Pre-Retirement Seminar Transition Readiness Seminar Requests:

Unit UTC Guide

(Updated 27 December 2019)

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https://www.clc2s1.usmc.mil

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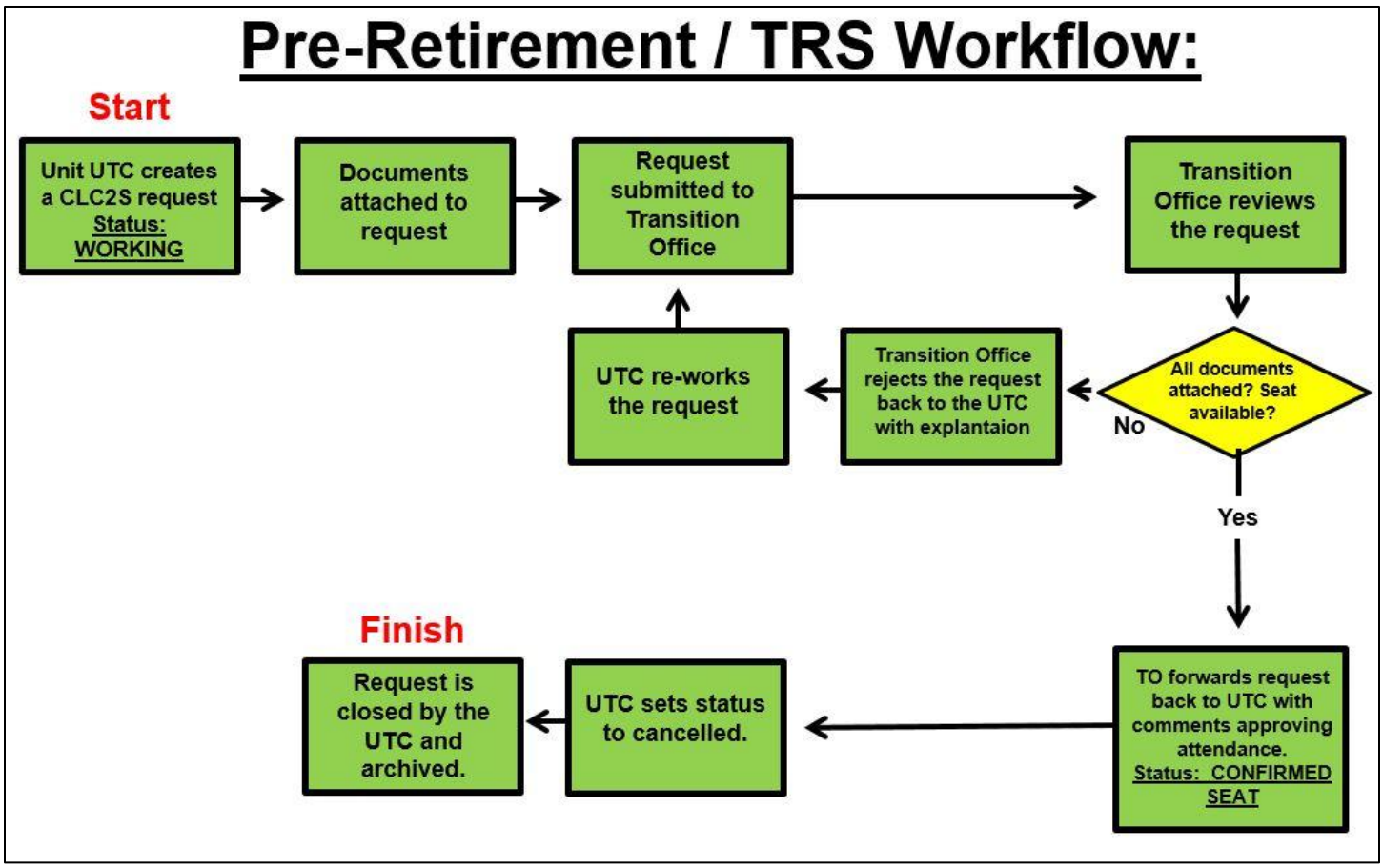
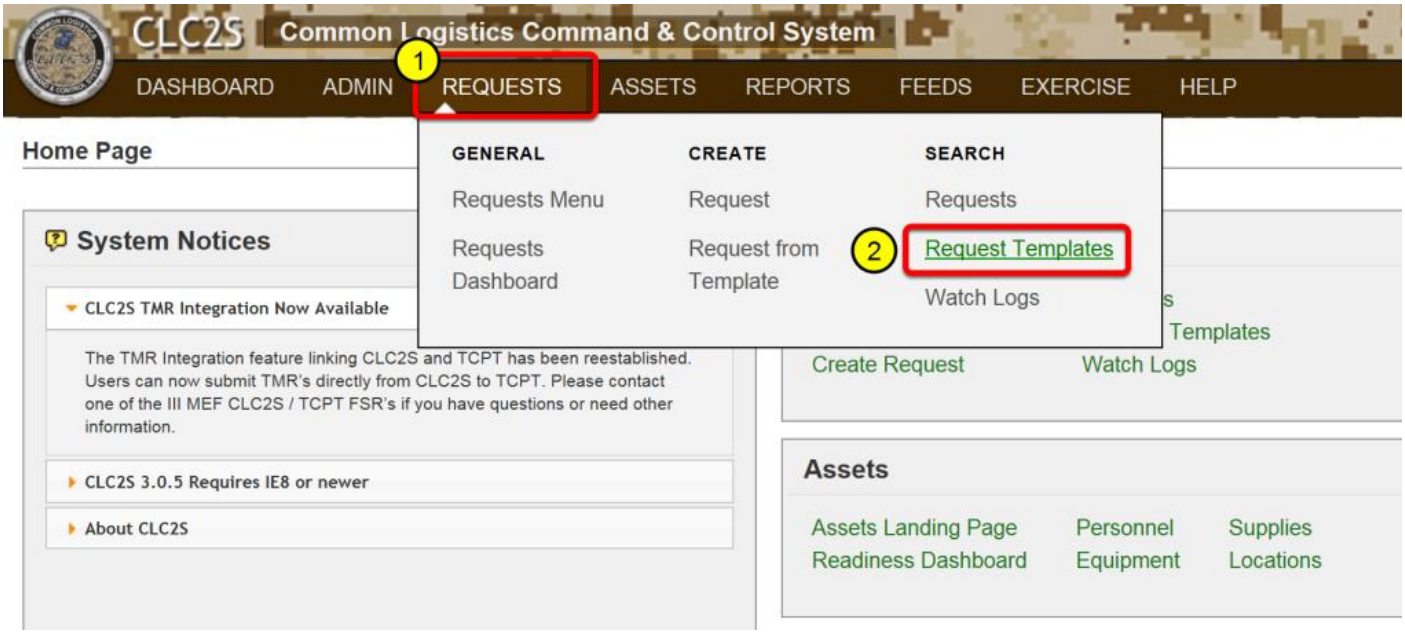
Table of Contents:

Creating a Pre-Retirement Seminar or TRS Request - Page 2
Checking the Status of a Request - Page 10
Closing Requests - Page 13
Managing Rejected Requests - Page 16
Searching / Checking the Status of a Request - Page 21
Recalling Requests - Page 24
Email Notifications - Page 28

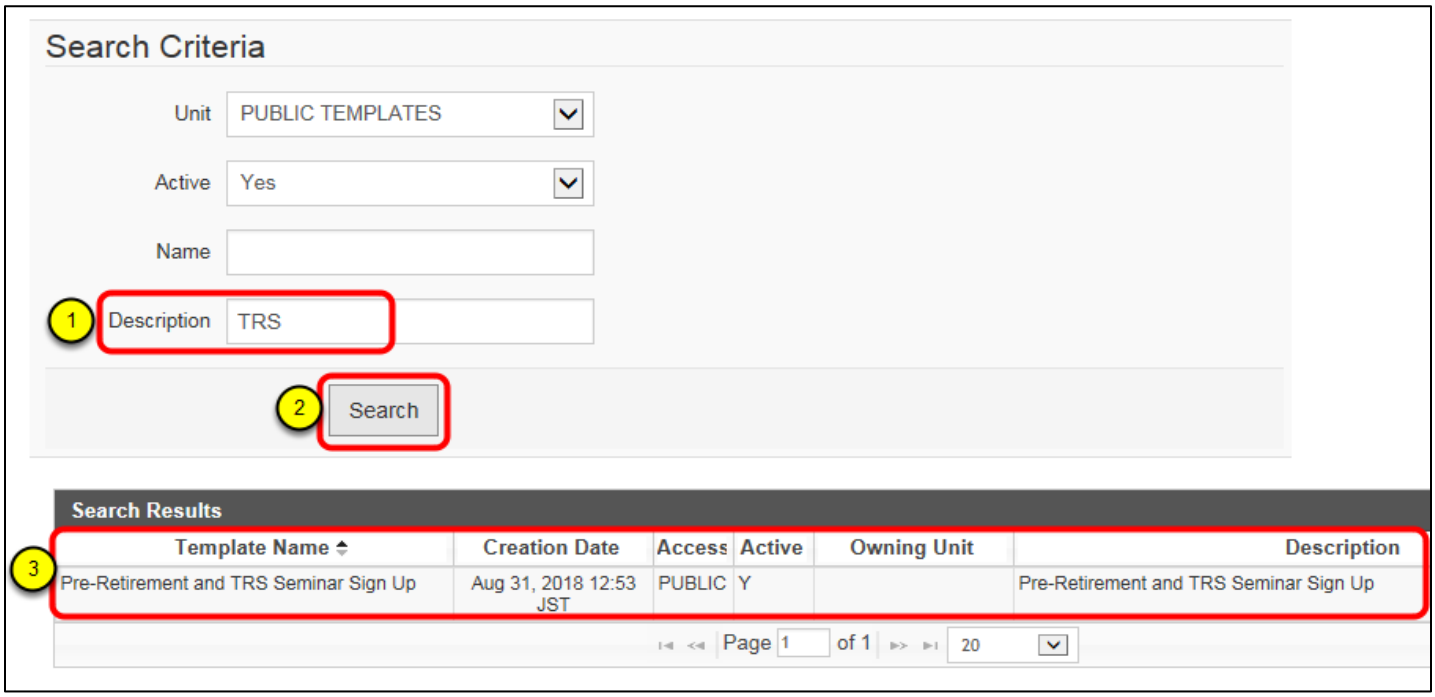


I. Creating a Pre-Retirement Seminar or TRS Requests

1. Click: Requests => Request Templates

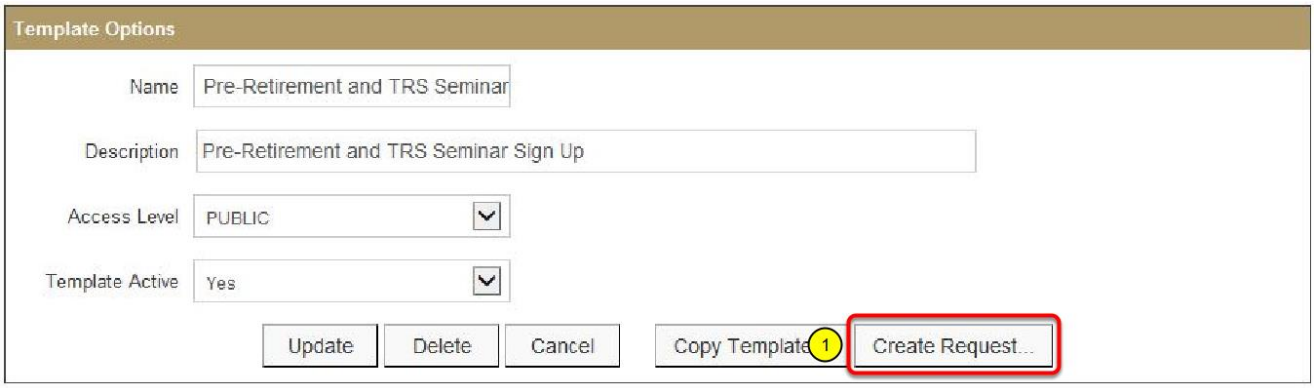


2. Locate the Template

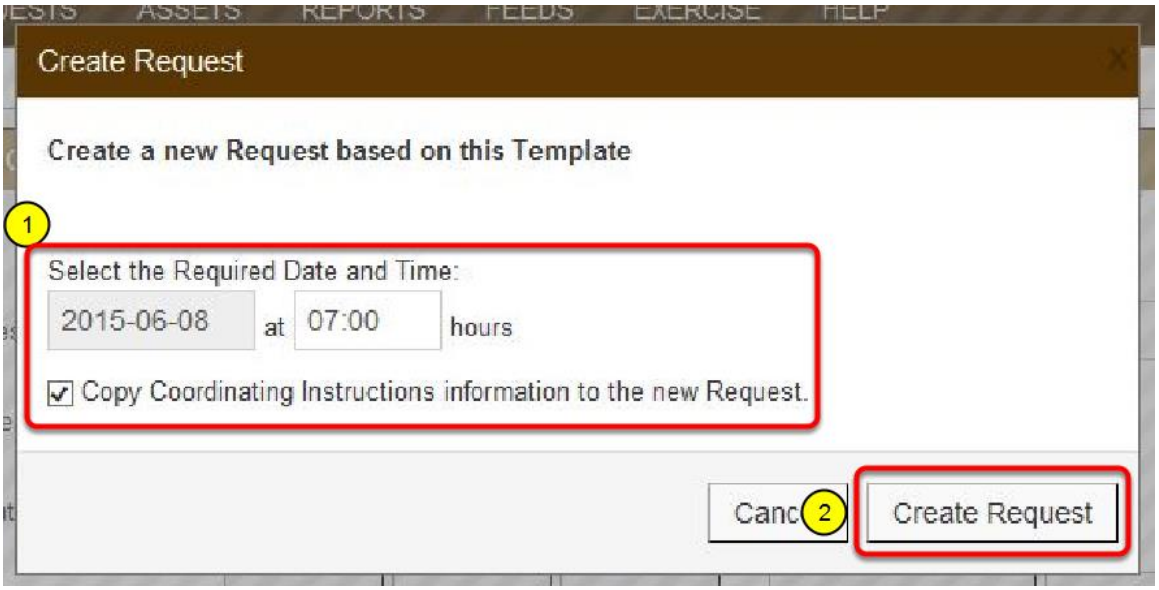


1. Enter "TRS" in the description field.
2. Click "Search"
3. The Pre-Retirement and TRS Seminar Sign Up template will appear in the search results.

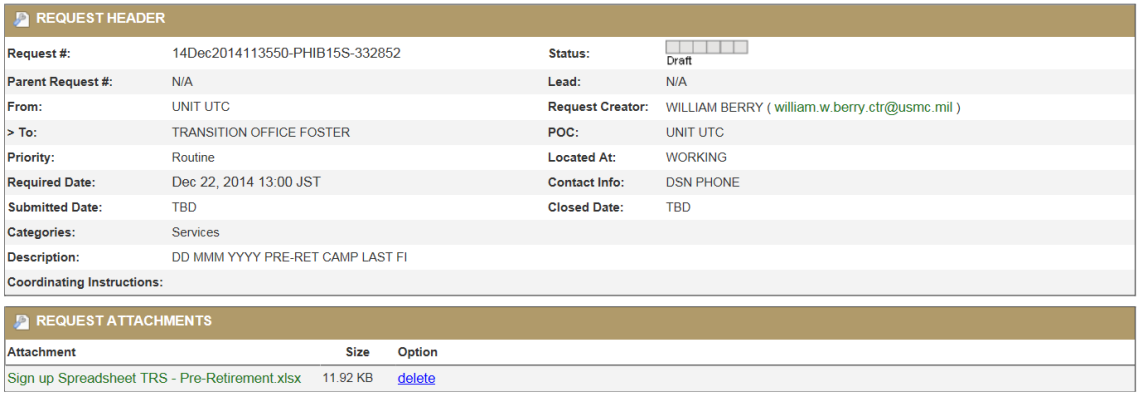
3. Create a request from the template



4. Select the desired seminar date and time



5. The request is created. (No action required)



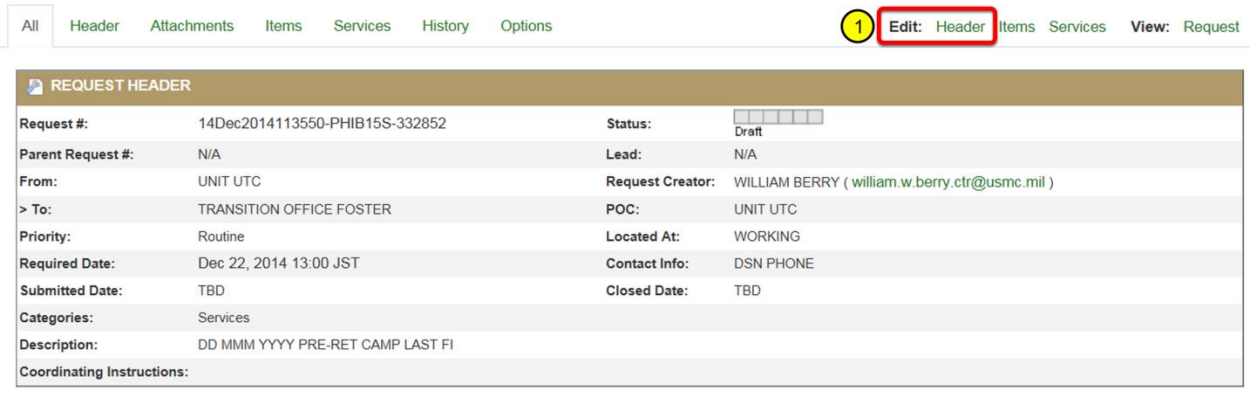
REQUEST HEADER

Request #:	14Dec2014113550-PHIB15S-332852	Status:	Draft
Parent Request #:	N/A	Lead:	N/A
From:	UNIT UTC	Request Creator:	WILLIAM BERRY (william.w.berry.ctr@usmc.mil)
> To:	TRANSITION OFFICE FOSTER	POC:	UNIT UTC
Priority:	Routine	Located At:	WORKING
Required Date:	Dec 22, 2014 13:00 JST	Contact Info:	DSN PHONE
Submitted Date:	TBD	Closed Date:	TBD
Categories:	Services		
Description:	DD MMM YYYY PRE-RET CAMP LAST FI		
Coordinating Instructions:			

REQUEST ATTACHMENTS

Attachment	Size	Option
Sign up Spreadsheet TRS - Pre-Retirement.xlsx	11.92 KB	delete

6. Click "Edit: Header"



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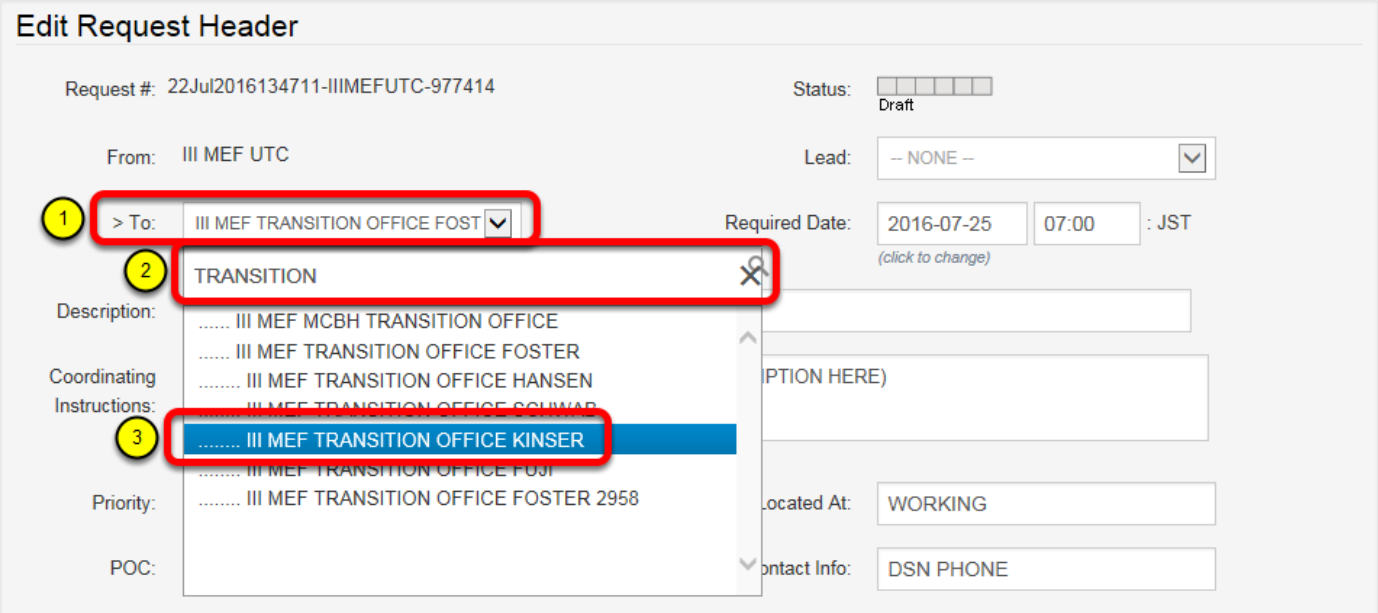
From:	UNIT UTC	Request Creator:	WILLIAM BERRY (william.w.berry.ctr@usmc.mil)
> To:	TRANSITION OFFICE FOSTER	POC:	UNIT UTC
Priority:	Routine	Located At:	WORKING
Required Date:	Dec 22, 2014 13:00 JST	Contact Info:	DSN PHONE
Submitted Date:	TBD	Closed Date:	TBD
Categories:	Services		
Description:	DD MMM YYYY PRE-RET CAMP LAST FI		
Coordinating Instructions:			

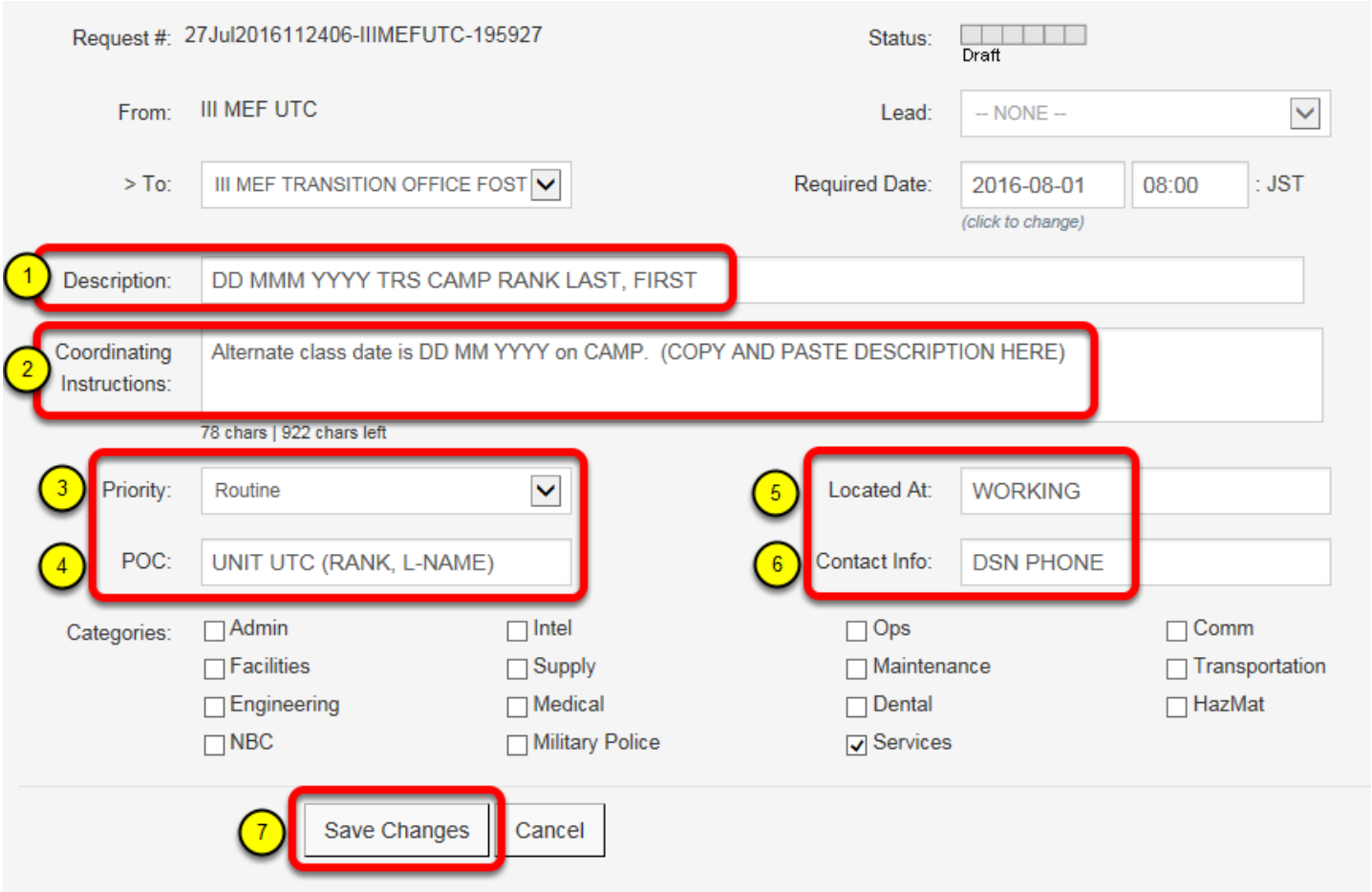
7. Select the desired Transition Office



1. Click on the > To: drop down menu
2. Type "TRANSITION"
3. Select the desired Transition Office

Note: All Pre-Retirement seminars go on Camp Foster

8. Update the Request Header information



1. Fill out the description in the following format:
DD MMM YYY, Seminar name (Pre-Ret or TRS), location of seminar (**the word "Camp" is not needed**), attendee rank, last name, (comma), first name.

Description Example:
22 JUN 2015 PRE-RET FOSTER MSGT SMITH, JOHN

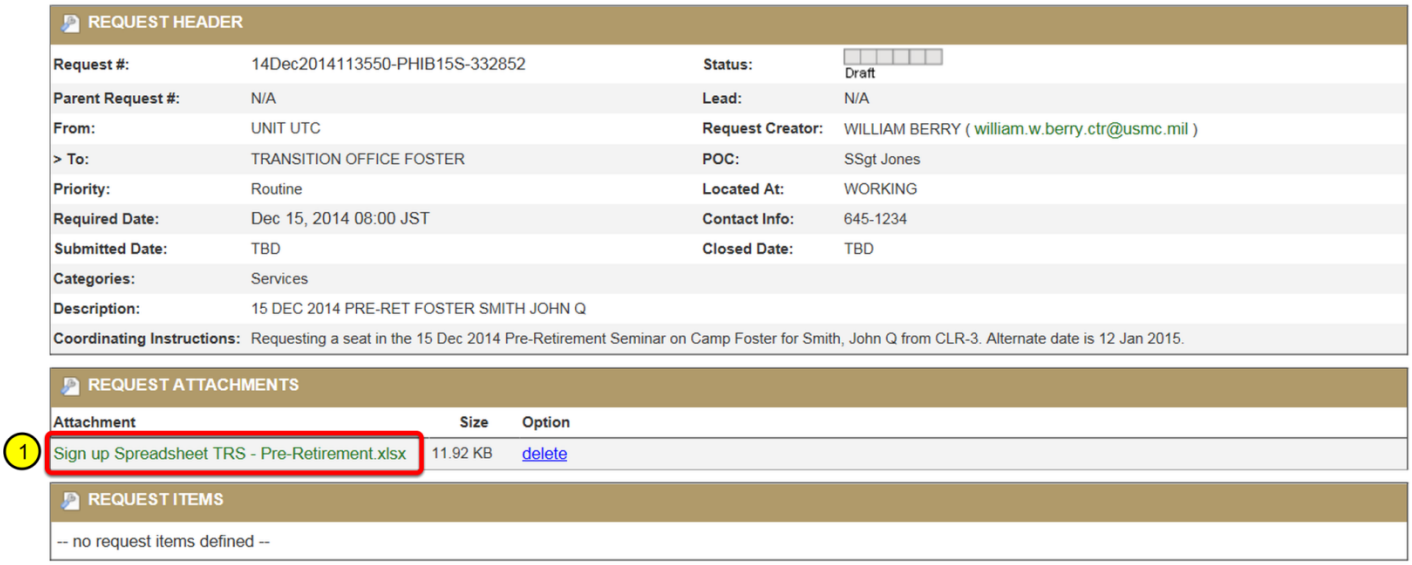
2. Enter coordinating instructions in the following format:
Alternate class date is DD MMM YYYY on CAMP. (COPY AND PASTE DESCRIPTION AFTER ALTERNATE CLASS DATE)

Coordinating Instructions Example:
Alternate class date is 13 JUL 2015 on HANSEN. 22 JUN 2015 PRE-RET FOSTER MSGT SMITH, JOHN

3. Select the priority of the request
   Routine = 90+ days, **Urgent** = 89 to 31 days, **Critical** = 30 days or less
   If a request is Critical, enter the justification in the Coordinating Instructions.

4. Enter the Unit UTC Point of Contact
5. Enter "WORKING" in the Located At: field. If a Service Member needs to make up only a portion of the training, enter "MAKE UP".
6. Enter the UTC's DSN phone number
7. Click "Save Changes"

9. Download the "Sign up Spreadsheet"



REQUEST HEADER

Request #:	14Dec2014113550-PHIB15S-332852	Status:	Draft
Parent Request #:	N/A	Lead:	N/A
From:	UNIT UTC	Request Creator:	WILLIAM BERRY (william.w.berry.ctr@usmc.mil)
> To:	TRANSITION OFFICE FOSTER	POC:	SSgt Jones
Priority:	Routine	Located At:	WORKING
Required Date:	Dec 15, 2014 08:00 JST	Contact Info:	645-1234
Submitted Date:	TBD	Closed Date:	TBD
Categories:	Services		
Description:	15 DEC 2014 PRE-RET FOSTER SMITH JOHN Q		
Coordinating Instructions:	Requesting a seat in the 15 Dec 2014 Pre-Retirement Seminar on Camp Foster for Smith, John Q from CLR-3. Alternate date is 12 Jan 2015.		

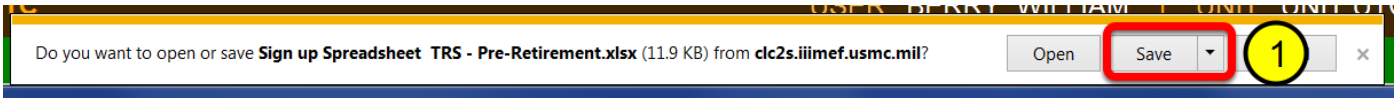
REQUEST ATTACHMENTS

Attachment	Size	Option
1 Sign up Spreadsheet TRS - Pre-Retirement.xlsx	11.92 KB	delete

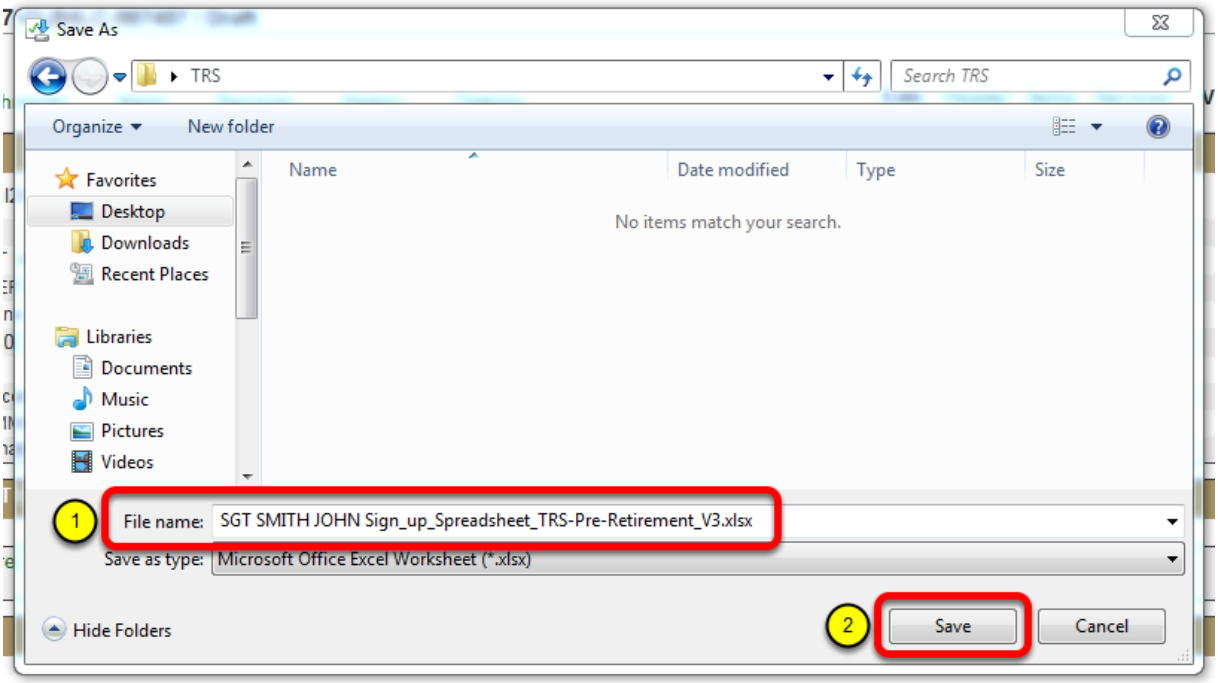
REQUEST ITEMS

-- no request items defined --

10. Save the spreadsheet



11. Add the attendee's name to the spreadsheet

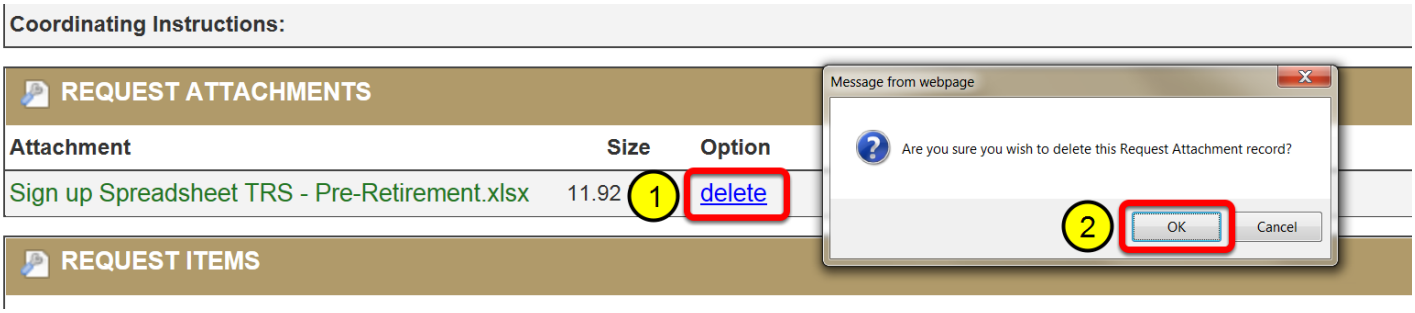


Add the attendee's name, but DO NOT change the rest of the file name. (Rank, Last, First)

12. Update the spreadsheet with the attendee's information

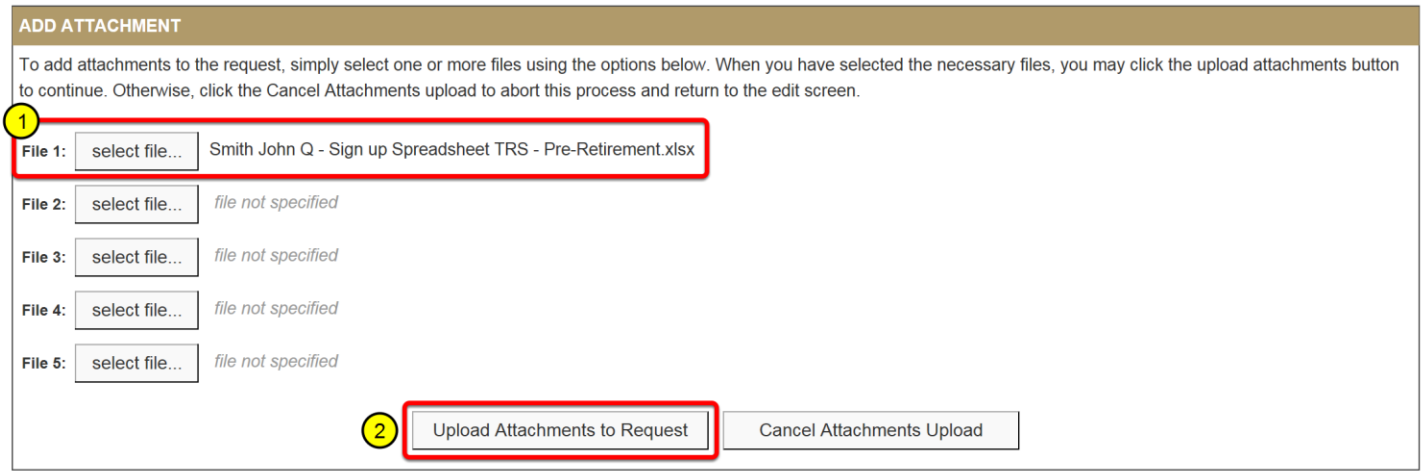
SEAT TYPE	SEMINAR TYPE	NAME: LAST, FIRST	DOD ID #	BRANCH	PAY GRADE	RUC/UI
TIER 1	TRS	SMITH, JOHN	1234567890	USMC	E-5	M00
SPOUSE		SMITH, JANE				

13. Delete the old spreadsheet



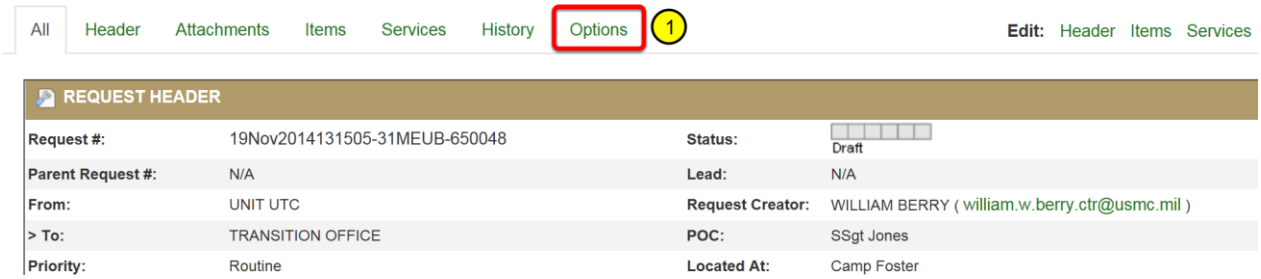
14. Click "Request Attachments"

15. Re-attach the updated spreadsheet

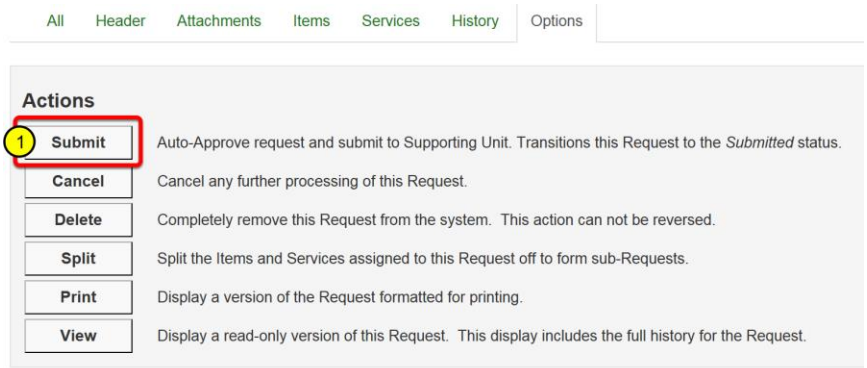


16. All required documents have been attached

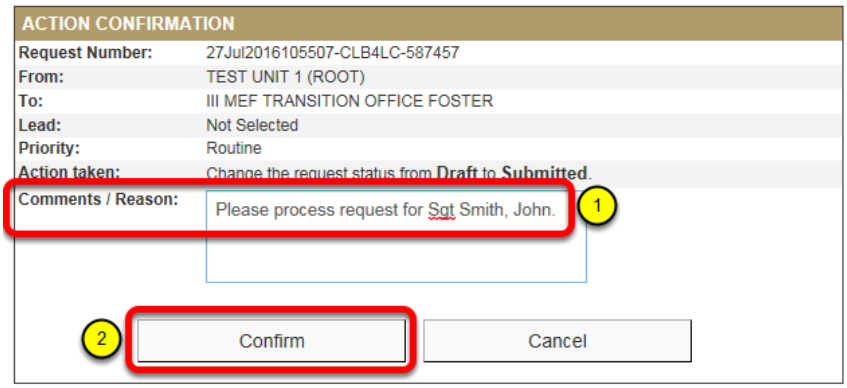
17. Click "Options"



18. Click "Submit"



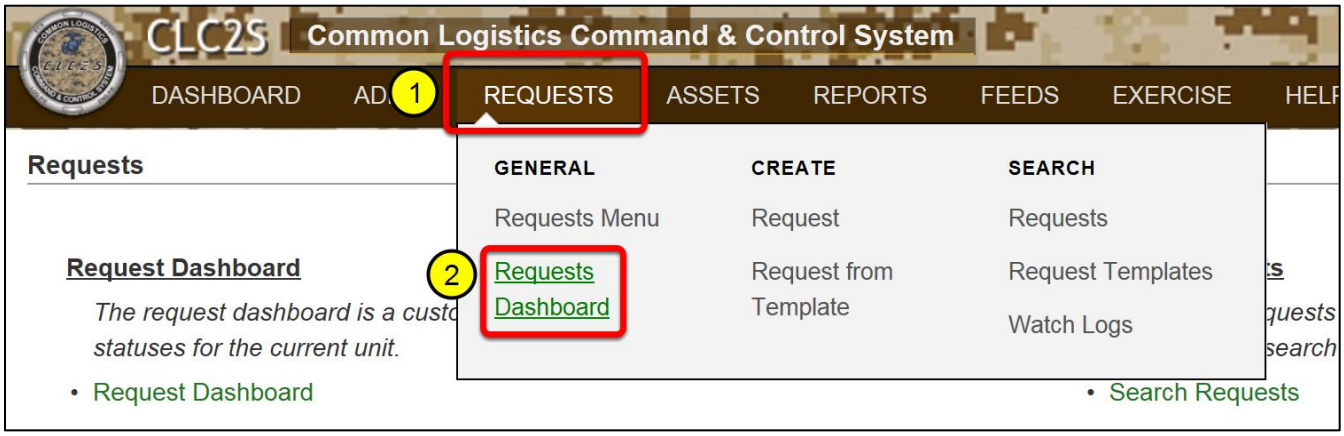
19. Enter comments / reason and click "Confirm"



The request has been submitted to the Transition Office. The request is still visible through the Request Dashboard, and by searching for the request.

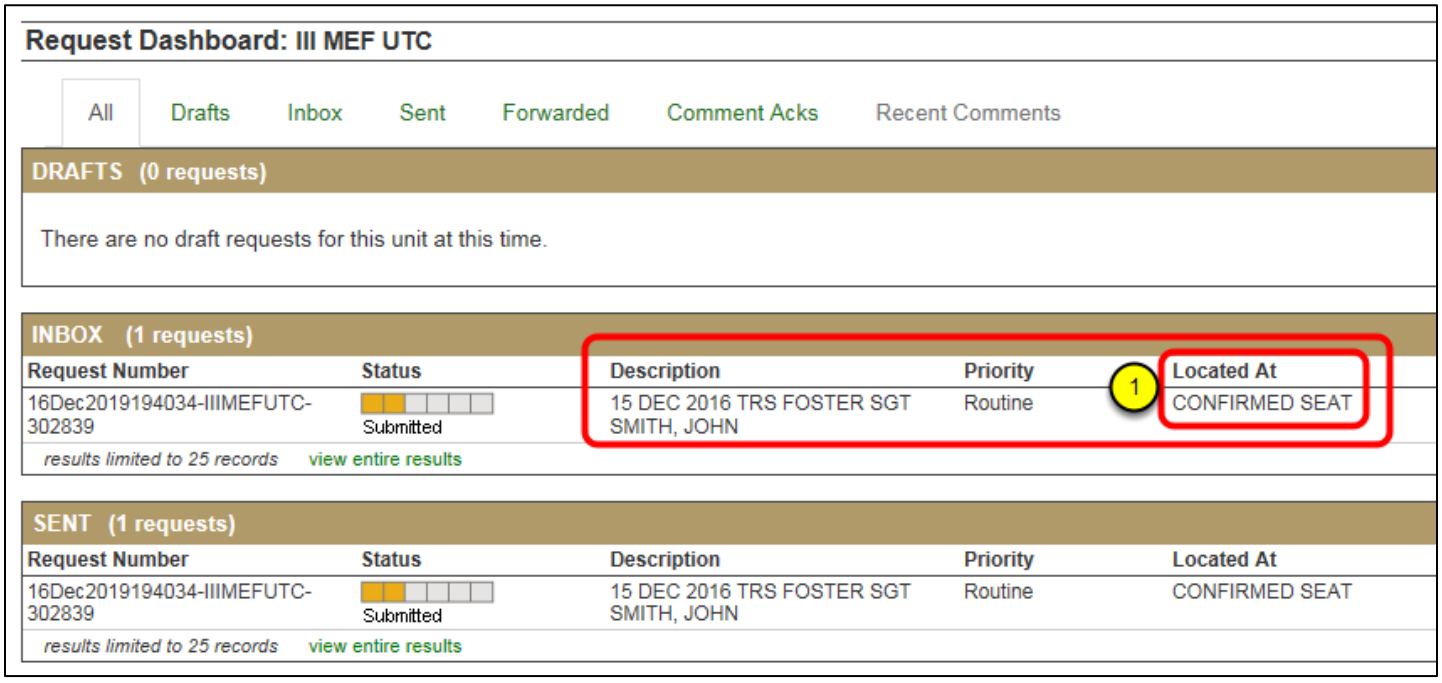
II. Checking on the Status of a Request

1. Click Requests => Requests Dashboard

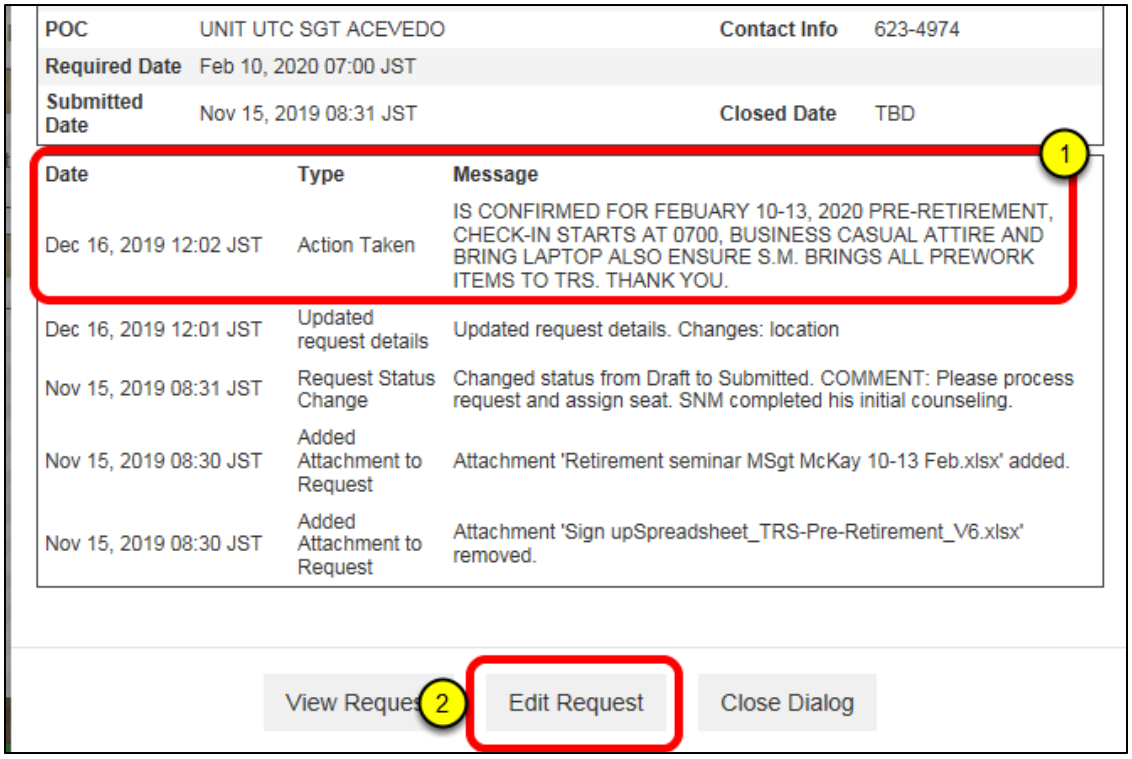


2. If the request is still pending, the Located At: will be "WORKING".

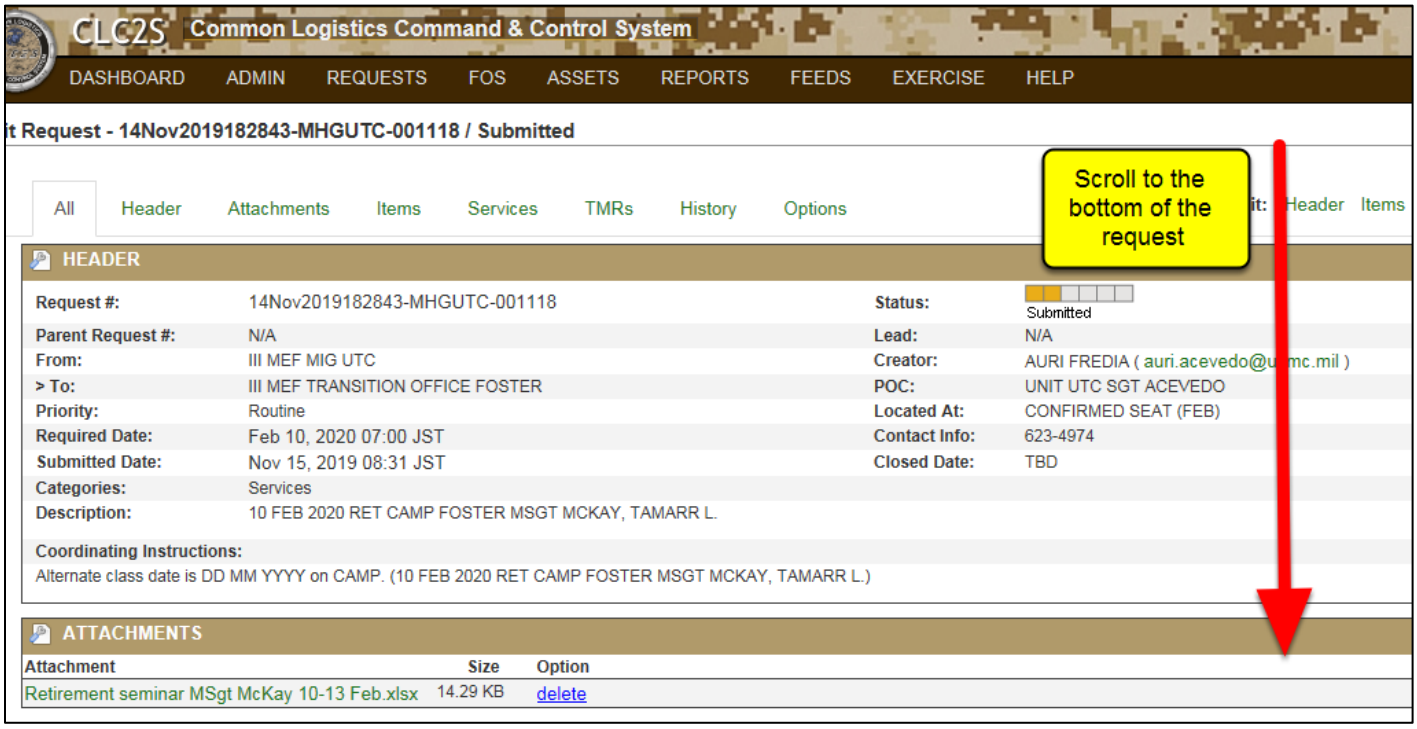
3. If the request has been processed, the Located At: will be "CONFIRMED SEAT".



4. Click on the request to review the comments. Click: Edit Request



5. The request will open. Scroll to the bottom of the page.



6. Detailed comments are listed in the History Log.

:: TMRs

-- no TMRs defined

:: HISTORY LOG

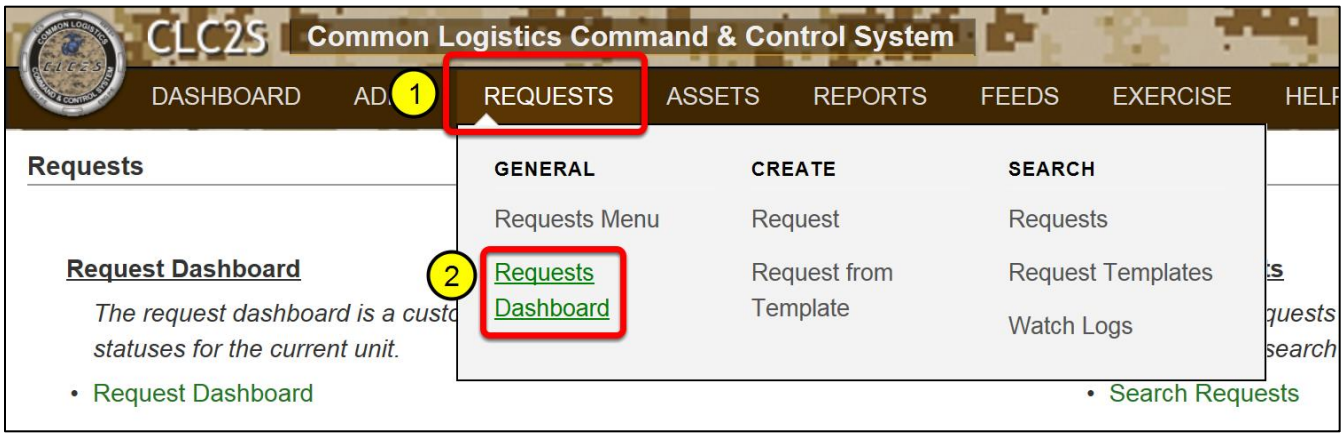
Date	Type	Unit	From	Message
Dec 16, 2019 12:02 JST	Action Taken	III MEF TRANSITION OFFICE FOSTER	JASMINE ARIAS	IS CONFIRMED FOR FEBUARY 10-13, 2020 PRE-RETIREMENT, CHECK-IN STARTS AT 0700, BUSINESS CASUAL ATTIRE AND BRING LAPTOP ALSO ENSURE S.M. BRINGS ALL PREWORK ITEMS TO TRS. THANK YOU.
Dec 16, 2019 12:01 JST	Updated request details	III MEF TRANSITION OFFICE FOSTER	JASMINE ARIAS	Updated request details. Changes: location
Nov 15, 2019 08:31 JST	Request Status Change	III MEF MIG UTC	AURI FREDIA	Changed status from Draft to Submitted. COMMENT: Please process request and assign seat. SNM completed his initial counseling.
Nov 15, 2019 08:30 JST	Added Attachment to Request	III MEF MIG UTC	AURI FREDIA	Attachment 'Retirement seminar MSgt McKay 10-13 Feb.xlsx' added.
Nov 15, 2019 08:30 JST	Added Attachment to Request	III MEF MIG UTC	AURI FREDIA	Attachment 'Sign upSpreadsheet_TRS-Pre-Retirement_V6.xlsx' removed.
Nov 15, 2019 08:30 JST	Updated request details	III MEF MIG UTC	AURI FREDIA	Updated request details. Changes: point_of_contact, short_desc, coordinating_instructions, contact_information
Nov 15, 2019 08:28 JST	Created new request	III MEF MIG UTC	AURI FREDIA	Created new request

III. Closing Requests

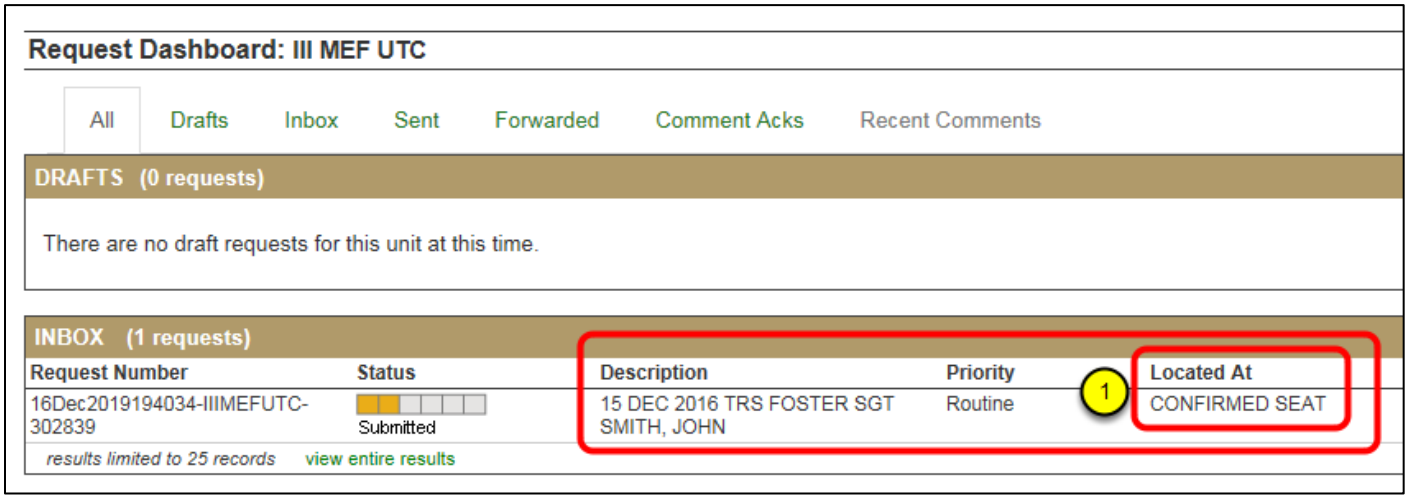
When a service member is accepted into TRS or Pre-Retirement, the Transition Office will change the Located At: field to "CONFIRMED SEAT" and will forward the request back to the UTC with comments.

Once the service member completes the training, the request can be archived

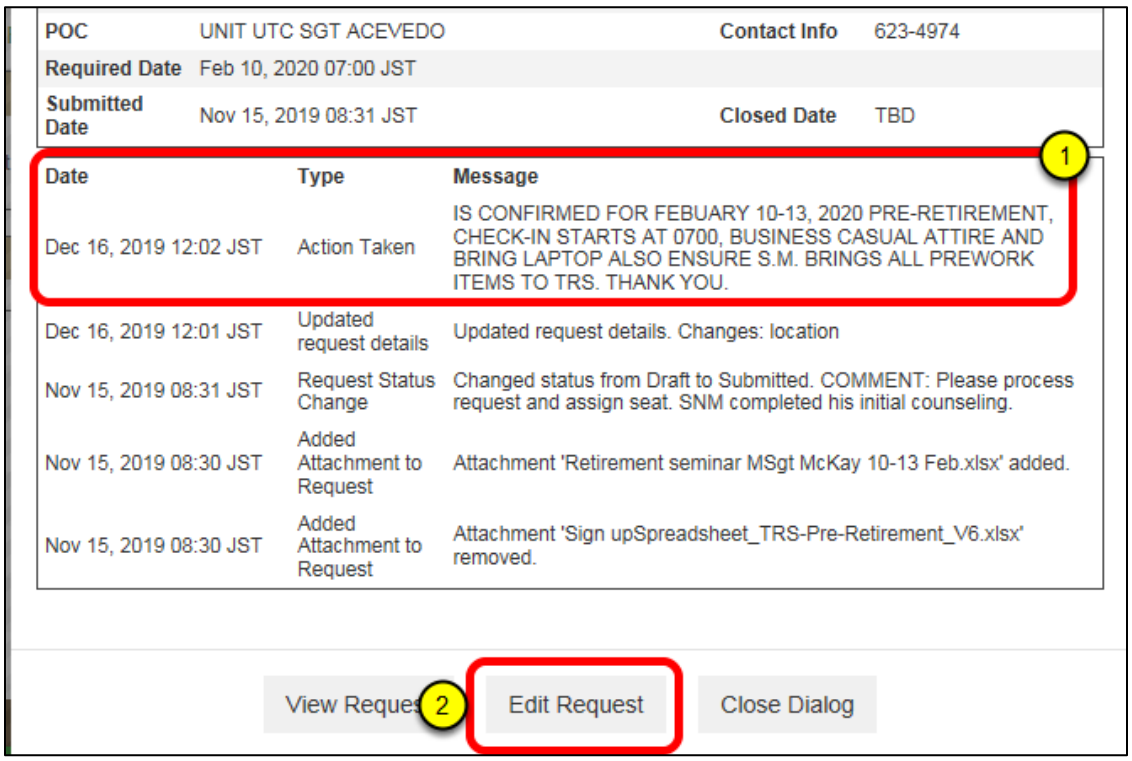
1. Click Requests => Requests Dashboard



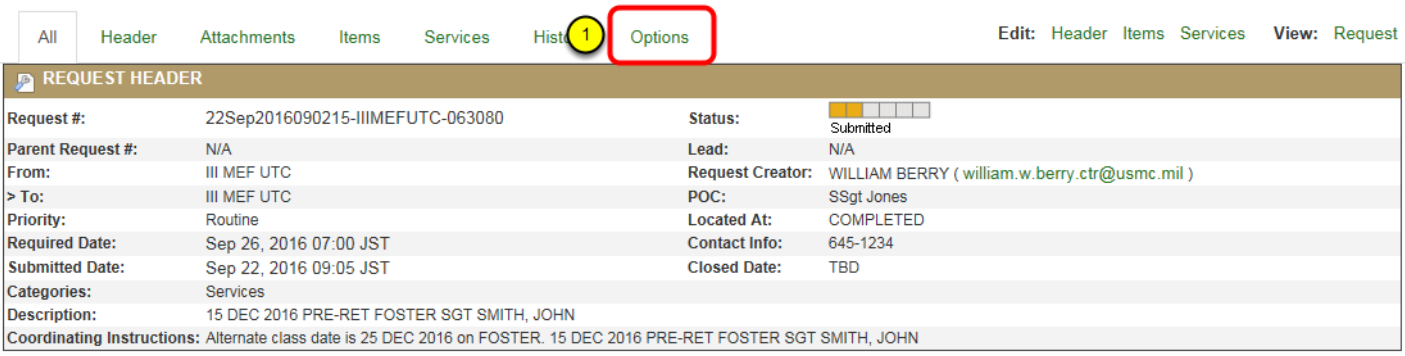
2. Click on the request



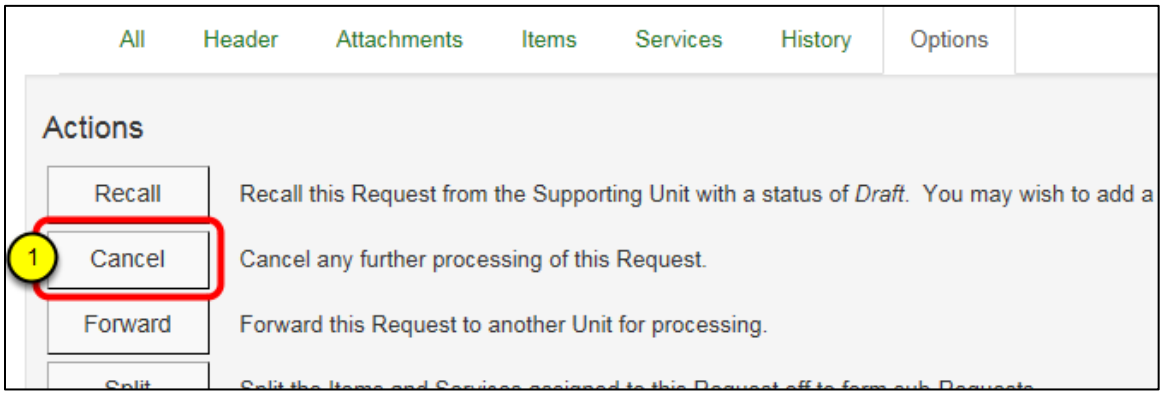
3. Review the comments. Click "Edit Request"



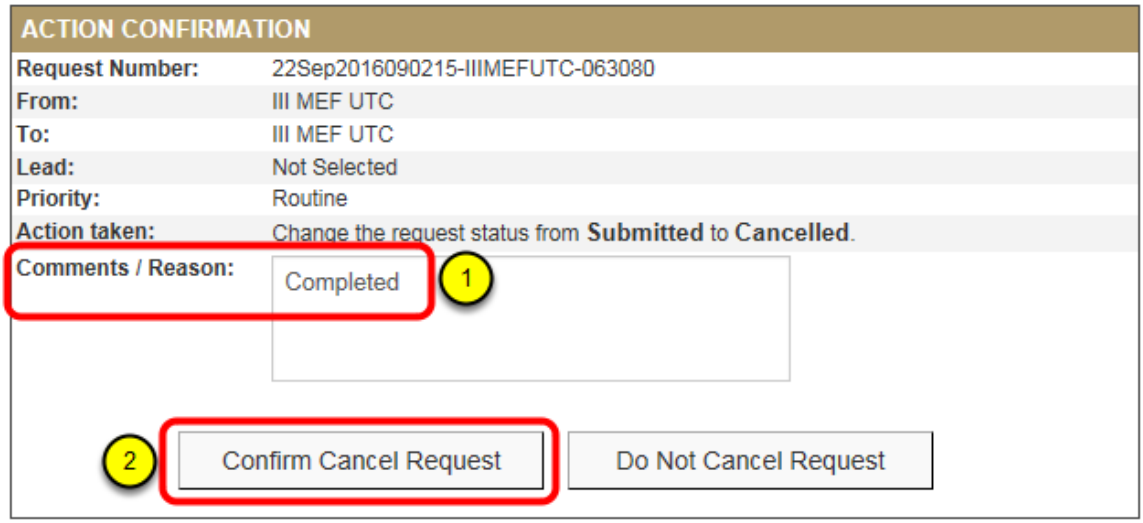
4. Click "Options"



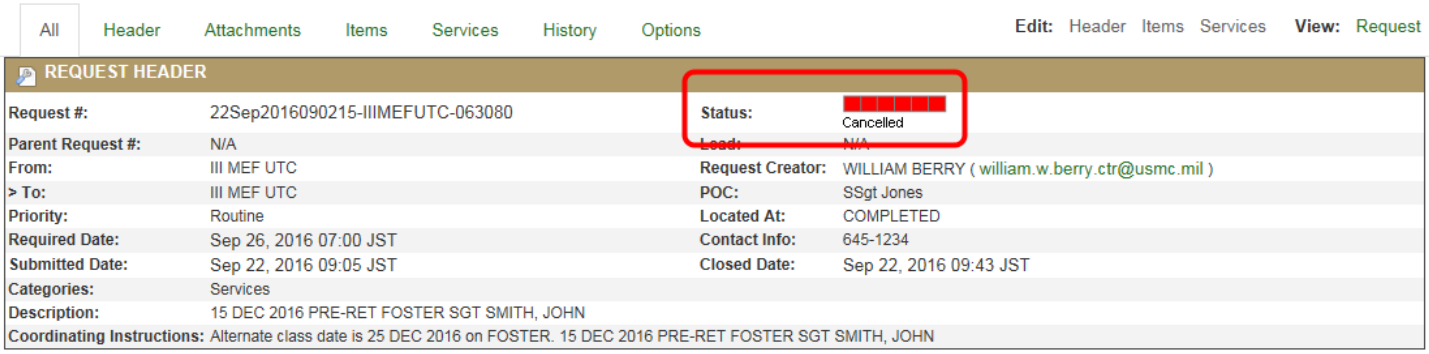
5. Click: Cancel



11. Enter closing comments and click "Confirm Cancel Request"

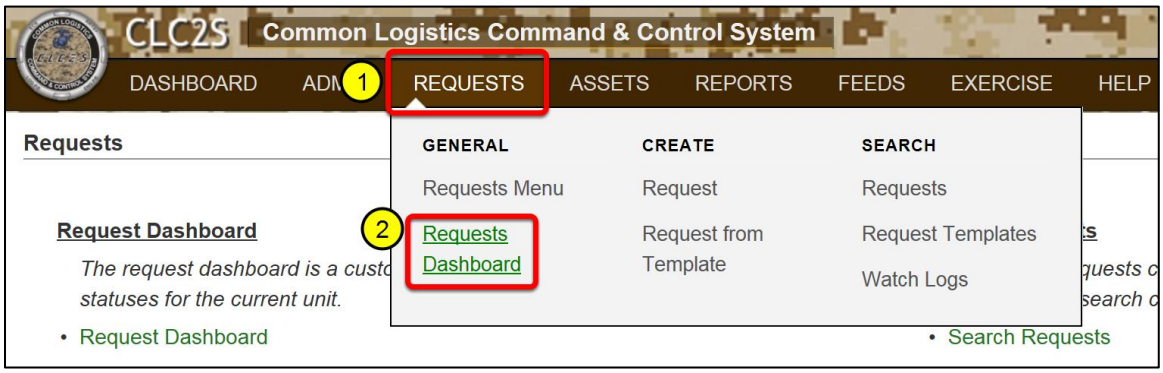


12. The request has been closed and archived.

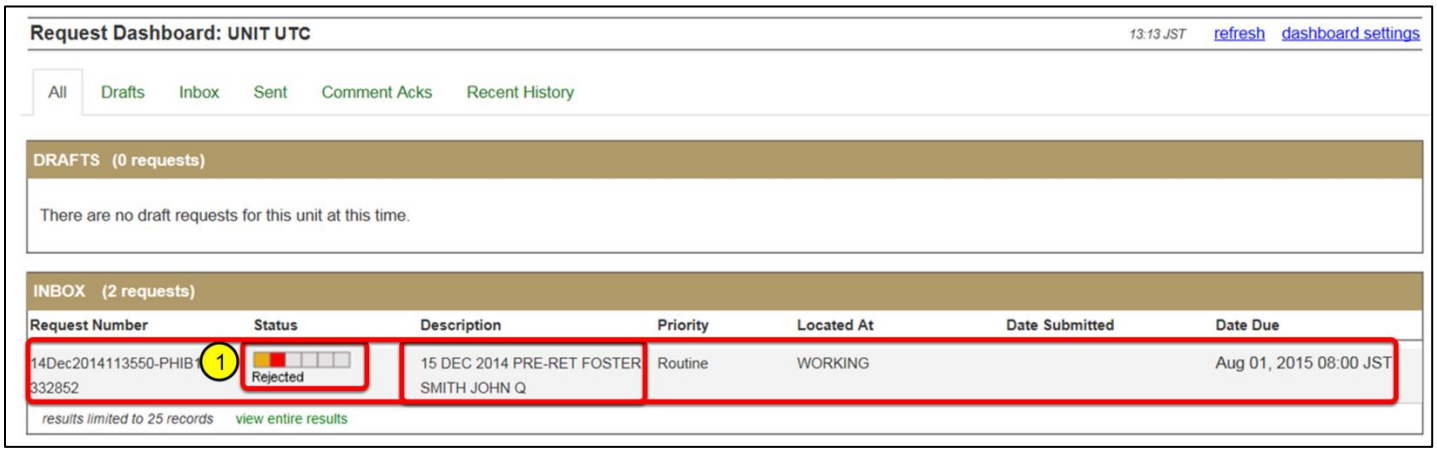


IV. Managing Rejected Requests

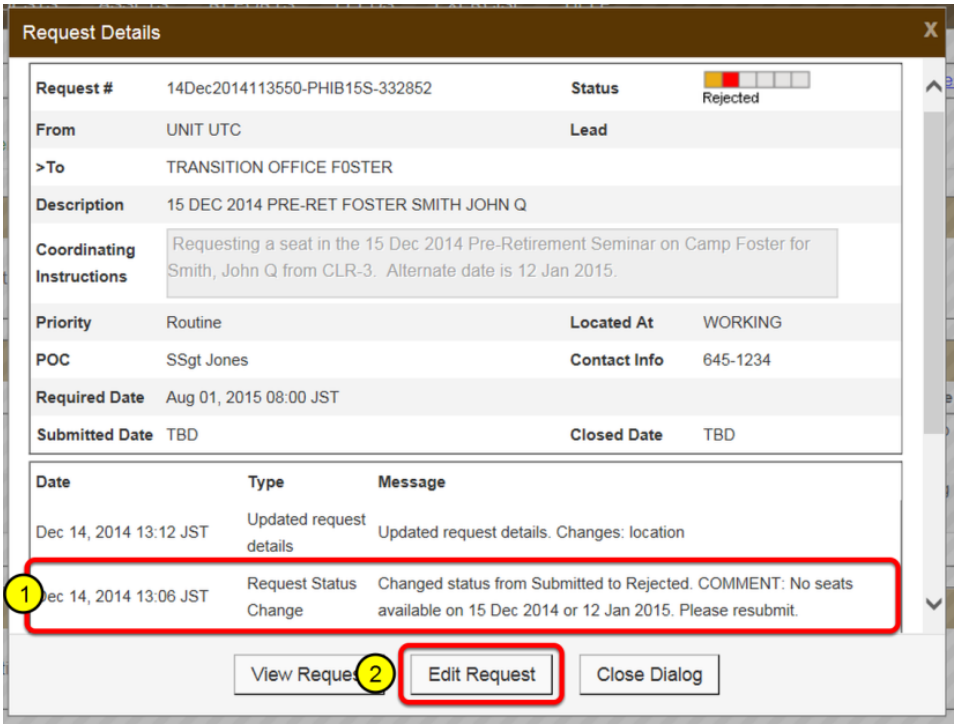
1. Click Requests => Requests Dashboard



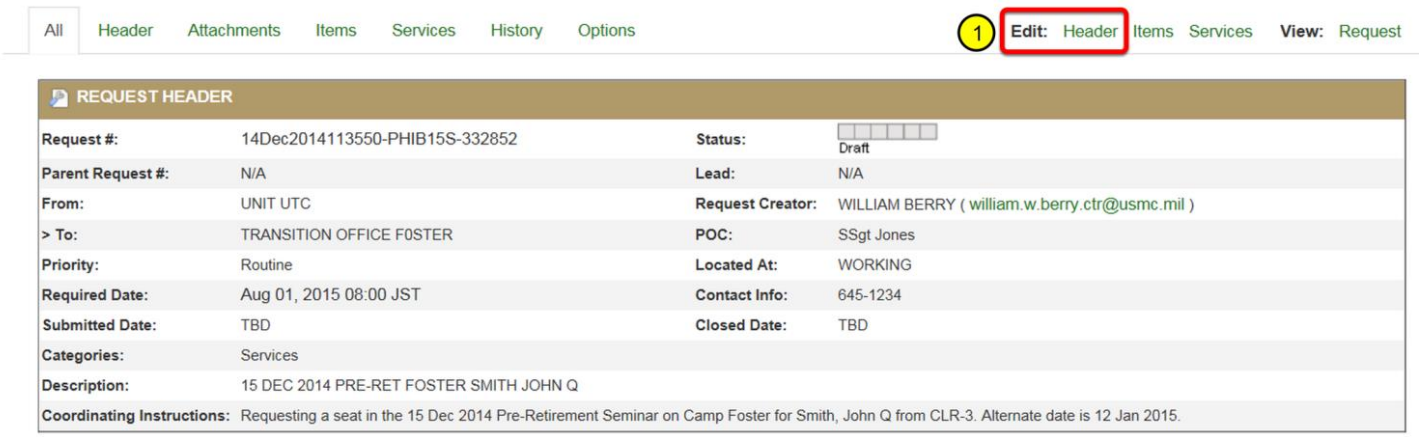
2. Click on the rejected request



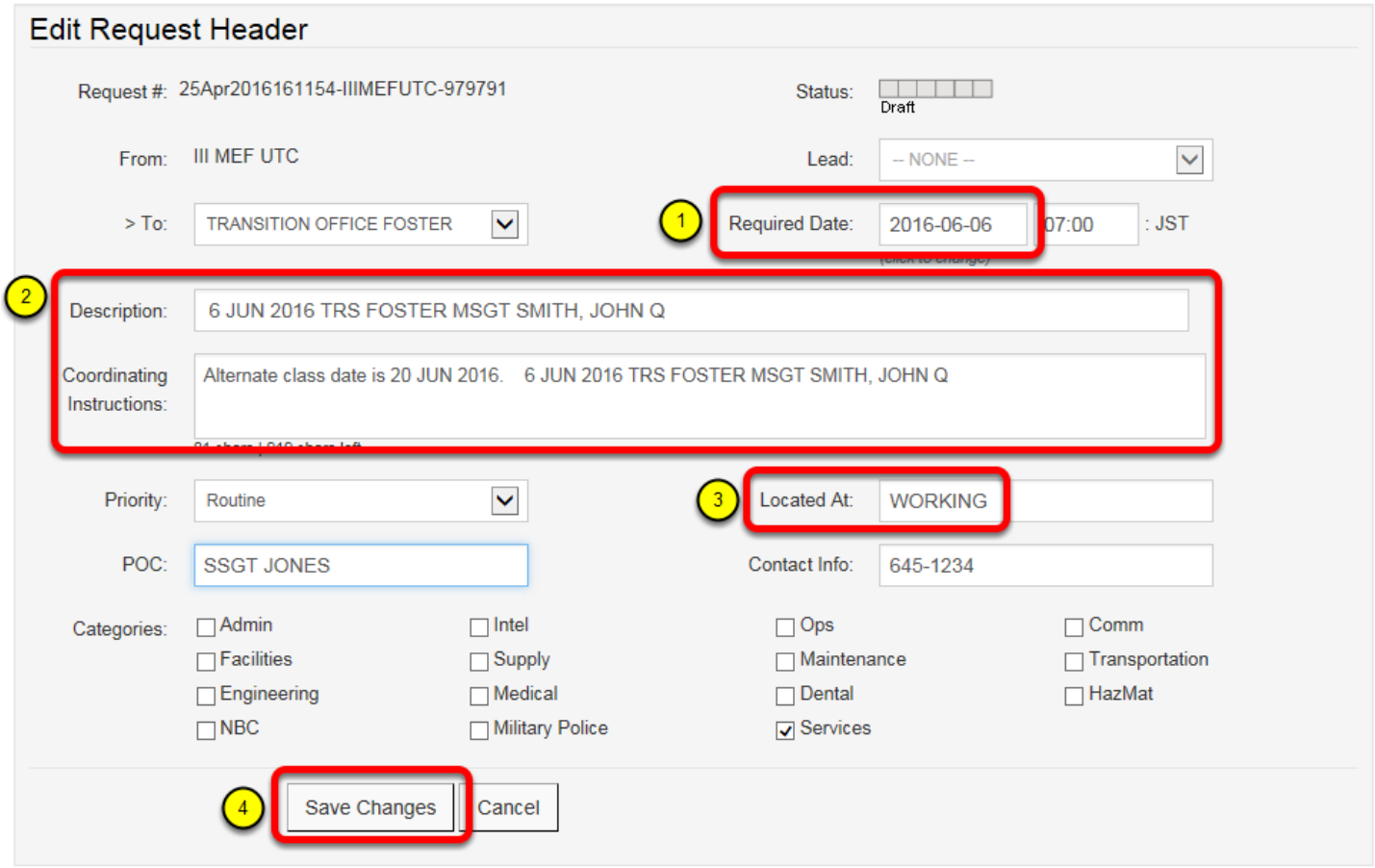
3. Review rejection comments and click "Edit Request"



4. Click "Edit: Header"



5. Update the header according to the rejection comments. Change Located At: to WORKING.

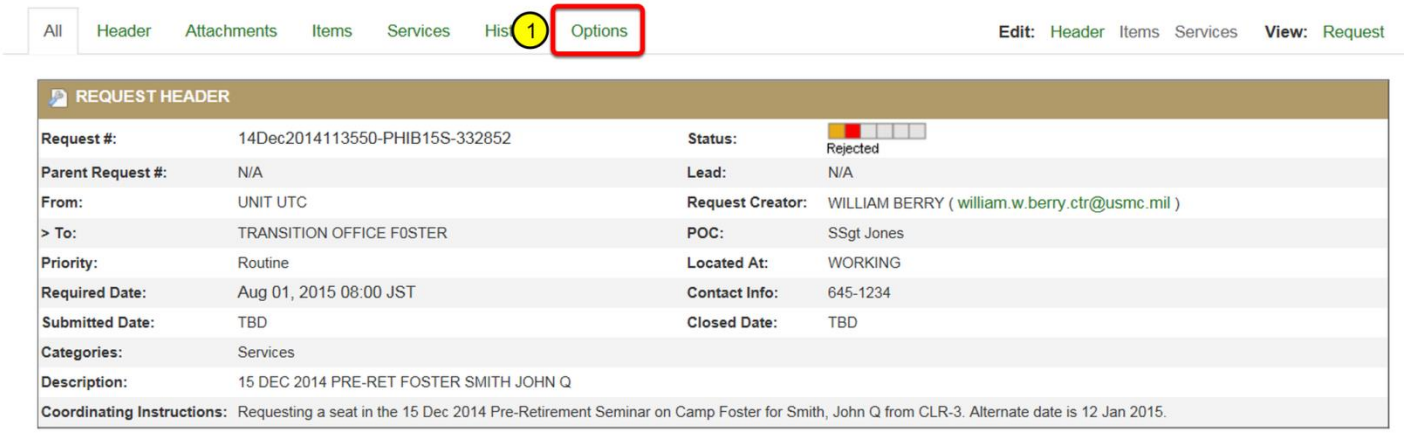


1. Change the "Required Date" to the new class date
2. Update the Description and Coordinating Instructions with the new primary and alternate class dates
3. Change the "Located At" field to WORKING.

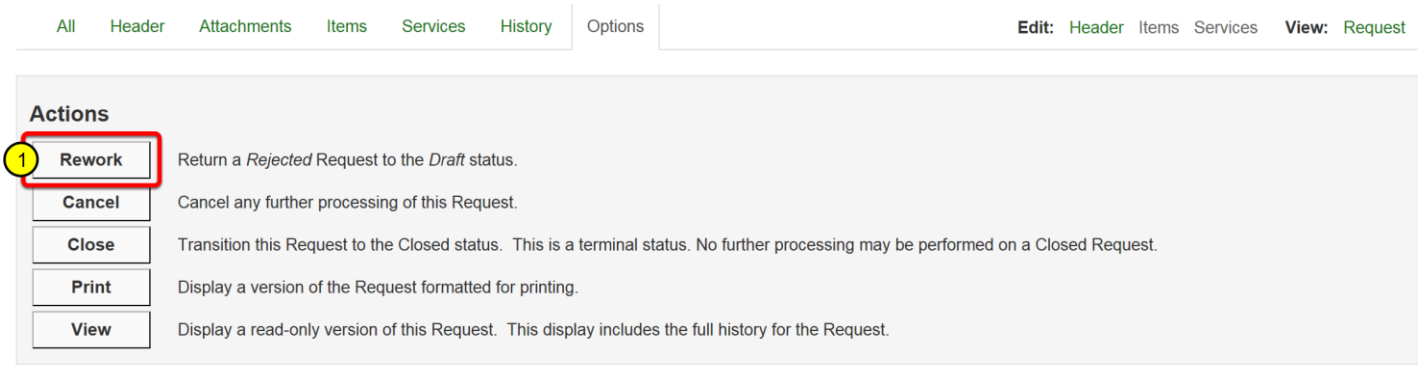
(ALWAYS change "Located At" to WORKING when re-submitting requests. This shows the Transition Office the request has been updated and requires attention)

4. Click "Save Changes"

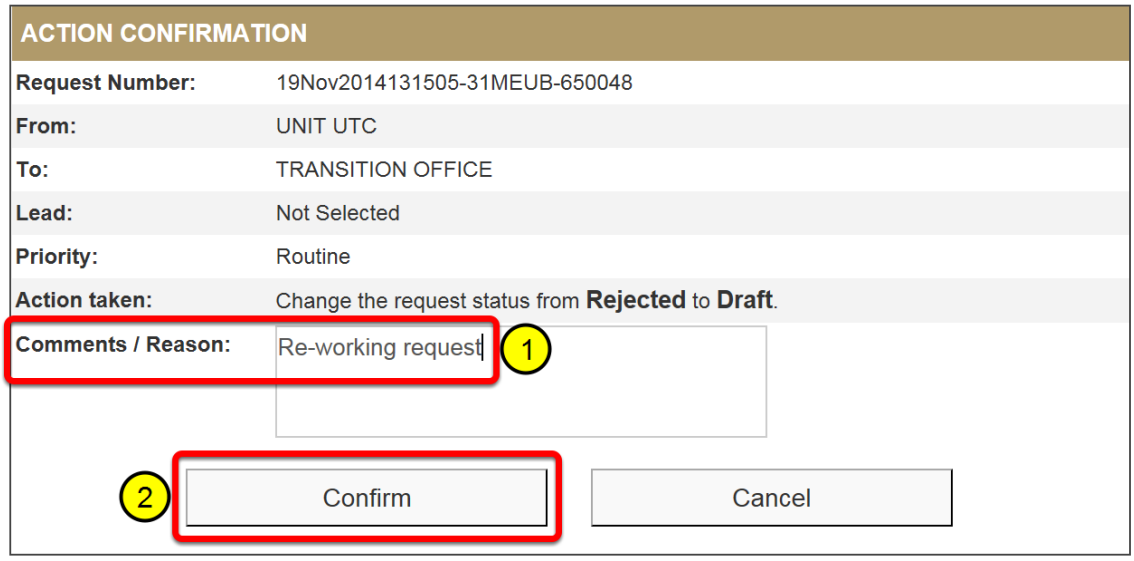
6. Click: Options



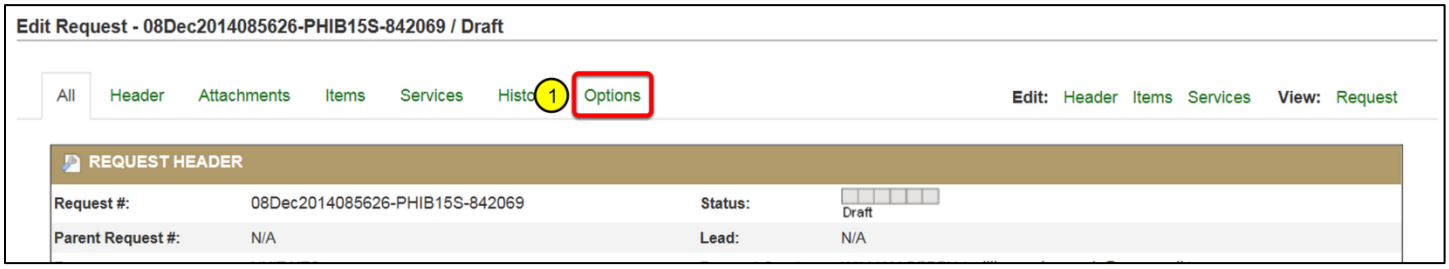
7. Click: Rework



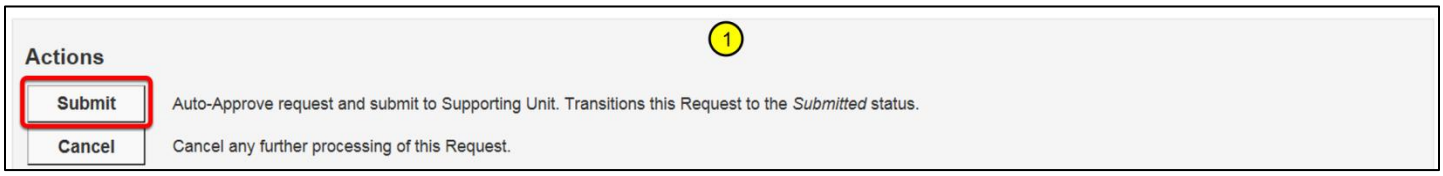
8. Enter Re-Work comments and click: Confirm



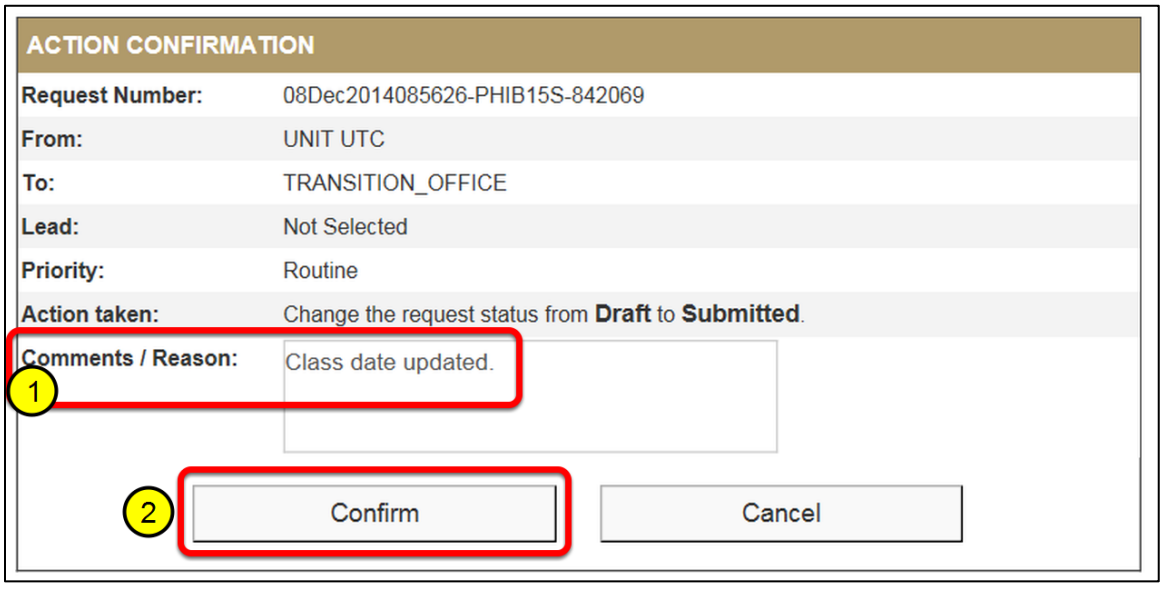
9. Click: Options



10. Click: Submit

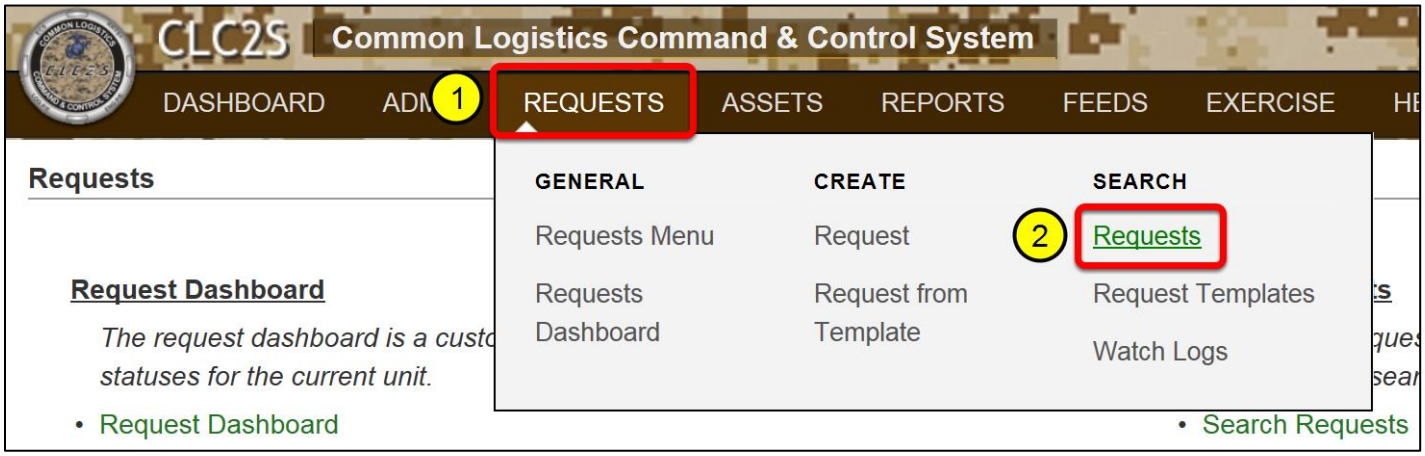


11. Add comments and click: Confirm

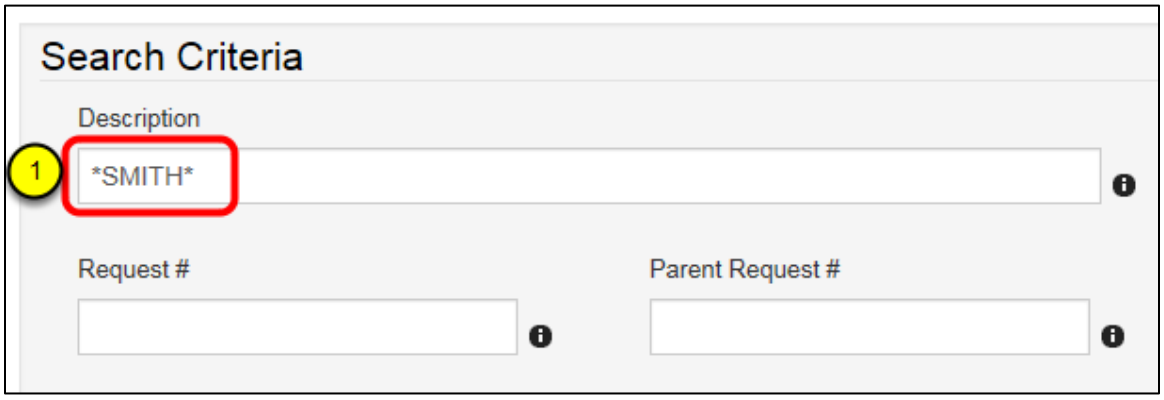


V. Searching / Checking on the Status of a Request

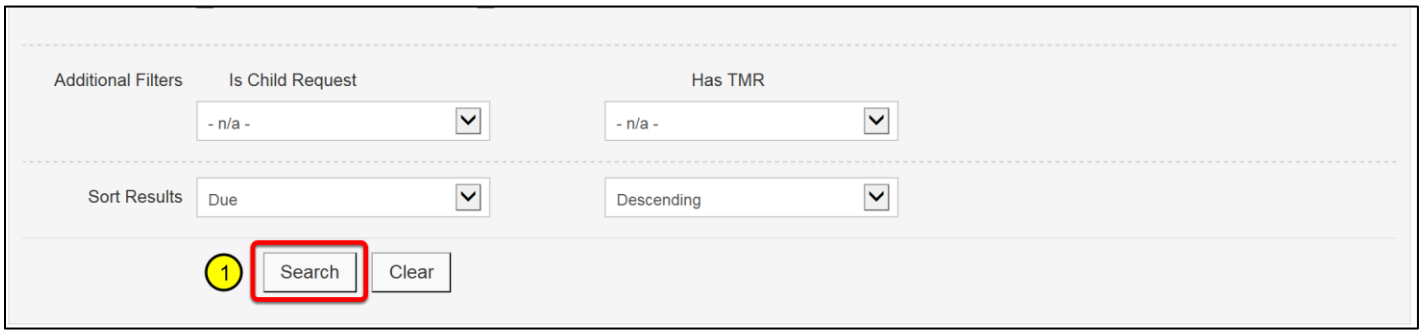
1. Click: Requests => Search Requests



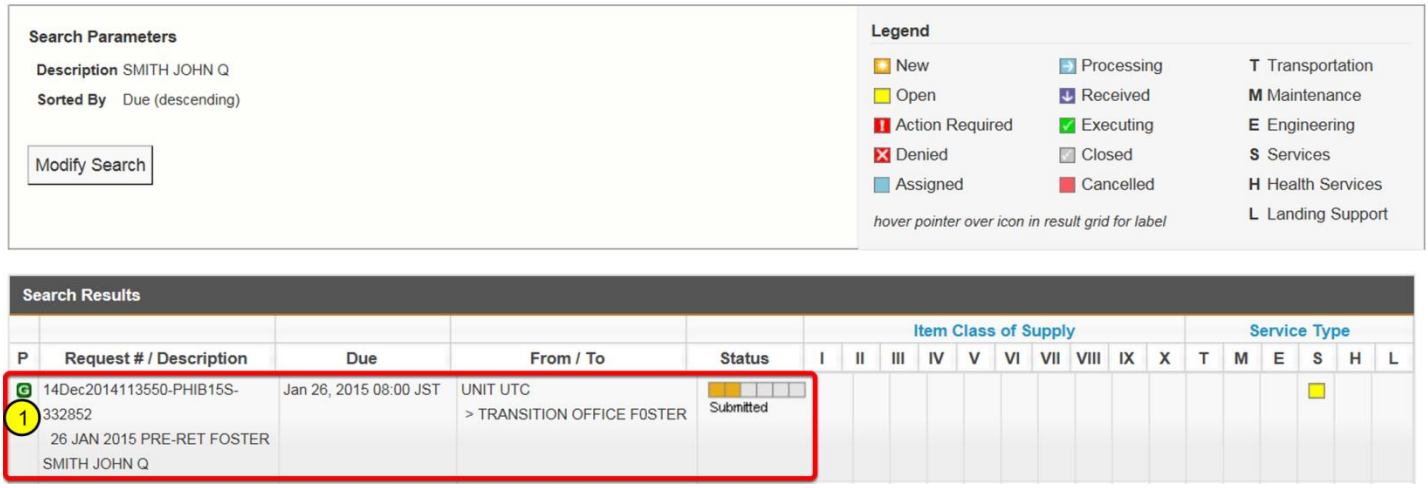
2. Enter the attendees name in the Description field. Place a (*) before and after the name.



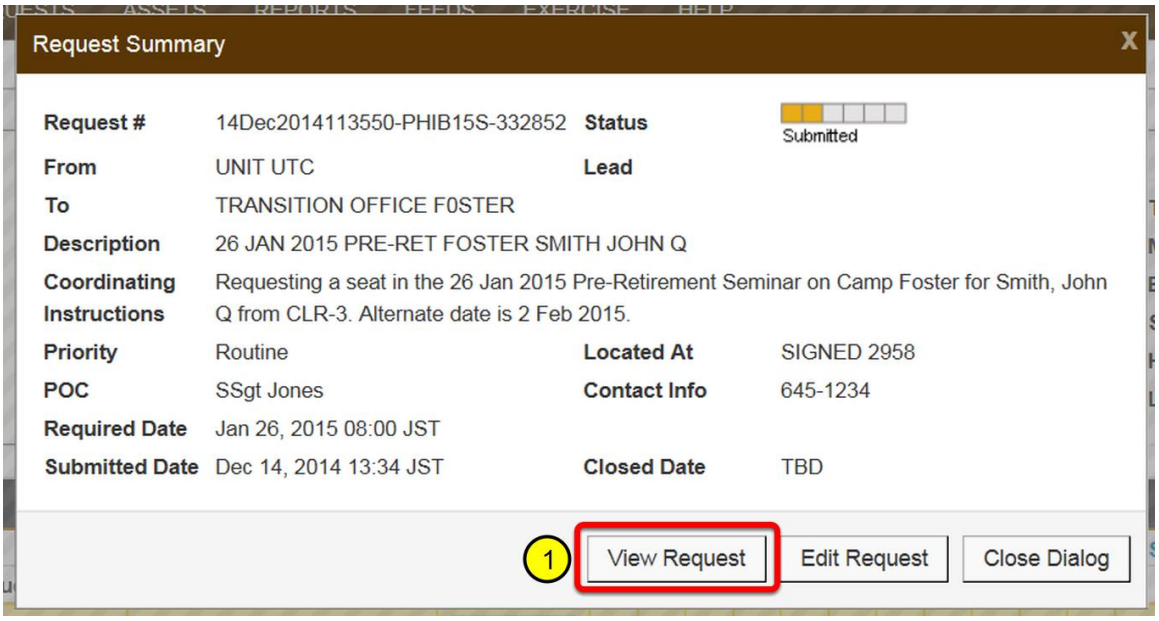
3. Scroll down and click: Search



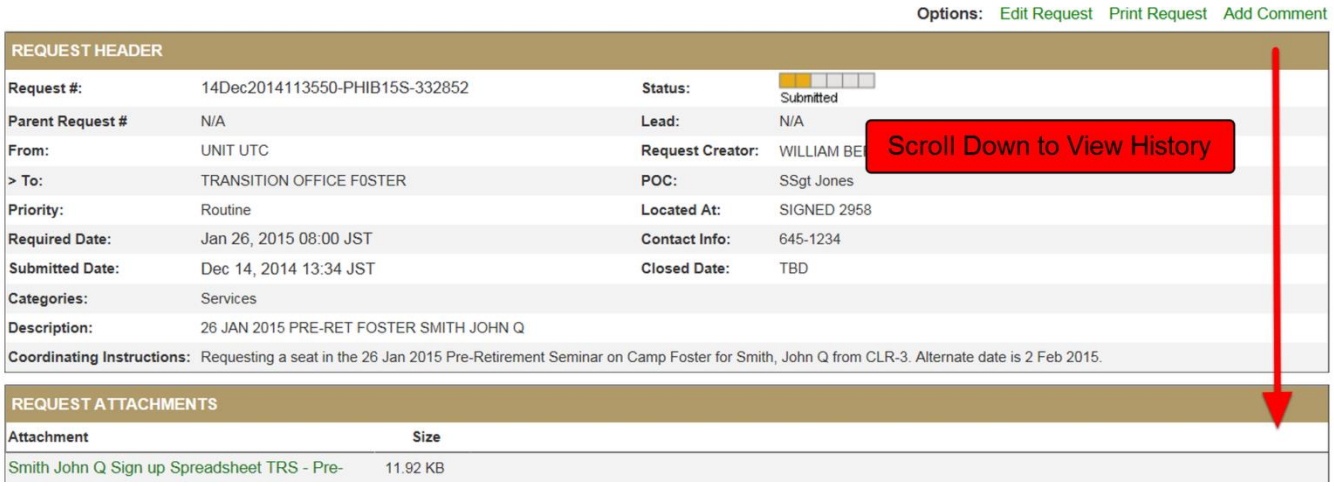
4. The attendees request and records appear in the search results



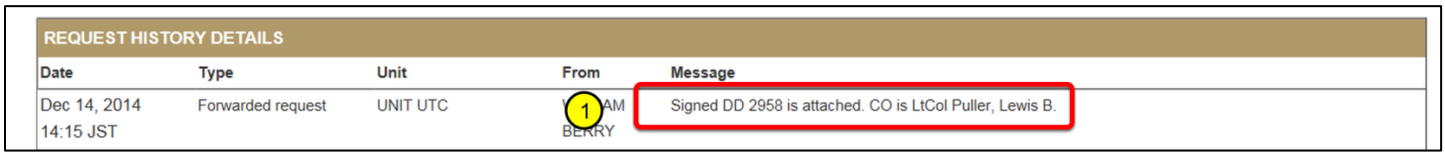
5. Click: View Request



6. Scroll down to view the request history



7. The comments and request history details are displayed

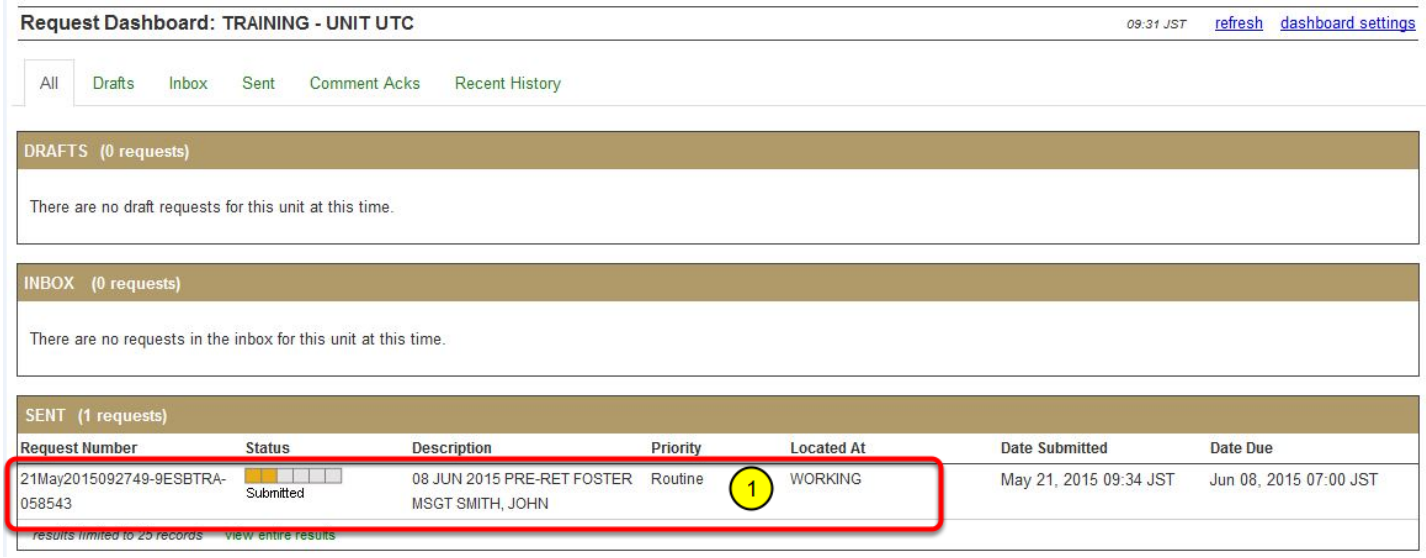


VI. Recalling Requests

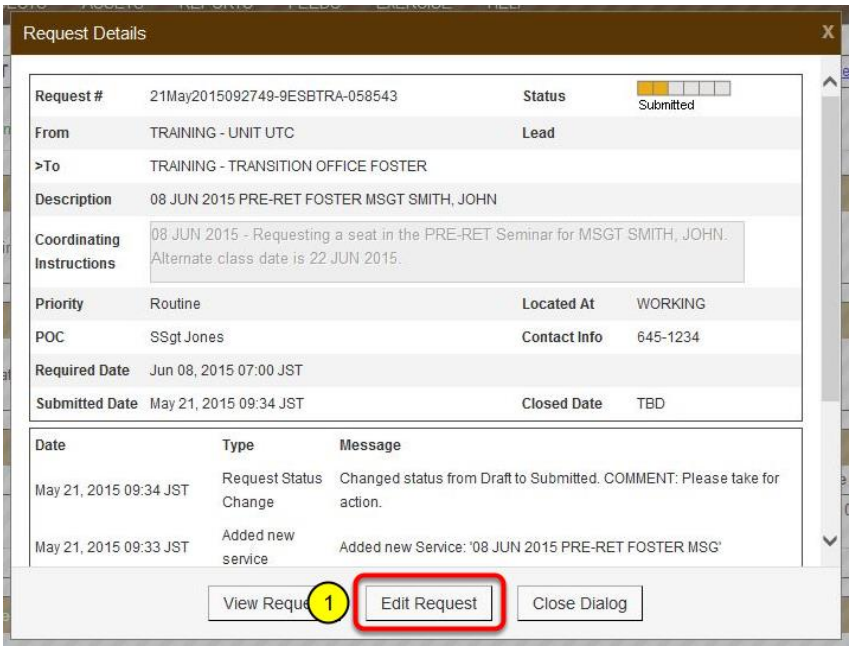
DO NOT RECALL A REQUEST WITHOUT FIRST CONTACTING THE TRANSITION OFFICE.

If a request must be recalled to be cancelled or updated, the UTC **MUST** contact the Transition Office and let them know about the change. If not – the Marine will remain scheduled for the class and will be listed as a No-Show.

1. Click on the Request



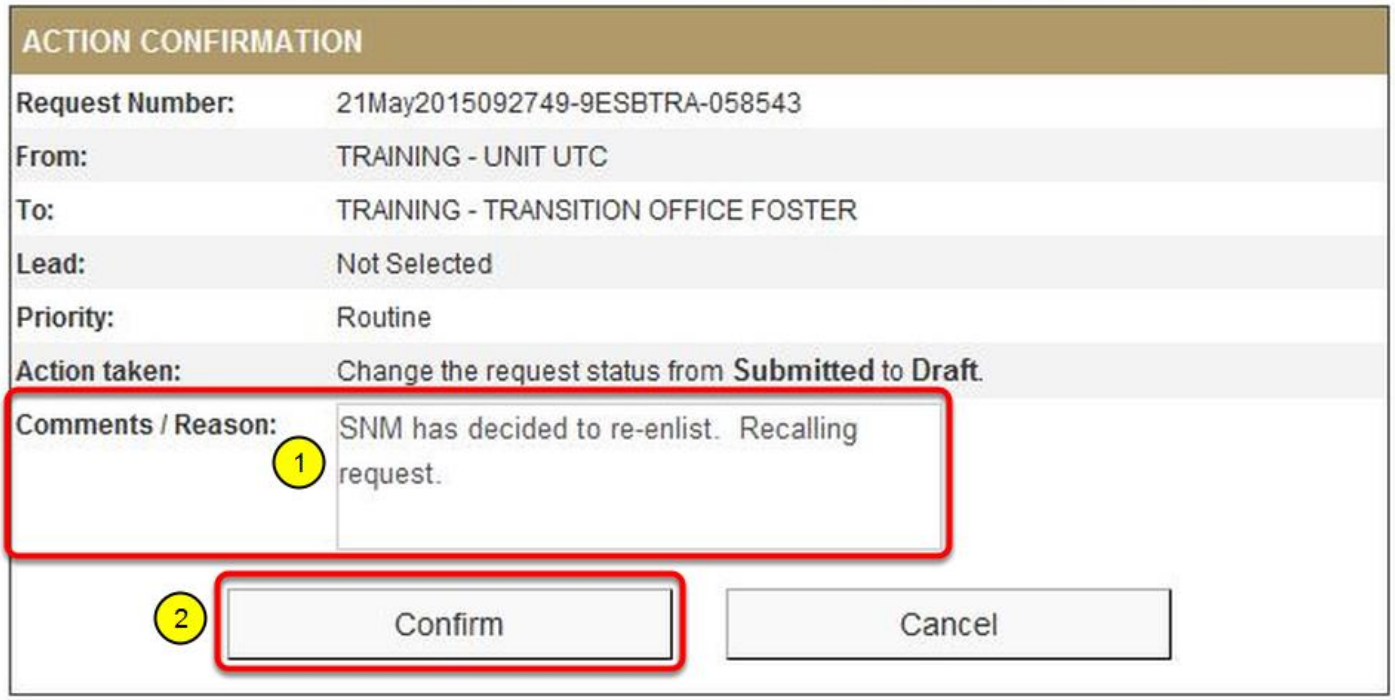
2. Click: Edit



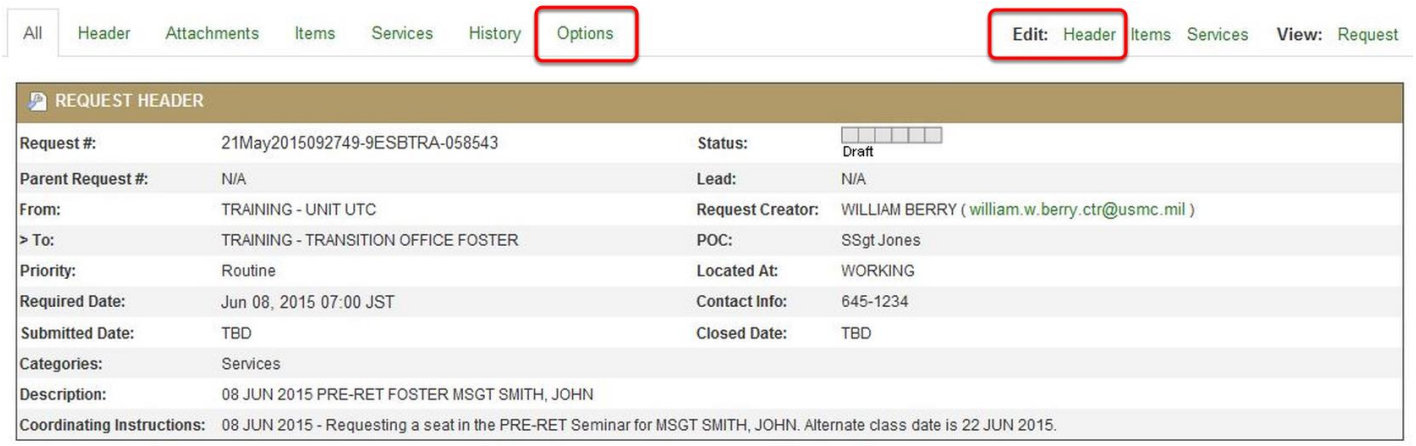
3. Click: Options

4. Click: Recall

5. Enter recall comments and click: Confirm

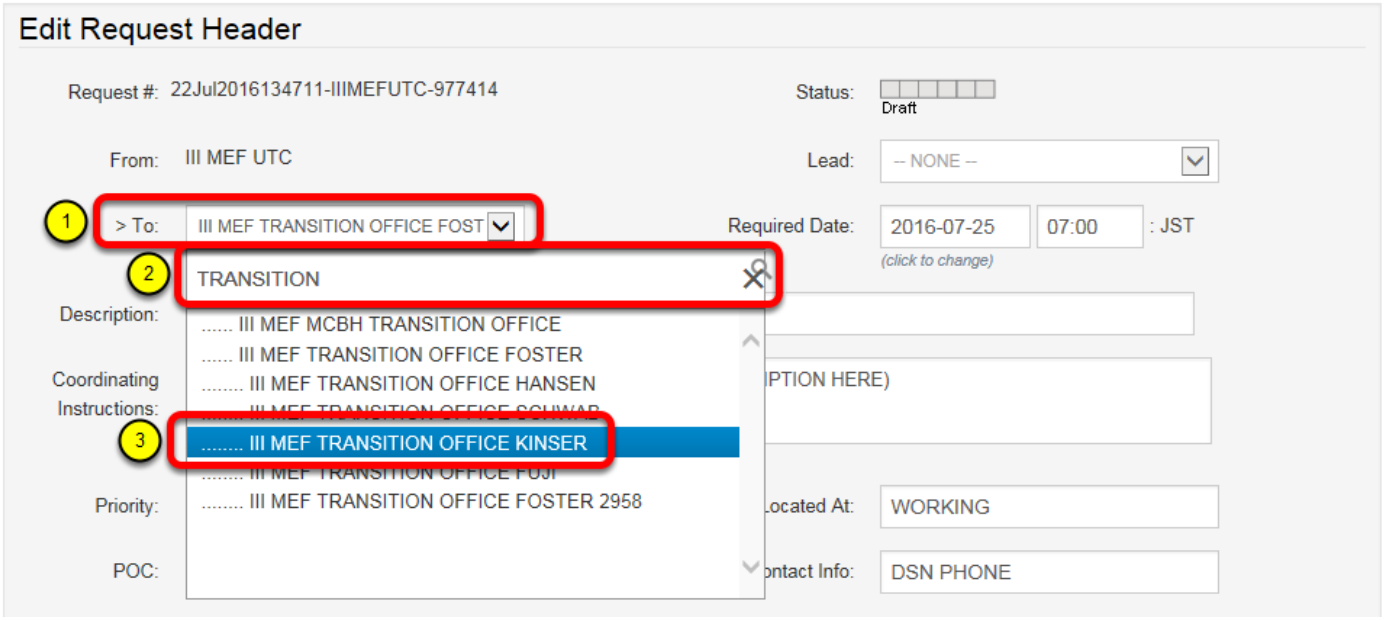


6. Click "Options" to cancel the request. Click "Edit: Header" to modify and re-submit.



- If the request needs to be deleted, click "Options" => "Cancel." Enter comments and close the request.

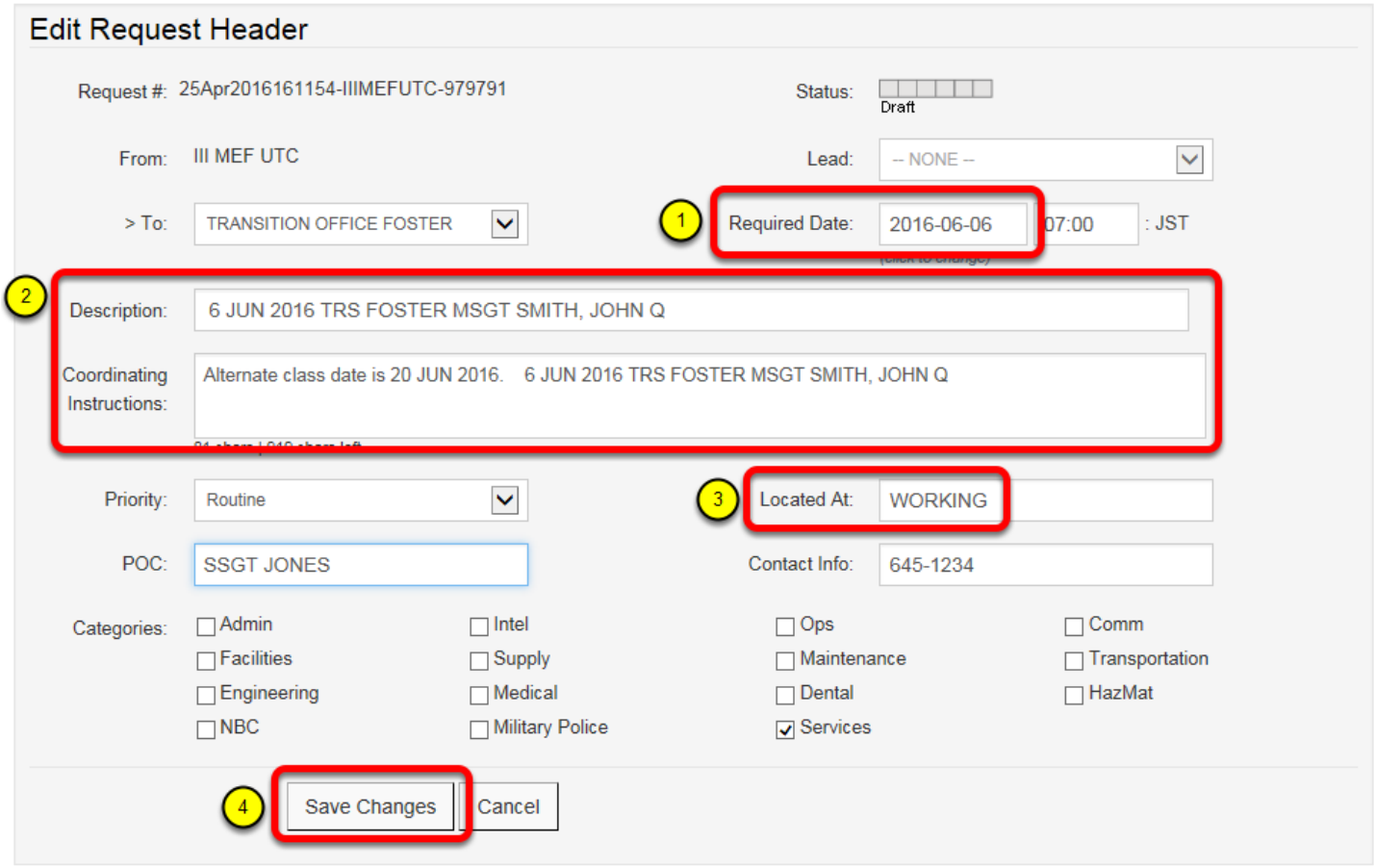
7. Select the desired Transition Office



1. Click on the > To: drop down menu
2. Type "TRANSITION"
3. Select the desired Transition Office

Note: All Pre-Retirement seminars go on Camp Foster

8. Click "Edit: Header" to modify and re-submit.



1. Change the "Required Date" to the new class date
2. Update the Description and Coordinating Instructions with the new primary and alternate class dates
3. Change the "Located At" field to WORKING.

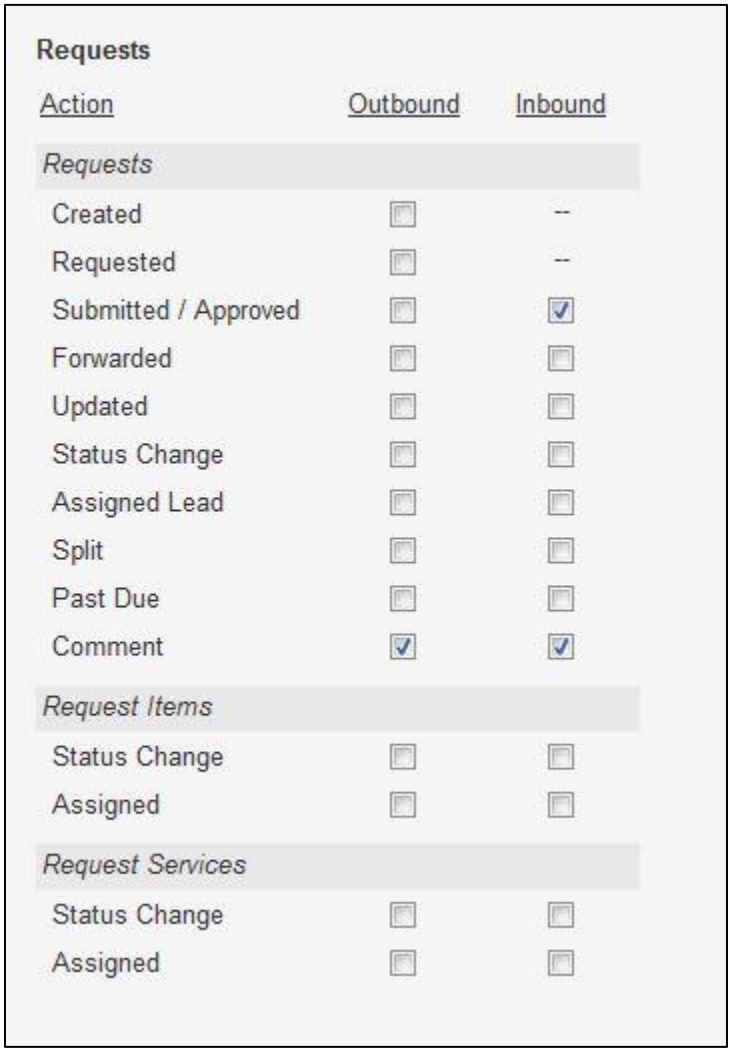
(ALWAYS change "Located At" to WORKING when re-submitting requests.)

4. Click "Save Changes"

5. Update "Services" information, save, and resubmit.

VII. Email Notification Settings

CLC2S can automatically email the user when a new request arrives in their inbox, or when comments are added to a request they have submitted.

To activate the email notifications:

- Click: Profile
- Scroll down to the "Email Notifications" section
- Check the following boxes: