



UNITED STATES MARINE CORPS

HEADQUARTERS BATTALION
TRAINING AND EDUCATION COMMAND
2006 HAWKINS AVENUE
QUANTICO, VIRGINIA 22134

IN REPLY REFER TO

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B 07-1

JUN 23 2021

From: Commanding Officer, Headquarters Battalion

To: Distribution List

Subj: ADMINISTRATIVE STANDING OPERATING PROCEDURES

Ref: (a) Battalion Policy Letter 1-21: Inspection of Individual
Readiness Standards

Encl: (1) Business Rules
(2) Routing Flowchart

1. Situation. One of Headquarters Battalion's (HQ Bn) three mission essential tasks is to provide administrative support to our Marines. As the largest active duty battalion in the Marine Corps, administrative support on this scale requires a coordinated and methodical approach to ensure it is carried out effectively, and in accordance with all governing rules and regulations.

2. Mission. Headquarters Battalion establishes general administrative standing operating procedures (SOP) for the submission, routing, and action on administrative packages or requests for members of HQ Bn in order to improve efficiency, timeliness, accuracy, transparency, and quality of administrative requests.

3. Execution

a. Commander's Intent

(1) Purpose. Improve efficiency, timeliness, accuracy, transparency, and quality of administrative requests.

(2) Method. This SOP standardizes the submission and processing of administrative packages by establishing requirements for templates, examples, and checklists; submission criteria; business rules; the routing process; and a transparent tracking system. Additionally, it lays the foundation for follow-on digitization and automation of the Battalion's administrative processes.

(3) End-state. With the help of standardized procedures, Marines are able to easily submit well-put-together administrative requests, administrative personnel are synchronized in the routing process, leaders are able to effectively track the requests, and all requests are actioned in a timely manner.

b. Concept of Operations. We will achieve this by implementing a standard process for submission, routing, and action on Marines' administrative requests. This standardized process will be governed by an overall set of business rules. The process begins with the request, which will use templates, examples, and checklists, along with quality control

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measures to ensure accuracy and completeness of the initial request. Upon acceptance of the request by the company office, the request will then be entered into and continuously tracked by a centralized package tracker, which can be accessed by the Marine's immediate leadership to build transparency. The package will then be routed following enclosure (2) to ensure timeliness. Ultimately, the package will be acted on (e.g. decision, endorsement, etc) within 15 business days. Marines and their immediate leadership will be informed of the package's progress along each step of its routing. Throughout this Order, for the sake of brevity, an administrative action request or an administrative package will be referred to as a "package". The package originator will be referred to as "requester". This SOP includes the following components:

(1) Business Rules. Our Admin Business Rules, which can be found in enclosure (1), serve as standing guidance, directed at both the requester, section leadership, and administrative personnel, to ensure optimal routing efficiency. All business rules must be adhered to, and are listed in order of significance, i.e., Business Rule number 1 has the greatest probability of impacting the efficiency of package routing.

(2) Templates, Examples, and Checklists. Administrative requests can range from simple, single page-documents, to complex packages with many references and enclosures. Incorrect and incomplete packages significantly delay requests and may not provide adequate information upon which to make a correct, informed decision. In order to assist both the administrative personnel, the requester, and the decision maker, the requester will use standardized templates. The templates were created in strict accordance with applicable orders and directives and leave little room for error. The template will be completed by referencing the examples. These templates and examples can be found on the Battalion SharePoint site and are linked to the Battalion ".mil" site. After completing the package, the requester and their immediate leadership will use the checklists to ensure accuracy and completeness of packages.

(3) Package Submission. Once a package is created, it must be appropriately routed for endorsement and/or decision. This begins with the requester submitting the package, either physically or digitally, to his or her company office. The package will be screened at the company-level, then accepted or rejected per the enclosed routing flowchart in enclosure (2). Once a package is accepted for routing, it is tracked through completion on the Battalion Document Tracker.

(4) Routing Flowchart. The package Routing Flowchart, enclosure (2), is a visual depiction of the flow of administrative packages, beginning with the requester, and ending with the signature of the Battalion Commander. Additionally, the flowchart depicts the criteria involved in the screening process that occurs at each level. Due to the many different paths a package might take once it is approved or endorsed at the battalion-level, the chart is unable to display all possible routing scenarios. It is intended to provide workflow clarity to administrative personnel, and routing transparency to the requester and their section leadership.

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(5) Routing Tracker. The Battalion Document Tracker is a digital spreadsheet located on the Battalion's Microsoft Teams portal. It serves as an electronic logbook, a one-stop-shop to maintain visibility of all packages in real time. It allows administrative personnel at all levels, section leadership, company leadership, Battalion staff, and the Battalion Command Deck to see packages currently in routing, their subject, their location, and how long they have been there. This enables all personnel involved in the workflow to ensure packages continue to move through the pipeline as efficiently as possible. The Battalion S-1 serves as the overall administrator of the tracker and is able to grant permissions to access.

c. Tasks

(1) Requesters. The greatest factor in the timely processing of an administrative request package is often the quality of the package. Prior to submitting a package, first and foremost, ensure your immediate leadership is aware of and has reviewed the request. Then, ensure all applicable orders and directives have been reviewed, and all required source documents are present. Requesters must utilize the templates, examples, and checklists established herein. The requester must also take into consideration the higher-headquarters due date, and the Battalion's routing timeline. Untimely requests will not receive preferential treatment, may not receive favorable endorsement, and may not make it to the higher-headquarters in time for decision. A failure on the part of the requester to submit a timely request is not a basis for expedited processing of their request. For planning purposes, a requester should expect a 15 working-day turn-around once a package is submitted and received by their company office.

(2) SNCOIC/OIC. Play an active role in your Marines' administrative requests. SNCOICs and OICs have a leadership responsibility to know what their Marines are requesting, and to counsel, mentor, and assist them with submission. This process begins with ensuring the request is valid, their package is complete, and proceeds through the package reaching its final destination, and ends when the Marine has been informed of the decision on the request.

(3) Company Clerks. Treat administrative request packages as if they were your own. Many requests have the potential to affect Marines' careers and families. Serve as the front-line subject matter expert for requesters in your company's supported organizations. This may require you to assist some requesters, along with their immediate supervisors, in the basic assembly of their package. Although you may assist in the assembly of packages, by providing access to templates, examples, and checklists, your help with the assembly of a package does not constitute acceptance or receipt of the package by the company office. Only accept complete packages on behalf of the company. Ensure the request is valid. If a package does not meet these basic criteria, do not accept it. Due to the sheer volume of packages being routed through the Battalion, meticulous vetting at the company-level is critical to sustaining package routing efficiency at higher-levels.

(a) Prior to accepting a package, ensure that:

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1. The Marine belongs to your respective company.
2. The package is a valid request.
3. If applicable, the Inspection Checklist in reference (a) is filled out.
4. The request is in the proper format.
5. All endorsements are included.
6. Enclosures and supporting documentation are included.

(b) Once accepted:

1. Enter package into Battalion Document Tracker.
2. Create a routing sheet and ensure it is completely and accurately filled out.
3. Draft an endorsement for the Company Commander.
4. Route through company leadership to acquire the Company Commander's signature.
5. Once the package is endorsed by the Company Commander, deliver the package to the Battalion S-1 the same day. Delivery may be physical or electronic, depending upon the final destination.

(4) Company Leadership

(a) Ensure you review and are thoroughly familiar with each package routed through your office. Be aware of the intent behind the request and be prepared to speak intelligently on all aspects of it.

(b) Check document tracker daily to ensure packages are being appropriately tracked.

(c) Implement quality control measures to spot-check packages and routing procedures.

(d) Implement internal company office procedures to maintain visibility on all packages.

(e) Ensure packages spend no more than three working-days within the company office prior to being completed or routed for higher-level action.

(f) Develop a turnover process between clerks and company leadership to ensure packages are not delayed due to a clerk being out of the office for any reason (leave, TAD, rifle range, etc.).

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(5) Battalion S-1. Act as the final administrative check-point for packages prior to routing to the Battalion Command Deck. Although the expectation is that packages will arrive administratively sound, they must still undergo a thorough screening at the Battalion S-1. Once a package has been received, a Battalion S-1 clerk will:

(a) Check the validity of the request. This may require basic research, including the review of applicable orders, directives, MARADMINS, and other updates to policy not widely disseminated.

(b) Ensure routing sheet contains required information.

(c) Update package status and location in the Battalion Document Tracker.

(d) When required, staff with pertinent Battalion staff sections.

(e) Draft a positive and negative endorsement for the Battalion Commander's signature.

(f) Ensure package is reviewed by Adjutant, Administrative Chief, or GS-9 Administrative Officer.

(g) Either physically deliver the package to the Command Deck Secretary or digitally submit.

(h) Once the package is endorsed or approved by the Battalion Commander and returned to the Battalion S-1, either notify company for retrieval, or prepare for submission to higher.

(i) Ensure packages route through the Battalion S-1 and acquire the Battalion Commander's decision within 12 working-days of receipt.

(j) For packages that require General Officer approval, enter the package into Task Management Tool (TMT) and forward to Training and Education Command (TECOM) in accordance with TECOM SOP, or deliver a hard-copy to the TECOM Adjutant Section. Unless otherwise required, packages must be received at TECOM at least 5 days prior to the final destination due date.

(k) For packages that require routing directly to Marine Corps Base Quantico, upload the package into SharePoint and electronically route into the Base's workflow.

(l) For packages that require direct routing to other commands, follow that command's respective routing SOP. For example, Marine Corps Recruiting Command (MCRC) requires that the requester submit their package directly to MCRC after acquiring all chain-of-command endorsements. Manpower and Reserve Affairs; however, requires that packages be emailed directly from the Battalion S-1 to their organizational mail box (OMB).

(5) Command Deck Secretary. Conduct a quick quality check of all packages received. Do not accept packages from any source other than the

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Battalion S-1 or the Career Planner. Ensure the package and its status is accurately reflected in the Battalion Document Tracker upon receipt, and then accurately tracked as it is routed through the Sergeant Major and Executive Officer, as applicable, and finally to the Battalion Commander. Once endorsed by the Battalion Commander, return each package to the Battalion S-1.

(6) Battalion Sergeant Major. Thoroughly review and provide recommendations, including concurrence or non-concurrence, on all packages routed through the Command Deck. Return any package that, in your opinion, is lacking information that may be relevant to the Battalion Commander's decision.

(7) Battalion Executive Officer. Thoroughly review and provide recommendations, including concurrence or non-concurrence, on all packages routed through the Command Deck. Return any package that, in your opinion, is lacking information that may be relevant to the Battalion Commander's decision. Be prepared to endorse or approve packages in an "acting" capacity in the absence of the Battalion Commander.

d. Coordinating Instructions

(1) Reenlistment requests or requests for extension will be routed directly from the Career Planning Section to the Battalion Command Deck. They will not be reviewed or routed through the Battalion S-1.

(2) Packages often contain personally identifiable information and must be treated with extreme care and in accordance with the provisions of the Privacy Act. Clerks are not allowed to discuss the contents of packages with anyone not involved in the routing process.

(3) Packages and related correspondence submitted by the company offices must be emailed to the Battalion S-1 OMB, or delivered via hard-copy. Packages submitted to individual accounts will not be appropriately actioned. The Battalion S-1 OMB is hqsvcbn s-1@usmc.mil.

(4) Many packages are returned without action due to a lack of supporting documentation. It is the responsibility of the individual Marine requesting the administrative action to obtain all necessary source documents prior to submitting the package.

(5) Packages are not officially "received" until acknowledged as received by the company clerk. This acknowledgment will come in the form of an email from the company OMB.

(6) Once received, the timeline for processing through the company-level is three working-days. Once the package is routed to the Bn S-1, it should be routed through the S-1 within six working days. Once routed to the Command Deck, it should be signed by the Battalion Commander within six working-days. Marines should expect the total processing time from receipt at the company to signature/action by the Battalion Commander to be 15 working days.


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4. Administration and Logistics. Inquiries regarding this order should be directed to the HQ Bn S-1.

5. Command and Signal

a. Command. This Order is applicable to all personnel assigned to HQ Bn.

b. Signal. This Order is effective the date signed.



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Distribution List: A

Business Rules

1. Section/front line leaders must be aware of and assist Marines & Sailors with packages.
2. Only administratively complete packages will be accepted for routing.
3. Marines should expect a 15-business day turn-around once accepted by the company office.
4. Packages will be electronically tracked from receipt by the company office through completion.
5. Sections/Companies may only contact the next level up for package updates.
6. Packages will only be routed electronically unless directed otherwise by higher authority.
7. All official business will be conducted in the uniform of the day.
8. Command letterhead is only authorized for use by the command (billets), individuals.
9. Individual Marines and Sailors may track their own electronically submitted packages in the system
10. Up-to-date templates for the top ten most common packages will be housed on the battalion's .mil site.

Routing Flow Chart

