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**CJCSI 1330.05C
19 July 2024**

**JOINT OFFICER
MANAGEMENT PROGRAM
PROCEDURES**



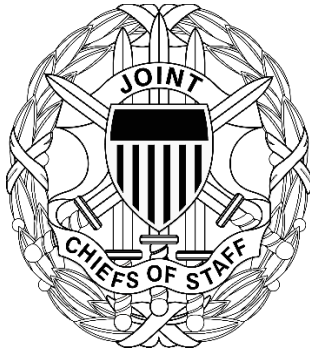
**JOINT STAFF
WASHINGTON, D.C. 20318**

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JOINT OFFICER MANAGEMENT PROGRAM PROCEDURES

References:

See Enclosure M

1. Purpose. This instruction establishes procedures and responsibilities for implementation of the Department of Defense (DoD) Joint Officer Management (JOM) and Joint Qualification System (JQS) for Active Component (AC) and Reserve Component (RC) officers.

2. Superseded/Cancellation. Chairman of the Joint Chiefs of Staff (CJCS) Instruction (CJCSI) 1330.05B, 6 July 2020, "Joint Officer Management Program Procedures," is hereby superseded.

3. Applicability

a. This instruction applies to the DoD Office of the Inspector General, the Joint Staff, CJCS-Controlled Activities (CCAs), Service Departments, Combatant Commands (CCMDs), Defense Agencies, jointly manned activities, DoD Field Activities, U.S. Elements of Combined Commands, and Military Department (MILDEP) Elements of U.S. Government Agencies outside the DoD.

b. This instruction applies to all commissioned military officers in grades O-6 and below, except as follows:

- (1) Warrant officers.
- (2) Retired commissioned officers.
- (3) Officers of the Coast Guard.
- (4) Officers of the United States Public Health Service.
- (5) Officers on an inactive status list.

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(6) Officers in the Retired Reserve.

c. Reference (c) applies to the management of General Officer/Flag Officer (GO/FO) positions and provides procedures for requesting changes to GO/FO positions, joint qualifications for GO/FO personnel, and procedures relating to O-7 and O-8 promotion selection boards. Appropriate GO/FO data from the Special Assistant for General/Flag Officer Matters is incorporated into the Joint Duty Assignment (JDA) List (JDAL) (Enclosure D) for production, uploaded into the Joint Duty Assignment Management Information System (JDAMIS) (Enclosure C) and included in the Annual JOM Report to the Under Secretary of Defense for Personnel and Readiness (USD(P&R)) (Enclosure L).

4. Policy. JQS operationalizes the JOM statutes and policies in references (b) and (c) and is intended to further enhance the goals and objectives of the *Goldwater-Nichols Act of 1986*, as amended. The objective of JQS is to ensure systematic, progressive, career-long development of officers in joint matters, ensuring that officers serving in joint assignments have the requisite experience and education to be highly proficient in joint matters as directed in title 10, U.S. Code, Chapter 38.

5. Definitions. See Glossary.

6. Responsibilities. Responsibilities for JOM and JQS are provided in Enclosure A. Specific procedures relating to JOM and JQS are provided in Enclosures B through L.

7. Summary of Changes. This document has been extensively rewritten and differs markedly from CJCSI 1330.05B. It should be read in its entirety to ensure users understand all applicable changes.

a. Enclosures have been reorganized for readability. Reference the Enclosures section listed below prior to reading.

b. JDAMIS process and procedures have been integrated into each enclosure. Prior references to emails or other manual processes have been replaced with JDAMIS system automation.

c. The JDAL (Enclosure C) and Experience-Based Joint Duty Assignments (E-JDAs) (Enclosure F) have been updated to provide clarity on submission requirements.

8. Releasability. UNRESTRICTED. This directive is approved for public release; distribution is unlimited on the Non-classified Internet Protocol Router

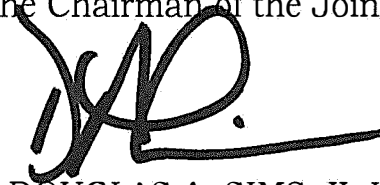
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Network. DoD Components (to include the CCMDs), other Federal agencies, and the public may obtain copies of this directive through the Internet from the CJCS Directives Electronic Library at <<http://www.jcs.mil/library>>. Joint Staff activities may also obtain access via the SECRET Internet Protocol Router Network directives Electronic Library web sites.

9. Effective Date. This INSTRUCTION is effective upon signature.

For the Chairman of the Joint Chiefs of Staff:

A handwritten signature in black ink, appearing to read 'DAS', with a long horizontal stroke extending to the right.

DOUGLAS A. SIMS, II, LTG, USA
Director, Joint Staff

Enclosures:

- A – Joint Officer Management and the Joint Qualification System
- B – Joint Duty Assignment Management Information System
- C – Joint Duty Assignment List
- D – Joint Duty Credit for Standard Joint Duty Assignment
- E – Tour Length Requirements and Early Releases
- F – Experience-Based Joint Duty Assignments Process and Procedures
- G – Discretionary Points
- H – Joint Professional Military Education Management Requirements
- I – Joint Qualifications
- J – Promotion Selection Board Requirements
- K – Reserve Promotion Selection Board Requirements
- L – Annual Joint Officer Management Report to the Under Secretary of Defense for Personnel and Readiness
- M – References

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ENCLOSURE A

JOINT OFFICER MANAGEMENT AND THE JOINT QUALIFICATION SYSTEM

1. Introduction

a. The JQS operationalizes the JOM statutes as described in reference (a), policy as described in references (b) and (c), and is intended to further enhance the goals and objectives of the *Goldwater-Nichols Act of 1986*, as amended. It acknowledges joint matters experience, considers the environment in which officers gain the experience and includes three qualification levels that encompass joint experience throughout an officer's career. JQS provides equal opportunity for AC and RC officers to attain joint qualifications.

b. The objective of the JQS is to ensure the systematic, progressive, career-long development of officers in joint matters, ensuring that officers serving in joint assignments have the requisite experience and education to be highly proficient in joint matters as directed in title 10, U.S. Code, Chapter 38. Joint matters experience and education must be updated accurately and punctually in JDAMIS to enable joint and Service command monitoring and utilization.

c. Joint matters apply equally to Standard Joint Duty Assignments (S-JDAs) and E-JDAs for the AC and RC, and are founded in law, doctrine, and policy. Only positions where the preponderance of an officer's duties provide significant experience in joint matters can result in joint credit. Title 10, U.S. Code, Chapter 38 defines joint matters as follows:

(1) Matters related to any of the following:

(a) The development or achievement of strategic objectives through the synchronization, coordination, and organization of integrated forces in operations across domains, such as land, sea, air, space, or the information environment, including matters relating to any of the following:

1. National Military Strategy.
2. Strategic planning and contingency planning.
3. Command and control (C2), intelligence, fires, movement and maneuver, protection, or sustainment of operations under unified command.
4. National security planning with other departments and agencies of the United States.

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5. Combined operations with military forces of allied nations.

(b) Acquisition matters conducted by members of the armed forces and covered under title 10, U.S. Code, Chapter 87 of this title involved in developing, testing, contracting, producing, or fielding of multi-Service programs or systems.

(c) Other matters designated in regulation by the Secretary of Defense (SecDef) in consultation with CJCS.

(2) In the context of joint matters, the term “integrated forces” refers to military forces that are involved in achieving unified action with participants from:

(a) More than one MILDEP.

(b) A MILDEP and one or more of the following:

1. Other departments and agencies of the United States.

2. The military forces or agencies of other countries.

3. Non-governmental persons or entities.

d. The achievement of unified action is further clarified in joint doctrine as shown in Figure 1 and reference (g). E-JDA and S-JDA experience occurs while performing joint matters duties at the strategic or operational levels.



Figure 1. National Strategic Direction

2. Responsibilities

a. CJCS is responsible for the administration and execution of the DoD JOM and JQS.

(1) The Special Assistant for GO/FO Matters will:

(a) Maintain currency and accuracy of all GO/FO positions on the JDAL.

(b) Maintain currency and accuracy of all GO/FO positions in the Fourth Estate Manpower Tracking System (FMTS) and review all requested GO/FO changes to FMTS.

(c) Process all required waivers for GO/FOs.

(d) Process joint qualification designation requests for GO/FOs.

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(e) Ensure all GO/FO JDAMIS transactions have been entered, to include S-JDA, E-JDA, joint education, JQ levels, and joint waivers.

(f) Provide GO/FO input for CJCS's input to the Annual JOM Report, sent to USD(P&R), to include GO/FO promotion statistics.

(g) Process all joint actions required for O-7 and above promotion boards.

(2) The Joint Staff Director for Manpower and Personnel, J-1 (DJ-1) will:

(a) Develop and implement procedures to comply with DoD policy for JOM and the JQS program for officers in grades O-6 and below.

(b) Develop and maintain procedures to ensure the MILDEPs comply with statutory and DoD policy standards for the JQS.

(c) Review and recommend JDAL changes to USD(P&R).

(d) Review and approve joint experience credit requests for O-6s and below.

(e) Review, update, and publish the JDAL annually.

(f) Manage the JDAMIS.

(g) Manage the joint qualification designation process for Level III and recommend approval to USD(P&R).

(h) Monitor Military Service promotion results of Joint Qualified Officers (JQOs) and Joint Staff officers in JDAs ensure appropriate consideration is given based on their performance in a joint capacity.

(i) Review Military Service requests for DoD JOM program waivers and make recommendations on such requests to CJCS or USD(P&R), as appropriate.

(j) Serve as board secretariat for boards convened by the USD(P&R) on management of officers under the DoD JOM program.

(k) Provide policy guidance governing joint representation and analytical review of O-4 through O-6 promotion selection boards.

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(l) Periodically review officer personnel assignment, promotion, and retention policies of the MILDEPs to ensure appropriate consideration is given to the performance of officers serving in Joint Staff JDAs or holding JQO designation.

(m) Conduct JDAL Revalidation Boards.

(n) Monitor Military Service compliance with Joint Professional Military Education (JPME) requirements, to include statutory JPME Phase II outplacement requirements.

(o) Prepare data for the JOM Annual Report to USD(P&R).

(3) The Joint Staff Director for Joint Force Development, J-7 (DJ-7) will:

(a) Certify joint training courses and associated point values for courses that contribute to an officer's expertise in joint matters.

(b) Identify, maintain, and publish a list of joint exercises that have direct relevance to the definition of joint matters at least annually.

(c) Establish policy and guidance, with the assistance of the Military Services, for JQO career development to ensure quality officers are educated and trained in joint matters in accordance with (IAW) reference (b).

(d) Provide to Joint Staff J-1/JOM the academic year JPME Phase II course start/stop dates as published to update in JDAMIS.

b. USD(P&R) is responsible for assisting DJ-1 in maintaining and updating the JDAMIS.

c. Secretaries of the MILDEPs will:

(1) Publish regulations, policies, and procedures to institute program management that ensures compliance with relevant statutes and DoD policies and this instruction regarding JOM and the JQS.

(2) Ensure joint assignment practices are IAW title 10, U.S. Code, section 664; DoD policy; and this instruction.

(3) Develop and implement policies and procedures to ensure that quality officers, who are adept at their Service core competencies, are assigned

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to the Office of the Secretary of Defense (OSD), the Joint Staff (reference (f)), CCMD headquarters (HQ), and Defense Agency HQ.

(4) Monitor and manage the careers of JQOs and officers who are serving or have served on the Joint Staff in JDAs.

(5) Ensure appropriate assignment of JQOs to critical (Level III) S-JDAs.

(6) Ensure the officers designated as JQOs or assigned to the Joint Staff in JDAs are of such quality that the Service can meet the statutory joint promotion objectives.

(7) Support boards or panels convened by USD(P&R) or the Joint Staff to manage officers under the DoD JOM program.

(8) Develop procedures to fulfill statutory and CJCSI guidance governing O-4 through O-6 promotion selection boards, to include joint representation, appropriate consideration, and analytical review of these board results.

(9) Screen officer E-JDA self-nomination to ensure only those meeting the joint matters definition are nominated to the Joint Staff for adjudication.

(10) Nominate to USD(P&R), through DJ-1, officers meeting the prerequisite joint qualification criteria for designation as a joint qualified Level III.

(11) Update, monitor, and track Joint Qualification Levels II and III in Service personnel systems.

(12) Ensure that assignment practices result in the MILDEP meeting the JPME outplacement requirements specified in title 10, U.S. Code, section 663 and reference (d).

(13) Manage and submit required JOM program waivers.

(14) Ensure all joint transactions are entered accurately and within 30 days of occurrence in JDAMIS and Service personnel systems.

(15) Ensure appropriate internal controls are in place to prevent officers from departing S-JDAs without appropriate authorization.

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(16) Ensure RC officers ordered to part-time JDAL positions understand the annual certification process and requirements.

(17) Submit required certification to the Joint Staff for the Annual Report to USD(P&R).

d. Heads of DoD Components will:

(1) Propose additions, deletions, and changes to the JDAL in coordination with the Military Services.

(2) Not reassign officers filling S-JDAs to non-S-JDAs, or JQOs filling critical (Level III) S-JDAs, without prior coordination with the respective Military Service.

(3) Monitor assignment actions to ensure organizational stability is maintained.

(4) Ensure officers do not depart S-JDAs early without appropriate authorization.

(5) Ensure complete and timely submissions of the organization's JDAL positions when scheduled for the JDAL revalidation.

(6) Ensure the performance of joint matters is documented in officer's performance reports.

(7) Inform officers in part-time Reserve JDAL positions of the requirement for them to submit certification documentation annually and certify officers annually with the number of days performed by part-time RC officers into JDAMIS. The joint organization must complete this certification within 30 days following the officer's anniversary date. The annual participation accounting date will be the anniversary date the officer was assigned to the JDAL position.

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ENCLOSURE B

JOINT DUTY ASSIGNMENT MANAGEMENT INFORMATION SYSTEM

1. Joint Duty Assignment Management Information System Overview.

JDAMIS is an automated management information system and database maintained by the Defense Manpower Data Center (DMDC) and managed and updated by the Joint Staff, Military Services, and joint organizations. JDAMIS is the permanent system of record for all JOM-related matters. JDAMIS supplements existing Military Service manpower and personnel information systems by providing automated files reflecting the approved JDAL and personnel data on officers with joint qualifications and other officers who have served or are serving in S-JDA positions, have completed E-JDA experiences, or JPME status. Current and historical JDAMIS data files are used to manage, analyze, and oversee the JOM Program. It is also used to prepare the Annual JOM Report to USD(P&R). The position management file in JDAMIS constitutes the official statement of current and historical S-JDA positions and will be modified only with USD(P&R) approval or other authority as provided by OSD.

2. Users. All users are responsible for validating the accuracy of transactions against the appropriate Service personnel system or other source documents. Individuals completing a transaction are certifying the data as complete and accurate. JDAMIS is the permanent joint database of record; erroneous or incomplete data is not acceptable. Joint transactions should be entered immediately, but no later than (NLT) 30 days after occurrence.

a. The Joint Staff uses JDAMIS to monitor and manage the overall JOM program.

b. Military Services use JDAMIS to update, track and manage officers in S-JDAs, designate JPME status, validate information for waivers, conduct promotion board reviews, and manage joint qualification points and joint qualification levels.

c. CCMDs, Fourth Estate joint organizations, U.S. Elements of Combined Commands, and MILDEP Elements of U.S. Government Agencies outside DoD use JDAMIS to monitor JDAL positions and the personnel assigned to those positions. Organizations with RC part-time S-JDA positions use JDAMIS to certify time served by RC personnel in those positions.

3. System Attributes. JDAMIS is made up of two sections: Manpower and Personnel. The JDAL is maintained in the Manpower section and personnel

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transactions are completed and maintained in the Personnel section. Each section has its own series of processes and reports.

4. Access. Requests for access must be submitted by the requesting activity to the Joint Staff J-1, using the System Authorization Access Request, DD Form 2875, and Privilege Request Sheet. Authorized activities will identify a minimum of two primary and alternate user access managers to establish procedures to grant access to users within their organization; additional users may be granted access following procedures outlined by their organization. When submitting for access, the request must indicate who the new user is replacing (if not in addition to current users), so the user's access can be removed. Authorized activities must inform the Joint Staff J-1 when users no longer require access or leave the authorized activity. The Joint Staff reserves the right to revoke individual user access.

5. Classification. JDAMIS is an UNCLASSIFIED system. Users must not enter any classified data into the system and will protect Personally Identifiable Information data at all times.

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ENCLOSURE C

JOINT DUTY ASSIGNMENT LIST

1. Introduction. The JDAL is a list of SecDef-approved S-JDA positions for the AC and RC where an officer gains significant experience in joint matters. Successful completion of an assignment in one of these positions is the primary path towards completing experience criteria for designation as a Level III JQO. Although the JDAL contains positions in grades O-4 through O-10, this Enclosure specifically covers the management of grade O-4 to O-6 positions. Reference (c) discusses the management of grade O-7 through O-10 positions.

2. Joint Duty Assignment List. The JDAL is the position management file of JDAMIS and is managed by the Joint Staff J-1. Only permanent positions at the O-4 grade and above, in which a preponderance of the position's duties meet the title 10, U.S. Code, section 668 definition of joint matters, may be designated as JDAL positions.

a. Each JDAL position resource identification code (reference (h)) details the Service and component responsible for filling the position. Reserve officers performing full-time military duty can encumber JDAL positions coded for active duty (AD), but AD and full-time reserve officers cannot encumber positions coded as part-time reserve positions.

b. The categories of positions considered for inclusion on the JDAL are among the following:

(1) Office of the Secretary of Defense Positions. The incumbents of these positions are responsible for developing and promulgating policies in support of national security objectives.

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

(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 C2 of combat operations under a CCMD.

(4) Defense Agency and Department of Defense Field Activity Headquarters Positions. The incumbents of these positions are involved in

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developing and distributing joint policy, strategic plans, and contingency plans relating to national military strategy.

(5) Organizational. These are positions other than those in OSD, the Joint Staff, CCMD HQ Positions, or Defense Agencies and DoD Field Activities) HQ Positions. The incumbents of these positions must be involved with matters related to the development or achievement of strategic objectives through the synchronization, coordination, and organization of integrated forces in operations conducted across domains such as land, sea, air, space, or 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.

(6) Dual-Hat Positions. A dual-hat position is one in which the incumbent officer has responsibilities to both that officer's Military Service and a joint, combined, or international organization or activity. An example would be an officer with duties both in a CCMD and one of its Military Service component commands. If the Service component command carries the position as its authorization, the joint command will reflect it as unfunded in the Joint Table of Distribution (JTD) and the incumbent is not eligible for joint duty credit as an S-JDA.

c. Automatic Joint Duty Assignment List Inclusion. All permanent and funded AD and full-time reserve positions in the grades of O-5 and O-6 with non-professional, non-technical, and non-scientific skill codes in OSD, the Joint Staff, and CCMD HQ are automatically included on the JDAL. These positions will continue to be reviewed by Joint Staff JOM during the change manpower package process to ensure automatic inclusion eligibility. These positions do not need to be submitted during the revalidation cycle. Refer to the respective Military Services' Skill Code Category listings to identify professional, technical, and scientific skill codes.

d. Positions Specifically Excluded from the Joint Duty Assignment List

(1) Student assignments for joint training and education.

(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 integration of those capabilities.

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(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.

(4) Positions/assignments within an officer's own MILDEP.

(5) Positions requiring grades of O-3 and below.

(6) Temporary, overage, or unfunded positions.

3. Critical (Level III) Standard Joint Duty Assignment Positions. "Critical" is a formal designation for positions in which the duties and responsibilities require, or would be greatly enhanced by, an officer previously experienced, trained, and educated in joint matters.

a. Only positions requiring grades O-5 and above will be designated as Critical (Level III) S-JDAs.

b. Critical (Level III) S-JDAs must be filled by JQ Level III (JQO) officers unless waived by the CJCS.

c. The heads of joint activities must identify positions that meet the criteria of critical (Level III) S-JDAs and recommend to the DJ-1 that they be designated critical (Level III) S-JDAs. With the assistance of the DJ-1, the SecDef (delegated to the USD(P&R) by reference (b)) designates critical S-JDAs IAW title 10, U.S. Code, section 661.

d. Joint activities must regularly review their critical position needs to ensure sufficiency in number, appropriateness of selection, and appropriate balance among the Military Services and across skill lines (i.e., the Military Service representation of critical (Level III) S-JDA positions should approximate the overall Military Service representation of the S-JDA positions). Critical positions are not necessarily the most key and essential S-JDA positions within an activity, although that may be the case.

e. If the number of critical (Level III) S-JDAs is determined to be insufficient to meet DoD mission requirements, the DJ-1 will coordinate with the heads of joint activities to identify additional positions that meet the definition of a critical (Level III) S-JDA.

f. Position redesignations may occur when the duties and responsibilities of the position change and impact the requirement for an incumbent to be

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previously educated and experienced in joint matters. A change in incumbents is not a basis for changing the position designation. Stability is essential to the Military Services' production and maintenance of sufficient numbers of JQOs per career area. Requests for redesignations must be submitted to a JDAL validation board. The heads of joint activities, on a case-by-case basis, can request an exception to policy from the DJ-1 to remove the critical designation outside of the JDAL Validation board process.

g. The Joint Staff J-1 will ensure the critical designation for each position is coded in JDAMIS.

4. Critical (Level III) Standard Joint Duty Assignment Joint Qualified Officer Qualification Waiver. Requests to fill a critical (Level III) S-JDA with a non-JQO officer shall be fully justified and must be approved by the Director, Joint Staff. JQO qualification waivers are considered on a case-by-case basis and should only be requested by exception. JQO qualification waiver requirements apply equally to AC and RC officers.

a. JQO qualification waivers must be approved prior to a non-JQO being assigned to a critical position. Services will ensure appropriate internal controls are in place to prevent non-qualified officers from being assigned to critical positions. JDAMIS will not accept transactions to log non-JQOs into critical (Level III) positions unless an approved JQO qualification waiver is reflected in JDAMIS.

b. Waiver requests to assign non-JQOs to critical positions are initiated by the Military Service. Secretaries of the MILDEPs may exercise disapproval authority or delegate disapproval authority. Waiver requests will be submitted using the JMIS waiver request module and formats as specified in Appendix A. Waivers not in compliance will be returned without action for Service correction and resubmission.

c. Additional JQO qualification waiver processing requirements:

(1) Complete waiver packages, to include the GO/FO cover memorandum, are submitted in the JMIS waiver request module.

(2) Officers without JPME Phase II are to be scheduled for a course prior to or within 1 year after arriving in their joint tour. The GO/FO cover memo must outline current attendance or provide the specific course date of future attendance.

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(3) A memorandum from the gaining joint activity agreeing to accept a non-JQO to a critical position, under a GO/FO or senior executive service (SES) signature block, must be obtained by the Service and included in the waiver package using the formats at Appendix B to this Enclosure. For officers who will attend JPME Phase II after arrival at the joint activity, the acceptance memorandum must indicate that the activity agrees to release the officer for scheduled JPME Phase II attendance and include the specific course date. The gaining joint activity memorandum must also specify whether the current incumbent in the position received a JQO qualification waiver.

(4) Waiver packages must provide complete justification for filling a critical position with a non-JQO to include the specific skills and experiences that demonstrate the officer's ability to operate effectively in the nominated position in a joint environment. Include the size of Service inventory of JQOs in the required specialty and a comment on the personnel management practices or issues that prevent assignment of a JQO to the critical position. Include the Services' total number of critical positions and total number of officers assigned to those positions, identifying which officers are JQO and which officers are non-JQO.

(5) Waiver packages will include the officer's career brief.

(6) Services will submit waivers to reach the Joint Staff a minimum of 90 days prior to requested report date. Services will not release orders prior to waiver approval. A planning factor of at least 120 days prior to departure date should, in most cases, support in-hand orders to the officer by 60 days prior to the reporting date. Waiver requests submitted less than 90 days in advance of the desired report date will include a full explanation for the late submission as part of the GO/FO or SES cover memorandum.

5. Standard Joint Duty Assignment Fill Requirements. IAW title 10, U.S. Code, section 661, the Military Services will ensure that at least 50 percent of S-JDAs in grades O-5 and above are filled by officers who have the appropriate level of joint qualification.

6. General Officer/Flag Officer Positions. The Special Assistant for GO/FO Matters handles all GO/FO actions IAW procedures established by reference (c). As such, GO/FO Matters is responsible for maintaining currency with the GO/FO positions on the JDAL. GO/FO Matters will use USD(P&R)-approved JDAL position changes as authority to initiate adding or deleting position information in JDAMIS. During JDAL production, GO/FO Matters will include a production submission to DMDC.

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7. The Joint Duty Assignment List Validation Process

a. The primary purpose of the JDAL validation process is to revalidate existing JDA positions, as well as to validate positions nominated by joint organizations for addition to, change, or deletion from the JDAL as outlined in reference (b). The JDAL validation process does not apply to positions qualifying for automatic JDAL inclusion as referenced in paragraph 2.c. of this Enclosure. DJ-1 is responsible for ensuring all positions on the JDAL meet the definition of joint matters.

b. Additionally, joint organizations and DJ-1 are responsible for revalidating JDAL positions every 5 years. Joint Staff J-1 will achieve this through periodic internal reviews as well as from the JDAL Validation Process. Joint Staff J-1 will also identify which positions will be reviewed internally and which positions will require review from the JDAL validation board process for revalidation. Joint Staff J-1 will be required to perform internal periodic reviews, as needed, of the JDAL, in whole or in part, to ensure joint positions continue to meet the joint matters definition standards. Joint Staff J-1 will also be required to conduct a minimum of one JDAL Validation Board annually. DJ-1 will include the number of positions validated and revalidated throughout the fiscal year (FY) in the Annual JOM report.

c. Joint Duty Assignment List Validation Board Procedures. The following procedures apply to S-JDAs, unless otherwise noted.

(1) Joint Staff J-1 will publish annually the convening dates for each JDAL board scheduled for that year.

(2) NLT 2 months prior to each scheduled JDAL Validation board, Joint Staff J-1 will provide joint activities and Military Services a JDAL Validation Package format and standards guide.

(3) The Joint Staff J-1 will provide a list of positions requiring revalidation NLT 2 months prior to each scheduled board for identified joint activities. Any joint activity may submit new positions, or proposed changes to positions (e.g., change to duties and responsibilities), to be considered for approval for any scheduled JDAL Validation Board.

(4) All proposed JDAL changes/additions shall be submitted to the Joint Staff J-1. IAW the JDAL Validation Package format and standards guide, activities will prepare and submit packages with the required information in the Joint Staff J-1-specified format, to include, at a minimum:

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- (a) Organization/mission description or charter.
 - (b) A diagram of the organization's structure.
 - (c) The individual position description (PD).
 - (d) The JDAL organization position ID listed in JDAMIS.
 - (e) The Service specific position identifier (e.g., for Navy, the billet identification number).
 - (f) The joint manpower document reflecting the funded authorization which shows the authorization does not reside within the incumbent's MILDEP.
 - (g) A O6 or GS15 nomination memorandum stating that nominated positions meet requirements outlined in law and policy.
- (5) Joint Staff, J-1 will screen all submissions to ensure the positions meet the requirements listed in this enclosure and notify the owning organization of positions that are incomplete or ineligible. Eligible positions will be submitted to the JDAL Validation Board for consideration and voting.
- d. Upon board completion, Joint Staff J-1 will consolidate the board's recommendations and provide the Services a courtesy copy. The Joint Staff J-1 will then forward the board's recommendations to DJ-1 for endorsement, who then forwards to USD(P&R) for final approval. Once approved, the Joint Staff J-1 will forward the results to the Services for Service GO/FO or SES acknowledgement.
- e. Joint Duty Assignment List Validation Board Implementation and Position Start Dates. On behalf of CJCS, the Joint Staff J-1 will notify activities of the board results upon USD(P&R) final approval.
- (1) The effective start date of new JDAL positions approved by USD(P&R) for addition to the JDAL will be the date DJ-1 signed the memorandum endorsing the board results. For currently encumbered positions, as long as the incumbent was serving in the position at the time the DJ-1 memorandum was signed, the Joint Tour Start Date will be the date the incumbent reported to the position.
- (2) Once a position is approved, S-JDA status is associated with the specific validated position. Any significant change to the PD, including primary

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skill or associated duties, may result in the termination of the S-JDA status and require the activity to submit a new JDAL Validation Package for board consideration.

f. Joint Duty Assignment List Validation Board Implementation and Position Stop Dates

(1) Positions removed from the JDAL will be stopped with an effective date matching the date USD(P&R) approves the JDAL Validation Board results.

(2) Military Services will not place an officer into a position in JDAMIS that is being coded for deletion unless approved by the Joint Staff J-1.

(3) Officers serving in “stopped” positions on or before the effective stop date will continue to accrue JDAL time until their tour is complete.

(4) Officers selected to serve in “stopped” positions will accrue JDAL time for the duration of their tour if they were placed on orders before the stop date and have a report date within 6 months of the stop date. The incumbent’s reporting date will be considered the tour start date.

(a) Services must notify the Joint Staff J-1 of officers in this category not later than 60 days after the board result release.

(b) Once the Service submission is validated, Joint Staff J-1 will make provisions for the officer to be entered in the stopped JDAL position.

(5) Officers selected to serve in “stopped” positions will not accrue JDAL time for their tour if they are placed on orders after the stop date.

8. Joint Duty Assignment List Review. IAW reference (b), JDAL positions will be reviewed and revalidated within a 5-year timeframe. This review will be conducted via a published schedule in conjunction with the JDAL Validation Board as well as with Joint Staff, J-1 internal reviews. Positions not revalidated within 5 years will be removed from the JDAL upon release of the board results for which the position should have been considered.

9. Joint Duty Assignment List Production. The Joint Staff J-1, working with DMDC, will produce a master JDAL at least annually. The JDAL itself is a point-in-time master list of all valid S-JDA positions.

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10. Additions and Deletions to Joint Duty Assignment Management Information System. The Joint Staff J-1 will ensure currency in JDAMIS as follows:

a. The Joint Staff J-1 will ensure USD(P&R)-approved JDAL Validation Board results are loaded into JDAMIS.

b. Organizations that use FMTS are responsible for updating position attributes while the Joint Staff J-1 updates JDAL specific information within FMTS to ensure accurate position data. If funding from a JDAL position is used as the offset for a nominative or rotational JDAL position, the joint organization must specify this in the “remarks” section in the description tab of the Position Data screen. The position used as the offset will retain its JDAL status unless it remains unfunded for more than 3 years.

c. Organizations not required to use FMTS, but with positions affected by the JDAL Validation Board, will forward position information in the Billet Master File format, as described in reference (i), to the Joint Staff, J-1. To ensure assigned officers correctly receive joint credit for their service, all fields in the billet master file format must be reported. Joint Staff, J-1 will review and validate these documents and forward to DMDC for processing and uploading into JDAMIS.

d. Joint Duty Assignment List Designation Removal

(1) The Military Services and joint organizations are notified that positions’ JDAL designation are being removed.

(2) The Joint Staff J-1 will remove from the JDAL any position that does not have an incumbent entered into JDAMIS for 5 years.

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APPENDIX A TO ENCLOSURE C

JOINT QUALIFIED OFFICER QUALIFICATION WAIVER FORMAT
(SERVICE INITIATED)

SERVICE LETTERHEAD

MEMORANDUM FOR CHAIRMAN OF THE JOINT CHIEFS OF STAFF

SUBJECT: Waiver Request for a non-Joint Qualified Officer to Fill a Critical (Level III) S-JDA: RANK, NAME

1. This memorandum is forwarded to request a waiver for RANK NAME, CAREER SPECIALTY, a non-JQO, to fill a critical (Level III) S-JDA as the DUTY TITLE, JOINT ACTIVITY. This is JDAL position number ### that requires a GRADE, CAREER SPECIALTY. The projected report date is DATE. RANK NAME's career brief is attached. JOINT ACTIVITY acknowledges this officer is not a JQO and agreed on DATE to accept him/her for the critical billet.
2. Include information on JPME Phase II attendance: RANK NAME completed COURSE NAME on DATE; or RANK NAME will attend COURSE NAME on DATE enroute to this assignment; or RANK NAME will attend COURSE NAME on DATE following arrival to this assignment. As outlined in the attached memorandum, JOINT ACTIVITY has agreed to release this officer to attend JPME Phase II.
3. Provide complete justification for filling a critical position with a non-JQO, to include the specific skills and experiences that demonstrate the officer's ability to operate effectively in the nominated position in a joint environment. Also include the size of Service inventory of JQOs in the specialty and a comment on the Service personnel management practices/issues that prevent assignment of a JQO to the critical position.
4. Waiver requests submitted to the Joint Staff less than 90 days in advance of the requested report date will include a full explanation for the late submission as part of the GO/FO memorandum.
5. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

Enclosures:

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Enclosure C

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APPENDIX B TO ENCLOSURE C

GAINING JOINT ACTIVITY MEMORANDUM OF ACCEPTANCE FORMAT

GAINING JOINT ACTIVITY LETTERHEAD

MEMORANDUM FOR SERVICE HEADQUARTERS

SUBJECT: Acceptance of a non-JQO to Fill a Critical Position: RANK NAME

1. NAME OF GAINING JOINT ACTIVITY agrees to accept RANK NAME, a CAREER SPECIALTY non-JQO, to fill the critical position JDAL POSITION NUMBER, DUTY TITLE that requires a GRADE, CAREER SPECIALTY.
2. If the officer will attend JPME Phase II after arrival to the joint activity include a comment: NAME OF GAINING JOINT ACTIVITY agrees to release RANK NAME to attend COURSE NAME on DATE.
3. The gaining joint activity memorandum must also specify whether the current incumbent in the position received a JQO qualification waiver.
4. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

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Appendix B
Enclosure C

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ENCLOSURE D

JOINT DUTY CREDIT FOR STANDARD JOINT DUTY ASSIGNMENT

1. Joint Duty Credit. AC and RC officers must be assigned to a JDAL position to receive joint duty credit under the “traditional” JDA path. Military Services enter officers into and out of S-JDA positions in JDAMIS and their respective Service personnel systems within 30 days of occurrence. Data accuracy affects assignment fill rates, approval of joint qualification designation levels, minimum tour length requirements, promotion board requirements, and the annual JOM Report to USD(P&R). AC and full-time RC officers serving in an S-JDA position must complete the statutory tour length.

a. An officer’s joint duty credit from assignment in a JDAL position is calculated based on the time between the effective date the officer arrived in the JDAL position and the effective date the officer departed from the JDAL position. Assignment to different JDAL positions with no break in time may be counted as one continuous tour of duty to meet minimum tour length requirements and requires the Services to appropriately enter the incumbent transactions in JDAMIS.

b. 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, will not exceed 90 days. After 90 days, the last officer assigned to the position will not accrue joint credit. Once the double incumbency is eliminated, the officer will begin to accrue joint credit from the date the incumbency is resolved. The lost days will affect the tour length completion date for the affected officer.

c. AC and full-time RC officers must serve a minimum of 2 years, unless waived by USD(P&R), or meet the requirements for early release as outlined in Enclosure E.

2. Constructive Credit for Joint Duty Tour Completion. Officers may depart an S-JDA up to 60 days early and receive constructive credit when specific criteria are met and approved by the Service. Constructive credit may be applied to S-JDA tours when time served reaches 22 months or more. 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) or when other alternatives would not suffice in meeting mission requirements. Constructive credit shall not be used for personal convenience.

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3. Joint Duty Credit for Officers Below Grade O-4. Officers in the grade of O-3 assigned to S-JDAs may receive joint duty credit; all joint duty provisions apply, including tour length and early release requirements. Officers in grades O-1 and O-2 may not be assigned to S-JDAs.

4. Joint Duty Credit During Periods of Temporary Duty. Temporary duty periods of over 30 consecutive days away from an officer's assigned joint organization for Service-related duties, including pre-command or refresher training, or attendance at JPME courses, may not count toward the 22-month minimum (with 60 days constructive credit applied) for JDA credit at the discretion of the joint organization. The joint organization to which the officer is assigned will track this requirement outside of the JDAMIS. The joint organization has the authority to establish policies to support this requirement when practical. This provision only applies to the 22-month minimum for JDA credit. It does not apply to tour lengths, which are governed by reference (e) and negotiated between the officer, joint organization, and Military Service. Temporary duty and return does not change an officer's permanent assignment to an S-JDA position.

5. Differential Joint Duty Credit. Credit earned by officers who served in an S-JDA in a geographical area designated as a Hostile Fire or Imminent Danger Pay (HF/IDP) area by the DoD Financial Management Regulation. This credit applies an intensity factor of two to the time spent in the HF/IDP designated area while serving in the S-JDA tour. Differential credit is applicable only to officers who have not earned full tour credit for the S-JDA tour. Once differential credit is applied, a total of 24 months/points must be accrued to award full tour credit. Differential credit is applicable to both AC and RC officers.

a. Differential credit may be awarded for actual time served in, or deployed to, an HF/IDP area. Services may request differential credit once the officer's tour is complete and the officer has not received full tour credit. Regardless, if a member is deployed or permanent party, a Leave and Earning Statement (LES) is required to validate the member received IDP (indicating the type/environment the member was in) at an IF2. Officers must attach a Defense Financial and Accounting Service (DFAS) adjudicated travel voucher for validation at the location where duty was performed to validate the actual dates the member was "boots-on-ground" (since the LES is not always accurate, seeking recoupment in future LESs). Submissions without verification of "boots-on-ground" dates will be returned without action.

b. Differential credit must be requested by the Services within 12 months of tour completion.

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6. Standard Joint Duty Assignment Path for Part-Time Reserve Component Officers. To earn full joint duty credit through the S-JDA path, RC officers who perform military duties part-time in a JDAL position must meet different tour requirements than officers who perform military duties full-time. Tour length waivers are not required for any part-time RC S-JDA tours.

a. O-6 and below part-time officers obtain full joint duty credit through part-time JDAL positions upon completion of one of the three different paths. To earn full tour credit in a part-time JDAL position, an officer must complete all participation requirements in a part-time S-JDA position and the required number of E-JDA points. Reference (b) outlines the basic tour length requirements as shown in Table 1 below.

	Years in S-JDA	+ Experience Points	Minimum Annual Participation in S-JDA (days a year)
O-6 and Below			
4-Year S-JDA Credit	4	0	36
3-Year S-JDA/E-JDA	3	10	36
2-Year S-JDA/E-JDA	2	18	36

Table 1. Reserve Component Officer Paths to Earn the Equivalent of Full Joint Tour Credit

b. To encourage tour-length stability, officers O-6 and below must serve a minimum of 2 years in an S-JDA meeting the minimum annual participation days to qualify for any of the tour credit combinations in Table 1. Minimum annual participation of 36 days in more than one part-time S-JDA can be combined to obtain full joint duty credit via the 3-year or 4-year path outlined in Table 1 as long as one of the tours included a minimum of 2 years meeting the 36-day participation minimum. Part-time S-JDAs do not translate into points for each year completed or accrued joint credit like full-time positions; officers must meet all requirements for S-JDA/E-JDA and annual participation requirements to receive full joint duty credit. Additionally, officers will not be designated Level II IAW Table 1 unless they have the requisite number of experience points and JPME I.

c. For an officer to utilize a tour in a part-time JDAL towards joint qualification, they must be an O-4 (for pay purposes) for at least 1 day during the tour.

d. Time served in a part-time JDAL position that is not sufficient to earn full JDA credit may be converted to accrued credit under the E-JDA path. The officer can request this conversion via their Service JOM office to Joint Staff,

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JOM, after they have been logged out of the position, utilizing the format in Appendix A of this enclosure.

(1) The conversion request will not be processed through an E-JDA board since the time served was in an approved JDAL position.

(2) Once the conversion is complete, it cannot be reversed, and the officer cannot utilize both the converted points to E-JDA and that time served in a part-time JDAL for future joint qualification. Only the converted points to E-JDA can be utilized.

e. Part-time officers can only fill JDAL positions coded for part-time officers unless mobilized or recalled to full-time status for 365 days or more. Part-time officers mobilized or recalled to full-time status for 365 days or more, regardless of orders type, have the option to be entered in a full-time JDAL position. The Service must upload a copy of the orders in JDAMIS for the Joint Staff J-1, who will enter the officer into the full-time JDAL position.

f. Services will log the officer into and out of the JDAL position in JDAMIS within 30 days of arrival or departure. The JDAL Tour start date is the date the officer is assigned to the position. The annual participation accounting date will be the anniversary date the officer was assigned to the JDAL position.

g. Annual Certification Requirements

(1) RC officers are expected to perform their drills and annual training in their JDA, performing duties associated with that position. Duty performed outside of the joint organization must not be certified as part of the JDAL tour.

(2) Joint organizations owning part-time JDAL positions will certify the officer annually with the number of days performed with the joint organization into JDAMIS and must identify a point of contact (POC) responsible for monitoring and performing the annual certification. Joint organizations must notify, in writing, each officer serving in a part-time JDAL position of the requirement to provide certification documentation during their joint tour anniversary month. The incumbent's anniversary date in a JDAL position is based on the date the officer was assigned to the JDAL position.

(3) The number of days certified must equal the actual number of days performed with the joint organization (e.g., two inactive duty training periods equals one duty day) and shall be entered into JDAMIS within 30 days of the officer's anniversary date. The maximum allowable number of certificated duty days should be no more than 249 days per anniversary year. The joint

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organization will establish procedures to ensure officers provide the certification documentation to the joint organization annually.

h. The required experience points, as identified in Table 1, must come from experiences outside of the duties performed in the S-JDA position. Up to six experience points in Table 1 may consist of discretionary points.

i. As with the AC, RC officers under all the part-time S-JDA options are not required to sequentially obtain JQ Level II designation prior to JQO Level III. Additionally, officers will not be designated JQ Level II under Table 1 unless they have the requisite number of experience points and JPME Phase I.

j. It is incumbent upon the officer to ensure they are performing the requisite number of days in the JDAL position and that the joint organization completes the annual certification. Officers failing to submit certification documentation to the joint organization within 90 days of departure from their part-time JDAL position will be certified by the joint organization for 0 days.

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APPENDIX A TO ENCLOSURE D

REQUEST FOR CONVERSION OF PART-TIME JOINT DUTY ASSIGNMENT LIST
TIME TO EXPERIENCE-BASED JOINT DUTY ASSIGNMENT POINTS

From: Rank First Name MI. Last Name, Service
To: Joint Staff, J-1, Joint Officer Management (JOM) Branch
Via: "Service" JOM Office

Subject: CONVERSION REQUEST OF PART-TIME JDAL TIME TO E-JDA
POINTS

Reference: (a) DoDI 1300.19, effective 3 April 2018, change 1 effective 18 May 2023, "DoD Joint Officer Management Program"

Enclosure: (1) Part-Time JDAL History from JDAMIS

1. In accordance with (IAW) paragraph 12.5 of reference (a), I request the time I served in part-time JDAL position XXXXXXXXX, which was not sufficient to earn full Joint Duty Assignment (JDA) credit IAW Table 3 of reference (a), be converted to joint credit under the E-JDA path.
2. Enclosure (1) is my part-time certification information from the JDAMIS. I was in the position for X years and had XXX days certified. I calculate that my part-time days will be converted to XX.X points. This is based on XXX days/30.4 (DoD formula).
3. I understand that I will not be able to reverse the conversion and will not be able to use the information contained in my part-time certification record in JDAMIS, at the time of this request, towards future joint qualification.
4. I understand that for joint qualification purposes, if I do not have a future tour in a part-time JDAL, in which I earn the equivalent of full JDA credit (via the 2, 3, or 4-year paths), I will have to meet the requirements for joint qualification specified in paragraph 3.2 of reference (a), including the recency requirement that: a minimum of 12 months in a position, either aggregated or served all at once, must come from joint experience earned in the pay grade of O-4 or higher.

NAME
Signature Block

D-A-1

Appendix A
Enclosure D

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“Service” JOM Office:

Recommend Approval

Do Not Recommend Approval

Joint Staff JOM Branch:

Approve

Disapprove

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ENCLOSURE E

TOUR LENGTH REQUIREMENTS AND EARLY RELEASES

1. Introduction. All provisions of tour length requirements and early releases apply to AC and full time RC officers in grades O-6 and below. Part-time Reservists serving in JDAL positions will follow procedures in Enclosure E.
2. Tour Length Requirements. Title 10, U.S. Code, section 664 states that the length of a JDA shall not be less than 2 years.
 - a. Officers in grades O-6 and below must be assigned to an S-JDA for at least 24 months, or for at least 22 months with Service-allocated constructive credit of 60 days, unless otherwise excluded or waived as explained below.
 - b. A tour during which an officer serves in more than one JDA without a break between the assignments shall be considered a single tour of duty in a JDA.
 - c. While officers may depart an S-JDA at 24 months to meet full joint requirements, this policy does not supersede tour length requirements stipulated in reference (e) and Joint Travel Regulation requirements for assignments within or outside the continental United States.
 - d. Military Services will ensure that internal controls prevent officers from departing a joint position prior to the officer meeting the minimum joint tour length. Orders for all officers departing S-JDA assignments should include “no earlier than” proceed dates to ensure all tour length requirements are met.
3. Exclusions from Tour Length Requirements. Officers in grades O-6 and below may qualify for early release due to a tour length exclusion, which are monitored and approved by the Military Services. Regardless of which early release exclusion is used, Military Services are responsible for obtaining concurrence from the losing joint organization prior to approving the officer’s early release and must ensure that both the officer and the joint organization understand the implications for joint credit. Compliance will be monitored by the Joint Staff J-1/JOM. Officers may be released from S-JDAs before completing 2 years without a tour length waiver in the following cases:
 - a. Officers serving in overseas S-JDAs, including Alaska and Hawaii, for which the S-JDA tour length prescribed by reference DoD Instruction (DoDI) 1315.18, “Procedures for Military Personnel Assignments” is less than 36 months. Officers will be awarded full tour credit for serving 24 month or more.

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Services may approve up to 60 days constructive credit to reach 24 months, resulting in a 22-month minimum requirement. Officers will be awarded accrued joint credit for serving less than 22 months.

b. RC officers assigned to part-time S-JDA positions.

c. Officers reassigned from an S-JDA for humanitarian or compassionate reassignment beyond the control of the officer or the MILDEP. Officer will be awarded accrued joint credit.

d. Officer retires or is released from AD. Officer receives accrued or full credit based on time served. Officers may be logged out of the S-JDA position prior to the retirement/release date if on terminal leave status.

e. Officer is suspended from duty and reassigned from the Joint Staff or a CCMD under title 10, U.S. Code, section 155(f)(2) or 164(g) or from any other S-JDA position. Losing commands will notify the Service of the suspension and request for reassignment with a GO/FO or SES memorandum. A suspension from duty is a permanent action and must be documented in JDAMIS. Officers suspended from duty shall not be reassigned to subsequent JDAs. The Military Service will load the suspension memorandum of officers suspended under these provisions via JDAMIS. Officers suspended from duty do not receive any joint duty credit, regardless of time served or experienced gained. Losing commands should exercise caution when suspending an officer as the suspension will impact the officer's ability to obtain JQO.

4. Joint Duty Tour Length Waivers. Except for the exclusions above, release at less than 24 months from an S-JDA requires a joint duty tour length waiver in all instances, regardless of an officer's need for joint credit. In cases of military necessity, Services may approve up to 60 days constructive credit to reach 24 months, resulting in a 22-month minimum requirement. Tour length waiver requests are considered on a case-by-case basis and will be the exception.

a. Tour length waivers must be approved before an officer departs the joint organization. Waiver requests shall be submitted to the Joint Staff J-1/JOM no earlier than 10 months, but NLT 60 days, before the desired departure date. A planning factor of at least 90 days prior to departure date should, in most cases, support in-hand orders to the officer by 60 days prior to the departure date. Services will ensure appropriate internal controls are in place to prevent officers from departing prior to waiver approval, or prior to the approved departure date.

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b. Only officers departing an S-JDA with an approved waiver for a command-boarded position, senior developmental education, inter-service transfer or selection for promotion to O-7 will receive accrued JDA credit. Officers departing an S-JDA with an approved waiver for any other reason, to include after the fact waivers, will receive zero JDA credit.

c. Waiver requests for early release from an S-JDA are initiated by the Service using the JDAMIS All Requests module. Secretaries of the MILDEPs may exercise disapproval authority or delegate disapproval authority. The submission of an accurate, complete, and timely tour length waiver is a Service responsibility. Waivers not in compliance will be returned without action for Service correction and resubmission. Packages must include:

(1) GO/FO or SES cover memorandum from the Service HQ which outlines complete justification for the early release of the officer, to include an explanation of impact on the officer and/or gaining organization if the waiver is not approved. Include information on the availability of other officers to fill the projected position and the replacement of an officer for the losing command. Waiver requests submitted less than 60 days in advance of the desired departure date will include a full explanation for the late submission as part of the dated GO/FO or SES cover memorandum.

(2) A memorandum from the losing joint organization concurring with the early release, under a GO/FO or SES signature block, must be obtained by the Service and included in the waiver package using the format at Appendix B. Service-requested departure dates may not be earlier than the date agreed to by the losing joint organization.

(3) Officer's duty history.

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APPENDIX A TO ENCLOSURE E

INDIVIDUAL TOUR LENGTH WAIVER FORMAT

MEMORANDUM THRU DIRECTOR FOR MANPOWER AND PERSONNEL, THE
JOINT STAFF

FOR DIRECTOR, GENERAL AND FLAG OFFICER MATTERS AND OFFICER
MANAGEMENT

SUBJECT: Joint Duty Assignment Tour Length Waiver for RANK NAME

1. Request your approval in accordance with title 10, U.S. Code, section 664, to waive the joint duty tour length requirement for RANK NAME. This officer is currently serving as the DUTY TITLE in JDAL position ### at JOINT ACTIVITY since START DATE. RANK NAME's Career Brief is attached.
2. GO/FO or SES Rank Name, Joint Activity agreed to the early release of RANK NAME no earlier than DATE in the attached DATE memorandum.
3. Provide complete justification for the early release of this officer to include the impact on the officer and/or gaining organization if the waiver is not approved. Include information on the availability of other officers to fill the projected position and the replacement of an officer for the losing command.
4. As of the requested DATE departure date, RANK NAME will have served ### months. This officer will not depart prior to the approval of the tour length waiver by USD(P&R) nor prior to the requested departure date.
5. Waiver requests submitted to the Joint Staff less than 60 days in advance of the requested departure date will include a comprehensive explanation for the late submission as part of the GO/FO or SES memorandum.
6. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

Enclosures:

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Appendix A
Enclosure E

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APPENDIX B TO ENCLOSURE E

LOSING JOINT ACTIVITY MEMORANDUM OF RELEASE FORMAT

FORMAT LOSING JOINT ACTIVITY LETTERHEAD

MEMORANDUM FOR SERVICE HEADQUARTERS

SUBJECT: Early Release for Tour Length Waiver: RANK NAME

1. NAME OF LOSING JOINT ACTIVITY agrees to release RANK NAME from his/her joint position no earlier than DATE. RANK NAME has been selected for COMMAND/SCHOOL/POSITION.
2. This officer will not depart prior to the approval of the tour length waiver by USD(P&R).
3. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

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Appendix B
Enclosure E

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ENCLOSURE F

EXPERIENCE-BASED JOINT DUTY ASSIGNMENTS PROCESS AND PROCEDURES

1. Introduction. IAW Enclosures E and F, service in an S-JDA and required JPME completion is the primary method for attaining JQO Level III qualification. Alternately, AC and RC officers may achieve levels of joint qualification designation by combining JPME completion with the approved accumulation of joint experiences, exercises, and courses. Joint matters experiences may be accrued while serving in non-JDAL positions, including duties with DoD, interagency, non-governmental, or international organizations.
2. Experience-Based Joint Duty Assignment. An E-JDA is a non-JDAL assignment or experience that demonstrates an officer's mastery of knowledge, skills, and abilities in "joint matters" as defined by title 10, U.S. Code, section 668. E-JDAs may be shorter in duration than a standard S-JDA tour; therefore, E-JDA tours may be aggregated to achieve the equivalent of a full joint tour of duty in an S-JDA. Officers may submit their request for experience points through the self-nomination process listed in paragraph 5 below.
3. Student/Fellowship/Intern Assignments. Officers cannot self-nominate experiences gained from education. This includes student, fellowship, or 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.
4. Joint Experience Requirements
 - a. The inclusive dates of experience include only arrival and departure dates to the location of the actual experience. Departure date from home base and subsequent return date, travel, or training dates must be excluded.
 - b. Officers shall not self-nominate an experience for consideration until "tour complete" or "experience complete." An experience is considered to have one duty title and one duty description. Minor changes in duty title or duty description can be considered one experience; however, significant changes in duty titles and duty descriptions should be considered separate and distinct experiences.

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c. The assignment and the preponderance of duties must have direct relevance to the statutory definition of joint matters found in title 10, U.S. Code, section 668.

d. Each experience submission must cover 30 or more days.

e. Officers must be in the paygrade of O-3 or above (for pay purposes) for the entire duration of their submitted experience to be eligible to self-nominate.

f. Multiple experiences cannot be combined into one self-nomination.

5. Self-Nomination Process. Officers nominate via the web-based system JDAMIS, which is the sole authorized system to contain joint experiences and supporting documentation. All information submitted or attached in JDAMIS must be UNCLASSIFIED. Officers must contact their respective Service JOM Office prior to submitting a self-nomination that contains CLASSIFIED supporting documents.

a. Officers

(1) Officers must complete and submit their self-nominated joint experiences to their respective Service JOM Office for processing within 12 months of completing their joint experience.

(2) AC and full-time RC Officers shall not self-nominate experiences earned for service in any S-JDA position.

(3) To submit a self-nomination, officers must apply via JDAMIS <<https://dhramission.servicenowservices.mil/>>. The officer will include the below mandatory documents within their self-nomination (reference Appendix A to Enclosure F):

(a) Adjudicated Orders to Area of Experience. (Mandatory) Used to support the Officer's duty history report.

(b) Officer Duty History Report. (Mandatory) Used to validate the self-nominations Name, Service, Component, start and end date of experience, grade during experience, location of experience. (See paragraph (f) for temporary duty (TDY) or deployed experience).

(c) DD214, and/or Reserve Point Summary. (If applicable) Used to support the completion of assignment. Reserve Point Summary validates

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number of inactive vs. active-duty days. Reference Appendix B for reserve point summary worksheet.

(d) Officer Performance Evaluations. (Mandatory) Officer performance evaluation(s) for requested periods to substantiate the experience. If the experience spans a long duration, multiple evaluations are required for submission. Used to validate the self-nominations unit/Organization of Assignment, higher headquarters (HHQs) of Unit, Immediate Supervisor, Senior Rater, Duty Title, and Duties and Responsibilities (see paragraph g for exceptions).

(e) Leave and Earning Statements. (Mandatory for IF2 credit) LESs reflecting the receipt of HF/IDP for each month of the nominated experience, to include start/stop dates. For approved submissions that cannot be verified with supporting documentation will reflect as approved, but with no intensity factor multiplier (i.e., IF1).

(f) Travel Voucher. In addition to the officer history report self-nominating TDY travel or deployed experiences, officers must submit a DFAS-adjudicated travel voucher that validates actual “boots-on-ground” dates in the location where duty was performed. “Boots-on-ground” dates for approved submissions that cannot be verified with supporting documentation will reflect as approved, but with no intensity factor multiplier (i.e., IF1). (Mandatory, see paragraph g for self-nominations that cannot provide a DFAS-adjudicated travel voucher).

(g) Statement of Service for the Period being Nominated. The Statement of Service must be signed by the officer’s Commanding Officer or First GO/FO or civilian equivalent or above. (Mandatory, if listed requirements in paragraphs (d) or (f) are not available). Statement of Service must include the name of person self-nominating, start and end date of experience, location of experience (Include specific dates and locations for experiences with multiple locations), unit/organization of assignment, HHQs of unit, immediate supervisor, senior rater, duty title, and duties and responsibilities.

(h) If the submission is for an experience the officer believes meets the “acquisition matters” portion of the Joint Matters definition, the officer must provide documentation that the position they filled during the experience was a designated Defense Acquisition Workforce position covered under title 10, U.S. Code, Chapter 87. The experience is not eligible for E-JDA board consideration without this documentation.

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(i) Awards. (Optional) Any dated award citation and/or narrative for the period being nominated. Awards are used for additional context and amplifying information but may not be used to validate elements of submissions.

(4) Officers will ensure each self-nomination submission is complete and accurate. Submissions that do not comply with stated policy are not considered eligible for E-JDA board consideration and will be returned for corrective action.

b. Service Joint Officer Management

(1) Services must forward self-nomination submissions to the Joint Staff, J-1 JOM Branch within 18 months of the experience completion. Late submissions by the Services to the Joint Staff require a GO/FO or SES letter endorsed by the respective Service explaining why the application was not submitted within the required timeline, to include an explanation of the unique and/or extenuating circumstances for which a waiver should be granted. The request will be routed through the DJ-1 to USD(P&R). Approved requests allow the submission to be reviewed by the board.

(2) Service JOMs will not rewrite an officer's Joint Experience Summary (JES), as the duties performed should stand alone.

(3) Review and validate each officer's self-nomination request and supporting documents for authenticity and accuracy. Ensure documentation supports all information listed on the JES. Calculate and recommend the number of experience points to award based on the appropriate point formula, paying particular attention to the accuracy of the point total for reservists performing part-time duties. Return any submission that does not comply with policy or does not have the required documents.

(4) Verify the intensity factor IAW paragraph 7, Point Accrual Formula.

(5) Forward fully documented packages to the Joint Staff J-1 for final adjudication. Submissions that are not fully documented and/or do not clearly meet the definition of joint matters will be denied by the Service.

(6) Officers must contact their respective Service JOM Office prior to submitting a self-nomination that contains CLASSIFIED supporting documents. Unless previously coordinated, only UNCLASSIFIED information can be submitted to the Joint Staff.

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(7) Provide O-7 and O-6 Service Board Member Nominees for all E-JDA boards when requested and IAW the Joint Staff suspense dates.

c. Chairman of the Joint Chiefs of Staff

(1) Conduct 100 percent review of Service batches to ensure all submissions meet eligibility standards. Recommend the number of experience points to award for each officer according to the Point Accrual Formula in paragraph 7.

(2) Notify Services of final board results and each officer's points award decision.

(a) Service JOMs should notify officers whose specific experience was "Disapproved" that they will have one opportunity for resubmission to a future review board. A second disapproval is final, and subsequent resubmissions of that experience will not be considered. Resubmission packages must include significant new or additional information in the JES for the specific joint experience. Disapproved packages that do not include significant new or additional information will be returned to the Service and accounted for as a second disapproval, and will no longer be eligible for resubmission or reconsideration of that experience.

(b) Services will notify officers whose experience was once disapproved that they may resubmit experience for reconsideration within 6-months of the final DJ-1 adjudication memorandum date. Submissions which do not meet this timeline will be permanently ineligible for further consideration.

(3) DJ-1 has the authority to approve experience board results for O-6 and below experiences. Following DJ-1 approval of the E-JDA board's recommendations, the Joint Staff J-1/JOM will update awarded points in JDAMIS.

6. Adjudication Date of Joint Experience Points. The effective date of joint experience points will be the date the board results were approved by DJ-1.

7. Point Accrual Formula

a. Approved joint experience points are derived from the duration and intensity of a joint experience. Points equal the number of approved joint experience days divided by 30.4, with that resulting number multiplied by an approved intensity factor. Note: For the RC, the calculation of approved joint

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experience days performed as Inactive Duty Training (IDT) is calculated in the same manner stipulated above and then is divided by half. Joint credit is day-for-day and is not calculated the same way retirement points and pay are calculated for IDT periods. The intensity factor is determined by the location and environment (combat or steady state) in which the joint experience is gained.

(1) Combat: intensity factor of two. The intensity factor is correlated to the receipt of HF/IDP as specified in Volume 7A of the DoD Financial Management Regulation 7000.14-R, Chapter 10, Figure 10-1. Current IDP locations can be found at:

<<https://www.dfas.mil/militarymembers/payentitlements/Pay-Tables/IDP-Areas/>>

(2) For RC part-time experience, Service Managers must provide a Point Credit Accounting Record System (PCARS) spreadsheet to determine the number of days and points.

8. Timeframe to Self-Nominate Joint Experiences

a. For initial submission, officers must complete and submit their joint experience self-nomination using JDAMIS as soon as possible but NLT 12 months after the officer completed the experience.

b. For initial submission, Services must complete and submit the joint experience self-nomination using JDAMIS as soon as possible but NLT 18 months after the officer completed the experience.

c. If an officer's joint experience is "rejected" for rework by the Joint Staff, the Service will work with the officer to resubmit the experience for consideration by a subsequent E-JDA board. The Service must submit the self-nomination to the Joint Staff within 6 months of the DJ-1 adjudication memorandum date, or the submission is permanently ineligible for further consideration. Self-nominations that are twice "rejected" for rework by the Joint Staff are permanently ineligible for further consideration.

d. If an officer's joint experience is "disapproved" by the board and is eligible for resubmission, the Service will work with the officer to resubmit the experience for consideration. The Service must submit the self-nomination to the Joint Staff within 6 months of the DJ-1 adjudication memorandum date, or the submission is permanently ineligible for further consideration.

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9. Experience-Based Joint Duty Assignment Boards

a. Boards will consider and adjudicate eligible self-nominated experiences. The Joint Staff J-1/JOM schedules and publishes board dates, requests Service Board Member nominations, and sets self-nomination experience submission suspense dates prior to board review.

(1) Compliance with stated suspense dates for requests of board nominees is required.

(2) Completed self-nomination packages, to include supporting documentation, must be uploaded into JDAMIS.

(3) Business rules outlining the E-JDA process and board execution are published and forwarded by the Joint Staff J-1/JOM to the respective Service Managers.

b. A board considering O-6 and above experiences will be composed of four GO/FOs (O-7) and one board chair, who will be either DJ-1. In the absence of DJ1, the board chair will be a GO/FO assigned to the Joint Staff. Additionally, a board considering O-5 and below experiences will be composed of four Colonels/Captains (O-6) and one board chair, who will be an O-6 from the Joint Staff J-1.

(1) Each Service will nominate two board members (an AC and an RC member) for both O-6 and above, and O-5 and below boards. All board member nominees external to the Joint Staff J-1 must be JQOs. The DJ-1 will determine final board membership. The Joint Staff J-1/JOM will notify Services of final board membership.

(2) Representatives from the Office of the Deputy Assistant Secretary of Defense, Military Personnel Policy and an O-6 from the RC will serve as board advisors.

(3) The board chair and the Service board members are designated as voting members; the board advisors are non-voting members.

c. All Joint Experience credit packages must contain a JES, orders/an updated officer duty history, and performance evaluation(s) for the requested periods. If the experience includes time in a deployed location, a DFAS-adjudicated travel voucher to validate boots-on-ground dates and LESSs showing receipt of HF/IDP are required for the award of the intensity factor of two. Note: RC officers must include orders or DD214 and reserve point

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summary spreadsheet for part-time experience. Reference Appendix B for the reserve point summary spreadsheet. Reference Appendix A for required documentation for E-JDA submissions.

d. Board members will only receive the JES to review. All supporting documentation, having been reviewed and validated alongside the JES by Joint Staff J-1/JOM prior to the board, will be available upon request.

e. Once the board concludes, its recommendations are compiled by the Joint Staff J-1/JOM and forwarded to DJ-1 for approval. The written report of the boards shall contain a list of all officers considered for joint experience points and the resultant board recommendations.

f. Upon adjudication of the DJ-1 boards results memorandum, results will be released to the Services by the Joint Staff J-1/JOM. Only general comments about procedures and approved board remarks may be discussed after the board. Details regarding board deliberations will not be disclosed.

10. Experience-Based Joint Duty Assignment Credit for Civilian Experiences. RC officers who are employed by the Federal Government, to include members serving in military technician status, may apply for JDA credit through the experience path if the performance of their duties meets the statutory definition of joint matters. The rules that apply are:

a. Up to 12 experience points may be accrued through a civilian experience and applied toward qualification as JQO. The other 12 experience points must be accrued performing duties while serving in the capacity of a military officer and must meet the same recency requirements stipulated in Enclosure B, paragraph 3. Military technicians may apply for JDA experience credit without caps for either JQ/Level II or JQO/Level III qualification if the experience is performed in the same position and meets the definition of joint matters.

b. In addition to submitting the JES, officers must provide documentation detailing the dates of the joint experience that meets the statutory definition of joint matters, percentage of time performing joint duties, and the organization-specific duties performed. If adequate documentation is not available, officers must submit a letter from the organization where their joint experience occurred. The letter must be certified and/or signed by the GO/FO or agency chief with personal knowledge of the experience and must articulate the inclusive dates of the joint experience, the 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 the civilian position.

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c. If the experience encompasses more than 12 months, the officer must provide a start date and an end date being requested for consideration. It is not necessary for the civilian assignment to have ended for the officer to request credit for that specific time period. The end date must be within 12 months of the submission IAW the timeline outlined in Enclosure F, paragraph 8.a. Reference Appendix A for required documentation for E-JDA submissions.

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APPENDIX A TO ENCLOSURE F

REQUIRED SUPPORTING DOCUMENTS FOR EXPERIENCE-BASED JOINT DUTY ASSIGNMENT SUBMISSIONS

Document	Applicability	Example	Requirement
Adjudicated Orders	AC/RC	PCS Orders, ADSO	Mandatory for all submissions
Officer Duty History	AC/RC/Civilian Experiences	ORB, STP, SURF, ODC, MBS, MSR	Mandatory for all submissions
Officer Performance Report	AC/RC	OER, OPB, FITREP	Mandatory for all submissions
DD-214	RC	N/A	If applicable
Reserve Point Summary ¹	RC	PCARS, ARCR, ASOSH, PRCS	Mandatory for part time submissions
LES ²	AC/RC/Civilian Experiences	Each month or pay period of the requested time frame	Mandatory for IF2 submissions
DFAS Adjudicated Travel Voucher ³	AC/RC/Civilian Experiences	Note Travel Request cannot take place of an adjudicated travel voucher	Mandatory for TDY, Deployed experiences, and all IF2 submissions
Statement of Service	AC/RC/Civilian Experiences	Memorandum format	Mandatory if Officer Performance Report, Civilian Performance Appraisal, or DFAS Adjudicated Travel Voucher cannot be produced
Civilian Performance Appraisal	Civilian Experience	DD 2906	Mandatory for all submissions
Awards/citations	AC/RC/Civilian Experiences	N/A	Optional

Table 2. Required Supporting Documents for Experience-Based Joint Duty Assignment Submissions

NOTE: All experiences require a complete Joint Experience Summary (JES) for consideration.

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Enclosure F

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¹ Required for part-time experiences to determine number of days and points. As services vary in ability to provide adequate break downs officers may use Reserve Point Summaries outlined in Appendix B to Enclosure G.

² All LESs are required if Travel Voucher does not show day-for-day location accountability.

³ IAW CJCSI 1330.05B, Enclosure A, paragraph 5.a. – DFAS adjudicated travel voucher mandatory to show “boots-on-ground” dates at location.

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APPENDIX B TO ENCLOSURE F

RESERVE POINT SUMMARY SPREADSHEET FOR RESERVE COMPONENT PART-TIME OFFICERS

LAST, FIRST RANK			TRACKING ID (PART-TIME SUBMISSION)		
Start Date	Stop Date	Type of Retirement Points	PCARS Points	Status	Days
dd-mm-yy	dd-mm-yy	9 – ECI School	x	Inactive	x
dd-mm-yy	dd-mm-yy	7 – Performance of Inactive Duty Training (IDT)	x	Inactive	x
dd-mm-yy	dd-mm-yy	4 – Performance of Active Duty (Annual Tour)	x	Active	x
				TOTAL DAYS	
				TOTAL POINTS	
Supervisor Rank, Name				Signature	

Table 3. Reserve Point Summary Spreadsheet for Reserve Component Part-Time Officers

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ENCLOSURE G

DISCRETIONARY POINTS

1. Introduction

a. JQS acknowledges officers may gain expertise in joint matters based on their participation in joint exercises and joint courses other than JPME. These types of opportunities may garner discretionary points. However, discretionary points alone will not enable an officer to earn joint qualification. Officers may not be awarded discretionary points for joint courses (except distance learning courses) or exercises that occurred during the same time period the officer accrued S-JDA or E-JDA credit.

b. Discretionary points may be earned from joint exercises and joint courses that contribute to an officer's expertise in joint matters. Discretionary points are designated by the Joint Staff J-7, and must have direct relevance to the definition of joint matters:

(1) Exercises. Participants in approved Joint Exercises will earn one (1) joint discretionary point per exercise.

(2) Joint Courses. Joint discretionary points will be assigned based on course content and duration.

(3) Discretionary points must be updated in JDAMIS within 12 months of the officer completing the exercise or course. Discretionary points that are not uploaded by the respective Service within 12 months of completion are not eligible for upload in JDAMIS.

2. Responsibilities

a. The Joint Staff J-7 will approve and certify joint exercises and courses that qualify for joint discretionary credit and publish them in the Joint Quarterly Report.

b. The Joint Staff J-1 will conduct periodic checks on discretionary credit documentation and review the Services' discretionary credit documentation for individual officers when submitted for JQO nomination utilizing discretionary credit to reach the JQO experience eligibility requirements.

c. Services are responsible for the following tasks:

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(1) Develop and execute a communications strategy to inform members of the opportunity for the award of discretionary points.

(2) Develop a method for members to submit requests to their respective Service's discretionary credit POC.

(3) Identify an individual or office with the Service that will be responsible for receiving submissions from officers and uploading approved discretionary points in JDAMIS.

(4) Appoint an officer (O-5 or above) in the Service's JOM Office chain of command to be the final approval authority for awarding discretionary points. This officer will verify documentation of an officer's participation in a joint exercise or completion of a joint course and certify the review by signed memorandum, which lists the documentation used to verify participation.

(5) Establish processes and procedures to ensure rigor and consistency with Service decisions regarding award of discretionary points.

(6) Award discretionary points to qualifying officers based on their participation in joint exercises or courses approved and certified by the Joint Staff J-7 on behalf of the CJCS. The award of points by the respective Military Service in JDAMIS must occur within 12 months of completion of the exercise or course. Points not uploaded in this timeframe are not eligible for award.

(7) Officers may also be awarded discretionary points for Joint Staff J-7 "joint courses" through distance learning where the officer is also awarded S-JDA/E-JDA points.

d. Officers may not be awarded discretionary points for "joint exercises" while serving in a full-time S-JDA tour or during any period for which the officer is awarded E-JDA points.

e. Inform members upon approval or disapproval of discretionary points.

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ENCLOSURE H

JOINT PROFESSIONAL MILITARY EDUCATION MANAGEMENT REQUIREMENTS

1. Introduction. JPME consists of sequenced phases of education. The standard sequence requires completion of Phase I before proceeding to Phase II. JPME management requirements apply to AC and RC officers as outlined below.

2. Joint Professional Military Education Phase I Requirements. Military Services are responsible for entering JPME Phase I course completion dates in JDAMIS for both AC and RC officers. JPME Phase I qualifications will be entered for an officer either upon graduation or NLT the date the next joint qualification entry is updated in JDAMIS.

3. Joint Professional Military Education Phase II Requirements. JPME Phase II is provided through CJCS-approved Service senior-level colleges and National Defense University (NDU) schools. Reference (d) provides additional JPME information and specific courses.

a. Joint Professional Military Education Phase II Direct Entry Waivers. Military Services are responsible for screening AC and RC officers to ensure they have completed JPME Phase I prior to attending JPME Phase II. Under exceptional conditions, the DJ-1 may approve a Direct Entry Waiver (DEW) to permit an officer to attend JPME Phase II before completing JPME Phase I.

(1) Requests for DEWs will be submitted by the Military Service to the Joint Staff for approval using the JMIS waiver request module. Approved DEWs are for sequencing purposes only and do not remove the requirement for the officer to complete JPME Phase I. JPME Phase II credit will not be granted until the officer completes JPME Phase I.

(2) The Military Service shall initiate the DEW request using the format specified in Appendix C of this enclosure. These waiver requests require a GO/FO or SES signature, full justification, joint assignment data, the date when the officer first became eligible to enroll in a Service JPME I distance education program, if the officer is currently enrolled in a JPME I distance education program (include the percentage of the specific program which has been completed), and the number of students from the Service attending this offering of the course. The DEW request must be submitted a minimum of 60 days prior to the start of the JPME Phase II class. Waiver requests submitted less than 60 days in advance of the graduation date will include a full

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explanation for the late submission as part of the GO/FO or SES memorandum.

(3) DEWs are limited by Service to 10 percent of the total number of that Service's officers attending an offering of the course.

b. Joint Duty Assignment Management Information System. Services are responsible for entering AC and RC officers enrolled in any JPME Phase II producing course into JDAMIS NLT 30 days following the course start date.

c. National Defense University Outplacement. Within 30 days of course graduation, Services are responsible for entering the required follow-on assignment codes so compliance with outplacement requirements can be monitored.

d. National Defense University Requirements. The Services must ensure the following additional requirements are met by all AC officers, and by RC officers to the maximum extent practicable, who graduate from each of the NDU schools for each FY:

(1) All JQ Level III (JQOs) must be assigned to an S-JDA as their next duty assignment following graduation unless waived on a case-by-case basis by USD(P&R). Waiver requests are submitted by the Service using the JMIS waiver request module in the format provided in Appendix D of this enclosure. These waiver requests require a GO/FO or SES signature, full justification, and the number of students the Service will be submitting for outplacement waivers for the FY. The NDU JQO outplacement waiver request must be submitted to the Joint Staff a minimum of 60 days prior to the graduation date. Waiver requests received less than 60 days in advance of the graduation date will include a full explanation for the late submission.

(2) Of the remaining graduates, more than 50 percent of graduates (for each Service for each school) must be assigned to an S-JDA as their first assignment following graduation. Up to 50 percent of the officers subject to this requirement (for each 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.

(3) On a case-by-case basis, Services may request approval for a non-JDAL assignment to be counted toward the NDU greater than 50 percent outplacement requirement. Waivers are submitted using the JMIS waiver request module in the format provided in Appendix E of this enclosure. The intent of this authority is to allow assignments to overseas contingency

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operations, such as Joint Task Force (JTF) HQ positions where officers may earn joint credit through the experience path, to be recognized as the equivalent of JDAL for NDU outplacement. Requests must include complete documentation on how the non-JDAL position meets the definition of joint matters and include a full outplacement plan for all officers in the course. Waiver requests submitted less than 60 days in advance of the graduation date will include a full explanation for the late submission as part of the GO/FO or SES memorandum.

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APPENDIX A TO ENCLOSURE H

REQUEST FOR DIRECT ENTRY WAIVER

SERVICE LETTERHEAD

MEMORANDUM FOR DIRECTOR MANPOWER AND PERSONNEL, THE JOINT STAFF

SUBJECT: Request for Direct Entry Waiver: RANK, NAME

1. This memorandum is forwarded to request a Direct Entry Waiver allowing RANK, NAME, to attend (Name and date of JPME Phase II course) prior to the completion of Joint Professional Military Education Phase I. The Service intends to send (number) officers to this class. This is the (number) waiver submitted for this course. A copy of the career brief for RANK NAME is attached.
2. Provide justification that includes how the officer's basic knowledge of joint matters and other aspects of the Phase I curriculum qualifies the officer to meet the minimum requirements established for entry into Phase II instruction. If the officer has not completed or is not currently in a joint duty assignment, outline plans for assignment to a joint duty position. Outline the reason the officer has not previously completed Phase I and the projected completion date.
3. The Service is aware that approval of this waiver is for sequencing only. RANK NAME will not receive credit for JPME Phase II until after completion of JPME Phase I.
4. Waiver requests submitted less than 60 days in advance of the graduation date will include a full explanation for the late submission as part of the GO/FO or SES memorandum.
5. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

Enclosures:

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APPENDIX B TO ENCLOSURE H

REQUEST FOR NATIONAL DEFENSE UNIVERSITY JOINT QUALIFIED
OFFICER OUTPLACEMENT WAIVER

SERVICE LETTERHEAD

MEMORANDUM THRU DIRECTOR FOR MANPOWER AND PERSONNEL, THE
JOINT STAFF

FOR DIRECTOR, GENERAL/FLAG OFFICER MATTERS AND OFFICER
MANAGEMENT

SUBJECT: NDU JQO Outplacement Waiver: RANK, NAME

1. In accordance with section 663(a), title 10, U.S. Code, request you waive the National Defense University (NDU) Joint Qualified Officer (JQO) joint duty assignment outplacement requirement for RANK, NAME. A copy of the career brief for RANK NAME is attached.
2. RANK, NAME was designated a JQ Level III (JQO) on DATE. He/she will graduate from the (NDU course title) on DATE. Officer's Career Brief is attached. Provide justification on why the officer should not be immediately reassigned to a joint duty assignment following graduation from JPME Phase II.
3. This is the (number) outplacement waiver for this academic year.
4. Waiver requests submitted less than 60 days in advance of the graduation date will include a full explanation for the late submission as part of the GO/FO or SES memorandum.
5. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

Enclosures:

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APPENDIX C TO ENCLOSURE H

REQUEST FOR NATIONAL DEFENSE UNIVERSITY JOINT DUTY ASSIGNMENT
EQUIVALENCY WAIVER

WAIVER SERVICE LETTERHEAD

MEMORANDUM THRU DIRECTOR FOR MANPOWER AND PERSONNEL, THE
JOINT STAFF

FOR DIRECTOR, GENERAL/FLAG OFFICER MATTERS AND OFFICER
MANAGEMENT

SUBJECT: NDU Joint Duty Assignment Equivalency Waiver: RANK NAME

1. In accordance with section 663(b), title 10, U.S. Code, request you approve the non-JDAL assignment of RANK, NAME, to be counted toward the National Defense University (NDU) outplacement requirement.
2. RANK, NAME will graduate from the (NDU course title) on DATE. Officer's Career Brief is attached. Provide documentation on how the non-JDAL position meets the definition of joint matters.
3. Attached is the full outplacement plan for all SERVICE officers in this course.
4. Waiver requests submitted less than 60 days in advance of the graduation date will include a full explanation for the late submission as part of the GO/FO or SES memorandum.
5. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES, Service

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SERVICE (NDU COURSE NAME) OUTPLACEMENT PLAN

Name		Rank/Component	Joint tour status
Full name	XXX-XX-XXXX	O-5/Reserve	JDAL, 1st tour
Full name	XXX-XX-XXXX	O-6/Active	Non-JDAL
Full name	XXX-XX-XXXX	O-6/Active	JDAL, defer to 2nd tour

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ENCLOSURE I

JOINT QUALIFICATIONS

1. Obtaining Joint Qualifications. Joint qualifications can be obtained through three paths:

a. S-JDA (i.e., traditional) path, through which most officers will continue to complete a JDA. S-JDAs refer to positions on the JDAL.

b. E-JDA (i.e., experience) path, through which an officer accumulates an equivalent level of joint matters experience.

c. Combination path, through which S-JDA credit and E-JDA credit are combined to meet the minimum experience requirements.

2. Joint Qualification Approval Authorities. Approval authorities for joint qualification levels II-IV are listed below.

a. Level II – The Secretary of the Military Service.

b. Level III/JQO – USD(P&R), as delegated by the SecDef.

c. Level IV – USD(P&R), as delegated by the SecDef.

3. Joint Qualification Criteria and Procedures. These requirements apply equally to AC and RC officers. Rounding to achieve the requisite points required for a joint qualification level is not authorized.

a. Level II. Recognition of joint matters experience and completion of JPME Phase I.

(1) An officer is eligible for Level II designation upon accrual of 12 joint qualification points (a minimum of 6 points must be derived from joint matters experiences other than joint training courses or joint exercises) or being awarded full joint duty credit, and successful completion of JPME Phase I. A maximum of 6 discretionary points may be applied toward award of JQ Level II. Interim credit while still serving in an S-JDA position shall not be used for JQ Level II eligibility.

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(2) Military Services

(a) Once per month using the JDAMIS JQ Level Processing module, the Military Services will approve a list of officers who meet the joint qualification and education criteria for joint qualification Level II. Services should approve fully qualified officers within the first month of eligibility to ensure accurate joint qualification data is available for joint utilization decisions.

(b) The Military Secretaries may formally delegate the approval authority to an officer in the grade of O-6 or above.

(c) After approval, the Service will ensure JQ Level II qualifications are updated in JDAMIS.

b. Level III/Joint Qualified Officer. Recognition for significant joint matters experience and joint education that enables an officer to function as a joint matters expert.

(1) Eligible for nomination by the Military Service upon successful completion of education requirements (JPME Phase II) and the following experience requirements:

(a) The award of full joint duty credit, accrual of 24 joint qualification points, or a combination of S-JDA and E-JDA time to equal 24 points/months.

(b) If currently serving in an S-JDA, an officer may use the accrued time in that S-JDA at the 22-month point and beyond toward the joint matters experience requirements of paragraph (a) above. This does not preclude the requirement to complete the full tour of duty in the current S-JDA. For officers currently serving in an S-JDA, the accrued time may not be used toward joint experience requirements prior to 22 months.

(c) A recency requirement of a minimum of 12 months of aggregated time in a position where joint experience is awarded while in the grade, for pay purposes, of O-4 or higher.

(2) Due to the 12-month recency requirement, officers may need more than 24 total points to qualify for Level III. Officers must be an O-4 (for pay purposes) for at least 1 day while filling an S-JDA in order for the full time in the S-JDA to count towards the 12-month recency requirement. Officers with approved E-JDA experiences receive day-for-day credit for time as an O-4 (for

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pay purposes) towards the 12-month recency requirement. Discretionary points cannot be used to fulfill the 12-month recency requirement.

(3) An officer must be in the grade of O-4 or above to be designated JQ Level III.

(4) AC officers nominated under the E-JDA or combined E-JDA/S-JDA path must hold an approved JQ Level II designation before they can be nominated for JQ Level III. As an exception, officers under the E-JDA or combined path meeting the requirements for JQ Level II and JQ Level III simultaneously may be designated as a Level III JQO without previously being designated as a JQ Level II. Officers nominated under the S-JDA path may be designated as JQ Level III without JQ Level II designation.

(5) No more than 6 discretionary points may be applied to meet JQ Level III requirements.

(6) The Military Services will:

(a) Using the JDAMIS JQ Level Processing module, submit consolidated monthly nominations for O-4 to O-6 AC and RC officers who meet the joint qualification, education, and quality criteria for JQO designation. Services should nominate fully qualified officers within the first month of eligibility to ensure accurate joint qualification data is available for joint utilization decisions. Nominations are due on the first duty day of each month and include a GO/FO or SES cover memorandum using the format specified in Appendix A of this enclosure.

(b) Services may elect to submit special nomination packages to the DJ-1 outside the normal monthly nomination cycle if expedited approval is needed for O-6s that will be considered by an O-7 promotion selection board. The GO/FO or SES cover memorandum must clearly outline the circumstances that have led to an expedited request and indicate the date when the officer(s) became JQO eligible.

(7) DJ-1 will:

(a) Using the JDAMIS JQ Level Processing module, review and validate nomination lists of officers who meet the joint experience and education criteria for JQ Level III.

(b) Submit validated nominations to USD(P&R) via JDAMIS.

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c. Level IV. GO/FO only. See references (b) and (d).

4. Joint Qualification Level III Officers. JQO designation is an administrative classification that identifies an officer as having significant education and 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 critical (Level III) S-JDA fill and AC promotion to O-7 requirements.

5. Special Joint Qualified Officer Considerations. The SecDef may, on an exceptional case-by-case basis and in the interest of sound personnel management, waive the JPME Phase II requirement for JQO designation if the officer has completed two full JDAs (one must be an S-JDA).

a. Nominations for officers without JPME Phase II who have completed two full JDAs are only permitted when it is impractical to require the officer to complete JPME Phase II 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 JQ Level III. Due to the increased availability of JPME Phase II, special nominations will only be considered for AC O-6s in the zone of consideration for O-7.

b. Submit nominations to the DJ-1 under a dated GO/FO or SES cover memorandum using the format specified in Appendix B of this enclosure. Requests will include full and detailed justification.

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APPENDIX A TO ENCLOSURE I

NOMINATION FOR APPROVAL OF JOINT QUALIFICATION LEVEL III

SERVICE LETTERHEAD

MEMORANDUM FOR DIRECTOR FOR MANPOWER AND PERSONNEL, JOINT
STAFF

SUBJECT: Service Nominations for Joint Qualified Officer (Level III)
Designation

1. This memorandum nominates ### officers for designation as Joint Qualified Officers (JQOs).
2. In addition to minimum education and joint experience levels, these officers meet performance standards consistent with JQO requirements.
3. The point of contact for this action is Name, Rank; Office; Phone Number; Email.

NAME
GO/FO or SES, Service

Enclosures:

NOTE: Services submit list via Excel spreadsheet.

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APPENDIX B TO ENCLOSURE I

NOMINATION FOR APPROVAL OF JOINT QUALIFICATION LEVEL III WITHOUT
JOINT PROFESSIONAL MILITARY EDUCATION PHASE II

SERVICE LETTERHEAD

MEMORANDUM FOR DIRECTOR FOR MANPOWER AND PERSONNEL, JOINT
STAFF

SUBJECT: Service Nomination for Joint Qualified Officer (Level III) Designation
without Joint Professional Military Education Phase II: RANK NAME

1. This memorandum nominates RANK NAME for designation as a Joint Qualified Officer (JQO). RANK NAME has completed two full joint duty assignments, including a standard joint duty assignment, but has not completed Joint Professional Military Education (JPME) Phase II. A career brief is attached.
2. Provide complete justification as to why it is impractical to require the officer to complete JPME Phase II at the current stage of the officer's career through any of the nine JPME Phase II producing schools. Include details on why the officer has not previously completed JPME Phase II. Outline the types of JDAs the officer completed and how they were of sufficient breadth to prepare the officer adequately for joint qualification Level III.
3. This officer will be considered for promotion to O-7 on DATE.
4. The point of contact for this action is NAME, RANK; OFFICE; PHONE NUMBER; E-MAIL.

NAME
GO/FO or SES
Service Signature Block

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ENCLOSURE J

PROMOTION SELECTION BOARD REQUIREMENTS

1. Introduction. The CJCS is required by law to review certain promotion selection board reports to determine if the boards acted in a manner consistent with SecDef guidelines under title 10, U.S. Code, section 615(c). In addition, this enclosure provides guidance on reporting promotion rate comparisons required by reference (b).

2. Applicability

a. Applies to officer promotion selection boards convened under title 10, U.S. Code, section 611 (selection boards) and section 628 (special selection boards) considering officers who are now “Serving In” (SI) or “Have Served” (HS) in Joint Staff JDAL positions or have the JQ Level III (JQO) designation.

b. Provides guidance on joint requirements for AC O-4 through O-6 promotion selection boards.

3. Responsibilities. For all promotion selection boards, including special selection boards, considering officers who are now SI or HS in Joint Staff JDAL positions or have the JQ Level III (JQO) designation:

a. The CJCS will:

(1) Based upon a Service nomination in JDAMIS, appoint an officer to represent the joint community as a member of each promotion board. This authority has been delegated to DJ-1.

(2) Review reports of promotion selection boards, including special selection boards, prior to their transmittal to SecDef by the Secretary of the MILDEP concerned. This authority has been delegated to DJ-1 for boards in which statutory In Zone promotion objectives have been met or to the Director, Joint Staff for boards in which statutory In Zone promotion objectives have not been met. The review will include:

(a) Whether boards gave appropriate consideration to the performance of officers who are now SI or HS in Joint Staff JDAL positions or who are JQO designated. Appropriate consideration will show, at a minimum, that each officer designated as a SI or HS in a Joint Staff JDAL position or JQO designated was clearly and equally identified for board members. The ability of board members to infer an officer’s joint status from a thorough review of

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official records does not meet the standard for appropriate consideration. The JDAMIS promotion board reports are used by the Joint Staff J-1/JOM during the CJCS post-board review process to confirm appropriate consideration was given to officers who are SI or HS in Joint Staff JDAL positions or are JQO designated.

(b) If boards met, or failed to meet, the promotion objectives set forth in title 10, U.S. Code, section 662. This provision does not apply to special selection boards convened under title 10, U.S. Code, section 628.

(c) Whether the board's actions were consistent with SecDef guidelines.

(3) At SecDef's request, propose guidelines for the Secretaries of the MILDEPs to ensure that selection boards give appropriate consideration to the performance of AC officers designated as SI or HS in Joint Staff JDAL positions or who are JQO designated.

b. The MILDEPs will:

(1) On an annual basis, provide a FY/CY board schedule to the Joint Staff J-1 that includes all boards outlined in paragraph 2 considering officers in grades O-4 through O-7.

(2) Utilizing the JDAMIS Promotion Board module, recommend to the Joint Staff J-1 officers with JQO designation for appointment as promotion board joint representatives. Services may nominate up to two officers per board (or panel). The GO/FO or SES memorandum (see format in Appendix D) will be submitted not less than 45 days prior to the scheduled board convening date. Completed appointment memorandums will be distributed to the designated officers by the Service.

(3) Clearly and equally identify for the board members all officers who are SI or HS in a Joint Staff JDAL position or have been designated as a JQO. The ability of board members to infer an officer's joint status from a thorough review of official records does not meet the standard for appropriate consideration.

(4) Provide guidance in the form of secretarial formal charges, letters of instructions, or precepts for promotion selection boards that include, at a minimum, the guidance as directed by reference (f). The Military Services must address the requirement to give appropriate consideration to the performance

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of officers who are SI or HS in Joint Staff JDAL positions or have been designated as a JQO.

(5) Special selection board promotion rates are not compared with the promotion selection rates of the original board. However, the pertinent records of those officers who should receive appropriate consideration for performance in Joint Staff JDAL positions or JQO designation as of the convening date of the original board will be precisely identified to the members of the special selection board. Reports of special selection boards will identify the selection status of officers considered who were SI or HS in Joint Staff JDAL positions or are JQO designated as of the convening date of the original board. Promotion statistics as required by paragraph 3.b.(7)(e) are not requirements for special selection boards.

(6) A minimum of 30 days prior to the board convening date, the Military Services must upload their eligibility list to JDAMIS under the Promotion Board Module. All eligible officers' records should be accurate in both Service records and JDAMIS records as of the board convene date.

(7) Prior to forwarding a selection board report that considered officers who are SI or HS in a Joint Staff JDAL position or are JQO designated to the SecDef for approval, MILDEPs will forward the board report to the CJCS for review and comment. The following are the minimum requirements to be forwarded:

(a) A transmittal memorandum from the Secretary of the MILDEP concerned addressing any significant aspect of the board report, to include:

1. Any failure to give appropriate consideration including the remedial action (e.g., failure to properly identify Joint Staff JDAL or JQO designated officers to the board membership).

2. Any non-compliance with statutory objectives in any of the six promotion objective categories (i.e., Joint Staff JDAL and JQO for promotion zones I, B, and A), including the action taken or proposed actions to prevent subsequent failures.

(b) The section of the board charge, precept, or memorandum of instruction that outlined joint requirements.

(c) A copy of the memorandum from CJCS that designated the joint representative for the promotion board.

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(d) Promotion statistics in the format indicated in Appendix B of this enclosure. These statistics will reflect each officer's status as of the board convening date. Statistics will include a consolidated report for all officers of the same grade convening at that date, not separate listings for each competitive board that may have been held. For example, Navy Commander Staff Civil Engineering Corps, Limited Duty Officer, and Supply Corps panels would be considered as one board for the special listing.

(e) A special listing reflecting which officers counted within each joint category in the format indicated in Appendix C of this enclosure. The special listing will be shown as a consolidated report for all officers of the same grade convening at that date, not separate listings for each competitive board that may have been held.

(8) Promotion Objectives

(a) Promotion zones I, B, and A results for SI or HS Joint Staff JDAL and JQO designated officers will be analyzed for trends. Statutory objective rates will be computed to determine whether or not each promotion objective category met or failed the following promotion objectives:

1. Officers who are SI or HS on the Joint Staff in JDAL positions 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 Service in the same grade and competitive category who are currently SI or HS on their Service's HQ staff (including the Secretariat) of their MILDEP (referred to as Service HQ Average).

2. Officers 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 Service in the same grade and competitive category.

(b) In addition to the two statutory promotion objectives above, Military Services will report officers who are SI or HS within OSD. They are expected, as a group, to be promoted at a rate not less than the rate for officers in the same Service, in the same grade and competitive category who are SI or HS on their Service's HQ staff (including the Secretariat) of their Service.

(9) Promotion Statistics

(a) Officers who meet more than one category will be reported in all applicable categories.

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(b) Track and report promotion statistics for all officers in the categories above, to include the Service HQ, regardless of the time served in those positions (whether 1 day or multiple years) and regardless of the reason for reassignment from those positions (e.g., suspension from joint duty or relieved for cause from the Service HQ).

(c) The SI category reflects an officer's assignment status, regardless of duration, on the day the board convenes. The HS category reflects officers who are no longer assigned to a position on the day the board convened. Officers should be tracked and reported as HS through their next consideration for promotion following reassignment from the position, unless the officer was already tracked and reported as SI for that assignment.

(d) Except for the JQO category, track in-zone officers as HS only through the first in-zone promotion consideration following reassignment from an S-JDA or the Service HQ. Track above-zone officers as HS only one time following their in-zone non-selection.

(e) Upon approval of Level III (JQO) designation, an officer will be tracked in the JQO category for all board and zone considerations. JQOs no longer SI or HS will be tracked as part of a "pool" and reported in total JQO category results.

(10) Special selection board promotion rates are not compared with the promotion selection rates of the original board. However, the pertinent records of those officers who should receive appropriate consideration for performance in Joint Staff JDAL positions or JQO designation as of the convening date of the original board will be clearly and equally identified to the members of the special selection board. Reports of special selection boards will identify the selection status of officers considered who were SI or HS in Joint Staff JDAL positions or are JQO designated as of the convening date of the original board. Promotion statistics as required by paragraph 3.b.(7)(e) are not requirements for special selection boards.

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APPENDIX A TO ENCLOSURE J

TRACKING AND REPORTING OFFICERS

Promotion Categories	JS		JQO			OSD	
	Joint Staff		Joint Qualified Officer			Office of the Secretary of Defense	
SI/HS Status (SI = Serving In; HS = Has Served):	JS/SI	JS/HS	JQO/SI	JQO/HS	JQO/Pool	OSD/SI	OSD/HS
Officer is:							
JS/SI, non-JQO	X						
JS/HS, non-JQO		X					
JS/SI, JQO	X		X				
JS/HS, JQO		X		X			
OSD/SI, non-JQO						X	
OSD/HS, non-JQO							X
OSD/SI, JQO			X			X	
OSD/HS, JQO				X			X
JQO not currently HS or SI					X		
JQO currently HS				X			
JQO currently SI			X				

Table 4. TRACKING AND REPORTING OFFICERS

NOTES:

1. Officers who may be counted in both SI and HS, within the same category, should be counted in both the SI and HS categories. However, when the category “total” is shown, the officer is only counted once in the total.
2. Officers who may be counted as SI or HS in different categories (Joint Staff, OSD, and JQO) should be counted in each category in the appropriate SI and HS status. The officer is counted once in the total for each category.

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APPENDIX B TO ENCLOSURE J

PROMOTION STATISTICS FORMAT

(SERVICE, GRADE, AND COMPETITIVE CATEGORY) Board Date:

A. IN THE PROMOTION ZONE

ACTIVITY	<u>SERVING IN</u>	<u>HAVE SERVED</u>	<u>TOTAL¹</u>
	CON ² SEL ³ SEL ⁴ %	CON SEL SEL%	CON SEL SEL%
Joint			
Staff			
JQO ⁵			
OSD ⁶			
Service HQ ⁷			
Board			
Average ⁸			

B. BELOW THE PROMOTION ZONE

ACTIVITY	<u>SERVING IN</u>	<u>HAVE SERVED</u>	<u>TOTAL¹</u>
	CON ² SEL ³ SEL ⁴ %	CON SEL SEL%	CON SEL SEL%
Joint			
Staff			
JQO ⁵			
OSD ⁶			
Service HQ ⁷			
Board			
Average ⁸			

C. ABOVE THE PROMOTION ZONE

ACTIVITY	<u>SERVING IN</u>	<u>HAVE SERVED</u>	<u>TOTAL¹</u>
	CON ² SEL ³ SEL ⁴ %	CON SEL SEL%	CON SEL SEL%
Joint			
Staff			
JQO ⁵			
OSD ⁶			
Service HQ ⁷			
Board			
Average ⁸			

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NOTE: These statistics are required by reference (b) and title 10, U.S. Code, section 662(b) and are included in the Annual JOM Report to USD(P&R). They are used to assess DoD compliance with statutory joint officer promotion policy objectives in title 10, U.S. Code, section 662.

¹ Total values should not double count any officer within the category total. Total considered and total selected are not necessarily the mathematical sum of the “serving in” plus the “have served” count if there are officers who have served in more than one joint tour since their last promotion board. Total values should represent a single accounting of all officers who were considered and all officers who were selected. No officer should count as considered more than once or as selected more than once within the category total.

² Number considered.

³ Number selected.

⁴ Percent selected (the number selected divided by the number considered). Compute to the nearest tenth. At .05 or more, round up. For example, 45.05 percent rounds up to 45.1 percent.

⁵ Includes all officers formally designated by the SecDef as Level III JQOs before the date the promotion board convenes. For “total,” also include officers qualified as JQO “pool.”

⁶ Comparison required by SecDef policy.

⁷ Includes Service Secretariats.

⁸ All officers considered within the same zone and all officers selected within the same zone (totals only).

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APPENDIX C TO ENCLOSURE J

PROMOTION BOARD SPECIAL LISTING

A sample format of a promotion board special listing is shown below.

ZONE ¹	LOC ²	SI/HS ³	SCRUB ⁴	NAME ⁵	GRADE	D	Recommendation Status ⁶
A	JS	SI		Jones, Abe	LTC	DoDID	
A	JS	SI		Smith, Burt	LTC	DoDID	
Total:		2 ⁷					0 ⁷
B	JS	SI		Smith, Charles	LTC	DoDID	Recommended
B	JS	SI		Zimmer, David	LTC	DoDID	
Total:		2 ⁷					1 ⁷
I	OSD	SI		Jones, Ann	LTC	DoDID	Recommended
I	OSD	SI		Smith, Edward	LTC	DoDID	Recommended
Total:		2 ⁷					2 ⁷
A	JQO	HS		Smith, Fred	LTC	DoDID	Recommended
A	JQO	HS		Zimmer, George	LTC	DoDID	
Total:		2 ⁷					1 ⁷

This report is required to review/validate which officers counted within each joint category. Numbers on this listing should match the numbers reflected on the promotion statistics report in Appendix B.

¹ Separate officers by zone (Above, Below, In).

² Separate officers within each zone by location (assigned at convening date – Joint Staff, OSD, and JQO).

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³ Separate officers within each zone and location by serving in or have served status.

⁴ Leave blank for Joint Staff use.

⁵ Alphabetize officers within each sub-group of zone, location, status.

⁶ Record promotion status by using the words “recommended.”

⁷ Subtotal within each joint category of eligibles and subtotal recommended column.

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APPENDIX D TO ENCLOSURE J

REQUEST FOR JOINT BOARD MEMBER APPOINTMENT

APPOINTMENT SERVICE LETTERHEAD

MEMORANDUM FOR DIRECTOR MANPOWER AND PERSONNEL, THE JOINT STAFF

SUBJECT: Request for Joint Board Member Appointment for BOARD NAME

1. This memorandum is forwarded to request appointment of Joint Board Members for the BOARD NAME scheduled to convene on DATE. This board will consider officers who are serving in, or have served in, Joint Staff JDAL positions or JQO designated.
2. The following JQO designated officers are nominated: Primary: RANK FULL NAME and Alternate: RANK FULL NAME requests submitted less than 45 days in advance of the board date will include a full explanation for the late submission as part of the GO/FO memorandum.
3. My point of contact for this action is RANK NAME, PHONE NUMBER.

NAME
GO/FO or SES
Service Signature Block

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Appendix D
Enclosure J

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ENCLOSURE K

RESERVE PROMOTION SELECTION BOARD REQUIREMENTS

1. Introduction. Title 10, Chapter 1405 does not establish joint promotion requirements for officers on the Reserve Active-Status List (RASL). Additionally, JQO designation is not a statutory requirement for promotion to O-7 on the RASL.
2. Applicability. The policy for joint promotion requirements and reporting applies to commissioned officer promotion selection boards considering officers to the grades of O-5 and O-6 convened under title 10, U.S. code, section 1405 for Active Guard Reserve (AGR) / Training, Administration, and Recruiting of Reserve (TAR) officers. Boards considering only professional specialties, Selected Reserve (SELRES), Individual Ready Reserve (IRR), Individual Mobilization Augmentee (IMA), and title 32 officers are exempt from reporting.
3. Responsibilities. NLT 1 November of each year, the Military Services will report RC JQO promotion selection rates via the JDAMIS Promotion Module. The report will contain JQO promotion selection rates as compared to the board average promotion selection rate for all applicable RC O-5 and O-6 promotion selection boards outlined in paragraph 2 of this enclosure convened during the previous FY. The report will reflect each officer's status as of the board convening date.
4. Future Objectives. To facilitate further RC integration into the JOM program, beginning 1 October 2025, the Military Services will address in the form of secretarial formal charges, letters of instruction, or precepts for promotion selection boards the requirement to give appropriate consideration to the performance of officers who have been designated as a JQO. Military Services will implement all necessary measures to ensure compliance beginning 1 October 2025.

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Enclosure K

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ENCLOSURE L

**ANNUAL JOINT OFFICER MANAGEMENT REPORT TO THE UNDER
SECRETARY OF DEFENSE FOR PERSONNEL AND READINESS**

1. Introduction. NLT 15 November of each year, CJCS shall, with the assistance of the Services, validate the data in the JDAMIS JOM Annual Report for the SecDef. The JOM Annual Report to USD(P&R) will report data across all categories for both AC and RC officers. The JDAL used to complete this annex will be the last one published in that FY.

2. Data Validation. Report data is based on the data stored in JDAMIS with a 30 September effective date. Services will ensure that all transactions for the FY have been entered NLT 30 days after 30 September. This includes, but is not limited to, all S-JDA arrivals and departures, all JPME Phase II enrollments, and outplacement data for all JPME Phase II graduates in the FY. Also, any errors or inconsistencies in transactions must be corrected to ensure that accurate data is reported.

3. Additional Service Input. Although the report is prepared based on the data stored in JDAMIS, Services may be required to provide Service-specific data for items not retrievable from JDAMIS.

4. Annual Report Items. The report includes the items shown for the DoD as a whole and for each of the Services, as follows:

a. By Service, the number of AC and RC officers who have completed JPME Phase II via:

- (1) National War College.
- (2) The Eisenhower School.
- (3) Joint Advanced Warfighting School.
- (4) Joint and Combined Warfighting School Resident-Hybrid.
- (5) The College of International Security Affairs.
- (6) The College of Information and Cyberspace.
- (7) A senior service college certified to award JPME Phase II.

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b. The number of officers, by Service component, designated in the previous FY as:

- (1) Level II Joint Qualified.
- (2) Level III, JQO.
- (3) Level IV Joint Qualified.

c. The total number of officers, by Service component, holding:

- (1) Level II Joint Qualification.
- (2) Level III, JQO.
- (3) Level IV Joint Qualification.

d. The promotion selection rates during the preceding FY for officers designated as a JQO compared with the promotion selection rates for all officers considered for promotion from within the primary promotion zone in the same pay grade and the same competitive category.

e. The promotion selection rates during the preceding FY of officers who are serving, or have served since their last promotion board, on the Joint Staff compared to the promotion selection rate for officers who are serving, or have served since their last promotion board, on their Service HQ staff.

f. JDA fill rate for the JDAL. The Joint Staff must provide an analysis of the extent to which the Secretary of each MILDEP is providing officers to fill that Department's share (as determined by law or by the SecDef), including the reason for any significant failure by a MILDEP to fill its share of such positions and a discussion of the actions taken to correct the shortfall.

g. The number of JDAL positions, by organization, billet number, and duty title, validated by the CJCS during the FY.

h. The total number of positions on the JDAL and how many positions were added or deleted in the FY.

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ENCLOSURE M

REFERENCES

- a. Title 10, U.S. Code, sections 152, 154, 155, 164, 619a, 661-668, 2151-2155, 7033, 8033, 8043, 9033, and 10216
- b. DoDI 1300.19, 3 April 2018, Change 1, 18 May 2023, "DoD Joint Officer Management Program (JOM)"
- c. CJCSI 1331.01E, 21 March 2022, "Manpower and Personnel Actions Involving General/Flag Officers"
- d. CJCSI 1800.01F, 15 May 2020, "Officer Professional Military Education Policy"
- e. DoDI 1315.18 CH-3, 24 June 2019, "Procedures for Military Personnel Assignments"
- f. DoDI 1320.14, 16 December 2020, "Commissioned Officer Promotion Program Procedures"
- g. Joint Publication 1, 27 August 2023, "Joint Warfighter"
- h. DoD Directive 7045.14, 29 August 2017, "The Planning, Programming, Budgeting, and Execution (PPBE) Process"
- i. DoDI 7730.64, 11 December 2004, "Automated Extracts of Manpower and Unit Organizational Element Files"

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Enclosure M

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GLOSSARY

PART I – ABBREVIATIONS AND ACRONYMS

Definitions with an asterisk () have a definition in Part II of the Glossary.*

AC*	Active Component
AD	active duty
C2	command and control
CCA	Chairman of the Joint Chiefs of Staff Controlled Activity
CCMD	Combatant Command
CJCS	Chairman of the Joint Chiefs of Staff
CJCSI	Chairman of the Joint Chiefs of Staff Instruction
DEW	Direct Entry Waiver
DJ-1	Joint Staff Director for Manpower and Personnel
DMDC	Defense Manpower Data Center
DoD	Department of Defense
DoDI	Department of Defense Instruction
E-JDA*	Experience-Based Joint Duty Assignment
FMTS*	Fourth Estate Manpower Tracking System
FY	fiscal year
GO/FO	general officer/flag officer
HQ	headquarters
HHQ	higher headquarters
IAW	in accordance with
JDA*	Joint Duty Assignment
JDAL*	Joint Duty Assignment List
JDAMIS*	Joint Duty Assignment Management Information System
JMD*	Joint Manning Document
JOM*	Joint Officer Management
JQO	Joint Qualified Officer
JQS*	Joint Qualification System
JPME	Joint Professional Military Education

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JTD*	Joint Table of Distribution
JTF*	Joint Task Force
JTMD	Joint Table of Mobilization and Distribution
MILDEP	Military Department
NDU	National Defense University
NLT	no later than
OSD	Office of the Secretary of Defense
PD	position description
POC	point of contact
RC*	Reserve Component
S-JDA*	Standard Joint Duty Assignment
SecDef	Secretary of Defense
SES	senior executive service
TDY	temporary duty
USD(P&R)	Under Secretary of Defense for Personnel and Readiness

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PART II – DEFINITIONS

Unless identified as extracted from Joint Publication 1-02, these definitions are not standardized within the Department of Defense and are applicable only within the content of this instruction.

4th Estate joint organizations. Refers to DoD organizations such as OSD, non-Intelligence Defense Agencies, and DoD Field Activities, other than the Joint Staff, Combatant Commands, and Military Services, having DoD manpower resources.

Accrued Joint Duty Credit. The joint credit granted to an officer for continuous time served in an S-JDA less than the duration needed to qualify for full joint duty credit upon departure from the position.

Active Component. That portion of the armed forces as identified in annual authorization acts as “active forces,” and in title 10, U.S. Code, section 115 as those active-duty personnel paid from funds appropriated for active-duty personnel. Also called AC.

Active Guard and Reserve. See Joint Publication 1-02.

Active Reserve. The Marine Corps equivalent to AGR personnel. Also called AR.

Assignment. The position in an organization to which an officer permanently belongs for manpower accounting purposes which temporary duty with other organizations does not alter.

Authorization. An approved military or civilian position on a JTD or JTMD that authorizes the assignment of personnel to perform required tasks. This term also may be used in referring to a total of all the approved authorizations. In contrast with a manpower requirement, a manpower authorization is always funded.

Board Convening Date. The first day a promotion board meets and official cutoff date for all Service-input JDAMIS changes impacting the board population.

Chairman of the Joint Chiefs of Staff Controlled Activity. An activity that meets all the following criteria:

- (1) Established by the CJCS and acts through a Joint Staff Directorate.

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- (2) Has a charter approved by SecDef.
- (3) Has a designated executive agent.
- (4) Is a multi-Service activity that performs a joint mission.
- (5) Has a JMD reviewed and managed by the Joint Staff J-1, that contains multi-Service positions.
- (6) May have S-JDA positions that meet and are recommended by the JDAL Validation Board.

Also called CCA.

Combatant Command. See Joint Publication 1-02.

Combined Command. Refers to a major command consisting of two or more forces or agencies of two or more allies.

Critical Standard-Joint Duty Assignment. Positions proposed by heads of joint activities and approved by the USD(P&R) with the recommendation of the CJCS which are enhanced by the incumbent possessing experience and education in joint matters, requiring a JQO to fill the position. Also called critical S-JDA.

Defense Agency. See title 10, U.S. Code, section 101.

Differential Joint Duty Credit. The joint duty credit earned by an officer who served in an S-JDA in a geographical area designated as a Hostile Fire or Imminent Danger Pay area by the DoD Financial Management Regulation.

Direct Entry Student. 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 an approved direct entry waiver.

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

Department of Defense field activity. See title 10, U.S. Code, section 101.

Dual-Hat Position. An O-6 or below position where the incumbent officer has responsibilities to both that officer's Military Service and a joint, combined, or

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international organization or activity (e.g., Combatant Command and one of its Military Service component commands). If the Service component command carries the position as its authorization, the joint command will reflect it as unfunded in the JTD, and the incumbent is not eligible for S-JDA credit. The term is also commonly used to describe an individual who serves in two roles in the same activity.

Department of Defense Identification Number. DoD Identification Number is the common name for the Electronic Data Interchange Personal Identifier (EDI-PI). The EDI-PI is a unique personal identifier created within the Defense Enrollment Eligibility Reporting System (DEERS) for each person who has a direct relationship with DoD. The DoD Identification Number is intended to support replacement of the SSN in most DoD processes.

Education. Education conveys general bodies of knowledge and develops habits of mind applicable to a broad spectrum of endeavors.

Experience-Based Joint Duty Assignment. An assignment, other than in a JDAL position, through which an officer demonstrates attainment of knowledge, skills, and abilities in joint matters. E-JDAs may be shorter in duration and, therefore, aggregated to achieve the equivalent of a full tour of duty in an S-JDA, as determined under such regulations and policy as prescribed by the SecDef. Also called E-JDA.

Executive Agent. See Joint Publication 1-02.

Fourth Estate Manpower Tracking System. The unclassified and classified web-based system for the management of joint manpower and personnel for OSD, Joint Staff, Combatant Commands, Defense Agencies, non- Intelligence Defense Agencies, and DoD Field Activities. Also called FMTS.

Full Joint Duty Credit. The joint credit designation granted to an officer for the completion of a tour of duty in an S-JDA position that meets all statutory requirements, or the accumulation of 24 joint experience points accrued from E-JDAs and discretionary points from joint courses/exercises, or a combination of both. See Enclosure E, Joint Duty Credit. Such credit may also be awarded to RC officers who meet the S-JDA tour length criteria established in the S-JDA path for part-time RC officers' section of Enclosure E.

Grade. The rank at which the officer is paid. It does not include frocked or promotion-select status.

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Have Served. An officer who served in a joint duty assignment or in the respective Service headquarters but is no longer assigned on the day the promotion board convenes. Also called HS.

Individual Augmentation/Augmentee. An IA is an unfunded temporary duty position (or member filling an unfunded temporary duty position) identified on a JMD by a supported Combatant Commander to augment staff operations during contingencies. This includes positions at permanent organizations required to satisfy a “heightened” mission in direct support of contingency operations. Either AC or RC personnel can fill IA positions. An individual mobilization augmentee (IMA) reservist filling, or activated to, their IMA position is not considered an IA. Also called IA.

In-Service position. A position assigned to an officer’s own Service. These positions will not be placed on the JDAL. The experience-based path (Enclosure G) allows officers in these positions to apply for joint experience wherever it occurs, provided the experience meets the definition of joint matters.

Joint Duty Assignment List Validation Board. As directed by the USD(P&R), a board composed of executive-level representatives, from the Joint Staff and each of the Military Services, convened to review positions for inclusion on the JDAL. An executive-level OSD representative will serve as an advisor/observer. The board makes recommendations to USD(P&R) through the CJCS regarding the addition, or deletion of, individual positions on the JDAL.

Joint Activity. An activity, operation, or organization in which elements of more than one Military Department of the United States, as reflected in joint manpower program documents, perform joint missions under the auspices of OSD, the CJCS, or the Commander of a Combatant or Combined Command.

Joint Duty Assignment. An assignment which provides significant experience in joint matters, excluding assignments for joint training or joint education, except as an instructor responsible for preparing and presenting courses for Joint Professional Military Education II. The two types of JDAs are S-JDA and E-JDA. Also called JDA.

Joint Duty Assignment List. Positions designated as a standard joint duty assignment are on a list approved by the SecDef, maintained by the Joint Staff and are reflected in the Joint Duty Assignment Management Information System. The Joint Staff Special Assistant GO/FO Matters is responsible for processing GO/FO JDAL actions. Also called JDAL.

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Joint Duty Assignment Management Information System. The automated system of record for all related joint manpower and officer joint personnel information, maintained by the Defense Manpower Data Center and managed and updated by the CJCS and Services. Also called JDAMIS.

Joint Duty Credit. The joint credit designation granted to an officer for either the completion of a tour of duty in a JDAL position (S-JDA) or the accrual of joint experience points (E-JDA), which may include discretionary points from joint courses/exercises), or a combination of both.

Joint Experience. The successful application of what individuals learn via joint individual training/exercises, Joint Professional Military Education (JPME) and other education, and self-development in a joint position that has direct relevance to the definition of joint matters.

Joint Experience Points. Points calculated to the nearest tenth derived from the duration and intensity of a joint experience whereby the intensity is determined by the environment (combat or steady state) in which the experience is gained. $\text{Joint Experience Points} = (\text{Number of Days} / 30.4) * (\text{Intensity Factor})$.

Joint Manning Document. A manning document of unfunded temporary duty positions constructed for or by a supported Combatant Command that identifies the specific IA positions to support an organization during contingency operations. JMDs for permanent activities with a JTD or JTMD should only identify IA positions for temporary military or DoD personnel. JMDs for activities without a JTD or JTMD (e.g., some JTFs) should identify all positions required for that activity to support the mission. Positions should be identified as unit fill, coalition fill, civilian/contractor fill, or IA fill on the JMD. Also called JMD.

Joint Matters. See title 10, U.S. Code, section 668.

Joint Officer Development. A process to produce the largest possible body of fully qualified and inherently joint officers for joint and staff responsibilities by cultivating an officer's service competencies and transforming them into joint capabilities through Joint Professional Military Education, training, experiences, and self-development.

Joint Professional Military Education. A CJCS-approved body of objectives, outcomes, policies, procedures, and standards supporting the educational requirements for joint officer management. Also called JPME.

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Joint Qualification. A level of proficiency ascribed by the SecDef with the advice and counsel of the CJCS; a series of hierarchical standards attained by an individual with joint experiences, education, training, and/or acculturation.

Joint Qualification Points. The aggregate of joint experience points and discretionary points.

Joint Qualification System. A multi-level system that recognizes joint experiences for all AC and RC officers, regardless of where they occur. The majority of the force will continue to complete a traditional S-JDA along with the requisite JPME. The alternate path of earning joint qualification involves the career long accumulation of joint experiences (E-JDA), recognized by the CJCS as infusing officers with an equivalent level of joint capability, and completion of the appropriate level of JPME. Also called JQS.

Joint Qualified Officer Level III. An officer (O-4 or above) who has completed the JQ Level III requirements and been so designated by the SecDef. Also called JQO.

Joint Table of Distribution. A manpower document that identifies the positions and enumerates the spaces that have been approved for each organizational element of a joint activity for a specific FY (authorization year), and those spaces which have been accepted for planning and programming purposes for the four subsequent FYs (program years) (Joint Publication 1-02). Also called JTD.

Joint Task Force. See Joint Pub Publication 1-02. Also called JTF.

Joint Training. Two or more Military Departments interacting with a Combatant Command or subordinate joint force commander to conduct mission rehearsals of individuals, units, and staffs using joint doctrine or joint tactics, techniques, and procedures to prepare joint forces to execute their assigned or anticipated missions.

Jointly Manned Activity. A joint organization, activity, or element that meets the following criteria:

- (1) Must be chartered by the SecDef or CJCS as a jointly manned activity.
- (2) Must have a single Service as Executive Agent.
- (3) Must be a multi-Department or multinational activity or element that performs a joint mission.

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(4) Must report operationally to a Combatant or Combined Command, international organization (e.g., NATO, NORAD, or the United Nations), or to/through the CJCS in the performance of a joint mission.

(5) Must have Service manning documents that are managed by the Executive Agent and approved by the Services.

(6) Positions should be equally distributed so that Service responsibility and influence can appropriately reflect the assigned mission (normally not more than 60 percent for any single Military Department).

(7) May have S-JDA positions. Organizations that are integral to a single Military Department (e.g., Service major commands) are not included in this definition for S-JDA purposes.

Organizational Positions. A category of JDAL positions that are not included in the Office of the Secretary of Defense, the Joint Staff, Combatant Commands headquarters, or Defense Agencies headquarters but provide the officer significant experience in joint matters.

Position. A manpower authorization that may be filled by one person. NATO activities also use the term “post.”

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.

Promotion Objective Categories. Includes six statutory and three “by-policy” promotion objective categories that are measured against the promotion objective rate. They are:

- (1) Joint Qualified Officer below-zone.
- (2) Joint Qualified Officer in-zone.
- (3) Joint Qualified Officer above-zone.
- (4) Joint Staff JDAL below-zone.
- (5) Joint Staff JDAL in-zone.
- (6) Joint Staff JDAL above-zone.

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- (7) Office of the Secretary of Defense below-zone.
- (8) Office of the Secretary of Defense in-zone.
- (9) Office of the Secretary of Defense above-zone.

Reserve Components. The RC 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. This definition excludes the Coast Guard Reserve. Also called RC.

Selected Reserve. See Joint Publication 1-02.

Serving In. An officer who is assigned to a joint duty assignment or their respective Service headquarters as of the board convening date. This also applies to JQO reporting. Also called SI.

Standard Joint Duty Assignment. An assignment in a JDAL position that meets the tour length requirement prescribed in title 10, U.S. Code, section 664(a); not less than 2 years. Also called S-JDA.

Statutory Objective Rate. The number of officers selected for promotion divided by the number of officers considered within each promotion objective category (“serving in” and “have served” are added together as a group).

Joint Staff \geq Service headquarters
JQO \geq board average

Temporary Duty. Temporary assignment of an officer to an organization other than the one the officer is permanently assigned, that does not alter the officer’s permanent assignment status. Also called TDY.

Unified Command. See Joint Publication 1-02.