



DEPARTMENT OF THE NAVY
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IN REPLY REFER TO:

JAG/COMNAVLEGSVCCOMNOTE 5200
60
10 Sep 10

JAG/COMNAVLEGSVCCOM NOTICE 5200

From: Judge Advocate General

Subj: BUSINESS RULES FOR THE USE OF THE JAG TASK MANAGEMENT SYSTEM WITHIN THE OFFICE OF THE JUDGE ADVOCATE GENERAL (OJAG) AND NAVAL LEGAL SERVICE COMMAND (NLSC)

Ref: (a) SECNAVINST 5430.7Q

1. Purpose. To establish JAG task management system (JAG Taskers) for OJAG and NLSC and to provide guidance for consistent use.

2. Discussion. JAG Taskers is an electronic, web-based task management system that has been designed for the exclusive use of the Navy JAG Corps (JAGC). Created as a subset of the OPNAV Taskers software, JAG Taskers provides the JAGC an independent means of coordinating tasks outside the OPNAV framework while also providing a platform to staff tasks with and through the traditional OPNAV Taskers construction. Correspondence, action memos, information memos, PowerPoint briefs and all other matters originating within OJAG or NLSC that require signature or decision by DJAG (RAO), DJAG/CNLSC, JAG or higher authority, will be processed using JAG Taskers. A collateral benefit of JAG Taskers is its knowledge management capability, as it allows users to search for and access historical tasks and their accompanying documentation. OJAG Codes and NLSC Commands are also encouraged to utilize JAG Taskers internally in order to streamline staff processing and best leverage available technology.

3. Action. OJAG Code 60 is designated the executive agent for implementation and oversight of JAG Taskers and shall promulgate additional or modified guidance as required.

4. Tasker Workflow Elements and Terminology.

a. Action Office (AO). The Action Office is the office initially responsible for the work product of a given task. In the event that the work product is a result of coordination among several offices, the AO is the office responsible for collating and overseeing the final coordinated product. As the

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office responsible for the work product, the AO is also frequently responsible for creation of the initial tasker.

b. Tasking Authority (TA). The Tasking Authority is the office that is responsible for making the final decision on a given task (i.e. approving a request, signing a document, etc.). The designation "Tasking Authority" reflects the idea that the TA, as ultimate "authority" and decision maker in the chain of command, is the only entity who may truly "task" a subordinate entity with completion of a task. This should not be read to mean that tasks may not be created without the explicit approval of the TA; rather, AOs seeking approval or action on tasks will regularly create taskers and route them to the TA without any prior direction by the TA.

c. Chop. The chop section is reserved for offices that need to review the AO's final product before it is forwarded to the TA for actual signature or approval. Chops may result in the work product continuing to the TA for approval or could result in a return to the AO for additional action. For example, an administrative office could be assigned as chop in order to review the proposed work product for conformance with the Navy correspondence manual. Chop is a sequential review; subsequent offices in the "chop chain" require finalized input from earlier chop offices prior to their review.

d. Parallel Chop. The Parallel Chop section permits multiple reviewing offices to provide comments on the AO's final work product at the same time. Unlike chop, parallel chop permits a simultaneous review. This type of workflow works well when one office's comments are not dependent upon the prior review of another office. For example, parallel chop may be useful when reviewing instructions or directives, or for maximizing the opportunities for review/input from many offices on "short fused" taskers.

e. Coordination. When needed, coordination offices provide input to the AO to assist it in the initial creation of a work product. Divisions or offices who are not responsible for initially drafting the work product may, in this way, provide collateral review and input to the assigned task before a work product is created.

f. Information. The Information section is used to provide notice of a task to offices or individuals who may not have

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responsibility on a task, but require access to the tasker for tracking or monitoring purposes.

5. Assigning Workflow.

a. Tasker Type. Absent special circumstances, all taskers created by offices within OJAG and NLSC should be created as "JAG Taskers." Creation of "General Taskers" should be reserved for occasions where staffing of a task requires action outside the JAGC, and are exceedingly rare. Consult Code 60 prior to creation of any General Taskers.

b. Workflow Participants. In an effort to facilitate meaningful, effective workflow, offices within the OJAG/NLSC structure are permitted to task other OJAG/NLSC offices with workflow responsibility when doing so is necessary or advisable in the course of processing a task. As AO, RLSO Midlant may, for example, task OJAG Code 63 as chop on a courtroom security waiver request prior to approval before Commander, Navy Legal Service Command (CNLSC). However, OJAG/NLSC offices may not assign workflow responsibility outside the OJAG/NLSC structure.

c. Determining Tasking Authority. Under normal circumstances, OJAG divisions serving as AO should assign TA responsibility to that divisions cognizant Assistant Judge Advocate General (AJAG). NLSC commands serving as AO should assign TA responsibility to OJAG Code 60 as the surrogate for CNLSC. Under no circumstances should OJAG/NLSC offices assign direct TA responsibility to DJAG (RAO), DJAG/CNLSC, JAG or higher authority without prior approval by that office's cognizant AJAG.

d. "Placeholder" Tasking Authorities. It is possible (and sometime advisable) to initially use other intermediate offices within your organization as TA while a task is being routed for coordination and perfection. By temporarily using another internal office as a "placeholder" TA, a work product may be routed through parallel or sequential chops and then, after the work product is perfected, the AO may redesignate the TA as the appropriate approving office. In so doing, the actual TA is not privy to the workflow on an issue until the work product is ready for ultimate action. However, in cases where the TA requests immediate or ongoing access to the tasker in order to monitor progress, this option is not advisable.

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6. Understanding the Template/Tasker Package Sections

a. Tasker Package Section. Documents or files that comprise the substance and background of a task should be placed inside the Tasker Package window. Examples of files to attach include: draft versions of documents to be signed, action or information memos, pre-decisional or informational PowerPoint briefs, and background e-mails/documents. The types of files that can be placed within the Tasker Packager window are limitless; however, only the most up-to-date versions of draft documents should be placed in this window. If, for example, a chop office revises the initial draft provided by the AO, the chop office should remove the original version of the draft, place it in the Working Documents section, and upload the most recent version of the draft into the Tasker Package.

b. Working Document Section. Previous versions of draft documents and documents that are useful as background but are not fundamental to the completion of a task should be included in the Working Documents section.

c. Final Response Section. This area is exclusively reserved for the Tasking Authority's final response, and must be posted in a non-editable form, such as .pdf. Only the Tasking Authority (or the designee) is authorized to post the final response. The final response is the conclusive answer to the task.

d. Tasker Blog Section. The tasker Blog section is designed to provide an explanation of what the tasker is, guidance on how it should be processed, and a historical perspective on how the task has developed. There are three component parts to this section:

(1) The Instruction Summary provides guidance on completing the tasker (i.e. the action or final product required). Under normal circumstances, the Instruction Summary should include:

(a) An initial, short, "bottom line" statement describing what the tasker is designed to accomplish;

(b) A background paragraph (or paragraphs) that put the task in perspective and provides a snapshot view of the issue at hand;

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(c) An itemized list of the documents or files that comprise a task; and

(d) Special guidance, as necessary, on how the task should be processed.

(2) The Status section describes what is happening on the tasker at any given time. Regular, up-to-date entries in this field are required in order to provide workflow participants with an accurate, timely description of a task's current posture. After an office or individual takes any action on a task, the status of the task should customarily be updated. Superseded status entries are automatically saved in the Blog History and can be accessed to provide a historical view on a tasker's progression.

(3) The Comments section serves as a forum for users to provide additional comments that do not directly pertain to the current status of the package. Like statuses, comments are automatically saved in the Blog History but do not replace the active status.

e. Change History Section. The Change History section of a tasker provides a running catalogue of the mechanical changes to the tasker since its inception. Hidden by default but viewable if selected, information within this section is automatically generated by the JAG Taskers system and is useful in determining information that may not be available in the Taskers Blog. Information typically available includes which office uploaded files, when files were uploaded, and when or who changed a tasker's workflow.

f. Workflow Due Dates. Due dates are required for every tasker. In addition to creating a due date for the overall completion of a tasker, assigning a specific due date to each activity level helps to ensure the AO's work product reaches the Tasking Authority with enough time to meet the overall tasker due date. The due date of the tasker should be reasonably achievable.

7. Creating a Tasker

a. Privacy Act Sensitive Taskers. Tasks that include Personally Identifiable Information (PII) such as full SSNs, dates of birth, home addresses, and medical information, require special handling. All taskers with PII must be marked as

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"Restricted" in the Access Control section of JAG Taskers. By default, when creating a new Tasker, the setting in this section is "Restricted." In no case should a subject line contain PII.

b. Naming Convention: Applying standard naming conventions to the subject lines of taskers makes it easier to visually access the tasker and categorize it according to its originating office. OJAG/NLSC offices are required to utilize the following naming convention when creating taskers (e.g., "Code 60/Draft Taskers Business Rules"):

(1) Phrase 1. Originating office designator. Standardized short titles for OJAG Codes and NLSC Commands provided in Appendix A.

(2) Phrase 2. Subject. Use a short phrase describing the event/matter, appropriately utilizing abbreviations that are universally recognized in practice. Examples include "Review of JAGINST 5800;" or "Pre-decisional Brief of Legalman Education Initiative."

c. Due/Suspense dates. Consider required routing, the final approval authority, and the time necessary to complete all steps in determining the overall tasker due date. The use of workflow due dates, designed to break up the overall task into smaller units, is strongly encouraged.

d. Consideration in Assignments. Assigning coordination roles is important. So too is the risk of over-burdening divisions or offices, particularly if their input will provide minimal meaningful input to the final work product.

8. Working and Completing Taskers

a. Upon receipt of a tasker, ensure that:

(1) Office responsibility within the workflow is correctly assigned. If you believe a tasker is misrouted to you, immediately contact the AO or the office that added you to the tasker workflow to seek clarification. In some cases, it may be appropriate to unilaterally reassign workflow without notification to the AO.

(2) The tasking assignment is clear, and you understand the requirements/deliverables.

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(3) The due date is realistically achievable.

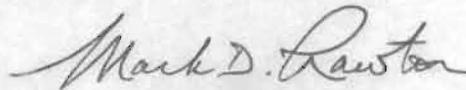
b. While working a tasker, keep workflow information up-to-date. Always annotate package location in the assignment and status blocks.

c. After a tasker enters the routing chain, periodically check your assigned tasks by going to the "My Work" tab of the main Taskers page. Maintain visibility over the assigned task until the action is completed or closed out.

d. Ensure the contents of the JAG Tasker can "stand on its own," independently of the need for supplemental information. AOs are required to make the tasker as complete as possible by attaching appropriate references, working documents, and emails as necessary. The goal of JAG Taskers is to streamline processes and minimize the need for offline communication, although such communication may, by necessity, be required on occasions where input or comments are contentious or audience-sensitive.

9. Cancellation. This notice effectively cancels and replaces JAG/COMNAVLEGSVCCOMNOTE 5200.

10. Assistance. For assistance with questions regarding the JAG Taskers system, please contact OJAG Code 60 at (202) 685-5190.



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By direction

Distribution:

Electronic only via the OJAG Website, <http://www.jag.navy.mil>.

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Appendix A

Naming Conventions for OJAG/NLSC Organizations

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| Inspector General | IG |
| Command Master Chief | CMC |
| Public Affairs Office | PAO |
| Special Assistant for Transformation | SAT |
| Code 01, AJAG, Civil Law | Code 01 |
| Code 02, AJAG, Military Law | Code 02 |
| Code 05, AJAG, Chief Judge of the Navy | Code 05 |
| Code 06, AJAG, Operations and Management | Code 06 |
| Code 10, International & Operational Law | Code 10 |
| Code 11, Admiralty & Maritime Law | Code 11 |
| Code 12, Environmental Law | Code 12 |
| Code 13, Administrative Law | Code 13 |
| Code 14, General Litigation | Code 14 |
| Code 15, Claims & Tort Litigation | Code 15 |
| Code 16, Legal Assistance | Code 16 |
| Code 18, Information Operations & Intelligence Law | Code 18 |
| Code 20, Criminal Law | Code 20 |
| Code 30, National Security Litigation | Code 30 |
| Code 40, Administrative Support (Military Law) | Code 40 |
| Code 45, Appellate Defense | Code 45 |
| Code 46, Appellate Government | Code 46 |
| Code 51, Navy-Marine Corps Court of Criminal Appeals | Code 51 |
| Code 52, Navy-Marine Corps Trial Judiciary | Code 52 |
| Code 60, Executive Administration | Code 60 |
| Code 61, Military Personnel | Code 61 |
| Code 62, Reserve & Retired Affairs | Code 62 |
| Code 63, Management & Plans | Code 63 |
| Code 64, Fiscal & Resource Services | Code 64 |
| Code 65, Knowledge & Information Services | Code 65 |
| Naval Justice School | NJS |
| Navy Legal Service Office, Central | NLSO Central |
| Navy Legal Service Office, Europe, Africa, and SW Asia .. | NLSO EURAFSWA |
| Navy Legal Service Office, Mid-Atlantic | NLSO Midlant |
| Navy Legal Service Office, North Central | NLSO NC |
| Navy Legal Service Office, Northwest | NLSO NW |
| Navy Legal Service Office, Pacific | NLSO PAC |
| Navy Legal Service Office, Southeast | NLSO SE |
| Navy Legal Service Office, Southwest | NLSO SW |
| Region Legal Service Office, Europe, Africa, and SW Asia | RLSO EURAFSWA |
| Region Legal Service Office, Hawaii | RLSO Hawaii |
| Region Legal Service Office, Japan | RLSO Japan |
| Region Legal Service Office, Mid-Atlantic | RLSO Midlant |
| Region Legal Service Office, Mid-West | RLSO Midwest |
| Region Legal Service Office, Navy District Washington ... | RLSO NDW |
| Region Legal Service Office, Northwest | RLSO NW |
| Region Legal Service Office, Southeast | RLSO SE |
| Region Legal Service Office, Southwest | RLSO SW |