



Department of Defense INSTRUCTION

NUMBER 1300.19

October 31, 2007

Incorporating Change 2, February 16, 2010

USD(P&R)

SUBJECT: DoD Joint Officer Management Program

- References:
- (a) DoD Directive 1300.19, "DoD Joint Officer Management Program," September 9, 1997 (hereby canceled)
 - (b) DoD Instruction 5025.01, "DoD Directives Program," October 28, 2007
 - (c) Deputy Secretary of Defense Memorandum, "Guidelines for Implementation and Administration of Joint Officer Management Program Joint Qualification System," October 2, 2007 (*hereby cancelled*)
 - (d) DoD Directive 5124.02, "Under Secretary of Defense for Personnel and Readiness (USD(P&R))," June 23, 2008
 - (e) through (*eq*), see Enclosure 1

1. REISSUANCE AND PURPOSE

This Instruction:

1.1. Reissues Reference (a) as a DoD Instruction in accordance with the guidance in Reference (b) and the authority in References ~~(c) and~~ (d). This Instruction also incorporates guidance from and cancels *Reference (c) and* DoD Instruction 1300.20 (Reference (e)); DoD Interim Policy Memorandum of the Secretary of Defense, August 27, 2003 (Reference (f)); DoD Interim Policy Memorandum of the Under Secretary of Defense for Personnel and Readiness, March 30, 2006 (Reference (g)); DoD Instruction 1215.20 (Reference (h)); and Under Secretary of Defense for Personnel and Readiness Memorandum (Reference (i)).

1.2. Establishes policy and assigns responsibilities for the DoD Joint Officer Management Program. Specific procedural guidance for implementing the DoD Joint Officer Management Program is established by the Chairman of the Joint Chiefs of Staff.

2. APPLICABILITY AND SCOPE

This Instruction applies to the Office of the Secretary of Defense (OSD), the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities in the Department of Defense (hereafter referred to collectively as the “DoD Components”), as well as U.S. Elements of Combined Commands and Military Department Elements of U.S. Government Agencies outside the Department of Defense. The term “Military Services,” as used herein, refers to the Active and Reserve Components (AC and RC) of the Army, the Navy, the Air Force, and the Marine Corps.

3. DEFINITIONS

Terms used in this Instruction are defined in Enclosure 2.

4. POLICY

It is DoD policy:

4.1. That a significant number of officers be educated, trained, and experienced in joint matters to enhance the joint war fighting capability of the United States through a heightened awareness of joint requirements, including multi-Service, interagency, international, and non-governmental perspectives.

4.2. To designate officers as joint qualified based on their achievement and/or completion of education, training, and experience that develop and utilize knowledge, skills, and abilities relevant to the definition of joint matters in chapter 38 of title 10, United States Code (Reference (j)). Such progressive levels of joint qualification shall be known as: Level I, Level II, Level III (Joint Qualified Officer (JQO)), and Level IV. Criteria for each level of joint qualification are found in Enclosure 3.

4.3. To identify positions that provide officers significant experience in joint matters, as defined by section 668 of Reference (j), as joint duty assignments (JDAs).

4.4. To publish a joint duty assignment list (JDAL) of standard joint duty assignment (S-JDA) positions, and of those positions, identify positions that require the incumbent to be previously trained, educated, and experienced in joint matters (or at a minimum the position would be greatly enhanced by such an incumbent), as critical S-JDAs in accordance with statute.

4.5. That assignments in an officer’s own Military Department may provide an opportunity to gain joint experience; however, Service positions/billets will not be designated as S-JDAs or added to the JDAL.

4.6. To assign officers to S-JDAs for a length of time that provides stability to the joint organization. AC and full-time RC general and flag officers (G/FOs) shall be assigned to S-JDAs for not less than 2 years; all others shall be assigned for not less than 3 years. S-JDA tour length requirements for RC officers who serve less than full-time shall be a cumulative total of 4 years (*two 2-year tours*) for G/FOs and a cumulative total of 6 years (*two 3-year tours*) for all others. *RC tours do not need to be consecutive.*

4.7. To designate as JQOs sufficient numbers of quality officers who have completed Joint Professional Military Education (JPME) Phase II (or in the case of RC officers, Advanced Joint Professional Military Education (AJPME)) and a full S-JDA or who have met such additional criteria as prescribed by the Secretary of Defense in Enclosure 3 of this issuance.

4.8. That only officers in the grade of O-4 or above may be designated as a JQO.

4.9. To designate an appropriate number of critical S-JDA positions to meet mission requirements and to fill critical S-JDAs with JQOs; and to fill at least one half of all S-JDA positions designated as O-5 or above billets with officers who have the appropriate level of joint qualification.

4.10. To assign quality officers to S-JDAs. The qualifications of officers assigned to S-JDAs should be such that the promotion rates of those officers meet the objectives in section 662 of Reference (j).

4.11. That officers *on the Active Duty List* be assigned such that they can be credited with having completed a full joint assignment before appointment to brigadier general or rear admiral (lower half). For appointments *made after September 30, 2008 to brigadier general or rear admiral (lower half)*, officers on the Active Duty List must have met the prerequisites for and been designated a JQO in accordance with section 661 of Reference (j).

4.12. To assign all graduates of National Defense University JPME Phase II-awarding schools who are JQOs and more than 50 percent of the remaining graduates of each school to an S-JDA upon graduation in compliance with section 663 of Reference (j). This policy applies only to officers on the Active Duty List however; to the extent practicable, officers on the Reserve Active Status List (RASL) should also be assigned in accordance with this policy.

4.13. To establish, to the maximum extent practicable, similar policies emphasizing education and experience in joint matters for officers on the RASL.

5. RESPONSIBILITIES

5.1. The Under Secretary of Defense for Personnel and Readiness (USD(P&R)), shall:

5.1.1. Exercise overall responsibility for policies governing the DoD Joint Officer Management Program.

5.1.2. Exercise approval authority for the annual JDAL based on the recommendations of the Chairman of the Joint Chiefs of Staff.

5.1.3. Designate Level III and Level IV joint qualified officers.

5.2. The Principal Deputy Under Secretary of Defense for Personnel and Readiness (PDUSD(P&R)), under the USD(P&R), shall:

5.2.1. Review the program for JPME initiatives to ensure that military education policies enhance the education and training of officers in joint matters.

5.2.2. Designate the military specialties that meet the Critical Occupational Specialty (COS) criteria.

5.2.3. Act on requests to waive DoD Joint Officer Management Program requirements as authorized herein and forward those requests to the Secretary of Defense or Deputy Secretary of Defense requiring their action according to the DoD Joint Officer Management Joint Qualification System Implementation Plan (Reference (k)).

5.2.4. Convene boards, as necessary, to make recommendations on management of officers under the DoD Joint Officer Management Program.

5.2.5. Prepare and coordinate on reports, as required, in support of the DoD Joint Officer Management Program.

5.3. The Deputy Under Secretary of Defense for Military Personnel Policy (DUSD(MPP)), under the USD(P&R), shall:

5.3.1. Establish policies to administer DoD's Joint Officer Management Program.

5.3.2. Act on requests to waive joint tour length and post-JPME Phase II assignment waivers.

5.4. The Assistant Secretary of Defense for Reserve Affairs, under the USD(P&R) shall:

5.4.1. Exercise oversight for Joint Qualification System (JQS) policies and procedures that govern RC officers not on extended active service (e.g. unit members and Individual Mobilization Augmentees).

5.4.2. Develop guidance to allow RC officers not on extended active service to receive joint duty credit for joint experience.

5.4.3. Monitor RC compliance with the DoD JQS program with the goal of increasing the pool of RC joint qualified officers.

5.4.4. Coordinate RC joint officer education and joint officer management issues with the Chairman of the Joint Chiefs of Staff.

5.4.5. Allocate Capstone course quotas to the RCs for G/FOs or officers that have been selected for general or flag rank.

5.5. The Defense Manpower Data Center shall assist the Joint Staff Director of Manpower and Personnel in maintaining and updating joint duty management information systems.

5.6. The Chairman of the Joint Chiefs of Staff shall:

5.6.1. Formulate procedures and instructions to implement and support OSD policies governing the DoD Joint Officer Management Program.

5.6.2. Formulate and coordinate policies for JPME.

5.6.3. Develop and maintain, with the assistance of the Deputy Under Secretary of Defense (Program Integration), the methodology for determining S-JDA and critical S-JDA requirements.

5.6.4. Recommend JDAL changes to the USD(P&R) and review, update, maintain, and publish the JDAL annually.

5.6.5. Manage the Joint Duty Assignment Management System (JDAMIS).

5.6.6. Manage the joint qualification designation process.

5.6.7. Monitor the promotions of JQOs and officers who are serving or have served in an S-JDA to ensure that appropriate consideration is given to their *joint* performance ~~in an S-JDA. Beginning October 1, 2008, monitor the promotion of JQOs who achieved that qualification via the experience joint duty assignment (E-JDA) path.~~

5.6.8. Review Military Service requests for DoD Joint Officer Management Program waivers and make recommendations on such requests to the PDUSD(P&R).

5.6.9. Serve as board secretariat for boards (e.g., JDAL Validation Board) convened by the PDUSD(P&R) on management of officers under the DoD Joint Officer Management Program.

5.6.10. Prepare and coordinate on reports, as required, in support of the DoD Joint Officer Management Program.

5.6.11. Determine and accredit those joint experiences, joint training/exercises, and other education which have direct relevance to the definition of "Joint Matters" as prescribed in Enclosure 6.

5.7. The Secretaries of the Military Departments shall:

5.7.1. Support OSD policies governing the DoD Joint Officer Management Program.

5.7.2. Comply with procedures established by the Chairman of the Joint Chiefs of Staff for implementing the DoD Joint Officer Management Program.

5.7.3. Ensure that the JPME Phase I and Phase II curriculum of Military Service schools meets the criteria established in Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 1800.01C (Reference (l)).

5.7.4. Ensure that joint assignment practices result in the Military Departments meeting the tour length requirements specified in section 664 of Reference (j).

5.7.5. Nominate officers meeting the joint qualification criteria in Enclosure 3, to the Chairman of the Joint Chiefs of Staff and the Secretary of Defense, as appropriate, for designation as a Level II, III, or IV joint qualified officers.

5.7.6. Monitor the careers of JQOs and officers who are serving or have served in S-JDAs.

5.7.7. Ensure appropriate assignment of JQOs to critical S-JDAs.

5.7.8. Ensure the qualifications of officers assigned to S-JDAs are such that joint promotion objectives can be achieved.

5.7.9. Ensure that, for the AC, of those non-JQO officers identified to fulfill the requirement to be assigned to an S-JDA as their next assignment following graduation from National Defense University JMPE Phase II-awarding schools, at least half of those officers be assigned to an S-JDA as their immediate assignment following graduation and the remainder complete that assignment as their second assignment following graduation. To the extent practicable, this policy shall also apply to the RC.

5.7.10. Support boards convened by the PDUSD(P&R) on management of officers under the DoD Joint Officer Management Program.

5.7.11. Provide joint officer management reports, as required, through the Chairman of the Joint Chiefs of Staff to the Secretary of Defense.

5.8. The Heads of the DoD Components, excluding the Secretaries of the Military Departments, shall, as specified in this issuance, Reference (j), CJCSI 1331.01C (Reference (m)), and guidance established by the Chairman of the Joint Chiefs of Staff:

5.8.1. Support OSD policies governing the DoD Joint Officer Management Program.

5.8.2. Comply with guidelines and procedures established by the Chairman of the Joint Chiefs of Staff for implementing the DoD Joint Officer Management Program.

5.8.3. Provide to the Chairman of the Joint Chiefs of Staff, in coordination with the Military Services, proposed additions, deletions, and changes to the JDAL.

5.8.4. Not reassign, other than for cause, officers filling S-JDA positions to non S-JDA positions, or JQOs filling critical S-JDA positions, without prior coordination with the respective Military Service.

5.8.5. Support boards convened by the PDUSD(P&R) on management of officers under the DoD Joint Officer Management Program.

5.8.6. Monitor assignment actions to ensure organizational stability is maintained.

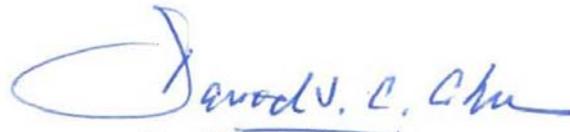
6. INFORMATION REQUIREMENTS

The reporting requirements identified in this Instruction have been assigned Report Control Symbol DD-P&R(AR) 2298, in accordance with DoD 8910.1-M (Reference (n)).

7. RELEASABILITY. UNLIMITED. This Directive is approved for public release. Copies may be obtained through the Internet from the DoD Issuances Web Site at <http://www.dtic.mil/whs/directives>.

8. EFFECTIVE DATE

This Instruction is effective October 1, 2007.



David S. C. Chu
Under Secretary of Defense for
Personnel & Readiness

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E1. ENCLOSURE 1

REFERENCES, continued

- (e) DoD Instruction 1300.20, "DoD Joint Officer Management Program Procedures," December 20, 1996 (hereby canceled)
- (f) DoD Interim Policy Memorandum of the Secretary of Defense, "Limit on Good of the Service Waiver Policy," August 27, 2003 (hereby canceled)
- (g) DoD Interim Policy Memorandum of the Under Secretary of Defense (Personnel and Readiness), "Joint Duty Assignment List (JDAL) Validation Process – Procedural Update," March 30, 2006 (hereby canceled)
- (h) DoD Instruction 1215.20, "Reserve Component (RC) Joint Officer Management Program," September 12, 2002 (hereby canceled)
- (i) Under Secretary of Defense for Personnel and Readiness Memorandum, "Reserve Component Officer Joint Qualification Program Guidance," March 28, 2008 (hereby canceled)
- (j) Sections 152, 154, 155, 164, 619a, 661-668, 2151-2155, 3033, 5033, 5043, ~~and~~ 8033, *and 10216* of title 10, United States Code
- (k) DoD Joint Officer Management Joint Qualification System Implementation Plan, March 30, 2007
- (l) Chairman of the Joint Chiefs of Staff Instruction 1800.01C, "Officer Professional Military Education Policy (OPMEP)," December 22, 2005
- (m) Chairman of the Joint Chiefs of Staff Instruction 1331.01C, "Manpower and Personnel Actions Involving General and Flag Officers," July 22, 2005
- (n) DoD 8910.1-M, "Department of Defense Procedures for Management of Information Requirements," June 30, 1998
- (o) DoD Instruction 1315.18, "Procedures for Military Personnel Assignments," January 12, 2005
- (p) *Chairman of the Joint Chiefs of Staff Instruction 1330.05, "Joint Officer Management Program Procedures," May 1, 2008*
- (q) *Section 709 of title 32, United States Code*

E2. ENCLOSURE 2

DEFINITIONS

E2.1. Advanced Joint Professional Military Education (AJPME). A Reserve Component (RC) course taught at Joint Forces Staff College (JFSC) that is similar in content to the in-residence JFSC JPME Phase II course. AJPME students shall be JPME Phase I graduates. AJPME educates RC officers and builds upon the foundation established in JPME Phase I. It prepares RC officers (O-4 to O-6) for joint duty assignments.

E2.2. Assignment. The position in an organization to which an officer permanently belongs for manpower accounting purposes. Temporary duty (TDY) with other organizations does not alter the officer's permanent assignment status.

E2.3. Combatant Command Positions. A category of positions defined by the Chairman of the Joint Chiefs of Staff. Incumbents of those positions are responsible for unified command and control of combat operations or operations other than war.

E2.4. Combined Command. For the purposes of this instruction, combined command refers to a major command consisting of two or more forces or agencies of two or more allies.

E2.5. Critical Standard-Joint Duty Assignment (Critical S-JDA). Designation of an S-JDA position for which, considering the duties and responsibilities of the position, the incumbent should be previously experienced and educated in joint matters, or at a minimum, the position would be greatly enhanced by such an incumbent. Critical positions are not necessarily the most key and essential billets in an activity. Critical positions are proposed by heads of joint activities and approved by the PDUSD(P&R) with the recommendation of the Chairman of the Joint Chiefs of Staff, and documented in the JDAL. Critical S-JDA positions are filled by Level III or IV Joint Qualified Officers unless waived by the Chairman of the Joint Chiefs of Staff.

E2.6. Critical Occupational Specialty (COS). A military occupational specialty designated by the PDUSD(P&R) from among the combat arms in the Army or equivalent military specialties in the Navy, the Air Force, and the Marine Corps (see Enclosure 9) where a severe shortage of trained officers in that skill exists. Equivalent military specialties are those engaged in the operational art to attain strategic goals in a theater of conflict through the design, organization, and conduct of campaigns and major operations. COS provisions do not apply to general and flag officers (G/FOs).

E2.7. Direct Entry Students. An officer, neither a graduate from an accredited and/or certified JPME Phase I course of instruction nor a JPME Phase I equivalency program, who is allowed to attend JPME Phase II by a Chairman of the Joint Chiefs of Staff waiver.

E2.8. Discretionary Points. Points earned in excess of the minimum education and experience requirement through exercises, education other than JPME, collective joint training, or individual joint training.

E2.9. Exercise Participation Descriptors

E2.9.1. Leader - Exercises formal authority and direction over significant organizational elements or major tasks.

E2.9.2. Planner - Serves as the focal point for an activity or organization. Empowered to speak on behalf of their organization and make commitments for specified support. There can be more than one.

E2.9.3. Participant - A person actively involved in an event capable of making positive contributions to the mission.

E2.10. Joint Duty Assignment (JDA). An assignment which provides significant experience in joint matters as defined by section 668 of Reference (j). There are two types of JDAs.

E2.10.1. Standard Joint Duty Assignment (S-JDA): An assignment that meets the tour length requirement prescribed in section 664(a) of Reference (j).

E2.10.2. Experience-based Joint Duty Assignment (E-JDA): Such other assignments and experiences that demonstrate an officer's mastery of knowledge, skills, and abilities in joint matters, as determined under such regulations and policy as prescribed by the Secretary of Defense. E-JDAs may be shorter in duration; therefore, they may be aggregated to achieve the equivalent of a full tour of duty in an S-JDA.

E2.11. Joint Duty Assignment List (JDAL). A consolidated list of *Active Component (AC) and RC* S-JDAs approved by the USD(P&R). Positions held by G/FOs and critical S-JDAs are shown separately. The JDAL is maintained by the Joint Staff, J-1. The Joint Staff Special Assistant for G/FO Matters is responsible for processing G/FO JDAL actions.

E2.12. Joint Duty Assignment Management Information System (JDAMIS). The automated management information system data base managed by the Chairman of the Joint Chiefs of Staff, maintained by the Defense Manpower Data Center, and updated by the Chairman of the Joint Chiefs of Staff and the Military Services. JDAMIS supplements existing Military Service manpower and personnel information systems by providing automated files reflecting the approved JDAL and personnel data on officers who are JQOs and other officers who have served or are serving in S-JDA positions or have completed E-JDA duties, or are attending JPME. Current and historical data files in JDAMIS are used to manage, analyze, and oversee the Joint Officer Management Program and are used to prepare the "Goldwater-Nichols Act Implementation Report Annex to the Secretary of Defense Annual Report to the President and the Congress."

E2.13. Joint Duty Credit

E2.13.1. Full joint duty credit is the joint credit designation granted for the completion of a tour of duty in an S-JDA that meets all statutory requirements or the accumulation of 36 joint experience points accrued from E-JDAs and discretionary points from joint training/exercises. Such credit may also be awarded to RC officers who meet the S-JDA tour length criteria established in Enclosure ~~14~~ 13.

E2.13.2. ~~Cumulative Accrued~~ joint duty credit is the joint credit designation granted for continuous time served in an S-JDA ~~of at least 10 months, but~~ less than the duration needed to qualify for full joint duty credit (see Enclosure 5) ~~or for periods of qualifying service in a qualifying Joint Task Force (JTF) headquarters temporary assignment (see Enclosure 13).~~

E2.14. Joint Experience. Joint experience is a key learning opportunity; it is where education and training move from concept to reality. The intellectual understanding of conflict that is gained through experience rounds out the continuum of joint learning. The joint experience pillar implicitly recognizes that the successful application of what individuals learn via joint individual training, JPME, and self-development is essential. Learning to operate jointly is not an academic pursuit although it entails an understanding of the spectrum of conflict; its competencies must be demonstrated by practice. This is an essential requirement for building a larger pool of jointly qualified officers.

E2.15. Joint Experience Points. Points that are derived from the duration and intensity of a joint experience. Joint Experience Points = (Number of Days / 30.4)(Intensity Factor). The intensity is determined by the environment (combat, non-combat, steady-state) in which the experience is gained. *Points are calculated to the nearest tenth of a point.*

E2.15.1. Combat is a multiplier of 3. The combat intensity factor will be correlated to the receipt of "Hostile Fire/Imminent Danger (HF/ID) pay."

E2.15.2. Non-combat is a multiplier of 2. Examples of this intensity factor include JTF Katrina, tsunami relief, and drug interdiction operations. The Chairman of the Joint Chiefs of Staff shall identify and certify which events/operations will qualify in this category.

E2.15.3. Steady-state is a multiplier of 1. This includes any staff assignment in OSD, the Joint Staff, COCOM headquarters, Defense Agency headquarters, DoD Field Activities, or Military Department elements of U.S. Government Agencies outside the Department of Defense. This may also include joint experiences gained while assigned to a Service position, excluding those qualifying experiences in combat.

E2.16. Joint Matters. Matters related to the achievement of unified action by multiple military forces in operations conducted across domains such as land, sea, or air, in space, or in the information environment, including matters relating to national military strategy; strategic planning and contingency planning; command and control of operations under unified command; national security planning with other departments and agencies of the United States; and combined operations with military forces of allied nations. In the context of joint matters, the term "multiple military forces" refers to forces that involve participants from the armed forces

and one or more of the following: other departments and agencies of the United States; the military forces or agencies of other countries; non-governmental persons or entities.

E2.17. Joint Training. Training, including mission rehearsals, of individuals, units, and staffs using joint doctrine or joint tactics, techniques, and procedures to prepare joint forces or joint staffs to respond to strategic, operational, or tactical requirements considered necessary by the Combatant Commanders to execute their assigned or anticipated missions. Joint Training involves forces of two or more Military Departments interacting with a combatant command or subordinate joint force commander, and involves joint forces, joint staffs and/or individuals preparing to serve on a joint staff or in a joint organization and is conducted using joint doctrine.

E2.18. Joint Professional Military Education (JPME). A Chairman of the Joint Chiefs of Staff-approved body of objectives, outcomes, policies, procedures, and standards supporting the educational requirements for joint officer management.

E2.18.1. Joint Professional Military Education (JPME) Phase I. The first phase of JPME taught at intermediate Service colleges and other educational programs which meet JPME criteria and are accredited by the Chairman of the Joint Chiefs of Staff.

E2.18.2. JPME Phase II. A second phase of JPME that enhances JPME Phase I instruction taught at JFSC, other National Defense University (NDU) schools, and accredited senior-level Service colleges. JPME Phase I and II (or AJPME for the Reserve Component in lieu of JPME Phase II) are required for JQO designation.

E2.18.3. Advanced JPME (AJPME). AJPME is a JPME course of instruction specifically created for the RC community. It is similar in content to the 10-week JPME Phase II course offered at the Joint and Combined Warfighting School.

E2.18.4. CAPSTONE. CAPSTONE is the third phase of JPME mandated by section 2153 Reference (j) designed specifically to prepare the G/FO to work with other armed forces.

E2.19. Joint Qualified Officer (JQO). An officer designated by the Secretary of Defense, with the advice and assistance of the Chairman of the Joint Chiefs of Staff, who is educated and trained in joint matters and has completed the Level III requirements for "JQO" designation. Replaces legacy term "Joint Specialty Officer (JSO)." An officer must be in the grade of O-4 or above to be designated as a JQO.

E2.20. Joint Qualification Points. Joint Qualification Points are the aggregate of Joint Experience Points and Discretionary Points.

E2.21. Mission Essential JDA. Non-critical S-JDAs that are essential to mission accomplishment may be designated as "mission essential" JDAs. For a position to be designated as "mission essential," it must be one deep, key and essential, and have direct mission impact critical to the accomplishment of the joint organization's mission.

E2.22. Organizational Positions. A category of positions not included in the Office of the Secretary of Defense, the Joint Staff, Combatant Commands headquarters, or Defense Agencies headquarters.

E2.23. Professional Specialties. Military occupational specialties (medical officer, dental officer, veterinary officer, medical service officer, nurse, biomedical science officer, chaplain, or judge advocate) for which joint duty requirements do not apply and may be waived for promotion to O-7.

E2.24. Qualifying Reassignment. An authorized early release from an S-JDA that does not require a tour length waiver. Such an early release is requested by the Military Service and must have the concurrence of the losing joint activity. The reason for reassignment must be, as follows, for:

E2.24.1. Unusual personal reasons (including extreme hardship and medical conditions) beyond the control of the officer or the Military Department;

E2.24.2. An immediate reassignment to another S-JDA due to an officer's promotion to a higher grade when no positions were available in the same organization in the officer's new grade; or,

E2.24.3. An immediate reassignment to another S-JDA due to elimination of the officer's position in a reorganization.

E2.25. Reserve Components. For the purposes of this instruction only, Reserve Components of the Armed Forces of the United States are the Army National Guard, The Army Reserve, the Navy Reserve, The Marine Corps Reserve, the Air National Guard, and the Air Force Reserve.

E2.26. Scientific and Technical Categories. Military occupational specialties for which G/FO joint duty requirements do not exist or not enough exist to provide for career progression.

E2.27. Temporary Duty (TDY). Temporary assignment of an officer to an organization that is not the organization to which an officer permanently belongs for manpower accounting purposes. TDY with other organizations does not alter the officer's permanent assignment status.

E2.28. Unusual or Extraordinary Positions. A category of positions not included in OSD, the Joint Staff, Combatant Command Headquarters (HQs), Defense Agency HQs, or organizational positions. Those positions may be included on the JDAL when the Secretary of Defense determines that the responsibilities of the position provide the officer significant experience in joint matters that qualitatively are equivalent to experiences gained by other officers filling JDAs.

E2.29. Validation Board. A board convened as directed by the PDUSD(P&R) and composed of representatives from the Chairman of the Joint Chiefs of Staff, and the Military Services, as well as an observer from OSD, to review nominated positions for inclusion on the JDAL. The Board

makes recommendations to USD(P&R) through the Chairman of the Joint Chiefs of Staff on adding and/or deleting individual positions on the JDAL.

E3. ENCLOSURE 3

JOINT QUALIFICATIONS

E3.1. JOINT QUALIFICATIONS

The JQS is a multi-level system open to all officers of the AC and RC, which recognizes joint experiences, regardless of where they accrue. Attaining expertise in joint matters is a career long accumulation of experiences that may be gained via various duties and assignments or to joint organizations for extended periods or through the performance of temporary duties of shorter duration. An S-JDA in accordance with section 664(a) of Reference (j) is still the primary means of achieving joint experience and joint duty credit (see Enclosure 4).

E3.2. JOINT QUALIFICATION LEVELS AND CRITERIA

The four-level system depicted in Table E3.T1. is designed to recognize an officer's progressive, career-long accumulation of joint experiences. Award of the various levels of joint qualification are contingent on meeting the following criteria:

E3.2.1. LEVEL I. [Approval authority – applicable Military Department (may be delegated to individual Military Services, at the G/FO or Senior Executive Service level).]

E3.2.1.1. An officer must successfully complete a pre-commissioning program (Reserve Officer Training Corps, Service Academy, or Officer Candidate School/Officer Training School) whose curriculum includes an introduction to joint concepts as delineated in Reference (l); and an officer basic course whose curriculum includes lessons on joint awareness as specified in Reference (l).

E3.2.1.2. Following Level I designation, officers may begin to accrue joint qualification points from joint experiences, joint training, joint exercises, as well as other education as determined by the Chairman of the Joint Chiefs of Staff.

E3.2.2. LEVEL II. [Approval authority – Chairman of the Joint Chiefs of Staff.] An officer must:

E3.2.2.1. Accrue 18 joint qualification points (a minimum of 12 points must be derived from joint experiences other than joint training or joint exercises), or have been awarded full joint duty credit; and

E3.2.2.2. Successfully complete JPME Phase I.

E3.2.2.3. Discretionary points may be derived from joint training, joint exercises, and other education which enhances an officer's knowledge and understanding of joint matters.

E3.2.3. LEVEL III. [Approval authority – USD(P&R).]

E3.2.3.1. An officer must:

E3.2.3.1.1. Earn 18 more joint qualification points, over and above the 18 points required to become a Level II joint qualified officer. A minimum of 12 "Joint Experience" points must have been accrued ~~since award of LEVEL II in the grade of O-4 or higher~~ for officers obtaining joint experience points through E-JDAs (in some cases, officers may need more than 36 total points to qualify for Level III due to the 12 point recency requirement), or have been awarded full joint duty credit. ~~;~~ ~~and:~~

E3.2.3.1.2. Successfully complete JPME Phase II. RC officers may complete AJPME in lieu of JPME Phase II.

E3.2.3.1.3. Be in the grade of O-4 or above.

E3.2.3.2. Discretionary points may be derived from joint training, joint exercises, and other education which enhances an officer's knowledge and understanding of joint matters. *A maximum of 12 discretionary points may be used for award of Level III joint qualification.*

E3.2.3.3. Officers approved for award of LEVEL III joint qualification shall be designated as a JQO.

E3.2.3.4. ~~Effective October 1, 2008, o~~Only officers designated as a JQO are eligible for appointment as an O-7 (brigadier general or, for the Navy, rear admiral (lower half)). This provision of section 619a of Reference (j) applies only to the active component.

E3.2.4. LEVEL IV. [Approval authority – USD(P&R).] A G/FO must:

E3.2.4.1. Accrue 24 Joint Qualification Points or have been awarded full G/FO joint duty credit from an assignment in a G/FO joint billet in OSD/Defense Agency/Joint Staff/COCOM Headquarters (HQs)/Joint Task Force (JTF) HQs [Officer must be a G/FO for pay purposes for at least one day while filling the G/FO joint billet.];

E3.2.4.2. Hold the JQO designation; and

E3.2.4.3. Successfully complete CAPSTONE (active component only).

E3.3. JOINT QUALIFICATION FORMULA

An officer's eligibility for consideration to be awarded joint qualification LEVEL II – IV shall be based on the completion of the requisite JPME, joint experience points, and discretionary points.

Table E3.T1. Joint Qualification Matrix

LEVEL	CRITERIA
I	a. Awarded upon joint certification of pre-commissioning <u>and</u> basic officer course completion. -- These courses provide learning objectives dealing with "Joint Introduction and Awareness." b. Junior Officers are focused on Service competencies. c. Qualification points begin to accrue following commissioning via opportune joint experiences, joint training, joint exercises, and other education.
II	a. Awarded upon completion of JPME Phase I and accrual of 18 points and certification by the Chairman of the Joint Chiefs of Staff. b. A minimum of 12 points must come from "Joint Experience." c. Discretionary points may be derived from joint experience, joint training, joint exercises, and other education. NOTE: Officers who have Full Joint Tour Credit and have completed JPME Phase I may be nominated by their Service, in accordance with procedures established by the Chairman of the Joint Chiefs of Staff, to be designated as Level II
III	a. Awarded upon completion of JPME Phase II or AJPME (Reserve Component officers) and accrual of a minimum of 36 total points (based on Level II point requirements, normally 18 more points since Level II) or Full Joint Duty Credit, and certification by the Secretary of Defense or his designee. b. Recency requirement: a minimum of 12 points must come from "Joint Experience" since Level II designation <i>earned in the grade of O-4 or higher.</i> c. Discretionary points may be derived from joint training, joint exercises, and other education. d. Formal designation: Joint Qualified Officer (JQO). e. Effective 1 Oct 2008, JQO required for appointment as an O-7 (AC Only).
IV G/FO Only	a. Awarded upon completion of CAPSTONE (AC only) and accrual of 24 joint experience points or full joint G/FO credit from an assignment in a G/FO joint billet in OSD/JS/COCOM HQs/JTF HQs, Defense Agency HQs, hold designation as a JQO, and certification by the Secretary of Defense or his designee. b. Officers must be a G/FO (for pay purposes) for at least one day while filling the G/FO S-JDA or during the period for which joint experience points are earned.

E3.4. JOINT QUALIFICATION POINTS

Joint Qualification Points are based on a formula which accounts for the type, intensity/environment, and duration/frequency of the joint experience; qualifications are contingent upon meeting the criteria set forth below.

E3.4.1. "Joint Experience" points are one of three components contributing to an officer's eligibility to earn Joint Qualification Levels II – IV. Points are computed by multiplying the duration of the experience by the intensity factor as depicted in Table E3.T2.

E.3.4.1.1. Duration: a month (30.4 days) equals one point.

E.3.4.1.2. Intensity:

E.3.4.1.2.1. "Combat" is a multiplier of 3. The combat intensity factor will be correlated to the receipt of HF/ID pay.

E.3.4.1.2.2. "Non-combat" is a multiplier of 2. Examples of this intensity factor include JTF Katrina, tsunami relief, and drug interdiction operations. The Chairman of the Joint Chiefs of Staff shall identify and certify which events/operations will qualify in this category.

E.3.4.1.2.3. "Steady-state" is a multiplier of 1. This includes any staff assignment in OSD, the Joint Staff, COCOM headquarters, Defense Agency headquarters, DoD Field Activities, or Military Department elements of U.S. Government Agencies outside the Department of Defense. This may also include joint experiences gained while assigned to a Service position, excluding those qualifying experiences in combat.

E.3.4.1.2.4. When the application of the intensity multiplier results in a points value of 24 (G/FOs) or 36 (for O-6 and below), it shall be considered to be a Full Tour of Duty in accordance with the 24 and 36 month tour lengths specified in 10 U.S.C., section 664(a) in Reference (j).

E3.4.2. "Discretionary" points may be earned from joint training, joint exercises, and other education that contribute to an officer's expertise in joint matters. Non-JPME education shall be included as a source of "discretionary" points as a future implementation action only after appropriate and viable criteria for assessing joint content and value are defined. (Action number 8.1.2., of Reference (k) applies.)

Table E3.T2. Point Accrual Formula

<p>Point Accrual Formula</p> <p>JOINT QUALIFICATION LEVEL = <u>JOINT EDUCATION</u> + <u>EXPERIENCE</u> Pts + <u>DISCRETIONARY</u> Pts</p> <p>Joint EXPERIENCE Points = Duration (<u>Months</u>) x Intensity Factor*</p> <p>*Combat: 3, Non-Combat: 2, Steady-state: 1</p> <p>DISCRETIONARY Points = Education + Training + Exercise</p> <p>Education / Training = degree or certification related to "Joint Matters" [Pts TBD]</p> <p>Exercise Points = Role [Participant (1pt), Key Participant/Planner (2pts), Leader (3pts)]</p>

E3.5. TRANSITION PROVISIONS -- JOINT QUALIFICATION CRITERIA

During the Department's transition to the JQS certain exceptions will be authorized to the joint qualification level criteria defined in paragraph E3.2.

E3.5.1. Until September 30, 2010 (*AC*) or *September 30, 2013 (RC)*, officers may be designated as a LEVEL III JQO without previously being designated as LEVEL II joint qualified as long as the officer has completed JPME Phase I and II (RC officers may complete AJPME in

lieu of JPME Phase II) and has accrued at least 36 joint qualification points or received full joint duty credit from an assignment in a JDAL position.

E3.5.2. Until September 30, 2010 *(AC) or September 30, 2013 (RC)*, G/FOs may earn LEVEL IV joint qualification without previously being designated as a LEVEL III JQO as long as the officer completed CAPSTONE (AC only) and accrued 24 joint qualification points or earned Full G/FO Joint Duty Credit from an assignment in a G/FO joint billet in OSD/JS/COCOM HQs/JTF HQs/Defense Agency HQs.

E3.5.3. The provisions of E3.5.1. and E3.5.2., do not preclude the statutory requirement of section 619a of Reference (j) that an officer on the active duty list must have completed a JDA and be designated as a JQO (formerly known as a Joint Specialty Officer) in order to be eligible for appointment to the grade of O-7 *after September 30, 2008*.

E4. ENCLOSURE 4

JOINT DUTY ASSIGNMENTS (JDAs) AND THE JDAL

E4.1. JDAs AND THE JDAL

The JDAL is a list of AD and RC S-JDAs approved by the USD(P&R) with the advice and assistance of the Chairman of the Joint Chiefs of Staff. The JDAL is the position management file of JDAMIS and is managed by the Chairman of the Joint Chiefs of Staff. *Positions are added to the JDAL to identify duties in which officers gain significant experience in joint matters. Force management will not be considered when determining if a position meets this standard.*

E4.2. CRITICAL S-JDAs

Critical S-JDAs are positions that require the incumbent to be previously trained, educated, and experienced in joint matters, or at a minimum the position would be greatly enhanced by such an incumbent. Critical S-JDAs must be filled by JQOs. The USD(P&R), with the assistance of the Chairman of the Joint Chiefs of Staff, designates critical S-JDAs in accordance with section 661 of Reference (j). The heads of joint activities shall identify those positions that meet the criteria of critical S-JDAs and recommend to the Chairman of the Joint Chiefs of Staff that they be designated as critical S-JDAs. Only positions requiring grades O-5 and above shall be designated as critical S-JDAs. Critical positions are not necessarily the most key and essential positions within an activity, although that may be the case.

E4.2.1. If the number of critical S-JDAs identified by heads of joint activities is determined to be insufficient to meet DoD mission requirements, the Chairman of the Joint Chiefs of Staff shall direct the heads of joint activities to identify additional billets that meet the definition of a critical S-JDA.

E4.2.2. Position redesignations occur when the duties and responsibilities of the position change and impact the requirement for an incumbent to be previously educated and experienced in joint matters. A change in incumbents is not a basis for changing the position designation. Stability in critical positions is essential to the Military Services' production and maintenance of sufficient numbers of JQOs per career area.

E4.3. MISSION ESSENTIAL JDAs

E4.3.1. Non-critical S-JDAs that are essential to mission accomplishment may be designated as "mission essential" JDAs. The incumbents of positions designated as "mission essential" S-JDAs shall not be assigned to lengthy temporary duty assignments (e.g., 12 weeks or more) unless waived for such temporary assignments by the commander or director of the joint organization. For a position to be designated as "mission essential," it must be one deep, key and

essential, and have direct mission impact critical to the accomplishment of the joint organization's mission.

E4.3.2. No more than 15 percent of an activity's non-critical JDA positions may be recommended for "mission essential" status. The Chairman of the Joint Chiefs of Staff approves these requests.

E4.4. S-JDA FILL REQUIREMENTS

The Military Services shall ensure that approximately one-half of their O-5 and above S-JDA positions are filled at any time by officers who have the appropriate level of joint qualification. The Military Services and joint activities shall ensure that critical S-JDAs are filled with JQOs unless waived by the Chairman of the Joint Chiefs of Staff.

E4.5. CRITICAL S-JDA JQO QUALIFICATION WAIVER

E4.5.1. The Chairman of the Joint Chiefs of Staff has the authority to approve or disapprove requests to fill critical S-JDAs with non-JQOs.

E4.5.2. Waiver requests for G/FOs are forwarded to the Chairman of the Joint Chiefs of Staff Special Assistant for G/FO Matters; all others are forwarded to the Chairman of the Joint Chiefs of Staff Directorate for Manpower and Personnel.

E4.5.3. Non-JQOs shall not be assigned to critical S-JDAs without an approved waiver. The Chairman of the Joint Chiefs of Staff shall provide a report to the USD(P&R) on the number of waivers granted each fiscal year.

E4.6. JDAL POSITION STANDARDS

E.4.6.1. Only permanent S-JDA positions where an officer gains significant experience in joint matters may be designated as JDAL positions. A position must be:

E4.6.1.1. Involved in producing or promulgating national military strategy, joint doctrine, joint policy, strategic plans or contingency plans, commanding and controlling operations under unified command, or national security planning with other departments and agencies of the United States; and

E4.6.1.2. Involved in matters related to the achievement of unified action by multiple military forces in operations conducted across domains such as land, sea, air, space, or in the information environment. "Multiple military forces" refers to forces that involve participants from the armed forces and one or more of the following: other departments and agencies of the United States; the military forces or agencies of other countries; or non-governmental persons or entities.

E4.6.2. Compliance with the requirements in paragraph E4.6.1. should be determined by verifying that a preponderance of a position's responsibilities involve those actions.

E4.6.3. Positions that meet the standards above may be included on the JDAL. Position redesignations, from S-JDA to non S-JDA or vice versa, occur when the duties and responsibilities of the position change. A change in incumbents is not a basis for changing the position designation. The process used to add or delete JDAL positions shall be delineated in forthcoming CJCSI guidance.

E4.6.4. The following are excluded from the JDAL.

E4.6.4.1. Student positions/assignments for joint education and/or training.

E4.6.4.2. Instructor positions except those responsible for preparing and presenting JPME Phase II courses in national security strategy, theater strategy and campaigning, joint planning processes and systems, and joint, interagency, and multinational capabilities and the integrations of those capabilities.

E4.6.4.3. Fellowship/Intern assignments that are affiliated with an educational, degree granting, or research program where an officer is not responsible for implementation of joint policy or program resulting from the officer's assigned responsibilities.

E4.6.4.34. Positions/assignments within an officer's own Military Department.

E4.6.4.45. Temporary, overage, or unfunded positions.

E4.6.4.56. Positions requiring grades O-3 and below.

E4.6.4.67. Positions requiring officers in the professional specialties: medical officers, dental officers, veterinary officers, medical service officers, nurses, biomedical sciences officers, chaplains, and Judge Advocate General officers.

E4.6.5. Not later than October 1, 2009, joint organizations will incorporate joint qualification levels as part of billet requisitions. Procedures for establishing and designating appropriate joint qualification levels for positions on the JDAL will be promulgated by the Chairman of the Joint Chiefs of Staff.

E4.7. JDAL POSITION CATEGORIES

Determining which positions may be included on the JDAL requires identification of positions that clearly meet the criteria in paragraph E4.6. There are five groups of qualifying positions.

E4.7.1. OSD Positions. The incumbents of these positions are responsible for developing and promulgating policies in support of national security objectives.

E4.7.2. Joint Staff Positions. The incumbents of these positions are responsible for matters relating to national military strategy, joint doctrine or policy, strategic planning, and contingency planning.

E4.7.3. Combatant Command Headquarters Positions. The incumbents of these positions are involved in matters relating to national military strategy, joint doctrine or policy, strategic planning, contingency planning, and command and control of combat operations under a Combatant Command.

E4.7.4. Defense Agency Headquarters Positions. The incumbents of these positions are involved in developing and promulgating joint policy, strategic plans, and contingency plans relating to national military strategy.

E4.7.5. Organizational Positions (other than those in the OSD, the Joint Staff, Combatant Command HQs Positions, or Defense Agencies HQs Positions). The incumbents of these positions are involved with matters related to the achievement of unified action by multiple military forces in operations conducted across domains such as land, sea, air, space, or in the information environment; where the preponderance of the incumbent's duties directly deal with producing or promulgating national military strategy, joint doctrine, joint policy, strategic plans or contingency plans, commanding and controlling operations under unified command, or national security planning with other departments and agencies of the United States.

E4.8. JDAL REVIEW

The entire JDAL shall be reviewed/revalidated every 5 years beginning in Calendar Year 2009, to ensure positions continue to meet the standards in paragraph E4.6. The Chairman of the Joint Chiefs of Staff shall be responsible for conducting the reviews and forwarding the results to USD(P&R) for approval.

E4.9. JDAL VALIDATION BOARD

The purpose of the JDAL Validation Board is to review positions nominated by joint organizations for addition or deletion to the JDAL.

E4.9.1. The Chairman of the Joint Chiefs of Staff shall be responsible for conducting at least one JDAL Validation Board annually. JDAL position standards described in paragraph E4.6. shall apply.

E4.9.2. JDAL validation board members shall be comprised of one colonel, or in the case of the Navy, captain, or civilian equivalent, from the Joint Staff and each of the Military Services. An executive-level OSD representative shall serve as an advisor/observer.

E4.9.3. PDUSD(P&R) is the approval/disapproval authority for JDAL Validation Board recommendations forwarded by the Chairman of the Joint Chiefs of Staff. Contingent on

approval by the appropriate authority to include billets on the JDAL, the effective date a position is added or deleted from the JDAL will be the date the Vice Director, Joint Staff (or Director, Joint Staff for G/FO positions), signs the recommendation memorandum on behalf of the Chairman of the Joint Chiefs of Staff.

E4.9.4. Organizational Positions (other than those in the OSD, the Joint Staff, Combatant Command HQs Positions, or Defense Agencies HQs Positions) must be reviewed by the JDAL Validation Board to be included on the JDAL. Positions in the OSD, the Joint Staff, Combatant Command headquarters, and Defense Agency HQs positions are included on the JDAL when the manpower requirement is approved.

E4.9.4.1. OSD staff principals, the Chairman of the Joint Chiefs of Staff, or a G/FO or civilian equivalent designee of the Military Services may submit a request to delete specific JDAL positions in those groups.

E4.9.4.2. The JDAL shall be published as needed, but at least annually. The JDAL used to complete the Joint Officer Management (JOM) appendix to the Annual Defense Report to Congress shall be the last one published in that fiscal year (FY).

E5. ENCLOSURE 5

JOINT DUTY CREDIT

E5.1. JOINT DUTY CREDIT

Section 664 of Reference (j) refers to “joint duty credit” which is earned from service in an S-JDA (i.e., JDAL position). Statutory requirements regarding tour lengths and full, *cumulative accrued*, and constructive credit shall apply. Officers must be assigned to positions on the JDAL to receive joint duty credit. Over-strength or temporary positions are not included on the JDAL. *(See Enclosure 13 for special provisions pertinent to certain joint task force headquarters assignments.)* Policies regarding the legacy credit and experience-based joint qualification point system are addressed in Enclosure 6.

E5.1.1. An officer begins to accrue joint duty credit upon assignment to the JDAL position and stops accruing joint duty credit on departure from the JDAL position.

E5.1.2. A tour of duty in which an officer serves in more than one S-JDA without a break between such assignments shall be considered to be a single tour of duty in a joint duty assignment. The assignment dates recorded in JDAMIS are used to calculate the annual joint duty tour length average.

E5.1.3. The assignment of more than one officer to one S-JDA is not authorized except during reassignment. The overlap of incoming and outgoing officers, during which time both officers accrue joint duty credit, may not exceed 90 days.

E5.1.4. A G/FO must serve a minimum of 2 years in an S-JDA to receive full joint credit, unless waived by the DUSD(MPP). All others must serve a minimum of 3 years to receive full joint credit, unless waived by the DUSD(MPP). *All officers must serve at least 10 months in an S-JDA to receive cumulative joint credit except as provided in Enclosure 13. Full credit is equivalent to 24 experience points for G/FOs, and 36 experience points for other officers (O-6 and below).*

~~E5.1.4.1. COS officers (O-6 and below) who meet all the criteria contained in paragraph E9.2. may receive full joint duty credit for serving at least 2 years in their initial S-JDA. In specific instances, up to 60 days of constructive credit may be used (see paragraph E5.3.).~~

E5.1.4.21. Officers (O-6 and below) who serve the accompanied-by-dependents tour prescribed in DoD Instruction 1315.18 (Reference (o)) in positions designated as full credit overseas S-JDAs, including Alaska and Hawaii, may receive full credit for serving less than 3 years in an S-JDA without a tour length waiver. Only those tours that are at least 2 years may be designated as full credit overseas S-JDAs. The officer must serve the accompanied-by-dependents tour length regardless of marital or dependent status to receive full credit without a tour length waiver. Officers who serve the unaccompanied-by-dependents tour length or tours that are less than 2 years receive *cumulative accrued* credit (discussed in paragraph E5.2.).

E5.1.4.32. Enclosure 1413 provides tour length requirements for RC officers who serve less than full-time in S-JDA positions.

E5.2. CUMULATIVE ACCRUED JDA CREDIT

Officers who ~~serve at least 10 months-do not receive full tour credit~~ in an S-JDA may receive ~~emulative accrued~~ joint duty credit when the criteria in paragraphs E5.2.1. and E5.2.2. are met. ~~Cumulative Accrued~~ credit may be combined to receive full joint duty credit when the minimum S-JDA tour length (2 or 3 years) is met.

E5.2.1. At least one of the S-JDAs used to accumulate joint credit must be an overseas assignment (which includes Hawaii and Alaska) or a qualifying reassignment ~~and the officer must serve at least 10 months in the assignment~~. There are three types of qualifying reassignments, as follows:

E5.2.1.1. Reassigned for Unusual Personal Reasons. Reassignment for reasons not under the officer's or Military Service's control. That includes extreme hardship and medical conditions.

E5.2.1.2. Officer Promoted. Officer promoted and no other billets requiring the officer's grade or skill are available in the same organization. To accumulate the time accrued, the officer must be immediately reassigned to another S-JDA.

E5.2.1.3. Position Eliminated. Officer's position is eliminated due to reorganization. To accumulate the time accrued, the officer must be immediately reassigned to another S-JDA.

E5.2.2. JDA credit from S-JDAs not covered by paragraph E5.2.1. may be accumulated with ~~emulative accrued~~ joint credit from overseas and/or qualifying reassignment S-JDAs (paragraph E5.2.1.) provided the officer serves a minimum of 2 years in the S-JDA with the following exception. If an officer is reassigned due to reasons stated in paragraphs E5.2.1.2. and E5.2.1.3., the time served in the new assignment (only if it is an S-JDA) may be accumulated ~~provided the officer serves a minimum of 10 months in the position~~. Constructive credit may be applied as discussed in paragraph E5.3.

E5.3. CONSTRUCTIVE CREDIT FOR JOINT DUTY TOUR COMPLETION

(Does not apply to G/FOs.) Officers may depart an S-JDA up to 60 days early and receive constructive credit when the criteria in paragraphs E5.3.1. and E5.3.2. are met. Constructive credit may be applied to 3-year S-JDA tour lengths, to 2-year early COS reassignments (see Enclosure 9), to overseas assignments with 2 year or more tour lengths (includes Hawaii and Alaska) and to S-JDA tours when 2 years of credit is accrued according to paragraph E5.2.

E5.3.1. Constructive credit is excluded when calculating the joint duty tour length average; only time actually served in an S-JDA may be used to calculate the joint tour length average (see Enclosure 12).

E5.3.2. Constructive credit may only be used when early departure is required for military necessity; e.g., school report date or a change of command that cannot be delayed; and other alternatives would not suffice in meeting mission requirements. It shall not be used for personal convenience.

E5.3.3. ~~An officer serving less than 10 months in an S-JDA shall not be eligible for constructive credit~~ *Constructive credit is not authorized when officers receive accrued credit for S-JDA.*

E5.4. JOINT DUTY CREDIT WHEN JDAL POSITIONS ARE ADDED OR REMOVED

E5.4.1. Positions that meet the definition of an S-JDA are added to the JDAL and are removed from the JDAL when the responsibilities of the position change.

E5.4.2. A position is removed from the JDAL when it no longer meets the definition of an S-JDA or the position is eliminated.

E5.4.3. An officer's joint duty credit begins on assignment to a JDAL position and stops when the officer departs the position. Officers serving in an S-JDA shall not be penalized by loss of joint credit if that position is removed from the JDAL during their tour of duty.

E5.5. JOINT DUTY CREDIT FOR OFFICERS IN GRADE O-3

Officers in the grade of O-3 assigned to JDAL positions receive joint duty credit; all joint duty provisions apply, including tour length and early release requirements.

E5.6. JOINT DUTY CREDIT DURING PERIODS OF TEMPORARY DUTY

Temporary duty does not change an officer's permanent assignment to a JDAL position or joint duty credit status.

E5.7. CREDIT FOR TIME ALREADY SERVED (INTERIM CREDIT)

Officers who are currently serving in a S-JDA and have completed JPME Phase II or AJPME may combine accrued Joint Qualification Points with time (months) already served in the S-JDA to achieve the requisite 36 points required for Level III.

E5.7.1. Use of interim time (months) served to achieve a total of 36 points shall not preclude the requirement to complete the full tour of duty in the current S-JDA.

E5.7.2. Total months served for the purpose of calculating the S-JDA tour length will count all months served in the S-JDA, including the months that were used in combination with accrued Joint Qualification Points to achieve 36 total points.

E5.7.3. Subsequent joint duty credit for that S-JDA shall be based on total months served minus the interim time that was already used to accrue 36 points.

E5.7.4. Tour length waiver provisions of paragraph E7.4. shall apply.

E5.8. TEMPORARY PROVISION – RESERVE COMPONENT RETROACTIVE JOINT CREDIT

RC officers are eligible for award of joint duty credit for service in qualifying joint assignments designated under provisions of chapter 38 of Reference (j) that were in effect from October 1, 1986, until September 30, 2007, including non-JDAL RC billets in OSD, the Joint Staff, Combatant Command HQs, and Defense Agencies HQs.

E5.8.1. The provisions of sections 661 and 664 of Reference (j) enacted by the Goldwater-Nichols Act of 1986, as well as DoD joint officer management policy, and all subsequent revisions in effect through September 30, 2007, shall apply. This shall include joint credit for Desert Shield/Desert Storm and for service in designated JTFs.

E5.8.2. Procedures for requesting and processing requests ~~will be promulgated by the Chairman of the Joint Chiefs of Staff~~ *can be found in the Chairman of the Joint Chiefs of Staff Instruction 1330.05 (Reference (p)).*

E5.8.3. RC officers awarded full joint duty credit under this provision who have completed either JPME Phase II or AJPME may be nominated by their Service for designation as a JQO.

E5.8.4. Requests for retroactive credit will be accepted from October 1, 2007, through September 30, ~~2010~~ *2013*.

E5.8.5. The effective date of the joint qualifications resulting from retroactive experiences is the approval date of the qualification and does not constitute grounds for supplemental promotion consideration of a prior promotion selection board.

E6. ENCLOSURE 6

JOINT EXPERIENCE, TRAINING, AND EDUCATION

The career-long accumulation of joint experience encourages officers to earn progressive levels of joint qualifications based on knowledge, skills, and abilities in joint matters. Joint experiences may be accrued via more traditional long-term assignments (S-JDAs) or brief periods of joint operations. Unique to this system is the opportunity to acknowledge that officers also gain expertise in joint matters based on their involvement in joint exercises and other forms of joint training, as well as JPME and other education. Joint experience, joint training/exercises, and other education must have direct relevance to the definition of “Joint Matters” and be designated by the Chairman of the Joint Chiefs of Staff.

E6.1. JOINT EXPERIENCE

The majority of the force will continue to complete a traditional S-JDA to earn full or **cumulative accrued** joint credit. A smaller portion of the force may earn joint qualifications from the career-long accumulation of joint experiences which are recognized by the Chairman of the Joint Chiefs of Staff as imbuing officers with an equivalent level of joint capability and expertise in joint matters. This method will enable officers to be recognized, through a points system, for their joint experiences in a systematic, progressive manner. Under the JQS, joint experiences will accrue points toward four successive levels of joint qualifications and provide the joint commander a greater degree of fidelity in assessing the capabilities of each officer. This will enhance the Department’s ability to ensure the appropriate mix of joint-experienced officers in each organization.

E6.1.1. Joint experience may be gained in the performance of duties that involve both aspects of the definition of “joint matters” (Enclosure 2) –WHO the duty is performed with and WHAT the duty entails.

E6.1.1.1. The “who” includes: multiple military forces which refers to forces that involve participants from the armed forces and one or more of the following: other departments and agencies of the United States, the military forces or agencies of other countries, and non-governmental persons or entities.

E6.1.1.2. The “what” includes: operations conducted across domains such as land, sea, or air, in space, or in the information environment, including matters relating to national military strategy; strategic planning and contingency planning; command and control of operations under unified command; national security planning with other departments and agencies of the United States; and combined operations with military forces of allied nations.

E6.1.2. Officers may gain joint experience while serving in positions internal to their Service; however, these Service positions will not be placed on the JDAL. The Chairman of the

Joint Chiefs of Staff shall establish a method of assessing joint experience gained from “in-Service” positions.

E6.1.3. Officers awarded “~~cumulative~~ accrued” joint duty credit under provisions in Enclosure 5 may have that credit converted to the appropriate number of joint qualification points as specified in ~~forthcoming CJCSI guidance~~ Reference (p).

E6.2. JOINT TRAINING

Training includes mission rehearsals of individuals, units, and staffs using joint doctrine or joint tactics, techniques, and procedures to prepare joint forces or joint staffs to respond to strategic, operational, or tactical requirements considered necessary by the Combatant Commanders to execute their assigned or anticipated missions. Joint Training involves forces of two or more Military Departments interacting with a combatant command or subordinate joint force commander, and involves joint forces, joint staffs and/or individuals preparing to serve on a joint staff or in a joint organization and is conducted using joint doctrine. Joint exercises are a form of joint training for the purposes of the Joint Qualification System.

E6.2.1. The Chairman of the Joint Chiefs of Staff shall establish a process to certify joint individual training courses, designated by U.S. Joint Forces Command, that contribute to an officer’s expertise in joint matters. A catalog of certified joint training courses will be developed and maintained. The catalog and distance learning courses will be available through the Joint Knowledge Online or as resident courses and will be assigned joint qualification points based on course content and duration.

E6.2.2. The Chairman of the Joint Chiefs of Staff shall identify, maintain, and annually publish a list of joint exercises that qualify for the award of joint qualification points. Joint exercises conducted on or after September 11, 2001, will be maintained on this list. Officers will be able to receive qualification points as a participant, planner, or leader in these designated joint exercises.

E6.2.3. The Chairman of the Joint Chiefs of Staff shall ensure that applicable policy and guidance institutionalize the Chairman’s oversight over the certification of joint training courses and incorporate business rules for broader joint experiences and training opportunities.

E6.3. JOINT EDUCATION

JPME, as defined in Reference (l), is the only approved joint education that meets the prerequisite for earning joint qualifications.

E6.3.1. Educational Framework of Professional Military Education (PME). PME is the systematic instruction of professionals in subjects that enhance their knowledge of the science and art of war. JPME is comprised of a three-phase approach consisting of a rigorous and thorough instruction and examination of officers of the armed forces in an environment designed

to promote a theoretical and practical in-depth understanding of joint matters. JPME is a Chairman of the Joint Chiefs of Staff-approved body of objectives, policies, procedures, and standards supporting JPME requirements for JQO designation. JPME is a shared responsibility of the Military Service colleges and National Defense University (NDU). National War College (NWC), Industrial College of the Armed Forces (ICAF), and Joint Advanced Warfighting School (JAWS) curricula encompass JPME Phases I and II. Other educational institutions approved by the Chairman of the Joint Chiefs of Staff conduct JPME Phase I, and JFSC conducts JPME Phase II as Joint and Combined Warfighting School (JCWS). Senior-level Service College in-residence programs may award JPME Phase II credit upon accreditation by the Chairman of the Joint Chiefs of Staff. Officers who complete JPME Phases I and II satisfy the educational requirements for JQO.

E6.3.2. JPME Phase I. JPME Phase I is that portion of the JPME incorporated into the curricula of intermediate and Military Service JPME schools and other appropriate educational programs that meet JPME criteria and are accredited by the Chairman of the Joint Chiefs of Staff. Other programs, as approved by the Chairman of the Joint Chiefs of Staff, may satisfy the JPME Phase I requirement.

E6.3.3. JPME Phase II. JPME Phase II is that portion of JPME that in sequence complements JPME Phase I. JPME Phase II is taught at the Joint and Combined Warfighting School (JCWS) to both intermediate and senior-level students and at Chairman of the Joint Chiefs of Staff-approved Service senior-level colleges. JPME Phase II is also taught at NWC, ICAF, and JAWS. Officers must complete JPME Phase I to be eligible to attend JPME Phase II.

E6.3.3.1. Under exceptional conditions, the Chairman of the Joint Chiefs of Staff may approve a “direct-entry” waiver to permit an officer to attend JPME Phase II without having completed JPME Phase I.

E6.3.3.2. An officer will not be credited with JPME Phase II until they have completed JPME Phase I.

E6.3.4. CAPSTONE. CAPSTONE is the third phase of JPME mandated by federal law designed specifically to prepare new general and flag officers to work with the other armed forces.

E6.3.5. AJPME. AJPME is a JPME course of instruction at NDU JFSC specifically created for the RC community. It is similar in content to the 10-week JPME Phase II course offered at JFSC. RC officers who complete AJPME are considered to be “JPME complete.” JPME Phase I is a pre-requisite to attend AJPME.

E6.3.6. Officer Professional Military Education Policy (OPMEP). The OPMEP (Reference (1)) defines the objectives and policies of the Chairman of the Joint Chiefs of Staff about the schools, colleges, and other educational institutions that make up the military education system of the Armed Forces. Additionally, it identifies the fundamental responsibilities of the major participants in the military education arena in achieving desired educational goals. In terms of

JPME, the OPMEP provides the policy guidance necessary to meet DoD responsibilities for the educational development of JQOs.

E6.3.7. NDU Graduates. The Military Services must ensure that the following requirements are met by AC officers who graduate from each of the NDU schools (e.g., NWC, ICAF, JAWS, or JCWS) for each FY:

E6.3.7.1. All JQOs must be assigned to an S-JDA as their next duty assignment following graduation unless waived on a case-by-case basis by the PDUSD(P&R).

E6.3.7.2. More than 50 percent of all non-JQO graduates (for each Military Service) attending NDU schools must be assigned to an S-JDA as their next duty assignment following graduation. One half of the officers subject to that requirement (for each Military Service for each school) may be assigned to an S-JDA as their second (rather than first) assignment following graduation, if necessary, for efficient officer management. The Military Service shall coordinate with the Chairman of the Joint Chiefs of Staff to document compliance in JDAMIS.

E6.4. TEMPORARY PROVISION -- RETROACTIVE JOINT EXPERIENCES (AC AND RC)

Joint experiences on and after September 11, 2001, which were not captured under the legacy JOM system may be considered retroactively for award of joint qualification points.

E6.4.1. The Chairman of the Joint Chiefs of Staff shall establish a method of evaluating requests for retroactive consideration of joint experiences that meet the criteria in paragraph E6.1.1. This shall include procedures for awarding joint qualification points for these experiences.

E6.4.2. From October 1, 2007, through September 30, 2010 *(AC) or September 30, 2013 (RC)*, officers may request an assessment of their joint qualifications based on joint experiences accrued during the specified retroactive period.

E6.4.3. The effective date of the joint qualifications resulting from retroactive experiences is the approval date of the qualification and does not constitute grounds for supplemental promotion consideration of a prior promotion selection board.

E7. ENCLOSURE 7

TOUR LENGTH REQUIREMENTS AND EARLY RELEASES

E7.1. TOUR LENGTH REQUIREMENTS

Except for S-JDAs terminated by joint duty tour length waivers or for one of the reasons listed in paragraph E7.3., officers assigned to S-JDAs in grades O-6 and below must complete at least 3 years in those S-JDAs and G/FOs must complete at least 2 years. Enclosure ~~14~~ 13 provides the tour length requirements for RC officers who perform duties less than full-time in S-JDA positions. Exceptions listed in paragraph E.7.3. also apply to these tour length requirements. A tour of duty in which an officer serves in more than one joint duty assignment without a break between such assignments shall be considered to be a single tour of duty in a joint duty assignment.

E7.2. ANNUAL JOINT DUTY TOUR LENGTH AVERAGE

For each Military Service, the average tour length for all AC S-JDAs (measured by the lengths of the S-JDAs that ended during each FY) must be not less than 3 years for officers in grades O-6 and below and not less than 2 years for G/FOs. S-JDA tours terminated by joint duty tour length waivers are included in the annual tour length average. Reassignment from S-JDAs under paragraph E7.3. may be excluded from the annual tour length average. Annual tour length averages are reported to the Congress for each Military Service according to the following categories:

E7.2.1. G/FOs assigned to S-JDAs under the Chairman of the Joint Chiefs of Staff.

E7.2.2. G/FOs assigned to all other S-JDAs.

E7.2.3. O-6s and below assigned to S-JDAs under the Chairman of the Joint Chiefs of Staff.

E7.2.4. O-6s and below assigned to all other S-JDAs.

E7.3. EARLY RELEASE FROM S-JDA

The Military Services initiate requests to release officers early from an S-JDA. All early releases must provide full justification and have the concurrence of the officer's joint organization. Concurrence from the joint organization must be obtained from a G/FO, or civilian equivalent, in the officer's chain of command. In cases where the joint activity does not concur with the release, resolution of the disagreement shall be addressed to the Chairman of the Joint Chiefs of Staff or the PDUSD(P&R) as appropriate. Officers may be released from S-JDAs before completing the prescribed tour lengths without a tour length waiver, as follows:

E7.3.1. COS officers who meet all the criteria in paragraph E9.2.

E7.3.2. Officers released from a second and subsequent S-JDA that is not less than 2 years as authorized by section 664 of Reference (j). ~~The number of S-JDAs terminated under this paragraph is limited to 10 percent of the total number of S-JDAs. At the beginning of each FY, the Chairman of the Joint Chiefs of Staff shall determine the number each Military Service is authorized to release so as not to exceed the 10 percent limit.~~

E7.3.3. Officers serving in overseas S-JDAs, including Alaska and Hawaii, for which the tour length prescribed by Reference (o) is less than 3 years (O-6 and below) or 2 years (G/FOs).

E7.3.4. Reassignment is from an S-JDA that:

E7.3.4.1. Meets the definition of a qualifying reassignment (Enclosure 2); or

E7.3.4.2. Is accumulated for full joint tour credit and the officer has served at least 2 years in that S-JDA; or

E7.3.4.3. Is any assignment following a previous early release from an S-JDA due to the officer being promoted and no other S-JDA positions were available in the same organization or the officer's position being eliminated due to reorganization (Enclosure 4).

E7.3.5. Officer retires or is released from active duty.

E7.3.6. Officer is suspended from duty and reassigned from the Joint Staff or a Combatant Command under sections 155(f)(2) or 164(g) of Reference (j). A suspension from duty is normally an adverse action that should be documented in the officer's personnel record, and in writing, to the appropriate Military Service.

E7.4. JOINT DUTY TOUR LENGTH WAIVERS

Except for the reasons contained in paragraph E7.3., early releases from all S-JDAs, including overseas tours that are not covered above, require a joint duty tour length waiver. Tour length waiver requests are considered on a case-by-case basis.

E7.4.1. Tour length waivers must be approved before an officer departs the joint organization.

E7.4.2. Waiver requests for early release from an S-JDA are initiated by the Military Services and forwarded from the Military Services through the Chairman of the Joint Chiefs of Staff to the DUSD(MPP) for action. Waiver requests shall be submitted to the Chairman of the Joint Chiefs of Staff at least 60 days before the desired departure date.

E7.4.3. Although the Secretary of Defense is the approval authority, the Chairman of the Joint Chiefs of Staff and Secretaries of the Military Departments may exercise disapproval authority or delegate disapproval authority.

E7.4.4. S-JDA tour length waiver requests should substantiate why the officer should be released at the requested time and include the information in subparagraphs E7.4.4.1. through E7.4.4.12.

E7.4.4.1. Officer's grade, name, social security number, current S-JDA position line number and description, and specify if the officer is serving in a critical S-JDA.

E7.4.4.2. Assignment history including JPME and previous S-JDA dates, and specify when the officer was designated a "JQO" (or legacy "JSO") if applicable.

E7.4.4.3. The name, grade, and duty title of the G/FO, or civilian equivalent, providing the concurrence or non-concurrence of the losing activity. Also indicate if a replacement has been nominated and accepted to fill the vacancy should the waiver be approved. If a replacement has been identified, provide the officer's name and indicate if the officer is a JQO.

E7.4.4.4. Duty title of the officer's projected assignment, and indicate if that is an S-JDA reassignment.

E7.4.4.5. Projected promotion date (if applicable).

E7.4.4.6. Specific qualifications making the officer uniquely qualified for the proposed assignment. (Stating that an officer is "the best or only" qualified is not sufficient.)

E7.4.4.7. Impact on the officer and the gaining organization if the waiver is not approved.

E7.4.4.8. Recommended departure date.

E7.4.4.9. The number of months the officer will have served in that S-JDA on reassignment.

E7.4.4.10. Specify current Military Service S-JDA tour length average, and potential effect on tour length average if the waiver is approved.

E7.4.4.11. Explanation for late requests (if applicable).

E7.4.4.12. An officer career brief shall be attached to the waiver request.

E7.5. REQUEST FOR JOINT CREDIT WITH JOINT DUTY TOUR LENGTH WAIVERS

Applications for a joint duty tour length waiver must include a specific request for full or ~~cumulative~~ *accrued* joint credit. Justification must show that the officer gained significant joint experience in the S-JDA.

E7.5.1. G/FOs may only be eligible for award of full G/FO joint duty credit after serving at least 14 months in an S-JDA.

E7.5.2. O-6s and below may only be eligible for award of full credit after serving at least 22 months in an S-JDA.

E8. ENCLOSURE 8

DESIGNATING LEVEL III JQOs

The designation as a Level III “JQO” is an administrative classification that identifies an officer as having education and/or experience in joint matters and is in addition to the officer's primary military occupational specialty. The “JQO” designation is an officer management tool used primarily in the assignment selection process and may not be declined by the officer. There are no restrictions on the number of JQOs; however, sufficient numbers must be available to meet the S-JDA and critical S-JDA fill requirements.

E8.1. JQO SELECTION CRITERIA

Officers must *be on the Active Duty List or Reserve Active Status List*, complete JPME Phases I and II (or AJPME for RC), and successfully complete a full tour of duty in a joint assignment (see Enclosures 7 and ~~14~~ 13, as applicable), or such other assignments and experiences in a manner that demonstrate the officer's mastery of knowledge, skills, and abilities in joint matters (see Enclosure 6) to qualify for designation as a “JQO,” except as noted in paragraphs E8.1.1., E8.1.2.1., and E8.1.2.2. Officers recommended for “JQO” designation should meet quality force standards established by their parent Military Service.

E8.1.1. Officers in grades O-6 and below with a COS may qualify for “JQO” designation after a 2-year initial S-JDA and completion of JPME Phase II (or AJPME for Reserve Component).

E8.1.2. The Secretary of Defense may, on a case-by-case basis, in the interest of sound personnel management waive the JPME Phase II/AJPME requirement if the officer has completed two full JDAs (one must be an S-JDA).

E8.1.2.1. Waivers for officers who have completed two full JDAs are only permitted when it is impractical to require the officer to complete JPME Phase II/AJPME at the current stage of the officer's career and the types of JDAs the officer completed were of sufficient breadth to prepare the officer adequately for LEVEL III joint qualification. To request those waivers for a G/FO, the Military Service must also show that the waiver is necessary to meet a critical need, as determined by the Chairman of the Joint Chiefs of Staff.

E8.1.2.2. For O-6s and below, the total number of two JDA waivers must not exceed 10 percent of the total “JQO” designations by grade for any FY. The officers' grade as of the date the “JQO” list is approved by the SecDef shall be used to determine the maximum number of waivers available. Each Military Service shall not exceed this 10 percent limit without the approval of the PDUSD(P&R).

E8.1.2.3. For G/FOs, the total number of two JDA waivers must not exceed a number that would result in more than 32 G/FOs being on active duty at the same time who were

designated as JQOs when holding a G/FO grade and for whom a two JDA waiver was granted under this paragraph. A Military Department may request authority to use this waiver with requests to designate selected “G/FOs” as “JQOs” to the Secretary of Defense through the Chairman of the Joint Chiefs of Staff.

E8.2. JQO CAREER GUIDELINES

JQOs are not expected to serve entirely in the joint arena. JQOs are expected to maintain a high level of knowledge of joint matters and be qualified in their military occupational specialty. The Secretary of Defense, with the advice of the Chairman of the Joint Chiefs of Staff, oversees the careers of JQOs and officers who are serving or have served in S-JDAs *in OSD or the Joint Staff*.

E8.2.1. The Chairman of the Joint Chiefs of Staff, with the assistance of the Military Services, establishes JQO career development guidelines to ensure that sufficient numbers of quality officers especially educated and experienced in joint matters are maintained.

E8.2.2. The Chairman of the Joint Chiefs of Staff monitors the promotions of JQOs and ~~other~~ officers who are serving or have served in S-JDAs *in OSD or the Joint Staff*.

E8.2.3. The Chairman of the Joint Chiefs of Staff manages JDAMIS and the Military Services update JDAMIS data files to aid monitoring of JQOs and ~~other~~ officers who are serving or have served in S-JDAs *in OSD or the Joint Staff*.

E8.3. TRANSITION PROVISIONS – DESIGNATING LEVEL III JQOs

Officers who have been designated as Joint Specialty Officers on or before September 30, 2007, shall be automatically redesignated as JQOs.

E9. ENCLOSURE 9

CRITICAL OCCUPATIONAL SPECIALTIES (COSs)

E9.1. COSs

(Does not apply to G/FOs.) The PDUSD(P&R) may designate those military occupational specialties as COS if the skill is in the combat arms for the Army, or equivalent career areas for the other Military Services, and a severe shortage of trained officers in that skill exists.

E9.2. EARLY RELEASE CRITERIA

Officers possessing a COS may be released early from an S-JDA with the approval of the joint activity if they meet all of the criteria in paragraphs E9.2.1. and E9.2.2.

E9.2.1. Reassignment must be to the COS specific skill held by the officer being released from the S-JDA.

E9.2.2. The officer must be serving in his/her initial S-JDA and must serve at least 2 years in that S-JDA. Up to 60 days of constructive credit may be applied toward this assignment. If maximum constructive credit is authorized, the officer may be released early after completion of 22 months in the assignment.

E9.3. EXCLUSION FROM TOUR LENGTH AVERAGING

S-JDAs terminated under paragraph E9.2. may be excluded from the annual tour length average. ~~subject to a maximum ceiling of 12.5 percent of the total number of S-JDAs. At the beginning of each FY, the Chairman of the Joint Chiefs of Staff shall determine the number of exclusions each Military Service is authorized so as to not exceed the 12.5 percent limit.~~

E9.4. FILL OF CRITICAL S-JDAs BY COS JQOs

Of the officers selected for JQO designation based on the COS provisions in paragraph E9.2., the Military Services shall ensure that an appropriate portion is subsequently assigned to critical S-JDAs. An appropriate portion should be approximately equal to the portion of JQOs designated from COS officers who completed S-JDAs under the early release provision in paragraph E9.2. for each Military Service compared to the total number of JQOs designated for each Military Service. This ensures that a reasonable number of 2-year COS officers return for a second joint tour.

E9.5. DESIGNATIONS

Skills that may be designated as COS are determined each FY and are included in the Joint Officer Management Annex to the Secretary of Defense Annual Report. As required, the Military Services submit requests to update the list of COS skills through the Chairman of the Joint Chiefs of Staff to the Secretary of Defense for approval.

E10. ENCLOSURE 10

PROMOTION OBJECTIVES

E10.1. PROMOTION OBJECTIVES

Promotion objectives specified in this enclosure apply only to officers on the Active Duty List. The qualifications of officers assigned to S-JDAs and officers designated as Level III JQOs should be such that:

E10.1.1. Officers who are serving, or have served, on the staff of the Secretary of Defense or on the Joint Staff are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for officers in the same Military Service in the same grade and competitive category who are serving, or who have served, on the headquarters staff of their Military Service.

E10.1.2. Officers who are serving, or have served, in S-JDAs are expected, as a group, to be promoted to the next higher grade at a rate not less than the rate for all officers in the same Military Service in the same grade and competitive category.

E10.1.3 . Effective October 14, 2008, ~~if not sooner passed into law~~, officers in the grade of major (or in the case of the Navy, lieutenant commander) or above who have been designated as a JQO are expected as a group to be promoted to the next higher grade at a rate not less than the rate for officers of the same armed force in the same grade and competitive category.

E10.2. PROMOTION TRACKING

E.10.2.1. The tracking and reporting of promotion statistics shall be in consonance with Reference (h) and ~~forthcoming CJCSI guidance Reference (p)~~.

E.10.2.2. *Effective October 1, 2013, each RC will report promotion statistics to the Joint Staff.*

E10.3. PROMOTION BOARD REQUIREMENTS

Active duty list promotion selection boards, including special selection boards, considering JQOs or officers who are serving, or have served, in S-JDAs must include at least one officer designated by the Chairman of the Joint Chiefs of Staff as a board member who is currently serving in an S-JDA.

E10.3.1. The Military Departments concerned shall recommend a minimum of two available officers for such duty to the Chairman of the Joint Chiefs of Staff, who shall select an officer from that list or another qualified officer.

E10.3.2. The Secretary of the Military Department's formal charge, letter of instruction, or precept for promotion selection boards shall include, at a minimum, guidelines to ensure that the board gives appropriate consideration to the performance in joint assignments of officers who are serving in, or have served in, such assignments as shall be required by ~~forthcoming CJCSI guidance~~ *Reference (p)*. Additionally, the records of all officers who are serving, or have served, in an S-JDA, shall be clearly identified for board members. Effective October 1, 2009, if not sooner passed into law, the records of all officers who have been designated as a JQO shall also be clearly identified for board members.

E10.3.3. For promotion selection boards, including special selection boards, that consider officers on the active duty list who are serving, or have served, in S-JDAs, the Chairman of the Joint Chiefs of Staff shall review the promotion board results to determine if S-JDA performance was given appropriate consideration.

E11. ENCLOSURE 11

GENERAL AND FLAG OFFICER PROVISIONS¹

E11.1. FULL TOUR OF JOINT DUTY

The joint duty tour length requirement for general and flag officers (G/FOs) is at least 2 years (IAW section 664 of Reference (j) unless the DUSD(MPP) approves a tour length waiver or the incumbent departs due to reasons provided in Enclosure 7. Enclosure ~~14~~ 13 provides the tour length requirement for RC G/FOs who perform duties periodically in an S-JDA.

E11.2. G/FO JDA CREDIT

Joint duty credit begins to accumulate the day an officer is assigned to an S-JDA position. The officer's pay grade on departure from an S-JDA determines the type of joint credit the officer receives (G/FO or field grade credit). Officers who are O-7 selects (includes frocked O-7s) on departure from an S-JDA will only receive field grade credit. ~~Enclosure 13, award of joint duty credit for qualifying temporary JTF assignments, applies to G/FOs.~~

E11.3. PROMOTION PREREQUISITE

An officer on the active duty list may not be appointed to the grade of O-7 unless the officer has completed a full tour of duty in a JDA. IAW section 619a of Reference (j), an officer on the active duty list must have completed a JDA and be designated as a JQO (formerly known as a Joint Specialty Officer) in order to be eligible for appointment to the grade of O-7 after September 30, 2008. The Secretary of Defense may waive the JDA requirement, the JQO requirement, or both on a case-by-case basis for the following reasons:

E11.3.1. Good of the Service. When this waiver is granted, the first duty assignment as a G/FO must be to an S-JDA.

E11.3.2. Scientific and Technical. This waiver may be requested for an officer whose selection is based primarily on scientific and/or technical qualifications for which S-JDA positions do not exist. Officers holding one of the specialties listed in ~~subparagraphs E11.3.2.1. and E11.3.2.2. Table E11.1~~, may serve one broadening assignment, not to exceed 36 months, outside that field while in the grade of O-3 through O-5. With the exception of that one broadening assignment, officers receiving scientific and technical waivers must have served continuously in the specialized field or serve in an S-JDA before reassignment to any other general/flag officer non-scientific/non-technical position. Those categories are ~~as follows identified in Table E11.1 by service.~~

Table E11.1. Scientific and Technical Waiver Categories

	<i>Army</i>	<i>Navy</i>	<i>Marine Corps</i>	<i>Air Force</i>
<i>SCIENTIFIC</i>				
<i>Chemical</i>	<i>x</i>	<i>n/a</i>	<i>n/a</i>	<i>x</i>
<i>Oceanography</i>	<i>n/a</i>	<i>x</i>	<i>n/a</i>	<i>n/a</i>
<i>Weather</i>	<i>n/a</i>	<i>x</i>	<i>n/a</i>	<i>x</i>
<i>Engineer</i>	<i>x</i>	<i>n/a</i>	<i>x</i>	<i>x</i>
<i>Civil Engineer Corps</i>	<i>x</i>	<i>x</i>	<i>n/a</i>	<i>x</i>
<i>Engineering Duty Officer</i>	<i>n/a</i>	<i>x</i>	<i>n/a</i>	<i>x</i>
<i>Aeronautical Engineering Duty Officer</i>	<i>n/a</i>	<i>x</i>	<i>n/a</i>	<i>x</i>
<i>Scientific and Development Engineer</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>x</i>
<i>TECHNICAL</i>				
<i>Astronaut</i>	<i>n/a</i>	<i>x</i>	<i>n/a</i>	<i>x</i>
<i>Acquisition Professional Career Fields</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>
<i>Aviation Maintenance</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>
<i>Comptroller/Finance</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>
<i>Education & Training</i>	<i>x</i>	<i>x</i>	<i>n/a</i>	<i>n/a</i>
<i>Law Enforcement/Military Police</i>	<i>x</i>	<i>n/a</i>	<i>x</i>	<i>x</i>
<i>Missile Maintenance</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>x</i>
<i>Ordnance</i>	<i>x</i>	<i>n/a</i>	<i>x</i>	<i>x</i>
<i>Public Affairs</i>	<i>x</i>	<i>x</i>	<i>x</i>	<i>x</i>
<i>Research & Development Program Mgmt</i>	<i>x</i>	<i>n/a</i>	<i>n/a</i>	<i>x</i>

~~E11.3.2.1. Scientific:~~~~E11.3.2.1.1. Chemical:~~~~E11.3.2.1.2. Oceanography:~~~~E11.3.2.1.3. Weather:~~~~E11.3.2.1.4. Engineer:~~~~E11.3.2.1.4.1. Civil Engineer Corps:~~~~E11.3.2.1.4.2. Engineering Duty Officer:~~~~E11.3.2.1.4.3. Aeronautical Engineering Duty Officer:~~~~E11.3.2.1.4.4. Scientific & Development Engineer:~~~~E11.3.2.2. Technical:~~

~~E11.3.2.2.1. Acquisition Professional Career Fields.~~

~~E11.3.2.2.2. Aviation Maintenance.~~

~~E11.3.2.2.3. Comptroller/Finance.~~

~~E11.3.2.2.4. Education & Training.~~

~~E11.3.2.2.5. Law Enforcement/Military Police.~~

~~E11.3.2.2.6. Missile Maintenance.~~

~~E11.3.2.2.7. Ordnance.~~

~~E11.3.2.2.8. Public Affairs.~~

~~E11.3.2.2.9. Research & Development Program Management.~~

~~E11.3.2.2.10. Services.~~

E11.3.3. Professional. For an officer whose military occupational specialty is medical officer, dental officer, veterinary officer, medical service officer, nurse, biomedical science officer, chaplain, or Judge Advocate General officer.

E11.3.4. Serving In. ~~For an officer who is serving in an S-JDA for not less than 2 years during which time the officer is selected for promotion to the grade of O-7. Serving in waivers are no longer granted. An officer serving in a joint duty assignment at the time of selection to O-7, who is not a joint qualified officer, requires a Good of the Service waiver request from the Secretary of the Military Department concerned. If approved, the officer may be forwarded with the other officers selected by the promotion selection board. Officers not approved for a Good of the Service waiver will be returned to the Military Department concerned without action. If otherwise eligible, officers may be subsequently nominated for promotion once they receive the appropriate joint officer qualification or if additional substantive information warrants an earlier submission.~~

E11.3.5. S-JDA before January 1, 1987. For an officer who served in an S-JDA for at least 12 months that began before January 1, 1987.

E11.4. JQO DESIGNATION CRITERIA

The JQO designation criteria in Enclosure 3 apply.

E11.5. COS PROVISIONS

COS provisions do not apply to G/FOs.

E11.6. ATTENDANCE AT CAPSTONE

Officers on the active duty list selected for promotion to O-7 must attend the CAPSTONE course (a course at NDU designed to prepare O-7s to work in the joint environment) within approximately 2 years after the Senate confirms selection unless such attendance is waived *or deferred*. Officers may attend CAPSTONE as soon as their selection has been publicly announced. The Secretary of the Military Departments may request that the PDUSD(P&R), through the Chairman of the Joint Chiefs of Staff, waive *or defer* CAPSTONE attendance for the following reasons:

E11.6.1. If the officer's assignment immediately before selection to the grade O-7 was an S-JDA and the officer is thoroughly familiar with joint matters.

E11.6.2. When necessary for the good of the Service concerned.

E11.6.3. In the case of an officer whose selection for promotion is based on scientific and technical qualifications for which JDA positions do not exist.

E11.6.4. In the case of a medical officer, dental officer, veterinary officer, medical service officer, nurse, biomedical science officer, chaplain, or Judge Advocate General officer.

E11.7. POSITIONS WITH SPECIAL JDA AND JQO REQUIREMENTS

E11.7.1. To be appointed as Chief of a Military Service, the officer must have previously completed a full tour of duty in a JDA as a G/FO.

E11.7.2. To be appointed as the Vice Chairman of the Joint Chiefs of Staff, or as the Commander of a Combatant Command, the officer must have previously completed a full tour of duty in a JDA as a G/FO and be a JQO.

E11.7.3. To be appointed as the Chairman of the Joint Chiefs of Staff, the officer must have served as Vice Chairman of the Joint Chiefs of Staff, Chief of a Military Service, or as Commander of a Combatant Command.

E11.7.4. The President, in accordance with the applicable sections of Reference (j), may waive any of the requirements in paragraphs E11.7.1. through E11.7.3., if such action is in the national interest.

E11.8. EVALUATION OF SENIOR OFFICERS

The Chairman of the Joint Chiefs of Staff shall review the joint duty experience of each officer recommended for initial appointment to grade O-9 and O-10 and provide an evaluation of that officer's performance as a member of the Joint Staff and in other joint duty assignments through the Secretary of Defense to the President. The Chairman will also comment on and make recommendation on any waivers requested/required.

E11.9. G/FO PROMOTION OBJECTIVES

Promotion objectives in Enclosure 10 apply to O-7 and O-8 promotion selection board consideration and reporting.

E12. ENCLOSURE 12
REPORT REQUIREMENTS

E12.1. ANNUAL JOINT OFFICER MANAGEMENT REPORT TO THE CONGRESS

Not later than November 15 of each year, the Chairman of the Joint Chiefs of Staff shall, with the assistance of the Military Departments and using the JDAMIS, prepare for Secretary of Defense approval, the Joint Officer Management Annex to the Secretary of Defense Annual Report to the President and the Congress. The report includes the items specified in section 667 of Reference (j) and, after September 30, 2008, the following information, which is shown for the Department of Defense as a whole and separately for the Military Services, as follows:

E12.1.1. The number of RC officers, by grade, who have earned full joint credit from the retroactive joint credit opportunity described in Reference (k) as well as Enclosure 6 of this Instruction.

E12.1.2. The number of RC officers, by grade, who have completed AJPME.

E12.1.3. The number of AC and RC officers who have completed JPME Phase II via:

E12.1.3.1. JFSC.

E12.1.3.2. ICAF and NWC.

E12.1.3.3. A senior service college certified to award JPME Phase II.

E12.1.4. The number of officers, by component, designated in the previous FY as:

E12.1.4.1. LEVEL II Joint Qualified.

E12.1.4.2. LEVEL III, JQO.

E12.1.4.3. LEVEL IV Joint Qualified.

E12.1.5. The total number of officers, by component, holding:

E12.1.5.1. LEVEL II Joint Qualification.

E12.1.5.2. LEVEL III, JQO.

E12.1.5.3. LEVEL IV Joint Qualification.

E12.1.6. Other information, as required.

E12.2. ADDITIONAL REPORTS

With the advice and assistance of the Chairman of the Joint Chiefs of Staff, USD(P&R) shall submit additional reports, as required by the Congress.

E13. ENCLOSURE 13

JOINT DUTY CREDIT FOR CERTAIN JOINT TASK FORCE ASSIGNMENTS

E13.1. ELIGIBILITY CRITERIA

E13.1.1. General

~~E13.1.1.1. Section 664 of Reference (j) authorized the Secretary of Defense, with the advice of the Chairman of the Joint Chiefs of Staff, to award officers who serve in certain temporary JTF headquarters assignments, on a case-by-case basis, credit for completing a full JDA or credit countable for determining cumulative service in JDAs.~~

~~E13.1.1.2. Specific criteria for award of such credit is provided in paragraph E13.1.2, and applies uniformly to each Military Department.~~

~~E13.1.2. Specific. All of the following criteria must be met to be eligible for award of joint duty credit codified in section 664(i) of Reference (j):~~

~~E13.1.2.1. Must have been assigned to a temporary position on the headquarters staff of a qualifying U.S. JTF that is part of a Combatant Command or the U.S. element of the headquarters staff of a multi-national force. The JTF headquarters must be constituted or designated by the Secretary of Defense or by the commander of a Combatant Command or of another force. Duties performed must have:~~

~~E13.1.2.1.1. Been in support of a mission that is directed by the President or that was assigned by the President to the U.S. Forces in the JTF involved.~~

~~E13.1.2.1.2. Included the conduct of combat or combat-related operations in a unified action under joint or multi-national command and control.~~

~~E13.1.2.1.3. Provided the officer significant experience in joint matters equivalent to experience gained from assignment to an S-JDA position.~~

~~E13.1.2.2. Must have served at least 90 consecutive days in a qualifying JTF HQs assignment on or after February 10, 1996, except as noted below for four specific operations, and must be recommended for consideration by the Chairman of the Joint Chiefs of Staff.~~

~~E13.1.2.2.1. Operation Northern Watch, during the period beginning on August 1, 1992, and ending on March 20, 2003.~~

~~E13.1.2.2.2. Operation Southern Watch, during the period beginning on August 27, 1992, and ending on March 20, 2003.~~

~~E13.1.2.2.3. Operation Able Sentry during the period beginning on June 26, 1993, and ending on February 28, 1999.~~

~~E13.1.2.2.4. Operation Joint Endeavor during the period beginning on December 25, 1995, and ending on December 19, 1996.~~

~~E13.2. QUALIFYING JOINT TASK FORCE HEADQUARTERS ASSIGNMENTS~~

~~E13.2.1. The Chairman of the Joint Chiefs of Staff shall forward a list of officers in qualifying JTF HQs positions that meet the criteria in paragraph E13.1. to the USD(P&R) for approval.~~

~~E13.2.2. Officers who serve in approved qualifying JTF headquarters assignments shall receive cumulative joint duty credit on completion of at least 90 consecutive days in the position, 1 day of which must have been served on or after February 10, 1996. The Chairman of the Joint Chiefs of Staff shall update that joint duty credit in JDAMIS.~~

~~E13.3. JOINT OFFICER MANAGEMENT PROGRAM REPORTS AND REQUIREMENTS~~

~~Joint credit awarded under this enclosure is exempt from promotion reports, minimum tour length requirements, Military Service tour length averages, and assignment fill rates.~~

~~E14E13~~. ENCLOSURE 1413

RC OFFICER JOINT QUALIFICATION PROGRAM

Effective October 1, 2007, RC officers are provided a dual path to earn joint qualification – the S-JDA path and the E-JDA path. RC officers may become joint qualified under either path or a combination. Since most RC officers perform duty periodically in other than JDAL positions, they may find the E-JDA path a more practical means of achieving joint qualification. This enclosure is primarily applicable to RC officers who perform duty part-time in positions that are eligible for inclusion on the JDAL. RC officers who serve in a full-time capacity are mentioned only where appropriate in order to cross-reference to pertinent sections of this Instruction.

~~E14E13~~.1. E-JDA AND S-JDA APPLICABILITY TO RC OFFICERS

~~E14E13~~.1.1. E-JDA. The E-JDA path allows an officer to obtain joint qualification through periodic or temporary joint assignments – the typical way RC officers perform duty – and completion of the requisite joint education. The E-JDA criteria prescribed in paragraph E3.4. shall apply to ALL RC officers.

~~E14E13~~.1.2. S-JDA for RC Officers Who Perform Duty Full-Time. The S-JDA joint credit criteria prescribed in Enclosure 5 shall apply to RC officers who perform duty full-time while assigned to a JDAL position.

~~E14E13~~.1.3. S-JDA for RC Officers Who Perform Duty Periodically. RC officers who perform part-time duty generally do not gain sufficient joint knowledge and experience within the S-JDA tour length requirements described in Enclosure 7. Paragraph ~~E143~~.3. prescribes the criteria for these RC officers to earn full joint duty credit while assigned to a JDAL position.

~~E14E13~~.2. JOINT EDUCATION

~~E14E13~~.2.1. The provisions of paragraph E6.3. apply to RC officers whether performing joint duty periodically or in a full-time status. Completion of JPME Phase I and JPME Phase II, or AJPME in lieu of JPME Phase II, is required in order to meet the joint education criteria for joint qualification.

~~E14E13~~.2.2. RC G/FOs are strongly encouraged to attend CAPSTONE.

~~E14E13~~.3. S-JDA FOR RC OFFICERS WHO PERFORM DUTY PERIODICALLY

~~E14E13~~.3.1. JDAL Positions. RC positions that comply with paragraph E4.6. of this Instruction shall be added to the JDAL. Until such time as RC positions have been documented

on the JDAL, RC officers may receive joint credit using procedures promulgated by the Chairman of the Joint Chiefs of Staff.

~~E14E13~~3.2. Joint Duty Credit. Effective October 1, 2007, RC officers who perform duty periodically and are assigned to a JDAL position may have time credited toward joint duty in accordance with the criteria prescribed in this paragraph. Full joint tour credit eligibility requirements are as follows.

~~E14E13~~3.2.1. Officers O-6 and below must serve a cumulative total of 6 years in a JDAL position or positions. The minimum initial period of assignment to a JDAL position is 3 years. A joint tour length waiver must be requested in accordance with paragraph E7.4. if there is a need to depart prior to completing ~~the 6-year full~~ a 3-year S-JDA tour of duty.

~~E14E13~~3.2.2. G/FOs must serve a cumulative total of 4 years in an O-7 or above JDAL position or positions. The minimum initial period of assignment to a JDAL position is 2 years. A joint tour length waiver must be requested in accordance with paragraph E7.4. if there is a need to depart prior to completing ~~the 4-year full~~ a 2-year S-JDA tour of duty.

~~E14E13~~3.2.3. The minimum annual participation requirement while serving in a JDAL position is 66 days (typically 24 days of inactive duty training (e.g., 48 drill periods), 12 days of annual training, and 30 additional days of duty or any other combination of duty).

~~E14E13~~3.2.3.1. Annual participation accounting date shall be the anniversary date the officer first performed creditable duty in the JDAL position.

~~E-14E13~~3.2.3.2. Officers failing to meet the 66 day annual participation requirement may request their time served be accrued under the E-JDA path.

~~E14E13~~3.2.4. RC officers serving part-time in an S-JDA position may receive full tour credit in conjunction with joint tour length waivers for 58 months served (O-6 and below) and 38 months served (G/FOs).

~~E14E13~~3.2.5. RC officers in career fields designated as a COS (Enclosure 9) may depart from their first S-JDA without a joint tour length waiver and receive full tour credit provided they have served at least 58 months of the 6-year tour.

~~E14E13~~3.2.6. The criteria specified in paragraph E5.1.2. regarding an officer who serves in more than one JDAL position without a break between assignments shall apply.

~~E14E13~~3.2.7. RC officers serving part-time in an S-JDA position may be designated as Level II if they complete JPME I and receive full joint tour credit.

~~E14E13~~4. COMBINING S-JDA and E-JDA TO BECOME JOINT QUALIFIED

~~E14E13~~4.1. Time served in a JDAL position that is not sufficient to earn full joint duty credit may be accrued under the E-JDA path.

~~E14E13~~4.2. RC officers who meet the criteria established in paragraph E3.2. may earn designation as a Level I, II, III, or IV joint qualification via the S-JDA or E-JDA path.

~~E13~~5. MILITARY TECHNICIAN (MILTECH)/AIR RESERVE TECHNICIAN (ART) EXPERIENCES

RC officers serving in compatible MILTECH/ART Title 32 Excepted Civil Service positions, (Reference (q)) where the military position is on the JDAL will receive joint duty credit as if they were assigned to a full-time military S-JDA JDAL position. No retroactive credit is authorized; experience will be credited from January 1, 2010 and forward.

~~E13~~6. CREDIT FOR CIVILIAN EXPERIENCES

E13.6.1. Effective January 1, 2010, RC officers, who in their civilian occupation are employed by a Federal, State, or local Government agency, may apply for joint experience credit through the experience path, if the performance of their duties meets the definition of joint matters. The following rules apply.

E13.6.1.1. Up to 18 experience points may be accrued through civilian experiences and applied toward qualification as a JQO (9 points may applied toward Level II qualification, and 9 points applied to Level III for a total of 18 points towards JQO). The other 18 experience points must be accrued performing duties while serving as a military officer.

E13.6.1.2. No retroactive credit is authorized; experience will be credited from January 1, 2010, and forward.

E13.6.1.3. Documentation

E13.6.1.3.1. In addition to the Joint Experience Summary, officers must provide documentation detailing the dates of the joint experience that meets joint matters, percentage of time spent in joint duties, and the organization-specific duties performed.

E13.6.1.3.2. In the rare exception adequate documentation is not available, officers may submit a letter from the organization where their joint experience occurred (certified and signed by the G/FO or agency chief with personal knowledge of the experience). The letter must have inclusive dates of experience, percentage of time spent in joint duties, and the specific joint duties that meet the definition of joint matters the officer performed while serving in their civilian position.

~~E14~~*E13.57.* TEMPORARY RETROACTIVE PROVISIONS

Criteria for retroactive eligibility for award of joint duty credit for service in qualifying joint assignments and joint experiences are provided in paragraphs E5.8. and E6.4., respectively.