recommended list based on the stockage from another unit already supporting the same end items and the source for these parts.
- (6) Application of the transfer standards in accordance with AR 700-142.
- (7) Scheduling of a transfer coordination meeting to develop and agree on displaced equipment checklist similar to the fielding checklist.
- (8) Transfer schedule, location, and approval for coordination.
- (9) A list of SC functions and responsibilities in the transfer.
- (10) A list of primary points of contact for the transfer in the LC and GC.

c. To support the MOA the GC will also—

- (1) Ensure timely establishment of authorization documents (MTOE and/or TDA).
- (2) Provide DA Form 5106 to the SC and LC to show the using, maintenance, and supporting units for the displaced equipment. The proper distribution for the operational readiness float assets will be designated, if applicable.
- (3) Identify personnel and training requirements for each gaining unit. Plan and coordinate displaced equipment training in accordance with AR 350-1.
- (4) Identify and program for additional or special facility requirements of the displaced equipment.
- (5) Plan, program, and budget for the receipt, operation, and maintenance of the system.

d. SC MOA procedures.

(1) When a MOA is used to transfer displaced equipment from one command to another that already uses and supports the system, the SC (Product Support Integrator of the system or its support equipment) will be involved as required. In some cases, the LC and GC will need little help in determining supportability and materiel requirements. SCs and maintenance depots will play a central role in determining if some or all the displaced equipment and its support equipment will be cycled through maintenance activities prior to transfer to the gaining command.

(2) In all cases, the Product Support Managers (PSM) and PSI (including the NMP) will plan, program, and budget for the continued support of the displaced equipment.

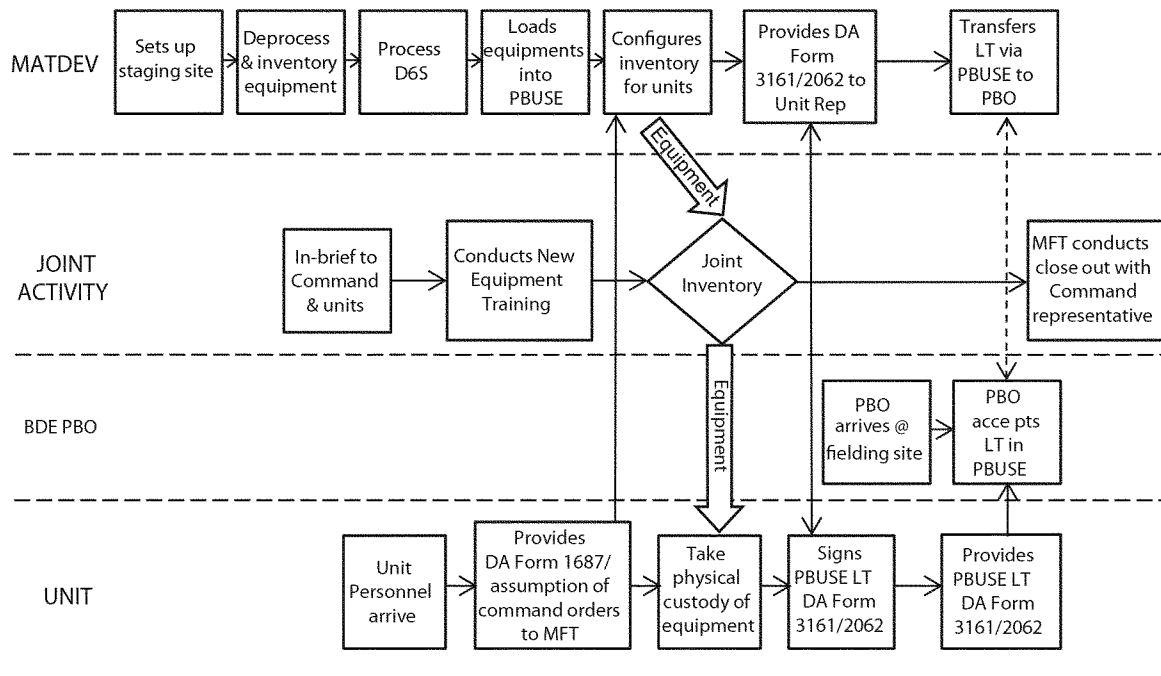
(3) On request, the SC will identify the displaced equipment and related ASIOE, components, class IX, and other support materiel. In some cases, this may be accomplished with direct assistance from equipment specialists and item managers; while in other cases use of the supply process may be appropriate. The initial support may be identified by the SCs. Initial support requirements may be an established authorized stockage list (ASL) computed list, or even stockage based on another unit already supporting the same end item.

(4) Based on coordination between the LC and GC, depot level refurbishment will be accomplished when deemed necessary and economical. This can involve needed modifications, conversions, or overhauls as appropriate.

e. Special assistance to the LC in achieving transfer standards may be required by the MATDEV on a reimbursable basis.

Chapter 6 Handoff Procedures

Handoff procedures will vary based on the level of system complexity and category of TPF. The MATDEV and GC will coordinate the MFP and agree (if an MFT is required or not). Subsequent coordination will specify the detailed materiel, personnel, and facility requirements to be provided by the MATDEV and GC. The entire handoff process often has three distinct steps: processing, inventory, and handoff. Figure 6-1 outlines handoff process.



Legend
PBO, Property Book Office
PBUSE, Property Book Unit Supply-Enhanced

Figure 6-1. Materiel fielding handoff procedures

6-1. Processing

a. Many items will not require any processing other than taking them out of a container, verifying their identity, and accepting materiel from the supply system.

b. The MFT will consist of personnel required to de-process the materiel and conduct a joint inventory of all materiel provided to each unit. If NET is planned in conjunction with the processing and handoff, the NETT coordinates with the MFT. When central staging is used, the MATDEV will arrange with the staging site for processing, inventory and handoff support using staging site, or contractor personnel, as required. When staging site facilities and personnel are used, the staging, processing, and handoff requirements will be identified and coordinated. In these cases, the staging site will furnish the tools and materiel for processing unless otherwise agreed on. When decentralized staging is used, the MFT or GC personnel will accomplish processing.

c. The MFT and staging site personnel will fill out any necessary discrepancy reports for missing, damaged, or defective items discovered before or during the handoff. The MATDEV provides a shortage listing to the gaining PBO and Supply Supporting Activity (SSA) accountable officer in order to establish valid due-in for all inventory shortages. The MATDEV will ensure that the missing, defective, or damaged items are provided to the customer at no cost. All

discrepancies will be reported on the appropriate form, SF 368 (Product Quality Deficiency Report (PQDR)), and will be promptly submitted through channels.

d. Other items received at a unit or central staging site will be inspected, given a complete operational check, and accepted in accordance with AR 710–2 and AR 735–5. Instructions will be included in the MFA and the method of processing will be coordinated with the staging site and/or unit personnel.

e. Items with extensive processing requirements due to either complexity or density will generally be de-processed by a MFT. The MATDEV determines and provides the necessary personnel, skills, equipment, tools, and materiel needed for the task. Generally, the processing will take place before GC personnel arrive for the inventory and actual handoff. If a central staging site or GC facility is needed for the processing, all the arrangements must be coordinated, agreed on, and documented in the MFP and MFA.

f. When a central staging is not used and no MFT is used for fielding, the GC will fill out and process all SF 368s, and the GC will submit it through established channels.

g. The MATDEV will fund all incurred processing costs.

6–2. Inventory

a. The unit will provide Assumption of Command Orders and DA Form 1687 (Notice of Delegation of Authority – Receipt for Supplies) to the MFT chief so the MFT can verify that the materiel is being issued to the correct MTOE/TDA organization and to ensure the commander has delegated signature authority to the personnel who will sign DA Form 2062, and DA Form 3161 in accordance with AR 710–2 and AR 735–5.

b. The MFT will perform a joint inventory with the unit to account for all items provided during the fielding. Both the MATDEV and the GC representative will sign the appropriate DA Form 2062, and DA Form 3161 in accordance with AR 710–2 and AR 735–5

c. When a MFT is used a joint inventory will be conducted. Arrangements for the inventory and handoff will be coordinated between the MATDEV, MFT or staging site personnel, and GC personnel.

d. The joint inventory will be done in conjunction with the handoff. Inventory of the materiel is conducted in the following manner:

(1) Class II and VII end items will be individually inspected to ensure all basic issue items and major components and on-board spares are included.

(2) All packaged materiel (class IX, technical manuals, special tools, and other packaged support items) will have the outer package opened, and the packing list will be compared to the status reports and the included customer documentation. All discrepancies will be annotated on the packing list and checked against the actual contents of the package. The individual packages will be removed, counted, and verified against the packing list.

(3) The inventory will be complete when all shortages, damages, or defects are listed on the DA Form 2062 and DA Form 3161 in accordance with AR 710–2 and AR 735–5. Shortages will be documented, and indicate whether a follow-on fielding or free issue of the items can be expected.

e. When MFTs are not used, the GC PBO and SSA accountable officer will process the customer documentation and appropriate discrepancy reports for any missing, damaged, or defective materiel.

6–3. Handoff

a. Handoff of the materiel is complete when all receipt documents are signed and accepted and processed using an APSR by the gaining PBO. Accountability for the fielded system and its support package will be transferred to the GC PBO or SSA accountable officer at handoff. The GC PBO/SSA/unit accountable officer will process the customer documentation provided to establish property accountability for all materiel received.

b. The MFT chief or central staging site personnel serving as the handoff team will prepare an AAR within 30 days after completion of the joint inventory and handoff. This report will include the following:

(1) A list of all materiel and services still owed to the GC that is required as a result of fielding deficiencies.

(2) A summary of the discrepancy reports, warranty claims, EIRs, and maintenance requests used during processing, inventory, handoff, or NET (if part of MFT function).

(3) A response to all fielding checklist statements listed in the MFT AAR.

(4) A list of any transfers that have not been accepted by the gaining PBO.

(5) A copy of the MFT AAR will be provided to the GC and the MATDEV.

Chapter 7

Fielding Equipment Using the Property Book Unit Supply Enhanced System

The use of the PBUSE instructions for fielding are intended to supplement the current Army policy and procedures outlined in the property book unit enhanced supply manual. The MATDEV property book unit enhanced supply

account is intended for establishing initial accountability and asset visibility to ensure GCs account for fielded equipment. Formal property accountability at handoff begins as outlined in AR 735-5.

Section I

Automated Process

7-1. Adding equipment to Property Book Unit Supply Enhanced System

Use these processes to add new materiel to an existing LIN and to increase and decrease the on-hand quantities of materiel items. For instructions, see PBUSE step-by-step instructions at <http://pbuse.lee.army.mil>.

- a. From Property Book Module, click on “Asset Adjustments” to display the Materiel Items screen.
- b. Make the appropriate entries into the required fields and click the “Apply” button. Completion of the transaction varies based on the Serial Registration Number Requirement Code (SRRC) of the item.
- c. After entering all information, click the Apply button.
- d. Click “OK” after item Update Document Number dialog box appears.

7-2. Materiel transfer process

- a. This process is used to move items from the MATDEV files to the MATDEV fielding team or to the unit receiving the equipment.
- b. From the Property Book Module, click on the “Transfer” tab. The MTP is a three-step process.
 - (1) The MATDEV account manager selects the GC UIC, selects items to be shipped and/or fielded to the GC and clicks the apply button.
 - (2) The account manager then selects the “Outgoing Suspense Action” tab, selects the correct document number and clicks “Notify PBO” button.
 - (3) The PBO will then click on the “Incoming Suspense Action” and accept or reject the item.
 - (4) The MFT will not depart until the PBO has accepted or rejected all items.

Section II

Manual Process

7-3. Adding equipment using the manual total package fielding process

After equipment is received at the fielding site and is prepared for issue in PBUSE, the MATDEV will—

- a. From the MILSTRIP or Order Item Module, click manual TPF to display the applicable screen.
- b. Insert appropriate TPF document number using the document number contained on the shipment documentation.
- c. Select the appropriate MATDEV UIC or Derivative UIC that equipment is to be transferred from.
- d. Select or complete all required information from the in-transit document including DODAAC, NSN, LIN and/or NSLIN, RIC To, and quantity received into PBUSE. Use Property Book Identification Code (PBIC) U.
- e. Post the receipt under the MILSTRIP or Order Item module.

7-4. Non-serial and/or lot numbered asset adjustment

- a. If the SRRC is N and the Type Action Code is P, the system displays a dialog box containing the document number.
- b. Click the “OK” button on the document number dialog box.
- c. If the new item requires a serial, registration, or lot number, a screen appears so that the Serial Number, Registration Number, and/or Lot Number can be added.
- d. Enter the required information and click, “Apply”.
- e. If the “items” inserted successfully, your document number will appear in the dialog box. Click the OK button to process the request.
- f. The “would you like to generate a FedForm?” message box may appear; depending on your selection, if the SRRC is A, C, R, S, T, or W and the Type Action Code is S, the action must be completed from the Suspense Action tab.
- g. If the end item has a SRRC other than “N”, the add serial number screen will appear. Serial numbers will be added for “ALL” weapons, ammunition, CCI, and rolling stock (vehicles, generators, trailers, and so forth). For rolling stock there is an additional requirement to add a registration number as well as the serial number. Items which have a SRRC other than “N” and have a controlled inventory item code (CIIC) of “U”, the SRRC can be changed to reflect no requirement for serial number tracking or reporting. Changing the SRRC will only affect the MATDEV PBUSE account; therefore, the gaining PBO will need to change the SRRC to “N” as well.
 - (1) Equipment that has a UII will have the UII added to the PBUSE asset record prior to posting the lateral transfer for the gaining PBO acceptance. If an end item has multiple parts and/or components with UII’s, the UII to be recorded in PBUSE is the one that the serial number is derived from.

(2) An Automated Transaction Process Interface (ATPI) has been developed that will allow for asset quantities, serial numbers, and UIC to be added using an extensible mark-up language interface, when using the ATPI, see PBUSE user's manual section 14.5.

7-5. Increase and/or decrease materiel items

Perform this function to increase or decrease the on-hand quantity of a selected materiel item.

- a. Click on the "Asset Adjustments" to display the Materiel Items screen from the Property Book module.
- b. From the materiel increase tab, click the "LIN" hyperlink on the lower half of the screen to open the Materiel Increase Asset Adjustment (MIAA) screen.
- c. Click the "Adjustment Action LOV" and select either Increase or Decrease.
- d. From the drop down menu select the "LOV" tab and make the desired selection.
- e. Make the appropriate entries and click the "Apply" button to assign a document number if not previously entered. The fields in red are mandatory entries.
- f. Click the "OK" button on the Document Number confirmation box. If the Type Authorization Code (TAC) is S, the action must be completed from the Suspense Action tab.
- g. If DA Form 4949 (Administrative Adjustment Report (AAR)) is selected from the LOV and CAD–Accountability Change is selected from the Type Trans Code LOV.

7-6. Issuing equipment

- a. From the Property Book menu, click the "LT" tab to display the LT screen, Materiel Items tab.
 - b. Click "Losing UIC" Find button and select a UIC.
 - c. Click "Transfer" to LOV and select PBUSE or Central Issue Facility.
- (1) The losing organization is the UIC or derivative UIC that the equipment is currently assigned (the MATDEV PBUSE UIC or derivative UIC). The gaining UIC is the unit that is being fielded the equipment. Items are to be fielded to the company or detachment level (not to the Brigade Combat Team level) unless prior arrangement has been made with the GC.
- (2) No equipment shall be issued to an organization without a DA Form 1687 (Notice of Delegation of Authority-Receipt for Supplies) and Assumption of Command memorandum from the commander that signed the DA Form 1687. The PBO may only accept a PBUSE transfer (which removes the issued property from the MATDEV account) when the signature card DA Form 1687, PBO appointment orders, and required documents have been provided to the staging facility manager.
- (3) In an effort to prevent PBOs from posting MATDEV LTs as an asset adjustment, the following statement will be added to the final copy of the transfer DA Form 3161 provided to the GC for signature of acceptance. (This is a TPF. Do not add this equipment using a APSR asset adjustment. Refer to APSR incoming transfers and accept or decline the transfer. If the transfer cannot be accepted or is delayed, notify the MATDEV point of contact as soon as possible.)
- (4) Ensure the GC UIC is registered in an APSR. Do not issue equipment to any UIC that is not registered.
- (5) A MATDEV representative shall sign and date the DA Form 3161 in block 13. Once the GC representative signs for the equipment (DA Form 3161 block 15). The MATDEV MFT representative will provide copies of all documents to the PBO or their representative at the conclusion of the fielding. If the PBO and/or representative is not available, the MATDEV MFT Chief will provide all supporting documents pertaining to the fielding to the GC PBO within 24 hours via e-mail or fax.
- d. The following procedures will be used to receive equipment prior to the departure of the MFT.
 - (1) The PBO or their authorized representative will log on to the PBO's APSR account.
 - (2) The PBO or their authorized representative will either accept or reject the MFT materiel transfers.
 - (3) The PBO or their authorized representative will immediately accept all correct materiel transfers in an APSR.

7-7. Follow-up procedures after completion of a fielding

a. Once fielding is complete, view the transfer in "Outgoing Suspense Actions" tab. Click on the "Notify Gaining PBO" button, this notifies the GC PBO in order for the transfer to change from a APSR suspense document to one that is posted. This will be done within 24 hours after completing the transfer. The MATDEV will use table 7-1 and table 7-2 appropriately to ensure timely closure of open transfers.

Table 7-1
Matériel transfer follow-up procedures for onsite matériel fielding

Responsible Agency	Required Action	Time Standard
PEO/MATDEV	Notify receiving unit PBO/Brigade Commander	after 5 working days if transfer is still open
PEO/MATDEV	Notify ACOM HQ that entered into MFP/MFA	after 20 working days if transfer is still open
PEO/MATDEV	Notify HQDA's DCS G-4	after 30 working days if transfer is still open
PEO	Notify DASA APL	within 40 working days if transfer is still open

Legend for Table 7-1:

MATDEV – Materiel Developer

PEO – Program Executive Office

DCS - Deputy Chief of Staff

DASA APL - Deputy Assistance Secretary of the Army Acquisition Policy and Logistics

PBO - Property Book Officer

Table 7-2
Matériel transfer follow-up for other equipment fielding's (mailings, deliveries, and so forth)

Responsible Agency	Required Action	Time Standard
PEO/MATDEV	Notify receiving unit PBO/Brigade Commander	after 15 working days if transfer is still open
PEO/MATDEV	Notify ACOM HQ that entered into MFP/MFA	after 20 working days if transfer is still open
PEO/MATDEV	Notify HQDA DCS G-4	after 30 working days if transfer is still open
PEO/MATDEV	Notify DASA APL	after 45 working days if transfer is still open

Legend for Table 7-2:

MATDEV – Materiel Developer

PEO – Program Executive Officer

DCS - Deputy Chief of Staff

DASA APL - Deputy Assistance Secretary of the Army Acquisition Policy and Logistics

PBO - Property Book Officer

b. Except for MATDEVs in areas designated as contingency operations by HQDA, only the equipment that is actively being fielded will be added to a PM's APSR account. Equipment is being actively fielded when the equipment has been segregated and identified for a particular unit with serial numbers, if appropriate, and is ready for issue. MATDEVs in Afghanistan are now additionally required to supplement their PBUSE accounts with equipment that is not being actively fielded to facilitate real-time visibility of equipment at Forward Operating Bases by Theater personnel. This includes equipment actively being fielded, yet to be fielded, no longer being fielded, used as operational floats, or turned in to the MATDEV.

c. MATDEVs in Afghanistan and/or OEF are not to add the following categories of equipment into an APSR:

- (1) Equipment currently accountable on another APSR account.
- (2) TPE.
- (3) Equipment required to facilitate fielding such as material handling equipment and shipping containers; relocatable buildings.
- (4) ASL and Prescribed Load List (PLL), repair parts, or components.

d. No MATDEV will add installation property, equipment in RESET, total quantities at a depot, and so forth into their APSR account.

e. MATDEV's will not transfer equipment to other MATDEVs using an APSR. Equipment from one MATDEV that is being fielded by another (such as ASOIE for TPF item or communications equipment in a vehicle) should only be added to an APSR by the MATDEV that is fielding the equipment to the GC.

f. Equipment that has been turned into a MATDEV directly from a unit will not be added to the MATDEVs APSR account using an APSR Transfer from the losing unit. Acceptance of an equipment turn-in using the APSR transfer process causes the Army to lose visibility and purpose of the equipment turn-in. MATDEVs will only accept property directly from a unit using a DD Form 1348-1A (Issue Release/Receipt Document).

Appendix A References

Section I Required Publications

AR 700-142

Type Classification, Materiel Release, Fielding, and Transfer (Cited in paras 1-1, 1-4, 2-1a, 2-2a, 2-3b(1), 2-3b(4), 2-5a, 2-5e, 2-8a(3)(g), 3-1, 3-2c, 3-3a(1), 3-3c(2), 3-4, 3-6a, 3-7a, 3-9, 3-10f(2)(e), 3-11a, 3-11b(2), 3-11b(4), 3-11d, 3-12b(3), 3-14a, 3-15, 3-16, 3-16a(1), 4-8, 5-1, 5-11b(6).)

Section II Related Publications

A related publication is a source of additional information. The user does not have to read it to understand this publication.

AR 5-13

Total Army Munitions Requirements Process and Prioritization System

AR 25-30

The Army Publishing Program

AR 25-50

Preparing and Managing Correspondence

AR 70-47

Engineering for Transportability Program

AR 71-32

Force Development and Documentation

AR 73-1

Test and Evaluation Policy

AR 200-1

Environmental Protection and Enhancement

AR 220-1

Army Unit Status Reporting and Force Registration - Consolidated Policies

AR 350-1

Army Training and Leader Development

AR 700-4

Logistics Assistance

AR 700-127

Integrated Logistic Support

AR 700-138

Army Logistics Readiness and Sustainability

AR 700-139

Army Warranty Program

AR 708-3

Army Adopted Items of Materiel and List of Reportable Items

AR 710-1

Centralized Inventory Management of the Army Supply System

AR 710-2

Supply Policy Below the National Level

AR 735-5

Property Accountability Policies

AR 750-1

Army Materiel Maintenance Policy

AR 750-59

Corrosion Prevention and Control of Army Materiel

DA Pam 25-30

Consolidated Index of Army Publications and Blank Forms

DA Pam 385-16

System Safety Management Guide

DA Pam 700-24

Sample Data Collection

DA Pam 708-3

Cataloging supplies and equipment, Army adopted items of materiel and list of reportable items (SB 700-20)

DA Pam 750-8

The Army Maintenance Management System (TAMMS) Users Manual

DODD 5160.62

Single Manager Responsibility for Military Explosive Ordnance Disposal Technology and Training (EODT&T)

MIL-HDBK-1791

Designing Internal Aerial Delivery (Available at <http://www.ansi.org>.)

MIL-PRF 32216

Evaluation of Commercial off the Shelf Manuals and Preparation of Supplemental Data (Available at <http://www.everyspec.com/MIL-PRF>.)

MIL-STD 882-E

American Society of Safety Engineers (Available at <https://www.asse.org>.)

MIL-STD-3003

Vehicles Wheeled Preparation for Shipping (Available at www.everyspec.com.)

MIL-STD-2073-1

Military Packaging (Available at www.everyspec.com.)

Air Force Manual 24-204

Transportation-Preparing Hazardous Materials for Military Air Shipments (Available at www.wpafb.af.mil.)

OSHA 1900.1200

(Available at <https://www.osha.gov>.)

SB 700-20

Army Adopted/Other Items Selected for Authorization/List of Reportable Items

TM 38-470

Storage and Maintenance of Army Prepositioned Stock Materiel

29 CFR

Labor (Available at <http://www.gpo.gov/fdsys/>.)

40 CFR

Protection of Environment (Available at <http://www.gpo.gov/fdsys/>.)

49 CFR

Transportation (Available at <http://www.gpo.gov/fdsys/>.)

Section III**Prescribed Forms**

Unless otherwise indicated, DA Forms are available on the APD Web site (www.apd.army.mil).

DA Form 5682

Material Requirements List (Prescribed in paras 2–5, 2–8, B–2.)

Section IV**Referenced Forms**

Unless otherwise indicated, DA forms are available on the APD Web site (www.apd.army.mil) and DD forms are available on the OSD Web site (<http://www.dtic.mil/whs/directives/infomgt/forms/>). SF forms are available on the GSA Web site (<http://www.gsa.gov/portal/forms/type/SF>).

DA Form 1687

Notice of Delegation of Authority - Receipt for Supplies

DA Form 2028

Recommended Changes to Publications and Blank Forms

DA Form 2062

Hand Receipt/Annex Number

DA Form 2406

Material Condition Status Report

DA Form 2407

Maintenance Request

DA Form 3161

Request for Issue or Turn-In

DA Form 3758–R

Calibration and Repair Requirements Worksheet

DA Form 4949

Administrative Adjustment Report (AAR)

DA Form 5106

Mission Support Plan (MSP)

DD Form 250

Material Inspection and Receiving Report

DD Form 361

Transportation Discrepancy Report (TDR)

DD Form 1348–1A

Issue Release/Receipt Document

DD Form 2977

Deliberate Risk Assessment Worksheet

SF 364

Report of Discrepancy (ROD)

Appendix B Instructions for completing forms

B-1. Instructions for Completing Mission Support Plan: (Department of the Army Form 5106).

Instructions for completing DA Form 5106 are found in table B-1.

Table B-1.
Instructions for completing DA Form 5106

BLOCK IN FORM	ENTRY TO BE MADE
CHECK ONE: PROPOSED FINAL	Identify if this is a proposed plan, or a final plan.
1.a. PREPARING ORGANIZATION NAME AND ADDRESS	Enter complete organization name, and address.
1.b. MACOM (ACOM, ASCC, DRU)	Enter Army Command, ACOM, ASCC, DRU of the preparing organization: FORSCOM, TRADOC, AMC, ARCENT, USANORTH, USARSOUTH, USAEUR, USARPAC, EUSA, USASOC, SDDC, SMDC, NETCOM, MEDCOM, INSCOM, CIDC, USACE, MDW, ATEC, USMA, USARC, ASC, IMA.
1.c. MSP Number	Enter Internal Mission Support Plan Number.
1.d. DATE (YYYYMMDD)	Enter date of form preparation.
1.e. POINT OF CONTACT	Enter Person from 1a. who will be responsible for information on the form.
1.f. PHONE DSN/COMM	Circle whether Phone number provided is Defense Switched Network (DSN) or Commercial, and annotate full phone number COMM or DSN.
2.a. NOMENCLATURE/MODEL	Enter the Nomenclature and model of the Materiel to be fielded, separated by a "/".
2.b. NSN	Enter Full National Stock Number for Materiel to be fielded (FSC and NIIN).
2.c. LIN	Enter LIN or ZLIN of materiel to be fielded. The LIN is a unique six digit alphanumeric code assigned to materiel by the Army for identification.
2.d. PROJECT CODE	Enter Project Code of Materiel being fielded. Project codes are used to distinguish requisitions, related documentation and shipments, as well as for the accumulation of intra-Service performance and cost data related to exercises, maneuvers, and other distinct programs, projects, and operations. A list of project codes can be found at http://www.dia.mil/j-6/dlms0/eLibrary/Manuals/MILSTRIP/Default.asp .
2.e. MTOE/TDA NUMBER	Enter the Number associated with the MTOE or TDA document that provides the authorization for materiel being fielded. I.E.; for an MTOE 06125RFC25, for a TDA NGWUICAA.
2.f. MTOE/TDA EFFECTIVE DATE (YYYYMMDD)	Enter date the MTOE or TDA referenced in 2e. is effective (per USAFMSA EDATE) Current Information for MTOE/TDA documents can be found at https://webtaads.belvoir.army.mil/ .
3.a. PROPERTY BOOK SYSTEM	Enter whether unit in 1a. is using Property Book Unit Supply - Enhanced (PBUSE), Army Medical Department Property Accounting System (AMED-DPAS), Manual, or other. If Other, annotate what system is being used.
3.b. DODAAC	Enter the DODAAC associated with the Property Book System in 3a.
3.c. MTOE/TDA	Enter whether the unit being fielding is an MTOE or TDA unit.
3.d. UIC DESIGNATION	Enter UIC for Using Unit. The UIC is a six-character, alphanumeric code that uniquely identifies each Active, Reserve, and National Guard unit of the Armed Forces.
3. e. Property Book System	Leave blank.
3.f. END ITEM DENSITY (Include ORF)	Enter Total Quantity of materiel to be fielded to include operational readiness floats (if authorized). i.e., If MTOE authorized quantity is 10, and ORF factor is 10%, End Item Density (quantity to be fielded) would be 11.

Table B-1.
Instructions for completing DA Form 5106—Continued

4. DODAAC AND ADDRESS OF HANDOFF SITE/SUPPLEMENTAL INFORMATION	For each Unit identified in 3.b thru 3.e above, enter the physical address of the handoff site and supplemental information (i.e. PBO Phone number, email address, and other notes related to mission support).
5. HAND-OFF DATE (YYYYMMDD)	Enter Date the Materiel Hand-off is planned to take place.
6. DATE MSP RECEIVED BY MATDEV	MATDEVs MFT Chief signs in this block and enters date.

B-2. Instructions for completing Department of the Army Form 5682, coordination checklist and report

Instructions for completing DA Form 5682 are found in table B-2.

Table B-2.
Instructions for completing DA Form 5682

BLOCK IN FORM	ENTRY TO BE MADE
1.a. Point of Contact NAME	Enter Point of Contact Name for MATDEV.
1.b. Office Symbol	Enter Office Symbol for MATDEV.
1.c. DSN	Enter Defense Switched Network (DSN) or commercial phone number for MATDEV.
1.d. DATE PREPARED (YYYYMMDD)	Enter date Form was prepared.
2. PRIMARY END ITEM	Enter Nomenclature of Primary End Item for Materiel being fielded.
3. STAGING SITE/HANDOFF LOCATIONS (Ship to Address)	Enter the Address the materiel is to be shipped for the handoff. Address should be in format required by transportation coordinator.
4. SCHEDULED HAND-OFF DATE (YYYYMMDD)	Enter Date Materiel Transfer to be performed.
5. Type of Fielding	If Fielding is a Total Package Fielding, check 5a. If Fielding is for a Unit Activation, check 5c. If Fielding is for a Unit Conversion, check 5d. If Fielding is for a specific level of complexity, enter a 1, 2, 3, or 4 in block 5b. to show level.
6. Gaining MACOM (ACOM, ASCC, DRU)	Enter Gaining ACOM, ASCC, DRU point of contact name, office symbol, Email address, and DSN phone number.
7. Gaining Command	Enter Gaining Command point of contact name, office symbol, Email address, and DSN phone number.
8. Gaining Unit Designation	Enter Gaining unit point of contact name, office symbol, Email address, and DSN phone number.
9. Gaining DODAAC	Enter Department of Defense Activity Address Code for gaining unit property accountability system.
10. Level of Support	Check 10a if materiel will be supported thru Field Maintenance, Check 10b if item will be supported at Sustainment level. Check both if both levels apply.
11. PACKAGE BASE	For local use.
12.a. Retail Supply System used by Gaining Unit	Check the Retail Supply System being used by Gaining Unit, to ensure proper document requirements are provided.
12.b. Property Book System used by Gaining Unit	Check the Property Book System being used by Gaining Unit, to ensure proper document requirements are provided.
13. Authorization Documentation	If Gaining Unit is authorized materiel thru MTOE, enter MTOE Number and e-date of MTOE in 13a. If Gaining Unit is authorized materiel by TDA, enter TDA number and e-date in 13b.
Parts B thru I of DA Form 5682	Fill in form for all applicable associated materiel requirements.

Appendix C Preparation Instructions for Materiel Fielding Documents

C-1. Preparation for the Memorandum of Notification

The MATDEV initiates the formal materiel fielding process by providing a MON to each GC, ASCC, and DRU at least 240 days before the LRIP and/or production contract for a developmental materiel system is awarded. The MON will be forwarded to the gaining ACOM, ASCC, and DRU at least 170 days prior to product availability. The MON will—

- a. State the intention to field a system.
- b. Provide specific fielding milestones.
- c. Briefly describe the system and its intended uses. The MON will also indicate if it replaces a materiel system now in use. If so, it will indicate whether the replaced system will be transferred under normal excess procedures, directed redistribution, or displaced equipment fielding.
- d. Identify the types of units to receive the materiel system and provide the best-cost estimate available for the logistics resource impact on the gaining commands. The Army Materiel Reference Data (AMRD) cost data will be used, if available, as the basis for these estimates.
- e. Be accompanied by a draft MFP. If a MFP is not necessary, the rationale will be provided, and the GC will be requested to concur and a MFA can be attached for signature or comment. GC concurrence is required to waive the requirement for an MFP.
- f. Provide the preliminary distribution plan, based on the current BOIP and common TOE update, if available, to the GC and state that a DA Form 5106 is required.
- g. Provide MATDEV points of contact and request GC points of contact.
- h. Request GC comments on the MON, MFP, and schedules.
- i. Ensure that MATDEV provides fielding schedules to GCs.

C-2. Memorandum of Notification format

The MON is a memorandum format with a standard FOR and SUBJECT line. (For is the GC, and subject is “MON”.) It includes brief summary descriptions for eight topic paragraphs, and has a signature block for the MATDEV. The summary paragraphs are:

- a. Reference.
- b. Intent.
- c. Milestones.
- d. System Description/Uses.
- e. Receiving Units.
- f. MON Justification.
- g. Preliminary Distribution Plan.
- h. MATDEV point of contacts.

C-3. Preparation of Materiel Fielding Plans

Prepare the MFP in one of two ways; a separate for each GC or a single MFP covering multiple GCs.

- a. For both preparation methods use the instructions in this appendix.
- b. When a materiel-fielding plan is being prepared to cover multiple GC, place GC unique information in identifiable paragraphs.
 - (1) Complete all the sections in each MFP. Provide best estimates available when finalized information has not been processed. If a section, paragraph, or subparagraph is not applicable, enter the statement, “NOT APPLICABLE,” along with supporting remarks. For example, “4.3 Support Equipment and TMDE (NOT APPLICABLE). No Support Equipment or TMDE is required.” If necessary, expand the MFP sections to meet the needs of the system, GC, or unique circumstances surrounding the specific fielding operation. Additional sections, paragraphs, and subparagraphs can be added. In the case of a system, being fielded to FORSCOM where Reserve Component units, in addition to Active Army units, will support the using units, then U.S. Army Reserve Command (USARC) unique impacts can be identified in a separate paragraph.
 - (2) Use the MFP to describe the total system. Do not prepare separate MFPs for lower indenture subsystems or components.
 - (3) Include any data that originates in other documents such as the RPSTL, NETP, qualitative and quantitative personnel requirements information, LCSP, technical publications, and the AMRD, that is required to make the MFP a stand-alone document.
 - (4) Base MFP detail and length on such factors as complexity, cost, and military essentiality of the system, GC support capability and limitations, required MATDEV support, geographical dispersion, deployment schedules, and any unusual logistics support procedures required for deploying the system.

(5) Do not restate standard supply, maintenance, packaging, or packing procedures unless needed for special emphasis.

(6) Make maximum use of lists, tables, diagrams, charts, and illustrations to present a complete picture of the system and logistics support structure. Use narrative descriptions only when the topic does not lend itself to a graphic or tabular presentation.

(7) Identify GCs, installations, and units in the MFP by DODAAC and UIC.

(8) When a MFP paragraph requires data that is classified, place the classified data in a separate appendix in section 9. Refer to the classified appendix in the paragraph requiring the classified data. Examples of possible classified data are system characteristics and performance data, deployment dates and quantities, and first unit equipped and initial operational capability dates.

(9) Cover all levels of support and maintenance that will be performed by the GC.

(10) Keep the materiel-fielding plan and materiel fielding agreement concise.

(11) Instructions for filling out the materiel-fielding plan are shown below, in the proper format.

c. All MFPs must be staffed with all stakeholders to ensure complete and coordinated planning well in advance of initial fielding of a materiel system. The MFP staffing will be accomplished in accordance with fielding milestones, as appropriate, or the specific agreed-upon milestones set up for the system fielding.

d. Some staffing requirements will vary based on the type of system and acquisition strategy. As a minimum, the coordination list in table 2–1 should be followed unless direct coordination with the organization or their headquarters deletes the requirement and unless there are other known requirements.

e. Coordination needs to be made to any GC scheduled to deploy the materiel system.

C–4. Materiel Fielding Plan and/or Materiel Transfer Plan format and instructions

The MFP and MTP are detailed documents broken into nine sections that expand on the summarized descriptions in the MON to provide clarity and accuracy, and outline agreements.

a. Section 1: Introduction.

(1) 1.1. Purpose. State the purpose of the MFP or MTP.

(2) 1.2. Data.

(3) 1.2.1. Data sources. List and include data sources used including the dates of their issuance or publication. For example, Army Modernization Information Memorandum (AMIM), NETP, DETP, BOIP, qualitative and quantitative personnel requirements information (QQPRI), and LCSP. Be sure to include the number and date of each data source.

(4) 1.2.2. Limits of data. Describe any limitation or qualifications that apply to data used.

(5) 1.3 Agreements. Place a listing of all MFAs or MTAs and other applicable agreements in this section. Append the actual agreements in section 9.

(6) 1.4. Fielding and logistic support concept. Indicate the concepts upon which the fielding and subsequent logistic support for the fielding are based. List any special factors or considerations. Identify the fielding method, TPF, or other. Identify any Interim Contractor Support (ICS), Contractor Logistic Support (CLS), or other nonstandard logistic support planned for during or after the fielding.

b. Section 2: System Description.

(1) 2.1. Functional and physical configuration. Briefly describe the functional and physical configuration of the system. Also state the category of TPF and level of system complexity. If the system is composed of multiple end items, identify each end item in the system and summarize the functional and physical characteristics.

(2) 2.2. Associated equipment.

(3) 2.2.1. Operational equipment. List all separately authorized associated equipment required to operate the system. Include the AMIM number, nomenclature, NSN, LIN, model number, source of supply, quantities required, and authorizing document.

(4) 2.2.2. Transport equipment. List all separately authorized associated equipment required to transport the system. Include the AMIM number, nomenclature, NSN, LIN, model number, source of supply, quantities required, and authorization document.

(5) 2.3. Capability Production Document (CPD) or Capability Development Document (CDD). Briefly summarize the CPD or CDD plan. Include the mission scenario and operational duty cycle, projected mission and duty cycle duration, annual usage rate, and any other pertinent information. This information, updated as necessary, is supplied by the Capability Developer.

(6) 2.4. Deployment schedules. Identify and summarize the BOI by dates and quantities for initial and follow-on deployment within the GC. Include a deployment schedule by unit and location (based on the GC input) in the earliest draft possible. Identify Army Prepositioned Stocks (APS) deployments by date and quantity. Any changes to fielding dates or deployment schedules will be coordinated between the MATDEV and the GC and published as a modification to the MFP or MTP.

c. Section 3: Fielding and Logistic Support Procedures.

(1) 3.1. Command and control procedures.

(2) 3.1.1. Describe the command and control procedures to be used by the MATDEV in managing and executing the materiel fielding or transfer effort. Identify the personnel, telephone numbers, and addresses, and propose the subsequent places, schedules, and procedures for additional coordination and staffing. Outline the type of fielding, TPF or other, and all subsequent coordination projected to assure a successful fielding. Identify subsequent site inspections, new materiel introductory briefing team (NMIBT), materiel requirements coordination meetings or staffing, NET, MFTs, staging, de-processing, inventory, handoff, and fielding evaluation actions that will be needed.

(3) 3.1.2. GC and control procedures. Describe the command and control procedures to be used by the GC(s) or subordinate commands in managing and executing the materiel fielding or transfer effort, to include APS. Identify personnel, places, schedules, and procedures for subsequent coordination and staffing. Identify constraints such as field exercises and training dates and places which must be considered in planning future coordination. Identify all special and specific needs of each gaining unit.

(4) 3.2. Logistics assistance. Coordinate the MFP or MTP with the LAO in accordance with AR 700–4. Describe the types of logistic assistance to be provided to the GC including assistance teams like NMIBTs, NETT, and MFTs. Identify the LARs and contractor personnel to be stationed within the GC as well as any special liaison offices. Identify the type of assistance to be offered, who will provide it, and when it will be available. Logistics Assistance Program contractor interface must be specifically addressed and delineated in field service contracts, MFPs, logistic support agreements, and other agreements with GCs.

(5) 3.3. Depot level or contractor support.

(6) 3.3.1. Organic support. When organic depot level support is planned, identify the depot(s) designated by Headquarters, USAMC to support the system. Include points of contact.

(7) 3.3.2. Contractor support. When contractor support is used, identify any special procedures necessary to return unserviceable items such as “ship to” and “mark for” instructions. If the unserviceable items are to be consolidated at a depot prior to shipment to the contractor, identify the depot designated by HQ AMC to provide the support.

(8) 3.3.3. Interim contractor support. Describe any interim contract support that is planned for the system. Describe the scope and duration of the support and identify the operational, supply, and maintenance echelons that will be affected. Give the projected date when the transition to organic support will be completed. Also include the number of contractor support personnel to be in the GC area, support which must be provided to these personnel, and provisions for continuation of essential logistic support in the event of hostilities. MFPs will contain a transition plan for those systems fielded with ICS instead of the planned strategy. This plan will contain enough detail to provide for a smooth transition to organic support.

(9) 3.3.4. CLS. Describe any CLS planned for the system. Provide information on the provisions for continuation of logistics support in the event of hostilities.

(10) 3.3.5. CLS for initial fielding. Describe all contractor support and any planned for emergency logistics support requirements due to schedule slippage or acceleration, or a funding shortfall in the availability of support equipment, spares, trained personnel, facilities, data or other logistic resources (AR 700–127).

(11) 3.4. Material defects correction. Describe the methods to be used for prompt identification, reporting, and correction of material defects and user problems. Include all information not given in paragraph 4.2 dealing with warranties.

(12) 3.5. Coordination. Indicate planned coordination with the GC to ensure complete understanding and agreement on logistics support procedures. Ensure that transportation and necessary training requirements are included when executing the coordination phase. All coordination for maintenance and transportation requirements must be detailed and specific.

d. Section 4: System Support Details.

(1) 4.1. Maintenance plan. Describe the specific maintenance plans, procedures, required skill levels, methods, and actions which drive the logistic planning and support for the system.

(2) 4.1.1. Maintenance reporting requirements. State whether the system is reportable on DA Form 2406 (Materiel Condition Status Report) under the provisions of AR 700–138 or under the provisions of DA Pam 750–8.

(3) 4.2. Warranties. Identify all warranties in effect at the time of fielding or transfer (AR 700–139). Describe how each warranty will be administered, to include the responsibilities of the manufacturer, fielder, warranty coordinator, and user. Include the following data for each item having a warranty:

(a) Nomenclature of item.

(b) NSN.

(c) Commodity office, address, and telephone number.

(d) Level of warranty claim actions related to the maintenance allocation chart.

(e) Warranty duration.

(f) Warranty usage and operation limits.

(g) Publication and date.

(h) Extended storage allowances.

(i) Special storage requirements.

- (j) Contract number.
 - (k) Entity code for Commercial and Government.
 - (l) Name, address, telephone number listing of servicing dealers.
 - (m) Warranty data plate location (description or pictorial) with explanation of abbreviated or condensed data.
 - (n) Components with different warranty parameters (list each difference in data elements 'A' through 'M' format for warranties).
- (4) 4.3. Support equipment and TMDE.
- (5) 4.3.1. Computer resources support. Identify the following in this section:
- (a) The SEC(s) for the system(s).
 - (b) The software support hotline telephone number.
 - (c) The software method to be used to change, replicate, distribute, install, and train for updates.
 - (d) The downloading methods and media to be used for software changes.
 - (e) The MOS and personnel to perform the downloading and installation of software changes.
 - (f) The frequency of change expected.
- (6) 4.3.2. Special tools and tool sets. List all required special tools and tool sets by nomenclature, LIN, and NSN. Specify required quantity for each level of maintenance to be performed by the GC. Identify the authorizing document.
- (7) 4.3.3. Common tools and tool sets. List all required common tools and tool sets by nomenclature, LIN, and NSN. Specify the required quantity for each level of maintenance to be performed by the GC. Identify the authorizing document.
- (8) 4.3.4. TMDE (to include special calibration equipment). List all special TMDE required by nomenclature, LIN, and NSN. Specify the required quantity for each level of maintenance to be performed by the GC. Identify the authorizing document. Identify calibration requirements for each item of equipment and level of maintenance.
- (9) 4.3.5. Test program sets (TPS) for TMDE. List all TPS for TMDE. Include projected availability dates and maintenance requirements.
- (10) 4.3.6. Performance monitoring and maintenance indicators. Identify all performance monitoring and maintenance indicator devices such as gauges, meters, and built-in-test-equipment which are built into the system.
- (11) 4.3.7. Special purpose kits. List all special purpose kits such as communications equipment, installation kits, winterization kits, and fording kits, by nomenclature, LIN, and NSN. Specify the required quantity and authorizing documents. Identify requisitioning procedures and special support requirements. Include associated technical publications in paragraph 4.7.
- (12) 4.3.8. Other support equipment. Identify any support equipment not listed under one of the above sections that is required for maintenance of the system. Include such special purpose equipment as maintenance stands and shelters. Identify the publications that authorize their use and requisition. Do not duplicate associated equipment and end items that are identified previously.
- (13) 4.3.9. Interim substitute support equipment. When items required to support the system are scheduled to be delivered six months or more after the FUE or handoff date, identify the items to be substituted during the interim by nomenclature, LIN, NSN, and model number. Describe procedures to be used when the equipment is delivered.
- (14) 4.3.10. Local fabrication requirements. Identify any requirements to locally fabricate support items such as tools, stands, and fixtures, to include materiel, manpower, and funding requirements.
- (15) 4.4. Supply support. A result of determining supply support is a total DA Form 5682. The DA Form 5682 identifies every item and quantity to be provided as initial issue by the MATDEV to each receiving unit in the TPF, by DODAAC and project code. It will also list all items and quantities which have been requisitioned for them and all items and quantities needed by the GC which they are to requisition if they do not already have them to support the fielding.
- (16) 4.4.1. Master support list. For non-TPF systems, the MATDEV will provide a master support list to the GC 240 days prior to the FUE or handoff date. The master support list will list computed initial support quantities, in whole numbers, for the needed spare and/or repair parts, special tools, and new TMDE required by class of supply. Quantities will be listed by stockage point listed on DA Form 5106. A cover letter will identify the master support list by number and date. The MATDEV point of contact for the master support list will be identified by name, office symbol, and DSN number. TPF systems will include these requirements on DA Form 5682.
- (17) 4.4.2. COEI list. Identify all end items with COEI lists in this area. Include the COEI lists as an appendix in section 9. The COEI list will include, as applicable, the LIN and NSN of each component listed.
- (18) 4.4.3. BII. Identify the end items with BII in this paragraph. Include the BII lists as an appendix in section 9. The BII list will include the nomenclature and NSN of each item.
- (19) 4.4.4. AAL. Identify all AAL items in this paragraph or provide an AAL appendix in section 9 and refer to it for TPF systems. AAL items will be identified and listed on DA Form 5682.
- (20) 4.4.5. Float quantities. Specify operational readiness float and repair cycle float factors and quantities (if applicable). Describe resource requirements necessary to maintain float requirements; (personnel, facilities, and support items). For TPF system, these requirements will be part of DA Form 5682.

- (21) 4.4.6. Basic sustainment materiel.
- (22) 4.4.6.1. Petroleum, Oils, and Lubricants (POL) (Class III). Identify Class III requirements by type, estimated annual consumption rate, and by unit of operation of equipment for both peacetime (training) and wartime. Wartime requirements will be based on an approved doctrine and operational mode summary. For TPF systems these requirements will also be identified on DA Form 5682.
- (23) 4.4.6.2. Other bulk supplies. Identify bulk supplies such as wire, rope, hose and fittings, tubing, gasket material, batteries, and paper. For TPF systems, these requirements will be identified on DA Form 5682.
- (24) 4.4.6.3. Ammunition requirements. Identify ammunition by type and amount (initial issue, training, and 30-day theater war reserve), estimated annual consumption rate, and by unit of operation of equipment for both peacetime (training) and wartime. Wartime requirements will be based on approved doctrine and operational mode summary. Describe storage facility requirements in paragraph 4.8.4. For TPF systems these requirements will be listed on DA Form 5682.
- (25) 4.4.7. Plans for all replaced and displaced equipment and materiel. Identify the unit's authorization documents (MTOE, CTA) and actions required to properly identify, turn in (especially large quantity turn-in to Defense Reutilization and Marketing Office), and redistribute or dispose of materiel which will become excess as a result of the fielding. Clearly state if a formal MTP or MOA will be required and coordinated to effect timely turn-in and redistribution. Assure plans for turn-in are in accordance with AR 710-2.
- (26) 4.4.8. Evacuation procedures. Describe requirements for evacuation of unserviceable materiel.
- (27) 4.4.9. Method of distribution. Identify the fielding as TPF or another method and clearly describe how initial issue materiel will be obtained and provided. Identify applicable project codes, schedules, and coordination needed before initial distribution. Also describe supply procedures for system peculiar items and any specially controlled items. Identify any nonstandard supply procedures such as those relating to a contractor operated national inventory control point or national maintenance point.
- (28) 4.5. Transportation and transportability.
- (29) 4.5.1. Transportability guidance and procedures (see AR 70-47). Based on transportability engineering analyses, provide guidance addressing unique requirements, procedures, and problems. State the specific condition, limitations, and scope of the transportability approval. Include transportation considerations for strategic (inter-theater) and tactical (intra-theater) movements. Completed transportability analyses and approvals should be appended in section 9.
- (30) 4.5.2. Security-in-transit. Describe security-in-transit requirements. This is based on mission, threat level, risk management, civil authority requirements during transportation (start point, route, and destination), standing operating procedures and regulatory requirements.
- (31) 4.6. Packaging, handling, and storage.
- (32) 4.6.1. Packaging. Provide approved packaging information for special group items, hazardous material, Estimated Shipping Date (ESD) sensitive, and other unique items, that are in accordance with MIL-STD-2073-1. This information, for end items, is found in Equipment Preservation Data Sheets for wheeled vehicles in accordance with MIL-STD-3003, in Shipping and Storage Instructions, in a Technical Bulletin (TB), TM work packages, or other instructional format.
- (33) 4.6.1.1. Identify all hazardous material being fielded and provide Safety Data Sheets (SDS). Provide copies of approved packaging instructions for all hazardous material to comply with International Air Transport Association, International Maritime Dangerous Goods, Air Force Manual 24-204 and with Titles 29, 40 and 49 CFRs.
- (34) 4.6.1.2. Identify all items going into APS and provide packaging information in accordance with MIL-STD-2073-1 and TM 38-470, Storage and Maintenance of APS Materiel. For ammunition, describe any limiting factors such as size, the requirement for double door magazines, and return requirements for containers upon downloading.
- (35) 4.6.2. Handling. Provide procedures for off-loading, receiving, de-processing, security, and issue. Confirm that all procedures are compatible with SDDC transportability guidance.
- (36) 4.6.3. Storage. Describe special storage instructions. Include security requirements. Describe special storage requirements for APS and Theater Reserve including materiel needed to care for systems in storage such as APS caretaker stocks the GC should obtain and have on hand.
- (37) 4.6.4. Identify any electro-static discharge precautions for both transportation and storage.
- (38) 4.7. Technical documentation.
- (39) 4.7.1. Technical Publications. Identify TMs, to include the RPTSL and Lubrication Orders (LOs), for each level of maintenance to be performed by the GC. Include TM number and title, date published or to be published, and method of distribution. For non developmental items that are not supported by Department of the Army TMs, list the commercial manuals and applicable summary data required for the system. A Non developmental items not supported by Department of the Army TMs may only be used for equipment that does not yet have FMR and for equipment that is not being fielded to MTOE units. An index of all applicable publications should be appended in section 9. Coordinate to determine which TMs must be included in the TPF starter sets.
- (40) 4.7.2. All MFPs will list all applicable security classification guides for any of the systems in the fielding not

- already used and supported by the GC. Information will also be provided on the physical, informational, and operational security requirements of all equipment, materiel, or documentation involved in the fielding.
- (41) 4.7.3. Supply manuals and bulletins. Identify supply manuals and bulletins. Include method of distribution and projected availability date. Identify those which will be part of the starter set.
- (42) 4.7.4. Camouflage pattern painting requirements. Provide camouflage pattern painting requirements in accordance with AR 750–59.
- (43) 4.7.5. Instruction cards and placards. List instruction cards and placards that will be provided with the system and those that must be prepared by the GC.
- (44) 4.7.6. Inspection, test, and calibration procedures. List any inspection, test, and calibration procedures that are to be used on the system. Clearly state each inspection, test, or calibration procedure required before equipment is put into operation, and identify how, when, and where it will take place.
- (45) 4.7.7. End item and/or weapon system environmental effects (AR 200–1). Describe the environmental effects in accordance with AR 200–1.
- (46) 4.7.8. MWO. List and describe all MWOs to be applied by the MATDEV.
- (47) 4.7.9. Transportability and transportation guidance TMs and/or TBs. List all transportability and transportation guidance TMs and/or TBs. Include the method of distribution and availability dates.
- (48) 4.7.10. Demilitarization and explosive ordnance disposal. List any applicable demilitarization and explosive ordnance disposal procedures.
- (49) 4.8. Facilities.
- (50) 4.8.1. Mobile and fixed facilities. Describe requirements for maintenance, training, supply, and storage facilities, to include any security requirements. Provide a reference to the Support Facility Annex of the LCSP, if available. Include all requirements for MFT support prior to, during, or after handoff.
- (51) 4.8.2. Environmental controls. Describe the environmental requirements of the facilities; for example, temperature, humidity and clean room.
- (52) 4.8.3. Site activation and preparation. Identify the requirements for foundations, runways, hard pads, revetments, bunkers, buildings, fences, shelters, towers, utilities, stationary equipment, and so forth.
- (53) 4.8.4. Ammunition storage. Define ammunition storage requirements to include quantity and distance requirements and other special requirements such as climate control and security, if applicable.
- (54) 4.9. Manpower and personnel requirements.
- (55) 4.9.1. Manpower and personnel.
- (56) 4.9.1.1. MTOEs and TDAs. List TOE or TDAs of all using and supporting units. Ensure the MTOE or TDA is established 340 days prior to the scheduled FUE or handoff date.
- (57) 4.9.1.2. Manpower requirements. State annual operator, crew, and direct productive annual maintenance man hour requirements by MOS for each level of maintenance to be performed by the GC.
- (58) 4.9.1.3. Personnel requirements. List personnel skill level requirements by MOS and grade for each level of maintenance to be performed by the GC. Include specific required personnel skills needed to support the fielding or handoff operation. Identify if GC, MATDEV, or contractor personnel will be required.
- (59) 4.9.2. Training.
- (60) 4.9.2.1. Training courses.
- (61) 4.9.2.2. Service school training. List and describe operator and maintenance instruction courses in TRADOC and other Service schools. Include requirements, school locations, and course start dates. Clearly distinguish between the minimum required training for each MOS and identify subsequent additional training.
- (62) 4.9.2.3. Training site training. List and describe training to be available from the GC training site, such as, FORSCOM regional maintenance training sites.
- (63) 4.9.2.4. New equipment training. Identify the NET to be provided. Include the NETP as an appendix in section 9. Include presentation dates and locations. If a MTP is being prepared for displaced equipment, “NOT APPLICABLE” will be entered, and paragraph 4.9.2.5. will apply. A copy of the NETP should be appended to the MFP in section 9. Information contained in the NETP is the latest available at the time the MFP was staffed. The NETPs are dynamic, living documentation that are subject to change, even after the MFA is signed. The most current information concerning NET can be verified through the Army Modernization Training Automation System or by contacting the NET managers. The training location should not be shown if the equipment’s security classification guide indicates that it is classified. When the location is classified, this paragraph should indicate the classified document in which the information will be listed.
- (64) 4.9.2.5. When ASIOE is being fielded to a GC for the first time or when the fielding is a unit activation, the MATDEV will ensure that training requirements for those items of equipment have been considered.
- (65) 4.9.2.6. DET. Identify the DET to be provided. Include the DETP as an appendix in section 9. Include presentation dates and locations. If a MFP is being prepared for the fielding of a new system, NOT APPLICABLE will be entered, and paragraph 4.9.2.4. will apply.
- (66) 4.9.2.7. Follow-on equipment training. Identify sources of additional training if required after NET or DET.

(67) 4.9.2.8. Training assistance. Describe the training assistance, other than NET or DET, which will be provided. In many cases, LARs will require training on new systems being fielded. This may be included in the instructor and key personnel training or scheduled along with the training for the MFT, NETT, or the gaining units. In all cases, include a clear statement either requiring such training or stating that no LARs will need the training.

(68) 4.10. Training Aids, Devices, Simulation and Simulators (TADSS).

(69) 4.10.1. Training materials.

(70) 4.10.1.1. Training aids. List and describe all training aids required within the gaining ACOM. Include the source of supply.

(71) 4.10.1.2. Training data. Identify field manuals, commercial literature, extension training material, trainer guides, the skill development test, the Army training and evaluation program to be available in the GC. Include training materials to be left by the NETT team or DET team. Include the method of distribution and projected availability dates.

(72) 4.10.1.3. Training devices. List all training devices to be available in the GC. Include the source of supply and projected availability dates.

(73) 4.10.1.4. Training equipment. When operational equipment is to be used for training, state the purpose and details of use and time period involved. Information should provide sufficient detail by which gaining units can adequately plan the use of equipment and not interfere with the use of equipment for NET.

(74) 4.11. Computer resources and software support. Identify computer hardware and software resources support required during the initial fielding. Address post deployment software support procedures, requirements, and responsibilities.

(75) 4.11.1. Identify Computer Program Materiel to be provided at fielding (that is, type of media, Computer Program Identification Number or version number).

(76) 4.11.2. Describe the process for loading and acceptance of software during the initial fielding and identify personnel support from the gaining unit for the initial processing.

(77) 4.11.3. Describe the process and procedures required to obtain replacement media and a point of contact and telephone number for help with software problems.

(78) 4.12. Safety and Health. Reference relevant system safety and health hazard documentation (for example, Safety and Health Data Sheets, Safety Assessment Reports (SAR), System Safety Risk Assessments, Hazard Classification Data, Surface Danger Zones, Safety Confirmations, Health Hazard Assessments, and so forth) developed during the acquisition process that provides supporting rationale for operational procedures, safety-critical maintenance and/or support, personal protective equipment and training requirements. See DA Pam 385-16 for more information on required documentation, hazard tracking, and system safety risk management.

e. Section 5: Readiness Reporting Requirements.

(1) 5.1. Reporting requirements. State whether or not the system is reportable. If the system is designated as not reportable by HQDA (DALO-PLR and DAMO-ODR), cite the DA letter or message authority.

(2) 5.2. Readiness reporting data (AR 220-1 and AR 700-138). If the system is designated as reportable, complete the following subparagraphs. If the system is not reportable, enter "NOT APPLICABLE" in this and the following subparagraphs.

(3) 5.2.1. Pacing item. State whether or not the system is to be designated a pacing item in AR 220-1.

(4) 5.2.2. AR 220-1 or AR 700-138 reportable. State whether or not the system is reportable under the provisions of these regulations. Cite the appropriate references for the readiness rating criteria and reporting instructions.

(5) 5.2.3. Equipment readiness code. Show the equipment readiness code for the system for each MTOE listed in paragraph 4.9.1.

f. Section 6: Sample Data Collection. State whether or not the system is to have a sample data collection effort under the provisions of DA Pam 700-24. If a sample data collection is required, include the sample data collection concept paper as an appendix in section 9.

g. Section 7: Support required from the GC(s). Define the administrative and operational support required from the gaining ACOM to accommodate system deployment and stationing of materiel fielding personnel (include DET team personnel) during the materiel fielding or transfer effort. Include the number, type, duration, and location of personnel and requirements for clearances. Identify the billeting, transportation, communications, office space, supplies, and other support needed by the materiel fielding personnel. Specify operational support required from the GC during de-processing and checkout such as labor, facilities, utilities, fuel, and equipment. Identify any reports which the GCs must submit, within 30 days after the first unit equipped or handoff date.

h. Section 8: Summary. Summarize the status of logistic support for the system. Highlight major accomplishments, weaknesses, and any significant issues to be resolved. Include any general comments considered necessary and any milestone schedules to resolve open issues. Identify the command POC for each outstanding issue to be resolved.

i. Section 9: Appendixes. Include the following appendixes in all MFPs or MTPs:

(1) 9.1. Agreements. MFAs or MTAs and final scrubbed Materiel Requirements List.

(2) 9.2. Key correspondence. Provide a listing of key correspondence (messages, letters, Memorandums for Record,

and so forth) with only enough information to accurately identify the originator, recipient(s), the subject, and the security classification.

(3) 9.3. Associated plans. Provide a copy of all associated plans; for example, the sample data collection plan or concept paper, the Computer Resources Lifecycle Management Plan, the NET Plan, and the DET Plan.

(4) 9.4. The MATDEV checklist. Provide a summary checklist of the planned, time-sequenced MATDEV actions to be taken relative to the planning, shipment, de-processing, checkout, training, and handoff of the system.

(5) 9.5. The GC checklist. Provide a checklist of planned, time-sequenced GC actions to be taken relative to the planning, shipment, de-processing, checkout, training, and handoff of the system.

(6) 9.6. Warranties. Required as an appendix by paragraph 4.2.

(7) 9.7. COEI lists. Required as an appendix by paragraph 4.4.2.

(8) 9.8. BII. Required as an appendix by paragraph 4.4.3.

(9) 9.9. AAL. Required as an appendix by paragraph 4.4.4.

(10) 9.10. Transportability analyses and approval. Required as an appendix by paragraph 4.5.1.

(11) 9.11. TMs. Required as an appendix by paragraph 4.7.1.

(12) 9.12. Related MFPs. MFPs of lower indentured COEI should also be appended to the MFP of the system being supported.

(13) 9.13. SDC concept paper. Required as an appendix by section 6.

(14) 9.14. Classified information. Provide classified information. Always make this the last appendix so it can be detached to allow the basic MFP or MTP to be unclassified.

Note. Add additional appendixes when needed.

Glossary

Section I Abbreviations

AAE

Army Acquisition Executive

AAL

Additional Authorization List

AAR

after action report

ACAT

Acquisition Category

ACOM

Army command

ADM

Acquisition Decision Memorandum

AFSB

Army Field Support Brigade

AEC

Army Evaluation Center

AIC

Army Interoperability Certification

AMC

Army Materiel Command

AMCOM

Aviation and Missile Command

AMEDDPAS

Army Medical Department Property Accounting System

AMRD

Army Modernization Reference Data

APB

Acquisition Program Baseline

APD

Army Publishing Directorate

APS

Army preposition stocks

ARDEC

Armament, Research, Development and Engineering Center

ARNG

Army National Guard

ASA (ALT)

Assistant Secretary of the Army (Acquisition, Logistics, and Technology)

ASCC

Army service component command

ASIOE

Associated Support Items of Equipment

ASL

Authorized Stockage List

ATEC

Army Test and Evaluation Command

BII

basic issue item

BOI

Basis of Issue

BOIP

Basis of Issue Plan

BOIPFD

Basis of Issue Plan Feeder Data

C/NDI

Commercial and Non-Developmental Items

CAM

Communications Security Account Manager

CAPDEV

Capability Developer

CARDS

Catalog of Approved Requirement Documents

CCI

Controlled Cryptographic Item

CDD

Capability Development Document

CECOM

Communications Electronics Command

CIDC

Criminal Investigation Division Command

CIIC

Controlled Inventory Item Code

CIO

Chief Information Officer

CLS

contractor logistics support

CMR

Conditional Materiel Release

COEI

Component of End Item

COMSEC

Communication Security

CONUS

Continental United States

CPD

Capabilities Production Document

CTA

Common Tables of Allowances

DARPL

Dynamic Army Resource Priority List

DASA (APL)

Deputy Assistant Secretary of the Army (Acquisition Policy and Logistics)

DEF

Displaced Equipment Fielding

DET

Displaced Equipment Training

DETP

Displaced Equipment Training Plan

DLA

Defense Logistics Agency

DODAAC

Department of Defense activity address code

DRU

Direct Reporting Unit

ECOP

Equipment Common Operating Picture

EIR

Equipment Improvement Recommendations

EOD

Explosive Ordnance Disposal

ETM

Electronic Technical Manual

FA

Functional Authority

FMR

Full Materiel Release

FORSCOM

Forces Command

FRP

Full Rate Production

FUE

First Unit Equipped

FUED

First Unit Equipped Date

GC

Gaining Command

GCSS-A

Global Combat Support System-Army

GWD

Get-Well Date

HQDA

Headquarters, Department of the Army

ICD

Initial Capabilities Document

ICS

Interim Contractor Support

IETM

Interactive Electronic Technical Manual

IMCOM

Installation Management Command

INSCOM

Intelligence and Security Command

JCIDS

Joint Capability Integrated Development System

JUONS

Joint Urgent Operational Needs Statement

LAO

Logistics Assistance Office

LAR

Logistics Assistance Representative

LC

Losing Command

LCC

Logistics Control Code

LCMC

Life-Cycle Management Command

LCSP

Life Cycle Sustainment Plan

LIN

Line Item Number

LIW

Logistics Information Warehouse

LMP

Logistics Modernization Program

LOA

Letter of Authorization

LOGSA

Logistics Support Activity

LP

Limited Procurement

LRIP

Low Rate Initial Production

MANPRINT

Manpower and Personnel Integration

MATDEV

Materiel Developer

MDA

Milestone Decision Authority

MFA

Materiel Fielding Agreement

MFP

Materiel Fielding Plan

MFT

Materiel Fielding Team

MMDF

Maintenance Master Data File

MRAP

Mine Resistant Ambush Platform

MOA

Memorandum of Agreement

MON

Memorandum of Notification

MOS

Military Occupational Specialty

MR

Materiel Release

MRA

Materiel Release Authority

MRL

Materiel Requirements List

MRO

Materiel Release Office

MRTS

Materiel Release Tracking System

MS

Milestone

MSP

Mission Support Plan

MSR

Materiel Status Record

MTA

Materiel Transfer Agreement

MTOE

Modified Table of Organization and Equipment

MTP

Materiel Transfer Plan

MWO

Modification Work Order

NET

New Equipment Training

NETP

New Equipment Training Plan

NETT

New Equipment Training Team

NICP

National Inventory Control Point

NGB

National Guard Bureau

NIIN

National Item Identification Number

NMIB

New Material Introduction Briefing

NMIBT

New Materiel Introductory Briefing Team

NMP

National Maintenance Point

NSLIN

Nonstandard Line Item Number

NSN

National Stock Number

OCONUS

Outside the Continental United States

OCAR

Office of the Chief, Army Reserve

OER

Operational Test Agency Evaluation Report

OMAR

Operational Test Agency Milestone Assessment Report

ONS

Operational Needs Statement

OSHA

Occupational Safety and Health Administration

PBO

Property Book Office

PBUSE

Property Book and Unit Supply-Enhanced

PD

Product Director

PEO

Program Executive Officer

PHC

Public Health Command

PLL

Prescribed Load List

PM

Program Manager

POC

Point of Contact

POL

Petroleum, Oils, and Lubricants

QDR

Quality Deficiency Report

QQPRI

Qualitative and Quantitative Personnel Requirements Information

RAM

Reliability, Availability, Maintainability

RFIC

Readiness for issue Certification

RM

Risk Management

SAR

Safety Assessment Report

SB

Supply Bulletin

SC

Supporting Command

SDDC

Surface Deployment and Distribution Command

SDP

Supporting Data Package

SEC

Software Engineering Center

SKOT

Sets, Kits, Outfits, and Tools

SLAMIS

Standard Study Number-Line Item Number Automated Management and Integrating System

SLIN

Standard Line Item Number

SMR

Software Materiel Release

SS

Supportability Strategy

SSA

Supply Support Activity

STTE

Special Tools and Test Equipment

TC

Type Classification

TC-STD

Type Classification Standard

TDA

Table of Distribution and Allowances

TEMP

Test and Evaluation Master Plan

TM

Technical Manual

TMDE

Test, Measurement, and Diagnostic Equipment

TOE

Table of Organization and Equipment

TPE

Theater Provided Equipment

TPF

Total Package Fielding

TRADOC

Training and Doctrine Command

UIC

Unit Identification Code

UMFP

Unit Materiel Fielding Point

UMR

Urgent Materiel Release

USACE

United States Army Corps of Engineers

USACSLA

United States Army Communications Security Logistics Agency

USAFMSA

United States Army Force Management Support Agency

USAMC

United States Army Materiel Command

USAMEDCOM

United States Army Medical Command

USAMMA

United States Army Medical Materiel Agency

USAPHC

U.S. Army Public Health Command

USAR

United States Army Reserve

USARC

U.S. Army Reserve Command

USAREUR

United States Army Europe

USARPAC

United States Army Pacific Command

USATA

United States Army Test, Measurement and Diagnostic Equipment Activity

USF

unit set fielding

WEBLIDB

Web logistics integrated database

ZLIN

Developmental Line Item Number

Section II**Terms****Caretaker stocks**

Any materiel needed for the care, preservation, and periodic checkout of APS equipment. This can include expendable supplies and materiel, spare and/or repair parts, and common or special purpose tools, test, and support equipment.

Displaced (cascaded) equipment

Army equipment redistributed within a command or between ACOMs, ASCCs, and/or DRUs, as a result of the Army modernization process. Most of this equipment is identified by DAMO-FDR (G-3) on the Force Development managed LIN List.

Displaced equipment training

Training provided to users and supporters of displaced equipment in the operation, maintenance, and support of displaced equipment.

Equipment-in-place

Fixed station, non-tactical, communications-electronics systems, air traffic control, or navigational aids equipment fixed in place or attached to real property.

Fielding activity

The MATDEV, subordinate command, agency, or activity responsible for the fielding of a materiel system.

First unit equipped date

The first scheduled date for fielding or handoff of a new materiel system in a gaining command.

Gaining command

The ACOM, ASCC, and/or DRU, subordinate organization, or field operating agency designated to receive a materiel system being fielded. Include FORSCOM, TRADOC, USAMC, CIDC, USAREUR, the Eighth U.S. Army, USARPAC, USASOC, ARNG, INSCOM. Other users and gaining commands include the other U.S. Forces, Federal Agencies, and security assistance customers.

Handoff

The process of preparing, inventorying, and issuing new materiel systems to gaining units.

Handoff date

The date scheduled for any unit in a command to receive a new system.

Handoff site

The area or facility selected for a GC or unit to receive a system being fielded. Under TPF, this can include a Joint inventory by the fielder and gaining unit. This is where the transfer of custody and establishment of formal property book accountability for the items being fielded takes place.

Handoff team

A team established by the MATDEV to accomplish fielding under TPF procedures.

Initial operational capability

The first attainment by the MTOE unit of the capability to operate and support effectively in their operational environment a new, improved, or displaced Army materiel system.

In-process review

Review of a project or program at critical points to evaluate the status and make recommendations to the MATDEV.

Mandatory parts list

A published list of spare and/or repair parts which must be stocked by designated units to support specific end items.

MANPRINT

The entire process of integrating the full range of human factor engineering, manpower, personnel, training, health hazard assessment, system safety and Soldier survivability throughout the materiel development and acquisition process to ensure optimum total system performance.

Materiel Requirements List

A comprehensive list prepared by the MATDEV identifying all materiel and technical publications needed to support the fielding of a materiel system. The list will distinguish between those items to be provided by the MATDEV and those the GC must provide.

Memorandum of agreement

An agreement between the losing and gaining command used to plan the actions and schedules to transfer displaced equipment not requiring an MFP.

New equipment training

The identification of personnel, training, and training aids and devices, and the transfer of knowledge from the MATDEV to the trainers, users, and maintainers of new Army equipment.

New equipment training plan

The plan to coordinate the resources and schedule for training of staff planners, testers, trainers, users, and LARs.

New equipment training team

A team of experts organized to conduct training of designated units or personnel on the operation and maintenance of new equipment at specified locations.

Replaced system

An Army end item being replaced by a new or product improved system. These systems are redistributed, declared excess, turned in, transferred, or disposed of in accordance with AR 710-2, AR 750-1, and other applicable guidance when not specifically designated by HQDA as a displaced equipment needing special management and control.

Staging site

The area, facility, or location where TPF materiel is received and held pending release for handoff to the gaining command.

Starter set of publications

A feature of TPF which is a one-time issue of two copies of each publication needed at the user level (unit) and each support level unit involved in the TPF. The publications required will only be for the TPF system and any end item or component included in the fielding which the gaining unit has not used or supported before the fielding.

Support items

A generic term used to refer to the various classes of supply which encompass the ASIOE, TMDE, ATE, TPS, tools, TMs, training devices, and spare and/or repair parts used with or on a materiel system.

Support list allowance computation

The process used by the MATDEV to compute tailored lists of needed initial issue spare and/or repair parts.

Supporting command

USAMC, DLA, GSA, other Armed Services and Federal agencies that provide materiel support but are not the MATDEV.

Testers and evaluators

Testers are individuals in a command or agency that plan, conduct, and report on results of Army developmental or operational tests in accordance with AR 73-1. Evaluators are individuals in a command or agency, independent from the MATDEV and the user, that conduct overall evaluations of a system's effectiveness, suitability, and survivability in accordance with AR 73-1.

Total package fielding

The Army's standard fielding method used to provide Army units a new and/or product improved materiel system and

all its related support materiel at one time. The materiel is consolidated in unit level packages and the handoff of the end items and related support materials is coordinated.

Unit materiel fielding point

One of the DLA depots used to receive and consolidate TPF materiel into unit level (DODAAC and/or project code) packages pending a coordinated release and shipment to a staging site, handoff site, or receiving unit.

Section III

Special Abbreviations and Terms

AESIP

Army Enterprise System Integration Program

APSR

Accountable Property System of Record

AR2B

Army Requirements and Resourcing Board

ASC

Army Sustainment Command

ATPI

Automated transfer protocol interface

DEP

Displaced Equipment Plan

DPAS

Defense Property Accountability System

GHS

Globally Harmonized System

IPS

Integrated Product Support

IPT

Integrated Process Team

MCL

Master Component List

MEEL

Mission Essential Equipment List

MIAA

Materiel Increase Asset Adjustment

MIB

Materiel Introduction Brief

PBIC

Property Book Identification Code

RMB

Risk Management Board

RPSTL

Repair Parts and Special Tools List

SDDCTEA

Surface Deployment and Distribution Command Test Evaluation Agency

SDS

Safety Data Sheet

SLAD/ARL

Survivability/Lethality Analysis Directorate of the Army Research Laboratory

SRRC

Serial Registration Number Requirement Code

TAC

type authorization code

TACOM

Tank-Automotive and Armament Command

TADDS

Training Aids, Devices, Simulators and Simulation

TC-OBS

Type Classified-Obsolete

TMR

Training Materiel Release

UII

Unique Item Identifier

UNCLASSIFIED

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