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Office of Freedom of Information
1155 Defense Pentagon
Washington, DC 20301-1155
[Email](#)
[FOIA.gov](#)

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**DEPARTMENT OF DEFENSE
FREEDOM OF INFORMATION DIVISION
1155 DEFENSE PENTAGON
WASHINGTON, DC 20301-1155**

Ref: 22-F-0932
September 30, 2022

This is the final response to your May 22, 2022 Freedom of Information Act (FOIA) request, a copy of which is enclosed for your convenience. We received your request on May 23, 2022, and assigned it FOIA case number 22-F-0932. We ask that you use this number when referring to your request.

The Washington Headquarters Services, Executive Services Directorate, Freedom of Information Division (FOID), a component of the Office of the Secretary of Defense, conducted a search of our records systems and located 73 pages determined to be responsive to your request. In my capacity as the FOID Initial Denial Authority, I have determined that the responsive records contain information exempt from mandatory disclosure. Portions of the records, including six pages withheld in their entirety, are exempt from release pursuant to 5 U.S.C. § 552 (b)(5), inter- and intra-agency information of a pre-decisional, deliberative nature which, if released, could reasonably be expected to interfere with the government's deliberative process; and 5 U.S.C. § 552, (b)(6), disclosure that, if released, would constitute a clearly unwarranted invasion of the personal privacy of the individuals involved. Please note that we have considered the foreseeable harm standard when reviewing records and applying exemptions under the FOIA in the processing of this request.

In this instance, fees for processing your request were below the threshold for requiring payment. Please note that fees may be assessed on future requests.

If you have any questions or concerns about the foregoing or about the processing of your request, please do not hesitate to contact the Action Officer assigned to your request, Raymond Hartwick, at 571-372-0432 or Raymond.j.hartwick.civ@mail.mil. Additionally, if you have concerns about service received by our office, please contact a member of our Leadership Team at 571-372-0498 or Toll Free at 866-574-4970.

Should you wish to inquire about mediation services, you may contact the OSD/JS FOIA Public Liaison, Toni Fuentes, at 571-372-0462, or by email at OSD.FOIALiaison@mail.mil. You may also contact the Office of Government Information Services (OGIS) at the National Archives and Records Administration to inquire about the FOIA mediation services they offer. The contact information for OGIS is as follows:

Office of Government Information Services
National Archives and Records Administration
8601 Adelphi Road-OGIS
College Park, MD 20740
E-mail: ogis@nara.gov
Telephone: 202-741-5770
Fax: 202-741-5769
Toll-free: 1-877-684-6448

You have the right to appeal to the appellate authority, Ms. Joo Chung, Assistant to the Secretary of Defense for Privacy Civil Liberties, and Transparency (PCLT), Office of the Secretary of Defense, at the following address: 4800 Mark Center Drive, ATTN: PCLFD, FOIA Appeals, Mailbox #24, Alexandria, VA 22350-1700.

Your appeal must be postmarked within 90 calendar days of the date of this response. Alternatively, you may email your appeal to osd.foia-appeal@mail.mil. If you use email, please include the words "FOIA Appeal" in the subject of the email. Please also reference FOIA case number 22-F-0932 in any appeal correspondence.

We appreciate your patience in the processing of your request. As stated previously, please contact the Action Officer assigned to your request, Raymond Hartwick, and reference FOIA case number 22-F-0932, if you have any questions or concerns.

Sincerely,

for Pamela Andrews
Stephanie L. Carr
Chief

Enclosures:
As stated

SOP (#1): CATMS v1: Tasking a FOIA – Traditional Tasking Method

(Current and Updated Versions Located on the O: Drive: FOID SOPs)

Last Revised: 5 March 2020

PURPOSE & SCOPE: This SOP is designed to provide new FOID Action Officers with a step-by-step guide when tasking components for action while processing a FOIA request.

Welcome to CATMS 101: Traditional Tasking

**CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace ▾ CATMS Navigation

 NEW ACTIVITY ▾  NEW RECORD ▾  SET AS HOMEPAGE  REVIEW ALERTS

CATMS NAVIGATION - WELCOME!

My Taskers (2135)

My Actions (1825)

Action/Tasker Wizard

Action/Tasker Search



Active Alerts: 0 New Alerts: 0

How are we
doing?



CATMS
Training

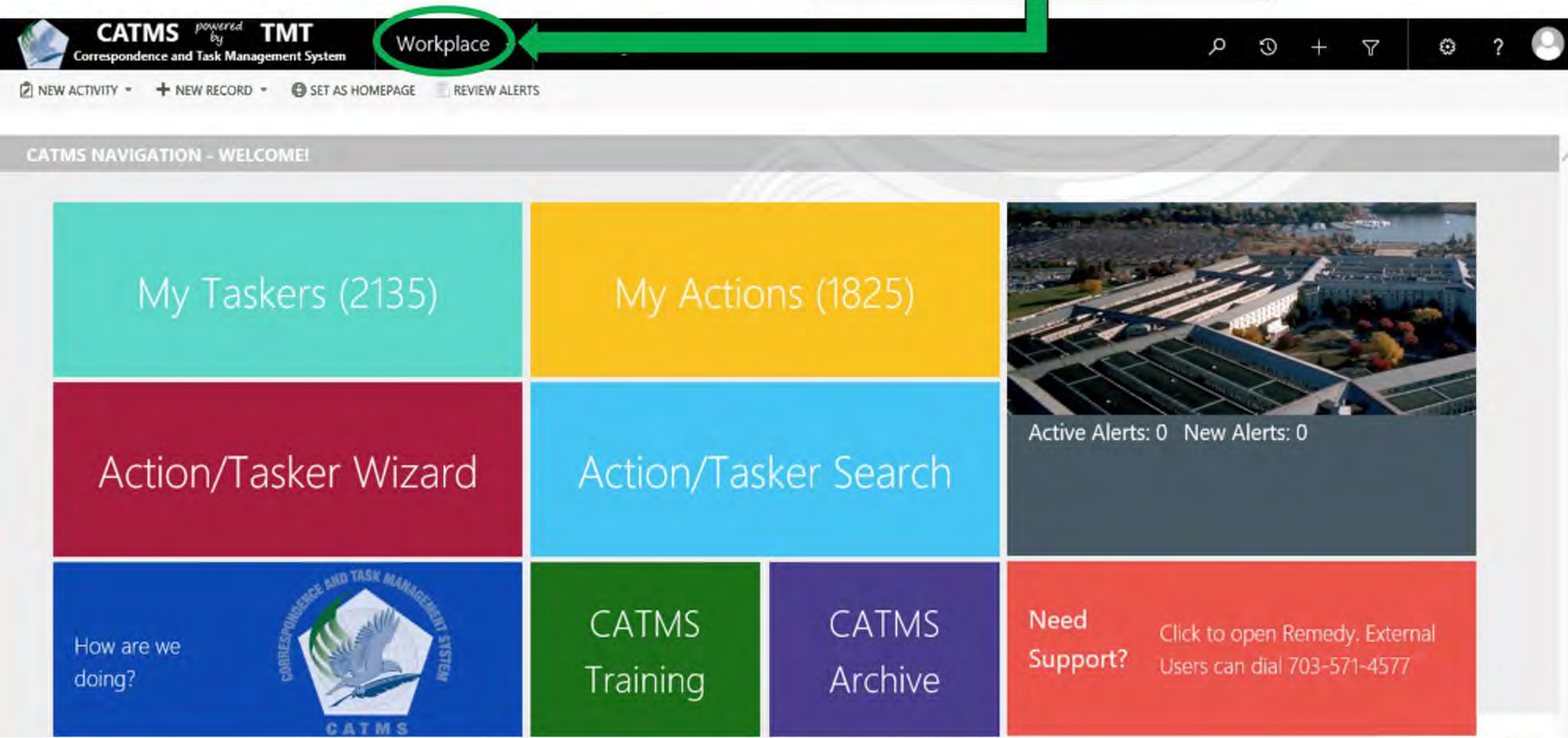
CATMS
Archive

Need
Support?

Click to open Remedy. External
Users can dial 703-571-4577

Beginning the Process

Select the workplace tab as shown.



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace

NEW ACTIVITY + NEW RECORD SET AS HOMEPAGE REVIEW ALERTS

CATMS NAVIGATION - WELCOME!

My Taskers (2135)

My Actions (1825)

Action/Tasker Wizard

Action/Tasker Search

CATMS Training

CATMS Archive

Need Support?

Click to open Remedy. External Users can dial 703-571-4577

Active Alerts: 0 New Alerts: 0

Workplace Tab



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ☒

CATMS Navigation

Workplace



Templates



Metrics/Reports



TMT Support



My Work



CATMS Navigation



Dashboards



Approval Requests



Extension Requests



Approval Requests (H...

CATMS



Actions



Tasks

Users & Teams



Teams

Select the ACTIONS tab



Actions Tab

Select the NEW ACTION tab. This will open the NEW ACTION window

The screenshot shows the CATMS TMT Actions Tab interface. A green arrow points from the 'NEW ACTION' button in the top navigation bar to the 'New Action' window. A red arrow points from the 'SAVE' button in the 'New Action' window to the 'Action Details' table. The 'New Action' window has a title bar 'ACTION : COMPONENT FORM' and a subtitle 'New Action'. The 'Action Details' table contains various fields for action creation, including Action ID, Request Type, Public/Private Action, Security Classification, Subject, Date of Correspondence, From, To, Priority, # of Biz Days Susp, Action Suspense Date, Record Series, Status Reason, Date of Receipt, Handling Procedures, File Number, Original Control #, For Comp Principal?, and Open. The 'SAVE' button is highlighted in red.

NEW ACTION

EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | REVIEW ALERTS | CHART PANE

Actions with Taskers for My Organization

SAVE | SAVE & CLOSE

ACTION : COMPONENT FORM

New Action

Action Details

Action ID*	Populated by Server	Status Reason	Open
Request Type*	All Other items	Date of Receipt	--
Public/Private Action*	Public	Handling Procedures	--
Security Classification*	--	File Number	--
Subject*	--	Original Control #	--
Date of Correspondence	--	For Comp Principal?	☐
From*	--		
To*	--		
Priority*	Normal		
# of Biz Days Susp	--		
Action Suspense Date	--		
Record Series	--		
Comments	--		

Action Details

- Action ID* - Self completing, no action necessary
- Request Type* - FOIA Request
- Public/Private Action* - Private Other (unless an FP - Private PII)
- Security Classification* - Tasker = Unclassified (always on NIPR)
- Subject* - XX-F-XXXX: Short description of request
- Date of Correspondence - Date of Tasker creation (always)
- From* - Your Name (always)
- To* - OSD/JS (always)
- Priority* - Normal
- Action Suspense Date - 20 business days from creation date

SAVE!!!!!!!

It's Tasking Time!

**CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace > Actions > CMO000798-20 >



 SAVE  SAVE & CLOSE  CLOSE ACTION  LOG PACKAGE  AUDIT HISTORY  FIX DOCUMENT ACCESS  REGULAR COVER  RED COVER  GREEN COVER ...

ACTION : COMPONENT FORM
CMO000798-20

Action Details

Action ID * CMO000798-20

Request Type * All Other Items

Public/Private Action * Public

Security Classification * Unclassified

Subject * XX-F-XXXX: Test 101

Date of Correspondence 2/27/2020

From * Me

To * OSD/JS

Priority * Normal

of Biz Days Susp --

Action Suspense Date 3/27/2020

Record Series --

Status Reason Open

Date of Receipt 2/28/2020

Handling Procedures --

File Number --

Original Control # --

For Comp Principal? ☐

Package Log

Package Holder --

Package Logged In --

Package Logged Out --

Tags

--

Child Taskers

Action ID Task ID ↑ Status Reason.. Owner Susp

No Tasker records found.

Comments

Save Comment

Each Component that requires either a SEARCH or REVIEW tasker will need individual CHILD TASKERS to be created and assigned.

Select the + symbol

Child Taskers Part 1: The Beginning

 **CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > New Tasker

SAVE SAVE & CLOSE ? HELP WORD TEMPLATES ▾

TASKER - INFORMATION ▾

New Tasker ≡

Classification*
UNCLASSIFIED

Status Reason
New

Role*
Initiator

Owner*
CMO-DA-1

General

Subject*
of Biz Days Susp
Suspense Date*
Warning Threshold*
External Tasker ID*
Date Signed

Test

2/28/2020 11:59 PM

24

--

Classification*
Priority*
Origin
Owner*
Is Private
Active Suspense Extension Rec
Related Tasker

UNCLASSIFIED
Normal
Local
CMO-DA-WHS-ES
☐
No
--

Response Type*
Tasker Notes

Answer Note

ADN-Answer Note from the Deputy Secretary of Defense

AMN-Answer Note from the Military Assistant to the Secretary of Deputy Secret.

ASN-Answer Note from the Secretary of Defense

C&R-Comments and Recommendations

FAA-For Appropriate Action

Component Tasker Info

Action ID
CMO000798-20

> Action Data

My Instructions *

Status

Active

Active

Response Type* - Select FAA-For Appropriate Action from the drop down menu

Child Taskers Part 2: Adding Instructions

Action Data

My Instructions* - Select the Insert Text From Template (below). This will open a new window in which you may select either a SEARCH or REVIEW Tasking form.

My Instructions *



Insert Text From Template



Consolidated Instructions

My Response

--

Status

Active

Active

Lookup Record(s) -- Webpage Dialog

Standard Look Up Records

Enter your search criteria below and click the Lookup icon to run the query. Then, select the record(s) you want and click OK.

Look for: Text Template

Search:

☐	Name	Owner	Created On
☐	Review Tasker	CMO-DA-WHS-ESD-FOID	1/6/2016 8:24 AM
☐	Search Tasker	CMO-DA-WHS-ESD-FOID	1/6/2016 8:23 AM

1 - 2 of 2 (0 selected)

OK Cancel

Choose either a REVIEW Tasker or SEARCH Tasker template form.

The Search Tasker Form

•All, This tasker is used in lieu of the SD Form 466. Please feel free to use this to further task for search in CATMS. Action needed: SEARCH. This request was received on Date. Search Criteria: Please conduct a search for records responsive to the requester. The requester is seeking: "...Quote from the request summarizing what is being requested..." Please read the entire request. Time Frame: If Applicable – Delete this entry if not pertinent. Requestor fee status: Commercial, New Media, Educational, NonCom/Scientific, Other – Select which option the requester has been identified as. (Located on Task Sheet from Team Lead. Suspense: Date. If this date cannot be met, please provide an estimated date of completion to this office, as directed by the Open Government Act of 2007. When tasking for PA requests ask the component where the records/documents pulled out of a System of Records (SORN), and if so, what is the SORN number? – Delete this entry if not pertinent. Tasker completion guidance: If you find responsive records, conduct a review, bracket, and cite the FOIA exemption(s) invoked for any information that your office wants to withhold along with your rationale for denial. It is mandatory when using exemption (b)(1) that you also identify the subsections of Executive Order 13526 that apply to the information that continues to be classified. If citing exemption (b)(4) for withholdings, you must ensure the Submitter Notice is completed (per Executive Order 12600). If your search does not find responsive records, please list details of the offices and systems used to conduct the search as well as the search terms used during electronic searches on the SD Form 472. Please note that regardless of withholding, a "clean" copy of all responsive records must be provided to our office, along with completed and signed SD Form 472 and DD Form 2086 (attached). If withholdings are recommended, a "marked" copy of the records must also be returned to this office. Please see attached tasker supplement documents. Blank 472 form can be obtained here:

(b)(5)

Blank 2086 form can be obtained here: (b)(5)

Please contact me if there are any questions. Thank you. Enter your Email Signature block here

The Review Tasker Form

•All, This email is used in lieu of SD form 466. Feel free to use this for your needs to further task for review in CATMS. Action needed: REVIEW. This request was received on Date. Requester fee status: Commercial, New Media, Educational, NonCom/Scientific, Other – Select which option the requester has been identified as. (Located on Task Sheet from Team Lead. Suspense: Date. If this date cannot be met, please provide an estimated date of completion to this office, as directed by the Open Government Act of 2007. Document Originator: Which component/agency provided the records requiring the review?. Additional Notes: NAME OF COMPONENT/AGENCY referred this FOIA request along with the responsive document to our office for review and direct reply to the requester – May not be pertinent. Tasker completion guidance: Please conduct a review of the responsive documents, bracket, and cite the FOIA exemption(s) invoked for any information that your office wants to withhold along with your rationale for denial. It is mandatory when using exemption (b)(1) that you also identify the subsections of Executive Order 13526 that apply to the information that continues to be classified. If citing exemption (b)(4) for withholdings, you must ensure the Submitter Notice is completed (per Executive Order 12600). Please provided to our office a completed and signed SD Form 472 and DD Form 2086 (attached). If withholdings are recommended, a "marked" copy of the records must also be returned to this office. Blank 472 form can be obtained here: (b)(5)

Blank 2086 form can be obtained here:

(b)(5)

Please contact me if there are any questions. Thank you. Enter your Email Signature block here

Child Taskers Part 3: Moving Right Along



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >



SAVE



SAVE & CLOSE



TASKER ASSISTANT



DOC LIBRARIES



TASKER STATUS



MANAGE ASSIGNMENTS



SUBMIT FOR APPROVAL



TASKER INFORMATION

CATMS28022020EJR...

Classification*

UNCLASSIFIED

Status Reason

New

Role*

Initiator

Owner*

CMO-DA-

General



Enter task instructions and fill in any required fields, then click "Save".

SAVE!!!!!!!!!!

General

Subject *



Test

of Biz Days Susp

--

Classification*

UNCLASSIFIED

Suspense Date *

2/28/2020 11:59 PM

Priority +

Normal

Warning Threshold *

24

Origin

Local

External Tasker ID +

--

Owner**

CMO-DA-WHS-E

Date Signed

--

Is Private



Active Suspense Extension Rec



No

Related Tasker

--

Response Type *

FAA-For Appropriate Action

Tasker Notes

--

Child Taskers Part 4: Supporting Documents

Supporting Documents

Supporting Documents Home 

FILES LIBRARY

 new document or drag files here

All Documents ...

Find a file



✓  Name Modified Modified By

There are no files in the

Scroll down to the SUPPORTING DOCUMENTS section to add the requisite documents and records by either browsing or drag and drop. Required documents – Required for ALL TASKERS - The Supportive Forms package (Forms 472, 2086 in the: “UPDATED FOIA_forms_and_supplemental 2020 final”) Required records – Required for REVIEW TASKERS ONLY – All UNCLASSIFIED records that the tasked component needs to review for release recommendations.

Child Taskers Part 5: Manage Assignments



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >

SAVE SAVE & CLOSE ★ TASKER ASSISTANT DOC LIBRARIES TASKER STATUS **MANAGE ASSIGNMENTS** SUBMIT FOR APPROVAL ...

TASKER : INFORMATION ▾

CATMS28022020EJR... ≡

Classification*
UNCLASSIFIED

Status Reason
Normal

Role*
Initiator

Owner*
CMO-DA-

General

Enter task instructions and fill in any required fields, then click "Save".

Scroll back to the top of the page and select the MANAGE ASSIGNMENTS tab.

General

Subject *	Test	Classification *	UNCLASSIFIED
# of Biz Days Susp	--	Priority +	Normal
Suspense Date *	2/28/2020 11:59 PM	Origin	Local
Warning Threshold *	24	Owner *	CMO-DA-WHS-E
External Tasker ID +	--	Is Private	☐
Date Signed	--	Active Suspense Extension Rec	No
		Related Tasker	--
Response Type *	FAA-For Appropriate Action		
Tasker Notes	--		

Child Taskers Part 6: Assigning for Action

Manage Assignments

Use this dialog to manage the Tasker's assignments. Add assignments using the assignment lookup field(s) below. You can further customize the assignments by editing their instructions and/or suspense dates using the appropriate fields below.

The documents will only be sent to new external assignments.

Current Tasker Assignments OPR Details & OCR Details

Select users and teams for assignment

Cancel Accept Only E-mail docs to new External Parties

Owner

Status

OPR C

Unique Suspense Date

Select the magnifying glass to access the search screen.

Select the LOCAL TEAMS option from the drop down.

Advanced Look Up Records

Enter your search criteria below and click the Lookup icon to run the query. Then, select the record(s) you want and click OK.

Look for:

Search

Name

Email

Parent Team

Search for the correct Component code. Then select ADD and OK.

0 of 0 record selected

Page 0 of 0

Selected records:

Add

OK

Cancel

Components in CATMS and their associated codes: A&S – USACAPE – CAPCIO – CIOCMO – CMOCOMPT – USCDAU – USA-ASDA-DAUDMDC – UPR-DHRA-CCO (submit thru DHRA) DPAA – USP DPAA FO Defense POW/MIA Accounting Agency ESD – CMD-RLBHA – UPR-ASD-HAMOS – UPR-ExecSec (email (b)(6) (b)(6) OGC – GCP&R – UPR-ExecSec PFPA – CMO-DA-PFPA R&E – UREUSD(I) – USIUSD(P) – USP FOIA Each component requires an individual CATMS tasker and assignment number.

Child Taskers Part 7: Saving the Tasker for the File



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >

SAVE SAVE & CLOSE ★ TASKER ASSISTANT DOC LIBRARIES TASKER STATUS MANAGE ASSIGNMENTS SUBMIT FOR APPROVAL



TASKER : INFORMATION ▾

CATMS28022020EJR... ≡

Classification*

UNCLASSIFIED

Status Reason

New

Role*

Local

General

Enter task instructions and fill in any required fields, then click "Save".

General

Subject *	Test	Classification *	UNCLASSIFIED
# of Biz Days Susp	--	Priority *	Normal
Suspense Date *	2/28/2020 11:59 PM	Origin	Local
Warning Threshold *	24	Owner *	CMO-DA-WHS-E
External Tasker ID *	--	Is Private	☐
Date Signed	--	Active Suspense Extension Rec	No
		Related Tasker	--
Response Type *	FAA-For Appropriate Action		
Tasker Notes	--		

Scroll to the top of the page and select the "... " option on the right. Select REGULAR COVER from the options provided.

- Close
- Send Release E-mail
- Reopen Taskers
- Create Template
- Generate Print View
- Help
- Email a Link
- Word Templates
 - 391 Form
 - Regular Cover
 - Red Cover
 - Green Cover

Adding the Tasker to the Administrative File: Parts1 & 2

Save as Acrobat
(PDF) file



- XML file with report data
- CSV (comma delimited)
- Acrobat (PDF) file
- MHTML (web archive)
- Excel
- TIFF File
- Word

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020
REQUEST TYPE	RESPONSE TYPE	
All Other items	FAA-For Appropriate Action	
FROM		
Me		
TO		
Me		
SUBJECT		
Test		

Control

CATMS2802



Acti

CMO000798-20

Home Tools Document

1 / 2

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020
REQUEST TYPE	RESPONSE TYPE	
All Other items	FAA-For Appropriate Action	
FROM		
Me		
TO		
Me		
SUBJECT		
Test		

CATMS28022020EJRKH3



Action ID

CMO000798-20

Select Edit PDF

- Create PDF
- Edit PDF
- Export PDF
- Comment
- Organize Pages
- Enhance Scans
- Protect
- Fill & Sign
- Prepare Form

Adding the Tasker to the Administrative File

Home Tools Document 1 / 2

Edit PDF Edit Add Text Add Image Link

Select Add Text

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY Normal	SUSPENSE DATE 28-Feb-2020	DATE OF CORRESPONDENCE 28-Feb-2020	Control Number CATMS28022020EJRKH3
REQUEST TYPE All Other Items		RESPONSE TYPE FAA-For Appropriate Action	
FROM Me		Action ID CMO000798-20	
TO Me			
SUBJECT Test			

Home Tools Document 1 / 2

Edit PDF Edit Add Text Add Image Link

Type Component's acronym and type of Tasker → **Component Search Tasker**

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY Normal	SUSPENSE DATE 28-Feb-2020	DATE OF CORRESPONDENCE 28-Feb-2020	Control Number CATMS28022020EJRKH3
REQUEST TYPE All Other Items		RESPONSE TYPE FAA-For Appropriate Action	
FROM Me		Action ID CMO000798-20	
TO Me			
SUBJECT Test			

Save the .PDF to the case file as: CASE
NUMBER_ACRONYM_CATMS_TYPE_TASKERExample: 20-F-0000_DPAA_CATMS_Search_Tasker

Completing the Tasker Process

1. Print and Save to both the physical and electronic case files. Add the new Tasker number to the case file in FOIAXpress. The CATMS number will always begin with: CMOMake sure you SAVE in FOIAXpress once you add the CATMS number!!

+ Sub Requests

- Custom Fields

Referred from :

Other Agency # :

Requester # :

Referred to :

CATMS Action # :

Date Case Assigned to AO : 

Interim Response Sent Date : 

Case Closeable As Of : 

- Classification

Class* :

- Estimated Completion Date

ECD STATUS :

SOP (#2): CATMS v1: Tasking a FOIA – The Wizard Tasking Method

(Current and Updated Versions Located on the O: Drive: FOID SOPs)

Last Revised: 13 August 2020

PURPOSE & SCOPE: This SOP is designed to provide new FOID Action Officers with a step-by-step guide when tasking components for action while processing a FOIA request.

Welcome to CATMS 101: The Wizard

**CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace ▾CATMS Navigation



 NEW ACTIVITY ▾ NEW RECORD ▾ SET AS HOMEPAGE REVIEW ALERTS

CATMS NAVIGATION - WELCOME!

My Taskers (2135)

My Actions (1825)



Active Alerts: 0 New Alerts: 0

Action/Tasker Wizard

Action/Tasker Search



How are we doing?

CATMS Training

CATMS Archive

Need Support?

Click to open Remedy. External Users can dial 703-571-4577

Beginning the Process

Select the tab as shown.

The screenshot displays the CATMS (Correspondence and Task Management System) homepage. The top navigation bar includes the CATMS logo, the text "powered by TMT", and the system name "Correspondence and Task Management System". It also features a "Workplace" dropdown menu and a "CATMS Navigation" link. On the right side of the navigation bar are icons for search, refresh, add, filter, settings, help, and a user profile. Below the navigation bar is a secondary bar with links for "NEW ACTIVITY", "NEW RECORD", "SET AS HOMEPAGE", and "REVIEW ALERTS". The main content area is titled "CATMS NAVIGATION - WELCOME!". It contains a grid of tiles: "My Taskers (2135)" (teal), "My Actions (1825)" (yellow), "Action/Tasker Wizard" (maroon), "Tasker Search" (light blue), "How are we doing?" (blue) with a CATMS logo, "CATMS Training" (green), "CATMS Archive" (purple), and "Need Support?" (red) with a link to "Remedy" and a phone number. A green arrow points from the instruction "Select the tab as shown." to the "Tasker Search" tile. To the right of the grid is a large image of a building complex with the text "Active Alerts: 0 New Alerts: 0" below it.

CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▼ CATMS Navigation

NEW ACTIVITY ▼ + NEW RECORD ▼ SET AS HOMEPAGE REVIEW ALERTS

CATMS NAVIGATION - WELCOME!

My Taskers (2135)

My Actions (1825)

Action/Tasker Wizard

Tasker Search

How are we doing?

CATMS Training

CATMS Archive

Need Support? Click to open Remedy. External Users can dial 703-571-4577

Active Alerts: 0 New Alerts: 0

Fill out the below highlighted fields.

**CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace ▼ CATMS Navigation

NEW ACTIVITY + NEW RECORD + SET AS HOMEPAGE + REVIEW ALERTS

ACTION/TASKER WIZARD

Step 1 - Action and Tasker General Details
Please enter details about the Task you would like to create

Step 1 - Action/Tasker Data >> Step 2 - Doc Attachments >> Step 3 - Manage Assignments >> Step 4 - Finish

General Details

Subject *

From *

Date of Corresp. *

Priority *

Tags

To *

Suspense Date *

Public/Private Action *

Request Type *

Congressional Type *

Security Class. *

Response Type *

All Other Items

Tasker Notes

Comments

Instructions *

For Component Principal?

☐

Home

Create Records

Next >>

Fill out the below highlighted fields. Example:

CATMS powered by **TMT**
Correspondence and Task Management System

Workplace CATMS Navigation

NEW ACTIVITY + NEW RECORD SET AS HOMEPAGE REVIEW ALERTS

ACTION/TASKER WIZARD

Step 1 - Action and Tasker General Details

Please enter details about the Task you would like to create

Step 1 - Action/Tasker Data >> Step 2 - Doc Attachments >> Step 3 - Manage Assignments >> Step 4 - Finish

General Details

Subject *	FOIA Request Case Number: Short Description			Request Type *	FOIA Request
From *	Your Name	To *	OSD/JS	Congressional Type	
Date of Corresp.	Date of tasker creation	Suspense Date *	Date Tasker is to be completed by	Security Class *	Unclassified
Priority *	Normal	Public/Priv. Action *	Private – Other or PII (depends on if request is FP)	Response Type *	FAA-For Appropriate Action
Tags					
Tasker Notes					
Comments					
Instructions *	Paste either the separately created Search or Review tasker here (see next 2 slides).				
For Component Principal?	☐				

Select Create Records when all entries are completed.

Home Create Records Next >>

The Search Tasker Form

•All,This tasker is used in lieu of the SD Form 466. Please feel free to use this to further task for search in CATMS. Action needed: SEARCH. This request was received on Date.Search Criteria: Please conduct a search for records responsive to the requester. The requester is seeking: "...Quote from the request summarizing what is being requested..."Please read the entire request.Time Frame: If Applicable – Delete this entry if not pertinent. Requestor fee status: Commercial, New Media, Educational, NonCom/Scientific, Other – Select which option the requester has been identified as. (Located on Task Sheet from Team Lead.Suspense: Date. If this date cannot be met, please provide an estimated date of completion to this office, as directed by the Open Government Act of 2007.When tasking for PA requests ask the component were the records/documents pulled out of a System of Records (SORN), and if so, what is the SORN number? – Delete this entry if not pertinent. Tasker completion guidance: If you find responsive records, conduct a review, bracket, and cite the FOIA exemption(s) invoked for any information that your office wants to withhold along with your rationale for denial. It is mandatory when using exemption (b)(1) that you also identify the subsections of Executive Order 13526 that apply to the information that continues to be classified. If citing exemption (b)(4) for withholdings, you must ensure the Submitter Notice is completed (per Executive Order 12600). If your search does not find responsive records, please list details of the offices and systems used to conduct the search as well as the search terms used during electronic searches on the SD Form 472. Please note that regardless of withholding, a "clean" copy of all responsive records must be provided to our office, along with completed and signed SD Form 472 and DD Form 2086 (attached). If withholdings are recommended, a "marked" copy of the records must also be returned to this office. Please see attached tasker supplement documents.Blank 472 form can be obtained here:

(b)(5)

Blank 2086 form can be obtained here: (b)(5)

Please contact me if there are any questions. Thank you.Enter your Email Signature block here

The Review Tasker Form

•All, This email is used in lieu of SD form 466. Feel free to use this for your needs to further task for review in CATMS. Action needed: REVIEW. This request was received on Date. Requester fee status: Commercial, New Media, Educational, NonCom/Scientific, Other – Select which option the requester has been identified as. (Located on Task Sheet from Team Lead. Suspense: Date. If this date cannot be met, please provide an estimated date of completion to this office, as directed by the Open Government Act of 2007. Document Originator: Which component/agency provided the records requiring the review?. Additional Notes: NAME OF COMPONENT/AGENCY referred this FOIA request along with the responsive document to our office for review and direct reply to the requester – May not be pertinent. Tasker completion guidance: Please conduct a review of the responsive documents, bracket, and cite the FOIA exemption(s) invoked for any information that your office wants to withhold along with your rationale for denial. It is mandatory when using exemption (b)(1) that you also identify the subsections of Executive Order 13526 that apply to the information that continues to be classified. If citing exemption (b)(4) for withholdings, you must ensure the Submitter Notice is completed (per Executive Order 12600). Please provided to our office a completed and signed SD Form 472 and DD Form 2086 (attached). If withholdings are recommended, a "marked" copy of the records must also be returned to this office. Blank 472 form can be obtained here: (b)(5) Blank 2086 form can be obtained here:

(b)(5)

Please contact me if there are any questions. Thank you. Enter your Email Signature block here



ACTION/TASKER WIZARD

Step 4 - Wizard Complete!

You have successfully created an Action & Tasker. What would you like to do next?

Step 1 - Action/Tasker Data >>

Step 2 - Doc Attachments >>

Step 3 - Manage Assignments >>

Step 4 - Finish**FINISHED!****CATMS13082020AB8U4R**[Open your new Tasker](#)**CMO003073-20**[Open your new Action](#)**Email a Link**[Create an email with a hyperlink to this Tasker](#)**Create Another Action/Tasker**[Click here to start a new wizard process](#)

Open you new action.

It's Tasking Time!

ACTION : COMPONENT FORM
CMO003073-20

• Action Details

Action ID *	CMO003073-20
Request Type *	FOIA Request
Public/Private Action *	Private - Other
Security Classification *	Unclassified
Subject *	20-F-1487: Propulsion Research, Inc. reports
Date of Correspondence	8/13/2020
From *	Raymond Harbick
To *	OSD/JS
Priority *	Normal
# of Biz Days Susp	--
Action Suspense Date	8/27/2020
Record Series	--

Status Reason	Open
Date of Receipt	8/13/2020
Handling Procedures	--
File Number	--
Original Control #	--
For Comp Principal?	☐

Comments

Save Comment

Package Log

Package Holder --

Package Logged In --

Package Logged Out --

Tags

--

Child Tasks

Action ID	Task ID	Status Reason...	Owner	Save
CMO003073-20	CATMS13082020A88U4R	New	CMO-DA-...	Save

Each Component that requires either a SEARCH or REVIEW tasker will need individual CHILD TASKERS to be created and assigned.

Select the Task ID

• Action Attachments

Refresh Document Library

FILES LIBRARY

It's Tasking Time!

TASKER INFORMATION

CATMS13082020AB8U4R - 20-F-1467: Propulsi...

Classification: UNCLASSIFIED
Status Reason: New
Role: Initiator
Owner: CMO-DA...

General

Enter task instructions and fill in any required fields, then click "Save".

Scroll down to Supporting Documents

General

Subject: 20-F-1467: Propulsion Research, Inc., reports

of Biz Days Susp: --

Suspense Date: 8/27/2020 5:00 PM

Warning Threshold: 24

External Tasker ID: --

Date Signed: --

Response Type: FAA-For Appropriate Action

Tasker Notes: --

Classification: UNCLASSIFIED

Priority: Normal

Origin: Local

Owner: CMO-DA-WHS-E-FOID

Active Suspense Extension Request: No

Is Private: ☒

Related Tasker: --

Principal Level Review: ☐

Component Tasker Info

Action ID
CMO003073-20

It's Tasking Time!

 **CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace > Tasks > CATMS13082020AB...

SAVE SAVE & CLOSE TASKER ASSISTANT DOC LIBRARIES TASKER STATUS MANAGE ASSIGNMENTS SUBMIT FOR APPROVAL CLOSE CANCEL

TASKER INFORMATION
CATMS13082020AB8U4R - 20-F-1467: Propulsi...
Classification: UNCLASSIFIED Status Reason: New Role: Initiator Owner: CMO-D...

Supporting Documents
Supporting Documents Home
FILES LIBRARY

+ new document or drag files here

All Documents Find a file

✓	Name	Modified	Modified By
There are no files in the view "All Documents".			

Drag and drop the original FOIA request, the 472 & 2086 package and any other pertinent documents here.

	UPDATED FOIA_forms_and_supplemental 2020 final	...	A few seconds ago
	20-F-1467 Request Description	...	A few seconds ago

It will look like this if documents are added correctly.

Status Active

It's Tasking Time!

CATMS powered by **TMT**
Correspondence and Task Management System

Workplace > Tasks > CATMS13082020AB... >

SAVE SAVE & CLOSE TASKER ASSISTANT DOC LIBRARIES TASKER STATUS **MANAGE ASSIGNMENTS** SUBMIT FOR APPROVAL CLOSE CANCEL ...

TASKER INFORMATION

CATMS13082020AB8U4R - 20-F-1467: Pro puls...

Classification	Status Reason	Role	Owner
UNCLASSIFIED	New	Initiator	CMO-D...

Supporting Documents

Supporting Documents Home

FILES LIBRARY

+ new document or drag files here

All Documents ... Find a file

✓ Name Modified Modified By

There are no files in the view "All Documents".

Select Manage Assignments

It's Tasking Time!

https://crm.osd.mil/?data={page:Dialogs/&id={9A1F7E38-5DD5-EA11-8146-005056941AD6}&orgId=1033 - Internet Explorer provided by

Manage Assignments

Use this dialog to manage the Tasker's assignments. Add assignments using the assignment lookup field(s) below. You can further customize the assignments by editing their instructions and/or suspense dates using the appropriate fields below.

① The documents will only be sent to new external assignments.

Current Tasker **Assignments** OPR Details & OCR Details

Select users and teams for assignment Cancel ☐ Accept Only ☒ E-mail docs to new External Parties

Owner	Status	OPR OCR CC	Unique Suspense Date

↑

Locate the desired component for tasking using their CATMS abbreviation.

? Help Cancel

https://crm.osd.mil/?data={page:Dialogs/&id={9A1F7E38-5DD5-EA11-8146-005056941AD6}&orgId=1033 - Internet Explorer provided by

Manage Assignments

Use this dialog to manage the Tasker's assignments. Add assignments using the assignment lookup field(s) below. You can further customize the assignments by editing their instructions and/or suspense dates using the appropriate fields below.

① The documents will only be sent to new external assignments.

Current Tasker **Assignments** OPR Details & OCR Details

usa ☐ Accept Only ☒ E-mail docs to new External Parties

Owner	Status	OPR OCR CC	Unique Suspense Date
USA	New	☐ ☒ ☐	8/27/2020 5:00 PM X

↑

The component being tasked.

↑

Choose the pre-determined completion date.

Click Send.

? Help Cancel

Saving the Tasker for the File



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >

SAVE SAVE & CLOSE TASKER ASSISTANT DOC LIBRARIES TASKER STATUS MANAGE ASSIGNMENTS SUBMIT FOR APPROVAL ...

TASKER : INFORMATION ▾

CATMS28022020EJR... ≡

Classification*
UNCLASSIFIED

Status Reason
New

Role*

General

Enter task instructions and fill in any required fields, then click "Save"

General

Subject *	Test	Classification *	UNCLASSIFIED
# of Biz Days Susp	--	Priority *	Normal
Suspense Date *	2/28/2020 11:59 PM	Origin	Local
Warning Threshold *	24	Owner *	CMO-DA-WHS-E :
External Tasker ID *	--	Is Private	☐
Date Signed	--	Active Suspense Extension Rec	No
		Related Tasker	--
Response Type *	FAA-For Appropriate Action		
Tasker Notes	--		

Scroll to the top of the page and select the "... " option on the right. Select REGULAR COVER from the options provided.

Close
Send Release E-mail
Reopen Taskers
Create Template
Generate Print View
Help
Email a Link
Word Templates
391 Form
Regular Cover
Red Cover
Green Cover

Adding the Tasker to the Administrative File: Parts1 & 2

Save as Acrobat
(PDF) file



- XML file with report data
- CSV (comma delimited)
- Acrobat (PDF) file
- MHTML (web archive)
- Excel
- TIFF File
- Word

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020
REQUEST TYPE	RESPONSE TYPE	
All Other items	FAA-For Appropriate Action	
FROM	Control	
Me	CATMS2802	
TO	Acti	
Me	CMO000798-20	

SUBJECT
Test

Select Edit PDF



COMPONENT COVER SHEET UNCLASSIFIED		
PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020
REQUEST TYPE	RESPONSE TYPE	
All Other items	FAA-For Appropriate Action	
FROM	CATMS28022020EJRKH3	
Me		
	Action ID	
	CMO000798-20	
TO		
Me		
SUBJECT		
Test		

Search Tools...

- Create PDF
- Edit PDF
- Export PDF
- Comment
- Organize Pages
- Enhance Scans
- Protect
- Fill & Sign
- Prepare Form

Adding the Tasker to the Administrative File

Home Tools Document 1 / 2

Edit PDF Edit Add Text Add Image Link

Select Add Text

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020

REQUEST TYPE	RESPONSE TYPE
All Other Items	FAA-For Appropriate Action

FROM
Me

TO
Me

Control Number
CATMS28022020EJRKH3



Action ID
CMO000798-20

SUBJECT
Test

Home Tools Document 1 / 2

Edit PDF Edit Add Text Add Image Link

Type Component's acronym and type of Tasker → **Component Search Tasker**

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020

REQUEST TYPE	RESPONSE TYPE
All Other Items	FAA-For Appropriate Action

FROM
Me

TO
Me

Control Number
CATMS28022020EJRKH3



Action ID
CMO000798-20

SUBJECT
Test

Save the .PDF to the case file as: CASE NUMBER_ACRONYM_CATMS_TYPE_TASKERExample: 20-F-0000_DPAA_CATMS_Search_Tasker

Child Taskers Part 1: The Beginning

 **CATMS** powered by **TMT**
Correspondence and Task Management System

Workplace ▾Tasks > New Tasker

SAVE SAVE & CLOSE ? HELP WORD TEMPLATES ▾

TASKER - INFORMATION ▾
New Tasker ≡

Classification*
UNCLASSIFIED

Status Reason
New

Role*
Initiator

Owner*
CMO-DA-1

General

Subject*
of Biz Days Susp
Suspense Date*
Warning Threshold*
External Tasker ID*
Date Signed

Test

2/28/2020 11:59 PM

24

--

Classification*
Priority*
Origin
Owner*
Is Private
Active Suspense Extension Rec
Related Tasker

UNCLASSIFIED
Normal
Local
CMO-DA-WHS-ES
☐
No
--

Response Type*
Tasker Notes

Answer Note

ADN-Answer Note from the Deputy Secretary of Defense

AMN-Answer Note from the Military Assistant to the Secretary of Deputy Secret.

ASN-Answer Note from the Secretary of Defense

C&R-Comments and Recommendations

FAA-For Appropriate Action

Component Tasker Info

Action ID
CMO000798-20

▸ Action Data

My Instructions *

Status

Active

Active

Response Type* - Select FAA-For Appropriate Action from the drop down menu

Child Taskers Part 2: Adding Instructions

Action Data

My Instructions* - Select the Insert Text From Template (below). This will open a new window in which you may select either a SEARCH or REVIEW Tasking form.

My Instructions *



Insert Text From Template



Consolidated Instructions

My Response

--

Status

Active

Active

Lookup Record(s) -- Webpage Dialog

Standard Look Up Records

Enter your search criteria below and click the Lookup icon to run the query. Then, select the record(s) you want and click OK.

Look for: Text Template

Search:

☐	Name	Owner	Created On
☐	Review Tasker	CMO-DA-WHS-ESD-FOID	1/6/2016 8:24 AM
☐	Search Tasker	CMO-DA-WHS-ESD-FOID	1/6/2016 8:23 AM

Choose either a REVIEW Tasker or SEARCH Tasker template form.

1 - 2 of 2 (0 selected)

Page 1 of 1

OK Cancel

Child Taskers Part 3: Moving Right Along



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >



SAVE



SAVE & CLOSE



TASKER ASSISTANT



DOC LIBRARIES



TASKER STATUS



MANAGE ASSIGNMENTS



SUBMIT FOR APPROVAL



TASKER INFORMATION

CATMS28022020EJR...

Classification*

UNCLASSIFIED

Status Reason

New

Role*

Initiator

Owner*

CMO-DA-

General



Enter task instructions and fill in any required fields, then click "Save".

SAVE!!!!!!!!!!

General

Subject *

Test

of Biz Days Susp

--

Classification*

UNCLASSIFIED

Suspense Date *

2/28/2020 11:59 PM

Priority +

Normal

Warning Threshold *

24

Origin

Local

External Tasker ID +

--

Owner**

CMO-DA-WHS-EJ

Date Signed

--

Is Private

☐

Active Suspense Extension Rec

No

Related Tasker

--

Response Type *

FAA-For Appropriate Action

Tasker Notes

--

Child Taskers Part 4: Supporting Documents

Supporting Documents

Supporting Documents Home

FILES LIBRARY

+ new document or drag files here

All Documents ...

Find a file

✓  Name Modified Modified By

There are no files in the

Scroll down to the SUPPORTING DOCUMENTS section to add the requisite documents and records by either browsing or drag and drop. Required documents – Required for ALL TASKERS - The Supportive Forms package (Forms 472, 2086 in the: “UPDATED FOIA_forms_and_supplemental 2020 final”) Required records – Required for REVIEW TASKERS ONLY – All UNCLASSIFIED records that the tasked component needs to review for release recommendations.

Child Taskers Part 5: Manage Assignments



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >

SAVE SAVE & CLOSE ★ TASKER ASSISTANT DOC LIBRARIES TASKER STATUS **MANAGE ASSIGNMENTS** SUBMIT FOR APPROVAL ...

TASKER : INFORMATION ▾

CATMS28022020EJR... ≡

Classification*
UNCLASSIFIED

Status Reason
Normal

Role*
Initiator

Owner*
CMO-DA-

General

i Enter task instructions and fill in any required fields, then click "Save".

Scroll back to the top of the page and select the MANAGE ASSIGNMENTS tab.

General

Subject *	Test	Classification *	UNCLASSIFIED
# of Biz Days Susp	--	Priority +	Normal
Suspense Date *	2/28/2020 11:59 PM	Origin	Local
Warning Threshold *	24	Owner *	CMO-DA-WHS-E
External Tasker ID +	--	Is Private	☐
Date Signed	--	Active Suspense Extension Rec	No
		Related Tasker	--
Response Type *	FAA-For Appropriate Action		
Tasker Notes	--		

Child Taskers Part 6: Assigning for Action

Manage Assignments

Use this dialog to manage the Tasker's assignments. Add assignments using the assignment lookup field(s) below. You can further customize the assignments by editing their instructions and/or suspense dates using the appropriate fields below.

The documents will only be sent to new external assignments.

Current Tasker Assignments OPR Details & OCR Details

Select users and teams for assignment

Cancel Accept Only E-mail docs to new External Parties

Owner

Status

OPR C

Unique Suspense Date

Select the magnifying glass to access the search screen.

Select the LOCAL TEAMS option from the drop down.

Advanced Look Up Records

Enter your search criteria below and click the Lookup icon to run the query. Then, select the record(s) you want and click OK.

Look for: Search

Name

Email

Parent Team

Search for the correct Component code. Then select ADD and OK.

0 of 0 (no record selected)

Page 0 of 0

Selected records:

Add

OK

Cancel

Components in CATMS and their associated codes: A&S – USACAPE – CAPCIO – CIOCMO – CMOCOMPT – USCDAU – USA-ASDA-DAUDMDC – UPR-DHRA-CCO (submit thru DHRA) DPAA – USP DPAA FO Defense POW/MIA Accounting Agency ESD – CMD-RLBHA – UPR-ASD-HAMOS – UPR-ExecSec (email (b)(6) (b)(6)) OGC – GCP&R – UPR-ExecSec PFPA – CMO-DA-PFPA R&E – UREUSD(I) – USIUSD(P) – USP FOIA Each component requires an individual CATMS tasker and assignment number.

Child Taskers Part 7: Saving the Tasker for the File



CATMS powered by **TMT**
Correspondence and Task Management System

Workplace ▾

Taskers > CATMS28022020EJR... >

SAVE SAVE & CLOSE TASKER ASSISTANT DOC LIBRARIES TASKER STATUS MANAGE ASSIGNMENTS SUBMIT FOR APPROVAL



TASKER : INFORMATION ▾

CATMS28022020EJR... ≡

Classification*

UNCLASSIFIED

Status Reason

New

Role*

General

Enter task instructions and fill in any required fields, then click "Save".

General

Subject *	Test	Classification *	UNCLASSIFIED
# of Biz Days Susp	--	Priority *	Normal
Suspense Date *	2/28/2020 11:59 PM	Origin	Local
Warning Threshold *	24	Owner *	CMO-DA-WHS-E
External Tasker ID *	--	Is Private	☐
Date Signed	--	Active Suspense Extension Rec	No
		Related Tasker	--
Response Type *	FAA-For Appropriate Action		
Tasker Notes	--		

Scroll to the top of the page and select the "... " option on the right. Select REGULAR COVER from the options provided.

- Close
- Send Release E-mail
- Reopen Taskers
- Create Template
- Generate Print View
- Help
- Email a Link
- Word Templates
 - 391 Form
 - Regular Cover
 - Red Cover
 - Green Cover

Adding the Tasker to the Administrative File: Parts1 & 2

Save as Acrobat
(PDF) file

COMPONENT COVER SHEET

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020
REQUEST TYPE	RESPONSE TYPE	
All Other items	FAA-For Appropriate Action	
FROM		
Me		
TO		
Me		

Control
CATMS2802

Acti
CMO000798-20

- XML file with report data
- CSV (comma delimited)
- Acrobat (PDF) file
- MHTML (web archive)
- Excel
- TIFF File
- Word

Select Edit PDF

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY	SUSPENSE DATE	DATE OF CORRESPONDENCE
Normal	28-Feb-2020	28-Feb-2020
REQUEST TYPE	RESPONSE TYPE	
All Other items	FAA-For Appropriate Action	
FROM		
Me		
TO		
Me		

CATMS28022020EJRKH3



Action ID
CMO000798-20

SUBJECT
Test

Search Tools...

- Create PDF
- Edit PDF
- Export PDF
- Comment
- Organize Pages
- Enhance Scans
- Protect
- Fill & Sign
- Prepare Form

Adding the Tasker to the Administrative File

Home Tools Document 1 / 2

Edit PDF Edit Add Text Add Image Link

Select Add Text

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY Normal	SUSPENSE DATE 28-Feb-2020	DATE OF CORRESPONDENCE 28-Feb-2020	Control Number CATMS28022020EJRKH3
REQUEST TYPE All Other Items		RESPONSE TYPE FAA-For Appropriate Action	
FROM Me		Action ID CMO000798-20	
TO Me			
SUBJECT Test			

Home Tools Document 1 / 2

Edit PDF Edit Add Text Add Image Link

Type Component's acronym and type of Tasker → **Component Search Tasker**

COMPONENT COVER SHEET
UNCLASSIFIED

PRIORITY Normal	SUSPENSE DATE 28-Feb-2020	DATE OF CORRESPONDENCE 28-Feb-2020	Control Number CATMS28022020EJRKH3
REQUEST TYPE All Other Items		RESPONSE TYPE FAA-For Appropriate Action	
FROM Me		Action ID CMO000798-20	
TO Me			
SUBJECT Test			

Save the .PDF to the case file as: CASE
NUMBER_ACRONYM_CATMS_TYPE_TASKERExample: 20-F-0000_DPAA_CATMS_Search_Tasker

Completing the Tasker Process

1. Print and Save to both the physical and electronic case files. Add the new Tasker number to the case file in FOIAXpress. The CATMS number will always begin with: CMOMake sure you SAVE in FOIAXpress once you add the CATMS number!!

+ Sub Requests

- Custom Fields

Referred from :

Other Agency # :

Requester # :

Referred to :

CATMS Action # :

Date Case Assigned to AO : 

Interim Response Sent Date : 

Case Closeable As Of : 

- Classification

Class* :

- Estimated Completion Date

ECD STATUS :

FREEDOM OF INFORMATION ACT DIVISION

Standard Operating Procedures (SOP) for Request for Estimated Completion Dates

When a Component of the DoD/OSD has been tasked, for a Search of their record system(s) or a Review of record(s)/document(s) sent for a release determination, an AO could be contacted by the FOIA requester for the current status of their request for records. It is the AO's responsibility to contact the Component tasked for the Search/Review and obtain an Estimated Completion Date (ECD).

1. The AO assigned should prepare a written request to the Component for the ECD.
2. The request should include the original Suspense date. The Suspense date is the due date the AO assigns the Component, at the time of tasking, to provide the responsive records, if any.
3. Make sure a PDF copy is placed in the electronic folder for the FOIA request as well as a hard copy in the file.
4. Once the email is composed to the component, attach a copy of the FOIA request and cc your Team Lead.

The email request to the component should model below:

On (DATE TASKED) FOID tasked your office for a (SEARCH/REVIEW) of responsive records in (FOIA NO.) a response was due on (SUSPENSE DATE).

The requester (MR./MRS. REQUESTER) has contacted FOID seeking the status of their FOIA request. Please provide FOID an Estimated Completion Date (ECD) for (FOIA NO.) by (7 DAYS FROM DATE OF EMAIL) so that an ECD can be provided to the requester.

Thank you for your cooperation.

Sincerely,

*AO Name
Contact Information*

FREEDOM OF INFORMATION ACT DIVISION

Standard Operating Procedures (SOP) for Component Request for Extension(s)

When a Component of the DoD/OSD has been tasked, for a Search of their record system(s) or a Review of record(s)/document(s) sent for a release determination, an AO could be contacted for an Extension of the 30-day (calendar) Suspense date. The Suspense date is the due date the AO assigns the Component, at time of tasking, to provide the responsive records, if any.

When a request is made, please adhere to the following:

1. The Component or POC for the Component will contact the AO to request an extension. If the request is made by phone, please advise the Component that the request must be made in writing, i.e. email.
2. Once the email is received, make sure to include the FOIA Request number with your written reply. The Component/POC usually provides the date of extension/completion.
3. Ensure that a PDF copy is placed in the electronic folder for that FOIA request, note the extension in FOIA Express and that your Team Lead is cc'd.

Please adhere to the following with your response:

This email responds to your request dated (DATE OF EMAIL) regarding FOIA request (FOIA No.) seeking an extension pass the 20 day (BUSINESS DAYS) timeline. Your request is granted until (DATE REQUESTED); However, FOID's standard office warning concerning extensions applies. Please note that while FOID is granting an extension, the requester has not. This leaves this case subject to appeals & litigation should the requester choose to exercise their rights under the FOIA.

If your proposed date cannot be met, please provide the AO assigned with a written update prior to the extension/completion date requested.

Thanks for your cooperation in this matter.

Sincerely,

*AO Name
Contact information*

Guidance on Referring Requests from the National Security Archive

This message concerns FOIA requests received from the National Security Archive. For many years, the Department of Defense has had an understanding with the Archive concerning the referral of their FOIA requests. They have, on several occasions, expressed to us that **when a DoD Component receives a FOIA request from them, that request should not be referred to another DoD Component for a search. They accept the responsibility of sending it to the correct Components.**

For example, if the Navy receives a request from the Archive and the Navy determines that USEUCOM may have responsive documents, the request should not be referred to USEUCOM. Instead, the Navy should address the request only for the Navy. Among some possible actions, the Navy may conduct a search, make a referral to one or more Navy activities, or respond that the subject of the request is not under the cognizance of the Navy. Of course, if a Navy search turns up documents with USEUCOM equities, then the request with the documents will be referred or transferred for a consultation to USEUCOM, whichever is appropriate.

I know that this is an exception to our policy guidance which says that we should refer a request to another Component should we have reason to believe that the other Component would have responsive documents. However, I believe that this exception for the National Security Archive actually makes our jobs a bit easier, and I am appreciative that the Archive is willing to work with us on this.

[Message from (b)(6)]



DEPARTMENT OF DEFENSE
WASHINGTON HEADQUARTERS SERVICE
1155 DEFENSE PENTAGON
WASHINGTON, DC 20301-1155



Memorandum for the Freedom of Information Division (FOID)

Subject: Operations Team Processing Standard Operating Procedures (SOP) for FOID

1. Purpose. To Establish standard policies and procedures for incoming OSD/JS FOIA requests.
2. Applicability. Applies to all members of the Operations Team A.
3. Policy. All Operations Team A members will adhere to policies and procedures for processing incoming OSD/JS FOIA requests in said SOP.
4. Responsibilities

Each team A member will conduct the following:

- a. Adhere to FOIA processing procedures
- b. Will check the fax, mail, PAL (FX), and email in a timely manner
- c. Execute projects appointed from leadership
- d. Assist with tasks for other teams when requested by leadership

5. Procedures

****IMPORTANT NOTE****

When dealing with Intelligence Agencies put everything on SIPRNet if it has classified markings. Even the unclassified memo and/or requests. The AO can make the determination. The consultation letter makes it a spillage because of the case number and the disposition from that component.

1. Notify the Operations Team

- A. If request was received via email, forward request with: "Printed and Processing" to the following personnel:
 1. Ops Team Leader/Security Manager: (b)(6)
 2. FOIA Analysts (Team A), Front End team
- B. Drag and Drop requester's email into "FY Printed Requests"

2. Initial FOIA Request Analysis

- A. When processing mail, emails (NIPR/SIPR), and fax: Login to FOIA Xpress:
 - 1. (b)(6)
- B. Print email and ALL attachments
- C. Read and Re-read request carefully
 - 1. Ensure UNCLASS classification on email and supporting attachments
 - 2. Requester cannot be representing the federal government (local & state government is valid to process)
 - 3. Decide on type of request
 - a. Personal records □ Secure (Privacy Act Data cover sheet)
 - 4. Expedite Requested? - Update FOIA Express (FX) to show "Expedited" processing if necessary
 - a. Attach "Expedited" cover sheet (paperclip)
 - 5. Fee Waiver Requested? - Update FOIA Express (FX) to show Fee Waiver was requested/update worksheet
 - 6. Willing fee amount or "Willing to Pay All Fees"? - Update FX/worksheet
 - a. Use \$25 as fee amount if requester provides any willing amount less than \$25
- D. Highlight BLUF statement of the request (only include what is being requested)
- E. Open Adobe Acrobat DC
- F. Scan to PDF

3. FOIA Xpress (FX) Website

- A. Open Internet Explorer or other web browser and go to FOIAXpress website
- B. Tab Navigation: Requests □ Search Requesters □ Type in requester's LN/FN
- C. If requester is listed, update requestor Information OR Create "New Requester" and update all listed contact information.

4. Create a Request

- A. If "Review Request History"
 - 1. Check description for duplicate requests
 - 2. If duplicate notify team lead
- B. Request Type
 - 1. **FOIA:** General request
 - 2. **FOIA/Privacy Act (PA):** Requester is asking for personal records; Staple Privacy Act Data cover sheet on front of folder (staple)
 - 3. **Consultation:** Agency identified portions of their FOIA requester's documents that are to be reviewed by us and sent back to the agency.
Note: Add Consultation Request & Original Request with uploaded request description in FX

4. **Litigation:** judicial review of OSD/JS's withholding of records
 5. **Consultation Litigation:** judicial review of an outside agency's documents with identified portions given for our review
 6. **Referral:** The requester is referring to the agency; process as a "**general FOIA request**"
- C. Multi-Track Type:
1. Complex
- D. Description:
1. Copy and paste highlighted portions from PDF of the request
- E. Referred From:
1. Federal Agency that referred request (referred FOIA request only)
- F. Other Agency #:
1. Referred Federal Agency FOIA Number (referred FOIA request only)
- G. Requester #:
1. Some requesters have their own FOIA number (Some examples: American Oversight, FOIA Group, and National Security Archive)
- H. Classification:
1. Change FOIA/PA requests to U - PII
- I. Departmental Awareness:
1. If request topic is of Department Level Interest (DLI), select Yes
- J. SAVE and click "Yes" ☐ FX will generate a reference number (Ex: 20-F-0001)
1. Double check for duplicate requests
 2. Scroll to the bottom and save request
 3. Add Case Number to Request Description PDF and Save
 4. Write case number on all front pages of each document
 5. Write case number on top and bottom right corner of folder
 6. Put initial FOIA sticker on front of folder
- K. Attaching FOIA Request
1. Save PDF as "20-F-xxxx Request Description"
 2. Attach PDF to "Drag and Drop Zone" on FX
 3. Hit "save" for the final time
 4. Re-check page for any mistakes or omissions

5. PAL: Online FOIA Submission

- A. Type: "***" in top search bar
1. Click the microscope after "***" to process the search
- B. New submissions are labeled "Admin, Admin"
- C. Re-assign to yourself:
1. Assign User
 2. Click the box with the three dots "..."

3. Find/Search for yourself
4. Hit Add User and Hit Save

With SECRET/TS Documents- IMPORTANT

- Work on NIPR FX
- Do not scan or upload any SECRET/TS documents
- Staple RED SECRET or Orange TS classification cover sheet on the front of folder
- Change classification box from "U" to "S" or "TS"

6. FOIA Case Assignment Worksheet

- A. Fill in Case Number (Examples: 20-F-0001, 20-FP-0001, 20-FC-0001)
- B. Circle Type of Requestor
 1. Other, non-scientific or educational, News Media, Commercial
- C. Check for Expedited Response Request
 1. ☐ Expedited
 2. Paper clip Expedited Cover sheet on the front of folder
- D. Check for Fee Waiver Request
 1. ☐ Fee Waiver
- E. Stamp Date Received: (Red Stamp ONLY)

7. Secure Folder

- A. Write Request Number on bottom and side of folder
- B. Document Order:
 1. Case Assignment "Worksheet"
 2. Email
 3. Memo/Request Letter
 4. FOIA Request
 5. Email Attachments
 6. Documents
 7. Place FOIA Initial Request sticker label on folder
Staple Privacy Act or any classification cover sheets - then place sticker on top
(Only for FOIA/PA Request and classified cases)
 8. Paperclip Expedited Processing Request cover sheet, if needed
Place FOIA Initial sticker on the actual folder

8. Deleting Request Letter

- A. Go to Correspondence

- B. Got to Correspondence Log
- C. Select Correspondence to be deleted
- D. Click "delete" and type "." in the comment box
- E. Hit Save

Interim Responses

- a. Team A Team Lead will notify the members of Team A which cases need interim responses drafted.
- b. Once notified, navigate to:
 - O:\FOID\000 - Official Record FOID\FOIA Access and Disclosure Request Files 203-02 (DEST 6 yrs after COFF)\TEMPLATES\00 Responses to Requesters\Interim Responses
- c. Choose the relevant template for the case status.
- d. Using the case information in FX, replace red text with the appropriate information.
 - 1) Remember to include case AO's information not your own, if applicable
 - 2) When filling in date, make sure it is all on one line, not broken up across two lines
- e. Send interim response back to Team A Team Lead for review and they will send to "B" or "C" Team Leads for review and signature.

9. Correspondence Scan Log: Closed FOIA Cases

- A. Open FOIA Xpress in web browser
- B. Insert case number "(20-F-0001)" → search button
- C. Select Correspondence
- D. Select Receive Correspondence
 - 1. Letter Template: Other
 - 2. Select Type of Correspondence

10. Order of Correspondence

"DO NOT SCAN RESPONSIVE DOCUMENTS"

- A. Scan documents 1 through 12:
 - 1. Final Response
 - 2. Case Summary
 - 3. Memorandum(s)
 - 4. Memorandum for Record(s)
 - 5. Tasker Response(s) –Include taskers in Email format
 - 6. Email(s) -Arrange from most recent to oldest
 - 7. Administrative Log(s)
 - 8. Interim Response(s)

9. Follow-Up Letters
10. Top Secret (TS) Registries
11. Referral Letter(s)
12. FOIA Case Worksheet
13. Documents (Do not Scan)
14. Request (Do not Scan)

11. Correspondence and Task Management System (CATMS)

“Manages and Tasks FOIA Requests from Operations Team to Action Officer”

- A. Access with CAC - Website: (b)(6) Access FOIA
Contacts Excel Spreadsheet
 1. This PC
 2. WHS_ESD_ORG (O:) Drive
 3. FOID
 4. Office Records OFOI
 5. Working – OFOI
 6. FOIA Contacts
- B. Refer to Case Assignment Worksheet to see which agency is being tasked with search request
- C. Search on FOIA Contacts list for the agency’s CATMS code/Point of Contact (POC)
- D. Go to CATMS and click on: Action/Tasker Wizard on homepage
 1. Subject: Case ID # and the description of what is being tasked
 2. Request Type: FOIA Request
 3. From: “AO’s full name”; To: OSD/JS
 4. Date of Correspondence: Today’s date
 5. Suspense Date: Month from today’s date
 6. Priority: Normal
 7. Response Type: FAA-For Appropriate Action
 8. Instructions: Copy and Paste SOP-derived template; fill-in with info below:
 - a. Date Received – Refer to Case Assignment Worksheet
 - b. The requester is seeking: (copy and paste description from FX)
 - c. Suspense: see date above (1 month out)
 - d. Tasker completion guidance: Don’t change
 - e. Copy and Paste AO’s signature block at the bottom
 - f. Select Next “→”
 9. Select Docs to Upload for Task
 - a. Doc Library is always “Supporting Documents”
 - b. Click on “+” Upload

- c. Upload Supplement Docs and Requests
 - d. Double check all attachments are in "Supporting Documents"
 - e. Hit Next "→"
- 10. Manage Assignments
 - a. Hit all teams
 - b. Click Add
 - c. Search for one CATMS POC in system (located on contact sheet)
- 11. Click on "Open your New Tasker"
 - a. Check entire generated page for any errors
 - b. Click on the 3 dots in the header "..."
 - c. Scroll down to "Regular Cover"
- 12. Save as Adobe (PDF) and print page
 - a. On printed page "write" the tasked component
- E. Entering the CATMS Action ID into FX
 - 1. Go to FX
 - 2. Select Request Documents
 - 3. Click on "New"
 - a. Suspense Date= one month out
 - b. Priority: Normal
 - c. Click on: Program Offices
 - d. Select component tasked
 - e. Hit Save
 - f. Subject: Type "Search or Review"
 - g. Click "email" at the bottom of the page

Tasking Joint Staff

- ONLY use SIPR CATMS
- Upload documents under "**Original Document**" (NOT Supportive Documents)
 - *Note: They will return responsive documents under "Final Documents" back to us*
- Search under "Enterprise" (NOT Local teams)
 - In the Advanced Lookup Records window, set the "Look for:" dropdown menu to "Enterprise" and search "**IMD/JSDB**" in the "Search" bar.

12. Tasker Response to AO: CATMS Email Box

- A. Accepted or Closed
 - 1. Drag to Respective Folder without Emailing AO
- B. Completed
 - 1. Search Case number in FX for assigned AO
 - 2. Update Request for Documents in FX
 - a. select correct component from email

- b. Read Status reports to ensure no recent update from AO has been made - status should be "request for docs sent"
 - c. select task action
 - d. Select "Received – Not Finally Evaluated"
- 3. Forward email to assigned AO: Cc the AO's Team lead and the Operations team (Use language below)
 "A response has been received and FX has been updated to show "Received - Not Finally Evaluated".
- C. Rejected
 - 1. Search Case number in FX for assigned AO
 - 2. Forward the Email to the AO to notify them (Cc the AO team lead and the Operations team)- Example Email: "This tasker came back as rejected"

13. Top Secret (TS) Registers

Purpose: "In order to make an unclassified record of TS FOIAs, the Ops Team stamps and registers all TS Documents onto the "FOID Format 4 Worksheet" before pushing the request forward."

- A. FOID Format 4 Worksheet: Paperclip on top of finished case folder
 - 1. Case Number – FOIA Xpress Case Number
 - 2. Originator – LEAVE BLANK
 - 3. Number of Copies – LEAVE BLANK
 - 4. Date of Register
 - 5. Description of Documents (Refer to "Classified Accountability Record"
 - a. Title of Document(something on the cover), Date, Number of pages
 - b. Run out of space ☐ create new worksheet
 - 6. Cope Number: "#__ TS Docs"
 - 7. TO: "AO"
 - 8. Date Transferred: LEAVE BLANK (Highlight Box)
 - 9. Signature and Grade: LEAVE BLANK (Highlight Box)
- B. OSD/JS Top Secret Control Stamp:
 - 1. Copy#: Record Number (ex: R-1)
 - 2. Case #: Input FOIA Case Number
 - 3. Document Number: Refer to "Classified Accountability Record"
- C. FOIA Case Folder Order (Use Accordion Folders)
 - 1. Case Worksheet
 - 2. Consultation Letter

3. Original FOIA Request
4. Compact Disc(s)
5. Classified Accountability Record
6. All Documents (In TS Register Order)
7. Copy & staple Manila package envelope to back of the accordion folder

Disks from OPM

7-Zip must be installed to work on disks sent by OPM. JSP allows this program to be installed by the user, so ensure that it is installed on your Mobi-Key or office machine.

To install 7-Zip:

- Go to the Start menu
- Click on Software Center (icon looks like a blue box with a CD-ROM on it)
- Scroll through the applications available for installation and search for 7-Zip (icon is black and white and says 7z).
- Click on the icon and choose to install.
- After the installation occurs, you will be able to access the 7-Zip program.

14. Follow-Up Emails

- A. Look up case with provided record number
- B. Forward email to case's action officer (AO)
- C. Drag to Follow-Up Box (Inbox □ General FOIA □ Follow-Ups)

15. Email Pre-Made Signature Blocks

“Follow-Ups for OUSD (A&S) CMO”

- A. (Action Officer's name), See forwarded email regarding your [Case Number] FOIA Request.

16. Update Request from Requester

- A. Good Morning Mr/Ms. _____,

The Action Officer assigned to your Consultation FOIA (Request # _____) is _____.

He/she can be reached during business hours at (AO Contact Info _____) with details on specific updates regarding your FOIA Request.

Respectfully,

17. FOIA Appeals Cases:

- A. Respond back to the appeals office acknowledging their email. The response to Appeals should be:
1. We acknowledge receipt of this appeal. The action officer is ____, and their team lead is ____. You should receive the administrative file from the action officer or team lead within the next 5 business days.
 2. Note: CC the entire Operations team and put your signature block.
- B. Send an email to the action officer and Cc their team leader and the entire Operations Team:
1. Good morning/afternoon _____ (Action Officer's name). Please see the email below from the Appeals office in reference to the subject FOIA request. FX indicates that you are the action officer for this case. Please provide the administrative file to (whoever sent the email- Danaeka, Adam, Don, or if it came from the CMO appeals box, to the appeals office) within the next 5 days. Thank you.
 2. Note: CC the entire Operations team and put your signature block.

18. When a representative from the Federal Government requests a FOIA:

- A. Good Afternoon (Title) _____,

I am with the Office of the Secretary of Defense and Joint Staff (OSD/JS) FOIA Requester Service Center. We recently received your FOIA request in which you were seeking information about As you may not be aware, the FOIA is not intended for official government purposes. Therefore, we are unable to accept requests that include government mailing or email addresses.

If you would like for us to communicate with you electronically, please resubmit your FOIA request using a personal email address.

19. Remand Cases:

- A. Respond back to the appeals' office acknowledging their email (see sample above, change to "remand"). Forward the email that the appeals' team sent to us and use the following sentence:
1. (FOIA Case- AO's name), please see the email below from the appeals' team in reference to the above subject FOIA. The case has been remanded. Please take the case folder to  so that it can be processed as a "Remand" in the system.

Pre-Coordination Emails:

Move emails requesting pre-coordination into the “Pre-Coordination Emails” folder. Inform  and make note.

Frequently Asked Questions (FAQ)

To create a group email contact in outlook:

1. On the Navigation bar, click People.
2. Under My Contacts, select the folder where you want to save the contact group. Usually, you'll select Contacts.
3. On the Ribbon, select New Contact Group.
4. Give your contact group a name.
5. Click Add Members, and then add people from your address book or contacts list.
6. Make sure you save and close.

To create a rule (handy for knowing when emails are inbound)

1. File-> Manage Rules & Alerts
2. Press the New Rule... button and start with a blank rule:
 - 2.1. Apply rule on messages I receive
3. In the next screen you can select the conditions.
In our case we select: the requester inbox or from our Team Lead.
4. In the bottom section, click “people or public group” to select the address(es) from your Address Book.
5. Click Next to go to the Actions screen.
6. Select the action: play a sound.
7. In the bottom section click “a sound” to select a sound file from your computer.
8. Note that you should use a wav-file for this.
9. Click next to advance to the next screen to set any exceptions when needed.
10. Once you’ve done that (or skipped that), click Next to give the rule a name.
11. Click Finish and then OK to close the open windows.

Operations Team (A) Teleworking SOP

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Processing FOIA Requests

FOIA requests can be submitted through the mail, fax, PAL, or requester service inbox (b)(6)

(b)(6) Team A should check these locations for new requests regularly.

For ALL Requests

Case Folder

1. Admin Files
2. Response
3. Taskers

FOIAXpress

4. Log into FOIAXpress (b)(6)
5. Search Requester to check for existing profile

Requester Inbox

1. Any request received via email, forward to all Team A members and say: "Processing"
2. Drag and drop requester's email into "FY 20XX Printed Requests"

Public Access Link (PAL)

1. To check for PAL requests, search ** in FOIAXpress. New requests will have Primary User "Admin, Admin".
2. Click green [Next] button under Action and Assign Request. Change yourself to the Primary User and [Assign].
3. Make new case folder as usual. Download PAL Request as Request Description and add case number and received date to the top-right corner.
 - Download any other documents included with request. Another document may be the actual request description.
4. Update Class with appropriate classification. (Likely "U")

Uploading Closed Case Documents

AOs will move case folders into the Closed Cases folder on the O: drive (location below) after completing them. Team A should check this folder regularly.

O:\FOID\000 - Official Record FOID\FOIA Access and Disclosure Request Files 203-02 (DEST 6 yrs after COFF)\Official Records FOID - CLOSED Cases

If a case folder is present,

1. Search the case number in FOIAXpress and go to the request's page.
 2. Click *Correspondence* on the left panel.
 3. Check the *Correspondence Log* (third tab across the top) to make sure someone else hasn't already uploaded the files.
 4. Click *Receive Correspondence* (second tab across the top).
 5. Within the case folder, navigate to the Admin Files or Tasking folder. On FX within *Receive Correspondence*, click the "Subject" drop-down menu and choose the category that corresponds with the file you want to upload from the O: drive case folder.
 6. Drag and drop (or upload) the file from the case folder to the upload section of FX. Click save. Repeat for all files in the Admin Files and Tasking folders.
 7. After files have been uploaded to FX, navigate back to the Closed Cases folder. Drag and drop the case folder into the FY 2021 DEST OCT 2027 folder.
- ! Do not upload requester-responsive documents from the Releases or Tasking folders. (These documents will likely be marked "redacted" or "clean"/"un-redacted")
- ! Do not upload PII documents like IDs, marriage certificates, etc.

Tasking Military OneSource (MOS)

You will receive an email from Maddy that an MOS case has been assigned to you and placed in your Operations Team folder.

Interim Response

1. Open interim response. Update all AO Information with your own and correspondence date at the top right to reflect today's date. Save as PDF.
2. Email (b)(6) No need to attach interim to email. (b)(6) will reply with changes to be made or notification that interim is signed.
 - *Interim response for XX-FP-XXXX is ready for signature and waiting in my Operations Team folder.*
3. Navigate to FOID Working Folder > DOCUMENTS FOR MAILING. Create a folder with the request number. Copy in 1) Signed interim response PDF, 2) Request description, 3) Note with password *marked DO NOT MAIL*

4. In FX, update "Interim Response Sent Date" with today's date.

CATMS

1. In case folder -> Taskers, create "MOS" folder.
2. Navigate to CATMS website. (b)(6)
3. From drop-down in top left: New Record -> Action
 - a. Request Type: FOIA Request
 - b. Public/Private Action: Private - PII
 - c. Security Classification: Unclassified
 - d. Subject: "XX-FP-XXXX: Short request description"
 - e. Date of Correspondence: Today's date
 - f. From: Your name
 - g. To: OSD/JS
 - h. Action Suspense Date: 30 days + next business day if weekend/holiday
 - i. SAVE (top left)
4. Click [Add Taskers] next to Child Taskers (bottom right). This will open a new window.
 - a. Response Type: FAA – For Appropriate Action
 - b. My Instructions: Paste in filled Search Tasker Language
 - c. Save
 - d. Supporting Documents: + new document -> Upload supplemental forms
+ new document -> Upload non-passcode protected request description
5. Click [Manage Assignments] across the top. Search/add "UPR-FOIA" then hit [Send].
6. On Tasker page, click three dots and choose "Regular Cover" from drop-down. Print to save as PDF under the MOS folder in the case folder. Name "XX-FP-XXXX Cover Sheet".
7. Copy Action ID (ADM#####-##) and paste into CATMS Action # in FX.

FOIAXpress

Go to Request for Documents. [New] -> [Add Program Offices] -> Check P&R | (b)(6)
(Page 6) -> [Select] -> Subject: "Search"-> [Email]

Outlook

1. Start a new email. Go to Options tab and click [ENCRYPT]
2. To: (b)(6)
3. Attach non-passcode protected request description (download from FX) and tasker cover sheet.
4. Subject: "XX-FP-XXXX Search Tasker"
 1. "A FOIA/PA tasker has been uploaded to CATMS. Request description and cover sheet are attached. If you have any questions, please reach out and refer to case number XX-FP-XXXX."
5. Send. Download email as PDF and save to MOS folder.

Receiving a Response

When a MOS response is received:

1. Save email as a PDF and put in case's MOS folder.
2. Upload task forms to MOS folder.
3. Make a folder within MOS called "Documents". Upload responding documents attached in the email here.
4. Move the entire case folder to MOS Cases Ready for Closure and notify (b)(6)
5. In FX, update Request for Documents as "Received – Not Finally Evaluated".

DoD SAFE

DoD SAFE is a service used to securely deliver files. The requester service inbox will get two emails: 1) a notification with subject "[DoD SAFE] NAME has dropped off files for you" and 2) one from the sender containing the password.

1. Using Internet Explorer, follow the link in the notification email.
2. Enter the *Claim Passcode* included in the first email. Click *Pick-up Files*.
 - *Claim ID* and *Recipient Code* should auto-populate, but if not, this information is also in the email.
3. Download files. When prompted for "Decryption Passphrase", enter password sent in second email.
 - If request/referral documents: process like a FOIA request as usual.
 - If final response documents: create a folder with the case number in FOID Working Folder > DoD SAFE Drop-Offs. Update FX and notify the AO, their team lead, and Team A, like receiving a CATMS tasker response.

Tasker Response Inbox

CATMS tasker notifications and component tasker emails are sent to the inbox (b)(6)

(b)(6) Based on the action, noted in the email:

- Accepted: Move email from main box to "CATMS Accepted" folder
- Closed: Move email from main box to "CATMS Closed" folder
- Cancelled: Move email from main box to "CATMS Cancelled" folder
- Completed
 1. Search case number in FX and note assigned AO
 2. In *Request for Documents*, select line with appropriate component
Make sure Status is "Request for Docs Sent"
 3. Click [Take Action]. Change Status to "Received – Not Finally Evaluated"
 4. Forward tasker email to AO, cc their Team Lead and Team A

- *A response has been received and FX has been updated to show "Received – Not Finally Evaluated".*
- 5. Move email to correct component folder under "CATMS Completed" or to "CATMS Completed" if a specific folder is not available
- Rejected
 1. Search case number in FX for assigned AO
 2. Forward tasker email to AO, cc their Team Lead and Team A
 - *This tasker came back as rejected.*

Bi-Annual Component Responses

All emails relating to the Bi-Annual Report must be forwarded to the relevant AOs and their team leads, cc (b)(6) (b)(6). Instructions to AOs should include:

Please update case folder(s)/FX and work with the component in regards to the case(s). Accordingly there is a 1-week timeframe to make any update(s).

Move these emails from the main box to "Bi-Annual Component Responses" folder.

Remand Cases

The Appeals office may send us cases for remand, meaning the AO must rework the case. Note that **remands are not appeals**, even though they are from the Appeals office. When an email is received with the term "remand" in the body:

1. Respond back to the Appeals office acknowledging receipt of the remand.
2. Forward email sent from Appeals to the AO, cc their Team Lead, and Team A:
 - *(AO Name), please see the email below from the Appeals team in reference to the above subject FOIA. The case has been remanded. Please send the electronic files to me so that it can be processed as a "Remand" in the system.*
3. Process in the same way as normal request, but choose Request Type "Remand".
4. Include emails and all documents sent by Appeals office in case folder. Make sure appeal request from requester is included.

Voicemails

To check work telephone messages from your personal phone:

1. Call your work phone number and let it ring.
2. When the “unavailable” message starts, press asterisk [*].
3. Enter voicemail password when prompted, then press pound [#].
 - a. Default password: 1557

Bi-Annual Report SOP

Purpose: The Bi-Annual report serves as an opportunity for the Freedom of Information Division (FOID) to engage with OSD/JS component offices to reconcile tasker lists and inform them of any 10 oldest Freedom of Information Act (FOIA) Cases, or FOIA Consultations they hold. It also serves as an opportunity to update the FOIAXPRESS (FX) database. The Bi-Annual reports (a spreadsheet) are sent in January and July of each year. The reports are sent in two stages. A heads up report and a final report accompanied by a letter signed by ESD Leadership, which is addressed to component leadership. The heads up report is an all-digital event. The Final report is sent both digitally and electronically.

Timeline of actions:

The language for the heads up report is sent to the FOID Chief and Deputy at least one week (2 weeks is better) before the reports are sent. The previous language used for the email is provided. The dates to meet the timeline like report run dates, and deadlines are added to language. POCs are adjusted as needed. Reminders are sent on a periodic basis to ensure that the language is finalized by the morning the heads up reports are to be sent.

The heads up list is prepared the Thursday before the reports are sent.

The heads up report is sent to all OSD/JS components on the first Friday of January and July. The reports are provided by email and utilize the language approved by the Chief & Deputy.

Once the heads up list is sent to the OSD/JS components, a list of the OSD/JS offices receiving a report should be sent to the front end so they can ensure that they have the correct mailing addresses for the offices for the final reports at the end of the month.

To prepare the new letter to accompany the Final Bi-annual report, the previous bi-annual letter, Form 2, and distribution list are provided to the Chief and Deputy for adjusting as needed. The dates to meet the timeline like report run dates, and deadlines are added to language. POCs are adjusted as needed. Reminders are sent on a periodic basis to ensure that the letter is finalized by the date reports are to be sent. Note this may spill into the next month but should not exceed one week from when they are supposed to go out.

Designated POCS correspond with component offices as they respond to the heads up list. Responses are passed to assign AOs and team leads for action and updating FX. Designated POCS follow up to ensure the actions have been taken by the AOs.

This should be done by verifying the individual cases have been updated and by following up with a new list sent to the component to show actions have been taken. **This action must occur before the final reports are prepared to be sent.** Office of particular interest are Records and Declassification Division (RDD), Correspondence Management Division (CMD), and Joint Staff (JS).

Final Bi-Annual reports are prepared the Thursday before the reports are sent.

Final reports are printed, in preparation for sending the final reports.

Once the final signed letter is received, digital copies of the final report are sent with the letter to the OSD/JS components. Copies of the signed letter are printed, one for each report. The printed reports are packaged individually for each component with a copy of the letter and sent thru distribution to the components.

Sample email Heads up Bi-Annual language

All,

It is nearly time for the Official Bi-Annual reports to be sent from our Senior Leadership to your Senior Leadership, for awareness and assistance with getting FOIA taskers returned, especially those taskers that appear to be stuck with Subject Matter Experts or other personnel. The plan is to have our memo signed by our Senior Leadership by July 31st, and in the mailboxes of your Senior Leadership by the first week of August.

Before we send the official reports to your leadership, we would like to give you the opportunity to begin the reconciling process. Please take the time to examine the list provided and work with FOID to reconcile what your office shows as having been tasked vs. with what FOID shows as having been tasked to you, that still shows as outstanding. Our goal is to ensure that our lists are the same, and that we have all of the completed responses that you have provided to our office. If there is a reason that a response you provided has not been accepted by our office and marked as complete, we would like to take this opportunity to resolve those discrepancies.

Please note that the cases on the tasker list are current as of Thursday 07/01/2021. If you were tasked something on or after this date, or responded on or after this date, it may not reflect correctly on this list.

Please send responses to this email address: (b)(6) and

(b)(6)

Please respond to our office no later than Friday 07/23/2021 with any responses, questions, or concerns about the list you have been provided. New lists will be generated no later than Friday 07/30/2021 to form the official lists which will go out with the memo. The new lists and memo should go out no later than Monday 08/02/2021 to leadership.

Thank you for your help and we look forward to working with you during this process.

V/R

Sample email Final Bi-Annual language

Greetings All:

The overdue tasker memo has been signed and the memo, along with your list of pending taskers, should soon be arriving in hardcopy form to your Senior Leadership. A copy of the memo is attached. This is an opportunity to ensure that your leadership is aware of what is currently pending in your component, to assist in getting taskers returned from your Subject Matter Experts for close out. We are nearing the end of the fiscal year and would appreciate your making every effort possible to get as many taskers as possible closed. Every tasker returned brings us one step closer to backlog reduction for the fiscal year.

As always, if you notice any issues with the list of overdue taskers for your component, do not hesitate to reach out to us. However, please note that the cases on the tasker list are current as of Thursday 07/29/2021. If you were tasked something on or after this date, or responded on or after this date, it may not reflect correctly on this list.

Please send responses to this email address: (b)(6)

(b)(6)

Thank you for your help and we look forward to working with you during this process, and we look forward to a strong finish for FY2021.

V/R