

# UTC Manual

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## Certification process

- ❑ Submit an Appointment Letter using the correct template
- ❑ Appointment letter is dated within 45 days of UTC Certification Training (IG0102)
- ❑ Create a UTC binder that can hold this manual and your Appointment Letter and UTC Certificate
- ❑ Email [beth.galvan@usmc-mccs.org](mailto:beth.galvan@usmc-mccs.org) to get the current list of the Capstone Designees in your unit. (IG0105)
- ❑ Add the UTC Website to your internet favorites
- ❑ Add the public TRS website to your favorites Google: MCCS Camp Lejeune; go to Marine & Family then Transition Readiness

# Get organized...

- ❑ File your UTC Certificate with your Appointment Letter
- ❑ Submit the ePAR request. It must include your UTC Certificate. The UTCN code must be entered in your MOL record. (0101)
- ❑ Put the TRUMBA password in a safe place
- ❑ Determine the TA and TZ code process in your unit/Command. Who enters it and how do you get the information to them? (0107)
- ❑ Download the UTC Tracker from the Toolbox and use your unit roster to populate it. (0103 & 0104)
- ❑ Determine the process to schedule the Commander's Verification with the CO/Capstone Designees.
- ❑ Reach out to any service members that have an EAS within 365 days
- ❑ Determine where you will keep the DD2648s upon EAS - Review your records and ensure you have DD2648s for people that have EASd. (0108)

# VOW Act and DoD policy timelines

- Ensure the Marine completes all **pre-work** as per the Transition 365 Checklist:
  - **Failure to provide pre-work or complete it correctly means the Marine will be sent back to the UTC for a new IC appointment**
- **IC** (one on one appointment with TRB Advisor) and **PreSep** (classroom training) completed 365 days from EAS
- **TRS/Retirement/ETRS** completed 180 days (six months) from EAS
- **Capstone Review** (with TRS class instructor) completed 120 days (four months) from EAS
- **Capstone/Commander's Verification** (with CO or Capstone Designee) completed 90 days (three months) from EAS

IC is a one on one session with an Advisor (365 days before EAS)

UTC verifies all pre-work then schedules IC

Print 365 Checklist and Self Assessment (or email them to Advisor)

SM and UTC receive confirmation email that IC was done

PreSep is an in class session (365 days before EAS)

Scheduled by Advisor during IC

UTC checks DASHBOARD for PreSep completion

UTC registers SM for class via TRUMBA

SM attends class (180 days before EAS)

UTC checks DASHBOARD for TRS completion

UTC runs TA event code in MCTIMS

Capstone Review One on One with Seminar Advisor (120 days before EAS)

UTC confirms SM has scheduled Capstone Review

UTC reviews CRS for completion

UTC provides correct designee email address on 365 checklist

Commanders Verification With CO or Capstone Designee (90 days before EAS)

UTC schedules meeting between SM and CO/Designee

UTC receives final DD2648

UTC runs TZ event code in MCTIMS

# GLOSSARY

Following are the terms used by TRS in alphabetical order.

# Tier

- The level correlating to the SMs readiness to get out of the military. It is assessed during an IC appointment and recorded in the eForm and on the Transition 365 checklist.
- The UTC needs the tier to correctly schedule the seminar.
- Tier 1 includes most retirees that will have 20+ years at the time of retirement

# Track

- A 2-day course attended after the 2 DoD mandated days of TRS are completed.
- The courses are: Employment, Education, Credential Exploration (Vocational) or Entrepreneurship
- During an IC the Advisor will recommend 2 tracks for the SM to pursue.
- Depending on the Tier that is assigned to the SM, they may be required to attend at least one track.
- All SMs have the option to complete additional tracks after TRS is complete.



# IC = Initial Counseling

- A meeting with a TRB Advisor to determine what the SM wants to do once they EAS.
- ALL pre-work must be verified before you can request an IC appointment.
- The SM must have the Self-Assessment and Transition 365 checklist that is digitally signed by the UTC with them at the IC appointment.
- The Advisor will log into the SMs eForm to record the Tier/Track

# Pre- Separation Counseling = PreSep

- A short introductory class that follows the IC appointment. It prepares the SM for TRS class and gets them thinking about their transition.
- SMs do NOT need to wait to meet with an Advisor PRIOR to TRS if they have questions about their transition. They can discuss goals; research college options; create financial plans all before they attend TRS if they choose.

# Transition Readiness Seminar = TRS

- Currently a 4 day LIVE Virtual class conducted via Adobe Connect that runs Tue-Fri approximately 0800-1600 each day. (3 days for Retirement and ETRS)
- If/when the Veterans Affairs (VA) establishes their own class that can be included in the week of TRS it will then run for all 5 days. For now, the TOL VA Benefits and Service course is part of pre-work as it remains a DoD mandated requirement.
- Students will receive the Adobe Connect link from their TRS/Retirement/ETRS Instructor a week prior to the start of class.
- Attendance is taken and monitored during class.

## Commander's Verification

- The meeting between the CO or Capstone Designee that is scheduled by the UTC.
- CO/Designee will review the CRS and digitally sign the eForm.
- All Designees must have an appointment letter on file with the UTC and TRB.
- Run the TZ code when you schedule this or once you get the final DD2648.

## eForm / DD2648

- The eForm is located on the DoDTransition Assistance Program website via Milconnect. SMs will need a user name/password to get in. They should monitor their eForm to ensure all phases are completed as they move through the M4LC.
- Only a finalized DD2648 can be given to IPAC for checkout. A DD2648 with a DRAFT watermark are incomplete and mean the SM has not completed all phases.
- Should be provided to the SM during Capstone/Commander's Verification – if it is not the SM needs to log into DoDTAP to print it out. Instructions in the Toolbox. *Do NOT send them to TRS for printing.*
- Must be maintained in the Command files for 1 year following the Marines' EAS. (IG0108)

# Career Readiness Standards = CRS

- ✓ Self-assessment/transition plan: ALL TIERS
- ✓ Budget: TIER 2 & 3, optional TIER 1
- ✓ Gap analysis: TIER 2 & 3, optional TIER 1
- ✓ Employment Track Draft Resume: TIER 3 optional for TIER 1 & 2
- ✓ Education/Vocational Track Program comparison: TIER 3, optional for TIER 1 & 2

It is **HIGHLY** recommended that the UTC review CRS prior to the Capstone. Any mandatory CRS that are not turned in to TRS will result in a negative response on the eForm and will require CO/Capstone Designee action.

# Retiree

- Refers to a SM who will have 20+ years at the time of retirement.
- They are exempt from the ROOB and DOL portions of TRS.
- Medical and TERA retirees MUST attend TRS. The Retirement Seminar does not include DOL and therefore does not meet the mandatory requirements this category of SM falls into. They MAY attend a Retirement Seminar AFTER they attend TRS if they choose.
- Retirement Seminar is up to and includes E8 and equivalent ranks. It is currently 3 days long.
- Executive Retirement Seminar (ETRS) is only open to and includes E9 and equivalent ranks. Is currently 3 days long.
- **ALL SMs MUST complete Pre-Work/IC/PreSep**

# DASHBOARD

- An Excel spreadsheet that contains information UTCs need to confirm information about class attendance prior to or after class is conducted.
- It also includes the year's TRS classes and special announcements.
- Sent to all TRB Certified UTCs every Wednesday.
- Sent to all MSCs every Thursday.
- Is the ONLY place to confirm TRS/Retirement/ETRS was completed so that the TZ code can be run.



**So what do you *actually* do?** Below are excerpts from various HQ sources that explain the role of a UTC. You can use these if you need to explain, summarize or give information on what a UTC does.

UTC roles and responsibilities are defined in MCO 1700.31.

The UTCs role is to facilitate all unit transition activities with the local Transition Readiness Program office and assist the Marine throughout the Marine For Life Cycle (M4LC).

The Transition Readiness Program provides a comprehensive transition and employment assistance program for Marines and their families; the program emphasizes a proactive approach that enables Marines to formulate effective post-transition entrepreneurship, employment, and educational goals throughout the Marine For Life Cycle through ongoing Career Services and Advising. The Transition Readiness Seminar, is a 5-day workshop that provides Marines and their families with the skills-building training, tools and resources needed to pursue Department of Defense (DoD) directed Career Readiness Standards (CRS) and meet the Veteran's Opportunity to Work (VOW) to Hire Heroes Act Compliance. CRS are tangible documents that demonstrate the Marine is prepared to transition effectively to pursue personal post transition goals. The VOW Act signed by the President on November 21, 2011 requires Service members to complete mandatory Pre-Separation counseling, participate in the Department of Labor Employment Workshop, and Veterans Affairs Benefits Briefings. Throughout this course, we will discuss these items in detail and how the role of the UTC and Transition Readiness staff facilitate the successful career development and transition of all Marines to civilian life.