

**WISCONSIN ARMY NATIONAL GUARD
OFFICER CANDIDATE SCHOOL
PACKET ASSISTANCE NOTES
“I’m interested in OCS, now what?”**

NOTE: Submission of a packet does not guarantee enrollment. The OCS applicant will be admitted into OCS only when a completed packet has been submitted prior to the application deadline and accepted by the RTI WI. Items that are waivable are discussed. If a waiver is not addressed, it is not waivable. All waivers and exception to policy will be forwarded to WIAR-G1-OFF and must be approved prior to the Soldier enrolling in OCS (prior to the completion of PH 0).

When beginning your application packet, it is advisable that you complete items in the following listed sequence. This will ensure that you meet each criteria and that you do not move onto more time consuming or costly items (physical / security clearance) if you are ineligible for the OCS program with regards to earlier listed criteria. Please be aware that you may copy and paste from this document to assist in completing the waiver requests. The counseling formats may be used as provided and are “fillable” forms. Good Luck!

1. Prior to initiating an enrollment packet, commanders should interview potential applicants to determine if they meet eligibility requirements and to ensure the applicant understands the training requirements. A suggested interview is located in Annex A. This will help determine the potential applicant’s ability to complete the OCS program.
2. Birth Certificate – Check to determine age at onset of application process, soldiers 42 years of age (as determined by the date of commissioning) are ineligible for OCS.
 - a. Used to verify age at time of commissioning.
 - b. Applicants must be between the ages of 18 and 41 years 364 days the date of commissioning.
 - (1) A birth announcement from the hospital is not acceptable.
 - (2) A Verification of Birth Form that recruiters use to enlist individual is not acceptable.
 - c. Verify that the applicant was born in the United States.
 - d. Verify that the applicant’s name is the same on other documents in the packet.
 - e. To obtain replacement birth certificates, visit <http://www.vitalcheck.com>
3. Age- Minimum age of 18 years, maximum age of 41 years and 364 days prior to commission. (No waiver necessary)
4. College Transcript – The second item to review should be the applicant’s college transcript(s). Failure to meet this requirement can be corrected but may take considerable time. To obtain the minimum 60 could take 2 years of college schooling if they do not currently possess any college education.
 - a. An **ORIGINAL official transcript** from an accredited college documenting a minimum 60 college semester hours (CSH)/90 college quarter hours (CQH) or more is required for enrollment in the traditional program. 90 CSH/135 CQH or more is required for enrollment in the accelerated program. Semester/quarter hours should be from one school, on one transcript. Soldiers should contact the WIARNG Education Services Officer for clarification and additional options at education@wi.ngb.army.mil.

OCS Packet Assistance Notes

b. Transcript must be official. Cannot have “issued to student” stamped on it or be a computer printout. Applicants should submit their request to the college to have their OFFICIAL transcript mailed to their unit of assignment’s point of contact.

c. Applicants with less than the required credits on one transcript must provide a current transcript and proof of enrollment in that same college that indicates the proper number of credits will be earned by the end of the current school term. In these cases, another original transcript, provided directly to the RTI, which indicates the prerequisite number of credits or more, is required prior to attending Phase 1.

d. Applicants who do not possess a bachelors degree will be counseled on the requirement to have 90 CSH/135 CQH to be commissioned and to the requirement to have a bachelor’s degree prior to promotion to captain. Counseling statement examples can be found in Annex D. A completed counseling statement will be included in packet.

e. To have credits from numerous colleges consolidated, contact the JFHQ-WI Education Office for more assistance at education@wi.ngb.army.mil.

f. Applicants who do not possess a bachelors degree are required to have a degree completion plan in place. Assistance for the completion of this plan can be obtained through the State Education Office 608-242-3447. Memo from soldier stating their degree completion plans, verification of current school enrollment and a counseling statement. Example of counseling can be found in Annex D and examples of memo can be found in Annex E.

5. ASVAB Results – The third item that should be reviewed is the applicant’s ASVAB results. If a soldier does not possess a minimum GT score of 110 or higher, it is advised that they obtain study materials prior to retesting. Failure to meet the minimum requirement on the re-test will cause a minimum 6 month delay in submitting an application for enrollment. Until a GT score of 110 or higher is documented, it is unnecessary to complete any further items on this checklist – they will not be accepted into the program. Study materials are available at most local libraries or at the Fort McCoy education office. DA Form 2-1 will **not** be used.

a. Include verification of the applicant’s GT score of 110 or better on the ASVAB.

b. Applicants, who do not have a minimum GT score of 110, may retake the test to improve their score. Time between re-tests must be at least 180 days. Contact the JFHQ-WI Education Office at education@wi.ngb.army.mil for more assistance on re-taking tests.

c. Once an applicant has obtained a score of 110 or better, the results must be submitted to PSB verification of scores will then be issued.

6. Security Clearance Verification Memorandum – The fourth item that should be reviewed is the clearance level the applicant currently possesses. If an applicant cannot obtain an interim secret clearance (at a minimum), they are non-commissionable and will not be accepted in the OCS programs. Financial difficulties, certain convictions and various other items can prevent a soldier from obtaining a secret clearance. It is critical that NOTHING be omitted from the SF86 (Security Questionnaire Worksheet) as soldiers who have done so and were caught, were denied clearances when the original fact would not have prevented this. **Non-disclosure is not an option, they will find out.**

a. Packet must include the JPAS Person Summary that reflects 1) the Soldier has eligibility of secret or higher, 2) the applicant has eligibility of interim secret or higher, or 3) that a security clearance application has been submitted. See WIARNG 380-67 for guidance on submitting an SF 86 and requesting an interim clearance.

b. Copies of DA 873, UPS print offs, and emails to State Security Manager are **NOT** acceptable documents.

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c. Applicants desiring a commission in a branch that requires a top secret clearance must be processed for a top secret clearance and an interim top secret requested.

d. Applicants who do not possess a final secret or top secret clearance will be counseled as to the consequences of being denied a clearance. A completed counseling statement will be included in packet.

e. Current policy allows commissioning with an interim secret/top secret clearance.

7. Moral / Civil Conviction Waivers (As Required by NGR 600-100) – The next item to be completed is any waivers needed for moral / civil convictions. An applicant, who currently possesses a secret clearance, must still disclose all convictions that meet the criteria below and request a waiver for them.

a. Required for any applicant who has a record of prior convictions IAW para 2-9b NGR 600-100. This includes, but is not limited to:

Underage Alcohol Possession/Consumption	Trespassing
Possession of False Identification	Indecent Exposure
Furnishing Intoxicants to Minor	Urinating in Public
Sale of Alcohol without a Permit	Deposit of Human Waste Products
Failure to take action to prevent Underage Drinking	Obstructing an Officer
Driving Under the Influence (DUI)	Illegal Carrying of a Firearm
Operating While Intoxicated (OUI)	Shoplifting
Driving While Intoxicated (DWI)	Breaking and Entering
Violation of Absolute Sobriety Law	Disorderly Conduct
Spousal or Child Abuse or Domestic Violence	Disturbing the Peace
Juvenile Crimes	Driving After Revocation of License

b. Traffic Violations (speeding, expired plates, malfunctioning equipment, parking tickets) of \$299.00 or less, do not require conviction waivers.

c. WI's Consolidated Court Access Program (CCAP) at <http://wcca.wicourts.gov/index.xsl> should be used to check applicant's record. Juvenile records will not be available on CCAP nor will most out of state violations.

d. Applicant must also disclose convictions on NGB 62, DD 2808/DD 2807-1, and SF 86.

e. Packet must include the waiver request with attachments. Waiver approvals must be forwarded to the OCS, 2nd Bn 426th Regt (GS) upon receipt.

f. Waivers are forwarded through command channels through State MILPO to the approving authority at NGB-ARH. See Annex B for a waiver request example.

g. Supporting documentation must accompany the waiver request – each conviction requires separate court documents and separate statement of circumstances. One memorandum of recommendation/endorsement is acceptable, but the memorandum must address each conviction specifically.

(1) (1+) Copy(ies) of final disposition of court case obtained from the court house. Court documents need to include police reports when available. If the county court house where the incident occurred, has no record of ticket or conviction, complete a DD 369 (Police Records Check) for that county along with a document from that county indicating that they have no records of listed offenses. The CCAP printout is not acceptable as sole court documentation. If documentation is not available (for substantial reasons only) soldier may include memorandum stating that records not available.

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(2) (1+) Signed Statement(s) of Circumstances from the applicant, in memorandum format to the unit commander, which answers the following questions:

- What was the offense/charge?
- What was the level of offense/charge?
- What was the date of your offense/charge?
- What was the date of your conviction?
- What was the final conviction and level of conviction?
- Why did you do this?
- What have you learned from this?
- How have you grown from this?

(3) (1) Memorandum of Recommendation/Endorsement from unit commander – must specifically address each conviction and provide positive comments on applicant.

(4) (1) Typed, complete copy of NGB 62.

(5) (1) Memorandum of Recommendation from each level of command up to MSC.

Memorandum example can be found in Annex D

h. Applicants requiring waivers will be counseled as to the consequences of having this waiver returned disapproved. Counseling statement examples can be found in Annex D. A completed counseling statement will be included in packet.

8. Chapter II Commissioning Physical (Including Drug & Alcohol Test (DAT) and HIV test results) (DD2808, DD2807-1, & SF507 (cont of DD2808 documenting Eye & Ear Exam printouts)) – Once the applicant has met all previous items, he or she should be scheduled for their Chapter 2 physical. This physical is completed at MEPS and will involve planning to ensure an appointment is made and the applicant brings all necessary medical documents with him/her. It is critical that the finalization of this document is not delayed.

a. Coordinate through unit recruiter.

b. Physical must be within two years of OCS/AOCS graduation date (i.e. if soldier graduates 20080824 physical must be in the following date range 20060825-20080808).

c. Application packet must include a clear, readable copy and include all pages, front and back sides. Original document should be filed in applicant's medical file.

d. Working copies are **not** acceptable as final documentation of physical, but should be included in packet if original physical has not been returned from MEPS.

e. Ensure the following items are complete on DD 2808:

(1) Date of Examination – must be prior to Phase 1 and within 24 months of commissioning.

(2) Blocks 15a, 15b, & 15c list the purpose of the examination to be Army, National Guard/Reserve/Active Duty, and Commission.

(3) Name of examining location must be listed in block 16 – must be a MEPS.

(4) Block 43 must be checked.

(5) Block 44 must have comments for any abnormal answers in blocks 17-42.

(6) Blocks 49 – 51 must be have negative test results.

(7) Block 55 – Ensure Ht/Wt standard IAW AR 40-501, Table 2-1 and 2-2. If applicable, applicant must have DA 5500 attached to physical.

(8) Block 62 – Refraction must be complete if Applicant wears corrective eye wear.

(9) Block 66 – If applicant fails color vision, Block 59 must be completed. Soldiers who fail color vision **AND red/green testing are INELIGIBLE for OCS.**

(10) Block 71(a) – Ensure hearing meets standard IAW AR 40-501, Table 7-1.

(11) Block 74 – Must be checked “Is Qualified for Service” and state Chapter II.

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f. Ensure the following items are noted on DD 2807-1. They are potentials for waiver requests:

- (1) Block 10h – Inhaler use
- (2) Block 11h – Surgery to Correct Vision
- (3) Block 12m – Plate(s), screw(s), rod(s), or pin(s) in any bone
- (4) Block 25 – Rejected for military service?

9. Medical Waivers (If applicable)

a. Required for applicants containing a 3 in any item within their PUHLES category or a 2 in “S” or having checked yes to block 11h and/or 12m. May be required for other conditions as well.

b. Corrective eye surgery (block 11h on DD 2807-1) requires specific forms to be completed by optometrist, contact JFHQ-WI, WIAR-G1-ENL/OFF for more information.

c. Failure to have at minimum **red/green color discrimination is not a waivable item.**

d. Packet must include the waiver request with attachments. See Annex B for a waiver request example.

e. Medical waivers are forwarded through command channels through State MILPO to the approving authority at NGB-ARS.

f. **ORIGINAL** Chapter II physical, MEPS documents, consult from primary care physician, and consult from specialist (if applicable) must accompany the waiver request.

g. Applicants requiring waivers will be counseled as to the consequences of having this waiver returned disapproved. Counseling statement examples can be found in Annex D. A completed counseling statement will be included in packet.

10. Proof of Citizenship (If applicable)

a. Required for all applicants who are not a United States citizen by birth.

b. If applicant is not a US Citizen, enclose in packet verification that he/she has applied for US Citizenship. Applicant will be counseled on having to be a US Citizen prior to commissioning.

c. If naturalized: IAW NGR 600-100, para 3-1a(15), do not enclose a copy of the naturalization certificate. Complete Memorandum for Record IAW NGR 600-100, fig 3-1 or fig 3-2. Submit memorandum with packet.

11. Name Change Document (If applicable)

a. Needed if applicant’s current name is not the same as the name listed on their birth certificate.

b. Documents acceptable for packet:

(1) Name change due to adoption – copy of adoption papers.

(2) Name change due to court action – copy of court documentation.

(3) Name change due to marriage – Packet must include a copy of the marriage certificate onto a single sheet of 8½ x 11 white paper and **MUST** be the only document on the sheet. Do not send the original. Copy must be clearly readable. Need to provide documents maintaining chain of changes if divorced applicant remarries but did not revert to birth surname upon previous divorce. Include 1st marriage certificate, divorce decree, and 2nd marriage certificate. For those applicants who reverted to their birth surname upon divorce and later remarry, only the 2nd marriage certificate is required. All previous names must still be annotated on security clearance application. To obtain replacement marriage certificates, visit <http://www.vitalcheck.com>

12. Prior Service - DD 220, DD 214, NGB 22 or similar documents

a. Must include one copy for each period of National Guard, United States Reserve, or Active Duty Service (any branch of service). Applicants enlisting under the split option program will need to include their DD 220 and DD 214.

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b. Must include the copy (MEMBER – 4) that indicates characterization of service at time of discharge – applicants must have honorable or uncharacterized discharge.

c. If applicant needed a waiver to re-enlist (see Reentry Code), he/she will need another approved waiver to be commissioned.

13. Exception to Policy for Non-Completion of AIT (If applicable)

a. Required for any applicant who has not completed AIT, except for those who enlisted under the OCS Enlistment Option. Enlistment contract must specifically say OCS enlistment option.

b. Packet must include the waiver request with attachments.

c. Waivers are forwarded through command channels through State MILPO to the approving authority at NGB-ART. See Annex B for a waiver request example.

d. Supporting documentation must accompany the waiver request – i.e. memorandum granting MOS for CASP.

e. Applicants requiring waivers will be counseled as to the consequences of having this waiver returned disapproved. Counseling statement examples can be found in Annex D. A completed counseling statement will be included in packet.

14. Exception to Policy for Less than One-Year Time in Service

a. Required for anyone who has not met the minimum one year time in service requirement, to include those enlisted under the OCS Enlistment Option.

b. Packet must include the waiver request with attachments.

c. Waivers are forwarded through command channels through State MILPO to the approving authority at NGB-ART. See Annex B for a waiver request example.

d. Applicants requiring waivers will be counseled as to the consequences of having this waiver returned disapproved. Counseling statement examples can be found in Annex D. A completed counseling statement will be included in packet.

15. OCS State Enlistment Option (If applicable) - Packet must include complete copy (all pages) of DD 1966 series for applicants enrolling under the OCS Enlistment Option. The remarks section will state “I am enlisting for the State Officer Candidate Enlistment Option...”

16. NGB 62E

a. Must be submitted **in electronic (3.5 floppy) and hardcopy (typed) form**. Prefer use of Word Document which can be found on the DSCPER / G1 web page.

b. Must be completed through student signature for State OCS, through 1st and 2nd endorsement for APCS and Federal OCS.

c. Must include Service Obligation Acknowledgement in block 2u.

“I the undersigned acknowledge that upon initial appointment as an officer in the Army National Guard I am required to remain in an active status in the ARNG for the remainder of my original statutory obligation or two years, whichever is later, beginning with the effective date of my state appointment orders.”

d. It is imperative that the unit commander and applicant discuss the future assignment of the applicant. Displaying interest in the future of the Soldier, demonstrates a commitment by both the candidate and his/her chain of command that they really know what they intend to accomplish by sending the Soldier to OCS.

OCS Packet Assistance Notes

17. Social Security Number Verification

- a. Packet must include a copy of the SSN card onto a single sheet of 8½ x 11 white paper and **MUST** be the only document on the sheet. Do not send the original. Copy must be clearly readable.
- b. Cannot be anything other than the actual card.
- c. To order a replacement card, visit www.ssa.gov

18. Personnel Qualification Report (PQR)

- a. Must be a clear, readable copy.
- b. Must be printed from RCAS UPS within three months of application deadline.
- c. Used to verify that applicant will not ETS prior to the end of OCS.
 - (1) Soldiers who ETS prior to the end of the OCS program, must submit a DA 4836 Oath of Extension extending their ETS out past the expected commissioning date.
 - (2) Ensure DA 4836 is submitted to WIAR-G1-ENL.
 - (3) Once the extension posts to UPS, print out PQR.

19. Application for Admission to OCS – Complete RTI Form 351a

- a. This document needs to be typed.
- b. All blocks must be completed.
- c. Must include applicant's signature. (signature may not be delegated)
- d. Must include unit commander's signature. (signature may not be delegated)
- e. Must include battalion commander's signature. (signature may not be delegated)
- f. ORIGINAL is submitted with application packet.
- g. Additional pages may be added, but need to identify that by checking block in bottom center of the page.
- h. Electronic document is available on DCSPER / G1 Home Page.

20. ATRRS Application – Reference the enrollment policy for correct school codes. Packet should include the ATRRS “RS” screen with all phases listed.

21. Attachment Orders to State Training Organization

- a. AGR applicants will not be attached.
- b. USAR/RA applicants will not be attached.
- c. Orders will be cut by 2nd Bn 426th Regt (MOD) when applicant is accepted into the program and successfully completes Phase 0.

22. Promotion Orders to E5s for E4s and Below

- a. AGR applicants will attend in their current rank unless approved by JFHQ.
- b. ADSW applicants will attend in their current rank unless approved by the organization employing them. If the ADSW orders expire while the OC is in the course, they will be advanced to E-5 at that time.
- c. USAR/RA applicants must be promoted by their unit of assignment.
- d. Orders will be cut by 2nd Bn 426th Regt (GS) when applicant is accepted into the program and successfully completes Phase 0.

Annex A – Commander’s Interview for Potential Applicant

Interviewing an applicant who is interested in attending the OCS program is one of the most important parts of the screening and selection process. It is used to ensure the applicant is qualified and has the right attributes to complete OCS before the packet is assembled and the soldier begins training. Some major problems for OCS attendees are listed below and should be discussed with the applicant. These questions are intended to assist the interviewer and can be expanded as necessary. Additionally each of the pre-requisites listed above should be addressed.

1. Have you incurred any physical injuries since your last medical examination? If so, has a military physician evaluated them? Do you have a current, qualifying chapter 2 physical (from MEPS)? Is it an Original?
2. For female applicants only. Are you pregnant? If so, under AR 40-501, you are medically disqualified for OCS training.
3. Are you aware that OCS training places strenuous requirements on your physical, psychological and mental resources?
4. Does your immediate family have any health problems that may interfere with your performance at OCS? Are you the sole custodian or guardian of a dependent?
5. Have you discussed the strenuous requirements you will be under while attending OCS with your immediate family? Are they supportive?
6. Do you have any personal, legal, or financial problems that could arise during training to interfere with your performance or prevent you from receiving a Final Secret Clearance? (Especially: Previous Bankruptcy.)
7. Are you prepared to accept all aspects of your training, including those you may not like or immediately understand? Are you prepared to spend personal time between drills working on OCS related projects?
8. Do you consider yourself physically fit for OCS?
9. How many college credits do you have completed today? If more than 60 but less than 90, then inquire: Do you have a plan to complete the remaining hours while you are attending OCS? If less than Baccalaureate Degree, then inquire: Do you have a plan to complete your degree prior to becoming eligible for promotion to Captain? (Refer to G1-OPM page for applicable policy letter)
10. Do you know of anything that would cause you to be ineligible for OCS training now?
11. Are you prepared to attend a basic officer leadership course following OCS graduation that lasts an average of 17 straight weeks away from home?
12. Are you aware that accepting your commission may add to your current military service obligations? (Refer to G1-OPM page for applicable policy letter)

Annex C – Security Clearance Verification Statement

Unit Letterhead

Office Symbol

Date

MEMORANDUM FOR TAGO, JFHQ-WI, ATTN: WIAR-G1-SEC, PO Box 8111, Madison, WI 53708-8111

SUBJECT: Request for Interim Security Clearance

1. IAW WIARNG Regulation 380-67, paragraph 7, request that an Interim Secret Security Clearance be issued on the following:

- a. Name: Soldier, Ima Great
- b. Rank: Sergeant / E-5
- c. SSN: 123-45-6789
- d. Date of Birth: 1 February 1975
- e. Place of Birth: Madison (Dane County) Wisconsin
- f. Results of Local Files Check: Favorable – Reference enclosed CCAP results.
- g. MOS: PMOS – 88M20 Duty Position – 88M20

2. POC for this action is SFC Over Worked at (555) 111-2222 or DSN 724-2222.

Encl
as

SAM I. AM
CPT, IN, WIARNG
Commanding

Unit Letterhead

Office Symbol

Date

MEMORANDUM THRU TAG, JFHQ-WI, ATTN: WIAR-G1-OFF, 2400 Wright Street,
Madison WI 53704-2572

FOR CNGB, ATTN: NGB-ARH, 1411 Jefferson Davis Hwy, Arlington, VA 22202-3231

SUBJECT: Request for Waiver of Moral / Civil Conviction

1. Under the provisions of NGR 600-100 2-9 b (1), request a waiver of moral conviction be granted to Specialist Ima G. Soldier, 123-45-6789, for the purpose of attending the Officer Candidate School Program, at the 2nd Battalion, 426th Regiment (General Studies).
2. The following is background information on this applicant:
 - a. SPC Soldier has explained the conviction in the attached statement of circumstances.
 - b. Civilian employment and education background is contained in NGB Form 62-E.
 - c. Court Records attached.
 - d. Letters of recommendation.
3. SPC Soldier has my recommendation and has demonstrated a high degree of integrity and dedication to positive personal growth. SPC Soldier has the ability to project his values and principles to the OCS class. These attributes lead me to strongly recommend his waiver of moral conviction.
4. POC for this action is SFC Over Worked at (555) 111-2222 or DSN 724-2222.

4 Encl

1. Commander's Statement
2. Statement of Circumstances
3. NGB Form 62E
4. Court Records

SAM I. AM
CPT, IN, WIARNG
Commanding

Unit Letterhead

UIC

Date

MEMORANDUM FOR DMA TAG-WI, WIAR-G1-OFF, 2400 Wright Street, Madison, WI
53704

SUBJECT: Endorsement of Request for Waiver of Moral / Civil Conviction, Rambo, John E.,
555-55-5555.

1. I fully support the attached request for waiver of moral conviction for John E. Rambo.
2. POC for this action is SFC Over Worked at (555) 111-2222 or DSN 724-2222..

SAM I. AM
CPT, IN, WIARNG
Commanding

Request for Medical Waiver

Utilize NGB form 22-3

Unit Letterhead

Office Symbol

Date

MEMORANDUM THRU TAGO, JFHQ-WI, ATTN: WIAR-G1-OFF, 2400 Wright Street,
Madison, WI 53704-2572

FOR CNGB, ATTN: NGB-ART, 1411 Jefferson Davis Hwy, Arlington, VA 22202-3231

SUBJECT: Request for Waiver of Prior Training – Soldier, Ima Great

1. References:

a. NGR (AR) 600-100, Commissioned Officers – Federal Recognition and Related personnel Actions.

b. All States Memorandum, State Officer Candidate School (OCS) Enrollment and Commissioning Criteria.

2. Request a waiver be granted for SPC Ima G. Soldier, 123-45-6789, for non-completion of Advanced Individual Training (AIT). SPC Soldier enlisted under the Civilian Acquired Skills Program (CASP). Reference attached memorandum granting soldier award of MOS 88M10. SPC Soldier enlisted 12 May 1999, attended Basic Training August – October of 1999, and has served as an 88M for 5 years.

3. POC for this action is SFC Over Worked at (555) 111-2222 or DSN 724-2222.

Encl

SAM I. AM
CPT, IN, WIARNG
Commanding

Unit Letterhead

Office Symbol

Date

MEMORANDUM THRU TAGO, JFHQ-WI, ATTN: WIAR-G1-OFF, 2400 Wright Street,
Madison, WI 53704-2572

FOR CNGB, ATTN: NGB-ART, 1411 Jefferson Davis Hwy, Arlington, VA 22202-3231

SUBJECT: Request for Waiver of Prior Time in Service – Soldier, Ima Great

1. References:

a. NGR (AR) 600-100, Commissioned Officers – Federal Recognition and Related personnel Actions.

b. All States Memorandum, State Officer Candidate School (OCS) Enrollment and Commissioning Criteria.

c. NGR-ARH Memorandum – Prior Training Requirements for Officer Candidate School Enrollment.

2. Request a waiver be granted for SPC Ima G. Soldier, 123-45-6789, for serving less than one year in a Selected Reserve unit for enrollment into the State Officer Candidate School. SPC Soldier enlisted under the OCS Enlistment Option. Reference attached DD 1966. SPC Soldier enlisted 23 January 2004 and attended Basic Training February – May 2004. He was awarded the rank of specialist due to his Bachelor of Arts Degree in Pre-Law.

3. POC for this action is SFC Over Worked at (555) 111-2222 or DSN 724-2222.

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as

SAM I. AM
CPT, IN, WIARNG
Commanding

DEVELOPMENTAL COUNSELING FORM

For use of this form, see FM 22-100; the proponent agency is TRADOC

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
 PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
 ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
 DISCLOSURE: Disclosure is voluntary.

PART I – ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank/Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II – BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g., performance/professional growth or event-oriented counseling, and includes the leader's facts and observations prior to the counseling.)

Soldier currently possesses 60 college credits or more, but less than the 90 college credits required for commissioning.

PART III – SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

Per current OCS regulations:

Soldiers not possessing at least 90 college credits are not eligible for commissioning.

Soldiers must be counseled when entering OCS – traditional program to ensure they are aware of this fact.

Soldiers not possessing 90 college credits are not eligible for the Accelerated OCS Programs.

OTHER INSTRUCTIONS

This form will be destroyed upon: reassignment (*other than rehabilitative transfers*), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below).)

Soldier will continue with their education to ensure they are eligible for commissioning.

Soldier is aware that promotion to O-3 is currently not possible without a 4-yr college degree.

Session Closing: The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.

Individual Counseled: I agree I disagree with the information above.

Individual counseled remarks:

I understand that I need a minimum of 90 college credits to be commissioned.

Signature of Individual Counseled: _____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

Signature of Counselor: _____ Date: _____

PART IV – ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DEVELOPMENTAL COUNSELING FORM

For use of this form, see FM 22-100; the proponent agency is TRADOC

DATA REQUIRED BY THE PRIVACY ACT OF 1974

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 PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
 ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
 DISCLOSURE: Disclosure is voluntary.

PART I – ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank/Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II – BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g., performance/professional growth or event-oriented counseling, and includes the leader's facts and observations prior to the counseling.)

Requirement for reserve officers to have a Baccalaureate Degree prior to Initial Appointment.

PART III – SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

Per current OCS regulations:

Soldiers not possessing a degree completion plan will not be allowed to obtain a commission in the WIARNG.

Soldiers must be counseled when entering OCS – traditional program to ensure that they are aware of this fact.

Soldier has been counseled on all available educational assistance programs available to them, which includes, but is not limited to, financial assistance programs and distance learning programs.

Soldier will coordinate with the education support center for development of their plan prior to attendance at OCS. <https://virtualarmory.com/education/index.asp>

Soldier will submit a written plan in memorandum form stating degree completion program intent to include at a minimum verification from accredited school that Soldier is enrolled and state the degree type.

OTHER INSTRUCTIONS

This form will be destroyed upon: reassignment (*other than rehabilitative transfers*), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

DA FORM 4856, JUN 1999

EDITION OF JUN 85 IS OBSOLETE

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The

actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below.)

Soldier will continue with their degree completion plan upon commissioning into the WIARNG.

Soldier is aware that promotion to O-3 is currently not possible without a 4 year college degree.

Session Closing: The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.

Individual Counseled: I agree I disagree with the information above.
Individual counseled remarks:

I understand that I need a degree completion plan prior to acceptance to OCS program.

Signature of Individual Counseled: _____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

Signature of Counselor: _____ Date: _____

PART IV – ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

Unit Letterhead

I understand that my appointment as a commissioned officer/warrant officer in the United States Army/National Guard/Army Reserve is being accomplished prior to completion of a required security investigation and issuance of a Secret clearance.

I further understand that if as a result of the post-commissioning investigative processes, I am determined to be unacceptable for appointment as a commissioned officer/warrant officer, I will be discharged from the United States Army/National Guard/Army Reserve and that I will receive an appropriate discharge certificate.

Typed Name & Signature

Date

DEVELOPMENTAL COUNSELING FORM

For use of this form, see FM 22-100; the proponent agency is TRADOC

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
 PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
 ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
 DISCLOSURE: Disclosure is voluntary.

PART I – ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank/Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II – BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g., performance/professional growth or event-oriented counseling, and includes the leader's facts and observations prior to the counseling.)

Soldier has applied for a civil or moral conviction waiver for attendance in Officer Candidate School (OCS). This conviction waiver has not yet been returned approved or disapproved.

PART III – SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:**Per current OCS regulations:**

Soldiers not possessing an approved waiver must be counseled when entering OCS as to the consequences of having the conviction waiver returned disapproved.

In the event the waiver is returned disapproved, the soldier will be released from the OCS program at the point of the program they are currently in and returned to their unit of assignment.

OTHER INSTRUCTIONS

This form will be destroyed upon: reassignment (*other than rehabilitative transfers*), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below).)

Soldier will continue to monitor their waiver request.

Soldier will provide any additional court documents requested in a timely manner.

Soldier will provide any additional statements requested in a timely manner.

Session Closing: The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.

Individual Counseled: I agree I disagree with the information above.

Individual counseled remarks:

I understand that I will be released from the OCS program should my waiver return disapproved.

Signature of Individual Counseled: _____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

Signature of Counselor: _____ Date: _____

PART IV – ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DEVELOPMENTAL COUNSELING FORM

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PART I – ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank/Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II – BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g., performance/professional growth or event-oriented counseling, and includes the leader's facts and observations prior to the counseling.)

Soldier has applied for a medical waiver for attendance in Officer Candidate School (OCS). This medical waiver has not yet been returned approved or disapproved.

PART III – SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

Per current OCS regulations:

Soldiers not possessing an approved waiver must be counseled when entering OCS as to the consequences of having the medical waiver returned disapproved.

In the event the waiver is returned disapproved, the soldier will be released from the OCS program at the point of the program they are currently in and returned to their unit of assignment.

OTHER INSTRUCTIONS

This form will be destroyed upon: reassignment (*other than rehabilitative transfers*), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below).)

Soldier will continue to monitor their waiver request.

Soldier will provide any medical documents requested.

Soldier will attend additional medical appointments as necessary.

Session Closing: The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.

Individual Counseled: I agree I disagree with the information above.

Individual counseled remarks:

I understand that I will be released from the OCS program should my waiver return disapproved.

Signature of Individual Counseled: _____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

Signature of Counselor: _____ Date: _____

PART IV – ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DEVELOPMENTAL COUNSELING FORM

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 DISCLOSURE: Disclosure is voluntary.

PART I – ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank/Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II – BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g., performance/professional growth or event-oriented counseling, and includes the leader's facts and observations prior to the counseling.)

Soldier has applied for a waiver for not having completed AIT prior to attendance in Officer Candidate School (OCS). This waiver has not yet been returned approved or disapproved.

PART III – SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:**Per current OCS regulations:**

Soldiers not possessing an approved waiver must be counseled when entering OCS as to the consequences of having the waiver returned disapproved.

In the event the waiver is returned disapproved, the soldier will be released from the OCS program at the point of the program they are currently in and returned to their unit of assignment.

OTHER INSTRUCTIONS

This form will be destroyed upon: reassignment (*other than rehabilitative transfers*), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below).)

Soldier will continue to monitor their waiver request.

Session Closing: The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.

Individual Counseled: I agree I disagree with the information above.
Individual counseled remarks:

I understand that I will be released from the OCS program should my waiver return disapproved.

Signature of Individual Counseled: _____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

Signature of Counselor: _____ Date: _____

PART IV – ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DEVELOPMENTAL COUNSELING FORM

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PART I – ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank/Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II – BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g., performance/professional growth or event-oriented counseling, and includes the leader's facts and observations prior to the counseling.)

Soldier has applied for a waiver for not having served one year with a reserve unit prior to attendance in Officer Candidate School (OCS). This waiver has not yet been returned approved or disapproved.

PART III – SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:**Per current OCS regulations:**

Soldiers not possessing an approved waiver must be counseled when entering OCS as to the consequences of having the waiver returned disapproved.

In the event the waiver is returned disapproved, the soldier will be released from the OCS program at the point of the program they are currently in and returned to their unit of assignment.

OTHER INSTRUCTIONS

This form will be destroyed upon: reassignment (*other than rehabilitative transfers*), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specified time line for implementation and assessment (Part IV below).)

Soldier will continue to monitor their waiver request.

Session Closing: The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate.

Individual Counseled: I agree I disagree with the information above.

Individual counseled remarks:

I understand that I will be released from the OCS program should my waiver return disapproved.

Signature of Individual Counseled: _____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

Signature of Counselor: _____ Date: _____

PART IV – ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling.)

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

Unit Letterhead

XXXXXX

02 MARCH 2008

MEMORANDUM FOR OCS PACKET

SUBJECT: Degree Completion Plan for Bourne, Jason, XXX-XX-5555, SSG WIARNG

- 1.) I am currently attending Upper Iowa University online. I am listed as a junior, with 94 Credit hours completed towards my Bachelor of Science Degree in Business Management.
- 2.) Upon the completion of my current semester, I will have attained a net total of 98 Credit hours towards the 138 Credit Hours needed for degree completion.
- 3.) Prior to my OCS class report date I will have 98 Credit Hours completed. Upon successful completion of Accelerated Officer Candidate School (AOCS), I plan on resuming my standard two classes per term format, enabling me to complete my degree by the end of the second Fall session of 2010. This two class format is specifically designed for working adults, and only requires that I attend class one night per week. This is my second term attending Upper Iowa, and to date there have been no conflicts between my school, work, military, and personal obligations that have interfered with my plan. It is further more assumed that none of the above commitments should limit my ability to complete my program of study upon return from OCS.
- 4.) I am also attaching a copy of the degree requirements for my chosen degree for reference as well.
- 5.) For any further assistance regarding my official student record, the primary Point of Contact is Laura Croft, Upper Iowa Adult Student Services Advisor. She may be reached at (262) 551-6555, or e-mail l.croft@UIU.edu
- 6.) I have also been counseled on a DA Form 4856 on the requirement to have a degree completion plan in place prior to acceptance of my commission in the Wisconsin Army National Guard.

SSG Jason Bourne
Squad Leader