

U.S. Department of  
Homeland Security

United States  
Coast Guard



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# **COAST GUARD OFFICER SPECIALTY MANAGEMENT SYSTEM MANUAL**

**COMDTINST M5300.3**

**June 2013**





Commander  
United States Coast Guard  
Personnel Service Center

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COMMANDANT INSTRUCTION M5300.3

Subj: COAST GUARD OFFICER SPECIALTY MANAGEMENT SYSTEM MANUAL

- Ref:
- (a) Staffing Standards Manual, COMDTINST M5312.11 (series)
  - (b) Competency Management System Manual, COMDTINST M5300.2 (series)
  - (c) Personnel Resources and Reprogramming Manual, COMDTINST M5312.13 (series)
  - (d) Coast Guard Individual Development Plan (IDP), COMDTINST 5357.1 (series)
  - (e) Correcting Military Records, COMDTINST 1070.1 (series)
  - (f) Officer Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series)

1. PURPOSE. This Manual establishes policy and doctrine, and outlines specific practices and procedures for the Coast Guard's Officer Specialty Management System (OSMS).
2. ACTION. All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, and chiefs of headquarters staff elements shall comply with the provisions of this Manual. Internet release is authorized.
3. DIRECTIVES AFFECTED. Those portions of References (a) and (b) dealing with Officer Billet Codes (OBC) will be updated in future revisions to reflect the officer specialty doctrine contained in this Manual. The term Officer Specialty Code (OSC) replaces the OBC terminology.
4. REQUEST FOR CHANGES. Units and individuals may recommend changes to this Manual by contacting Coast Guard Personnel Service Center (PSC-OPM-3). Coast Guard Personnel Service Center (PSC) is delegated authority to update this Manual as needed with concurrence from applicable Headquarters Directorates.

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NON-STANDARD DISTRIBUTION:

5. DISCUSSION.

- a. In 2001, CG-1 initiated an effort to replace the OBCs with OSCs. This new OSMS developed a framework of specialties and subspecialties, each distinguished with a unique OSC, to identify each position's need as well as officer capabilities. The Coast Guard Personnel Service Center, Officer Personnel Management Division (CG PSC-OPM-3) is the program office assigned management and oversight responsibility of the OSMS.
- b. The OSMS applies to commissioned officers O-1 through O-6, and their corresponding officer positions, both active and reserve. Chief Warrant Officers (CWOs) are managed separately. CWOs who become Lieutenants under the CWO to Lieutenant Program have the opportunity to earn specialties and subspecialties codes. Reference (b) describes and prescribes the doctrine for the Competency Management System (CMS) and is not changed by this release.
- c. Generally speaking when this Manual refers to "specialty" it includes "subspecialty" as well in content. If policy set forth in this Manual only concerns one or the other, the terms Specialty and Subspecialty are used with capital letters. Likewise, a Specialty Manager (SM) is the term used for those who manage either a specialty or subspecialty.
- d. For the purposes of this Manual, those responsibilities and authorities vested with Assistant Commandants apply to Commander, Force Readiness Command (FORECOM) and the Director of Operational Logistics (DOL).

6. DISCLAIMER. This document is intended to provide requirements for Coast Guard personnel and is not intended to nor does it impose legally-binding requirements on any party outside the Coast Guard.

7. RECORDS MANAGEMENT CONSIDERATIONS. This Manual has been thoroughly reviewed during the directives clearance process, and it has been determined there are no further records scheduling requirements, in accordance with Federal Records Act, 44 U.S.C. 3101 et seq., NARA requirements, and Information and Life Cycle Management Manual, COMDTINST M5212.12 (series). This policy does not create significant or substantial change to existing records management requirements.

8. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS.

- a. The development of this directive and the general policies contained within it have been thoroughly reviewed by the originating office and are categorically excluded under current USCG categorical exclusion (CE) #1 from further environmental analysis, in accordance with Section 2.B.2 and Figure 2-1 of the National Environmental Policy Act Implementing Procedures and Policy for Considering Environmental Impacts, COMDTINST M16475.1 (series).
- b. This directive will not have any of the following: significant cumulative impacts on the human environment; substantial controversy or substantial change to existing

environmental conditions; or inconsistencies with any Federal, State, or local laws or administrative determinations relating to the environment. All future specific actions resulting from the general policies in this Manual must be individually evaluated for compliance with the National Environmental Policy Act (NEPA), Council on Environmental Policy NEPA regulations at 40 CFR Part 1500-1508, DHS, and Coast Guard NEPA policy, and compliance with all other environmental mandates.

9. FORMS/REPORTS. The forms referenced in this Manual are available in USCG Electronic Forms on the Standard Workstation or on the Internet:  
<http://www.uscg.mil/forms>; CGPortal at  
<https://cgportal2.uscg.mil/library/SitePages/Home.aspx>; and Intranet at  
<http://cgweb.comdt.uscg.mil/CGForms>.

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## CHAPTER 1. OFFICER SPECIALTY MANAGEMENT SYSTEM (OSMS) OVERVIEW

### A. Purpose of the Officer Specialty Management System

1. The OSMS serves two primary officer workforce management functions: quantifying demands and measuring supplies. Before OSMS, officer workforce decisions were hindered by the lack of clear data – do we have a sufficient supply of specialists to meet billet demands. With the means in our human resource database system to accurately capture demand and supply, the service will optimize personnel management decisions in our officer corps.
  - a. Billet Need (demand side): OSMS quantifies the demands for the officer workforce. Through this, Program Managers (PM) can identify specialty or subspecialty *knowledge, skills, and abilities* (KSAs) required to best fulfill the needs of each position. Those billets with like KSAs are combined into specialties. Once labeled and quantified, workforce planners and managers have a tangible mission and slate to fill.
  - b. Personnel Identification (supply side): OSMS provides a means for workforce planners and managers to identify and track the supply of qualified officers by specialty. The goal is to maintain a sufficient supply of qualified officers in certain excesses to ensure each demand is met at all times. Workforce modelers can measure attrition rates and time-in-service profiles for the various specialties and adjust accession plans to accommodate individual differences amongst specialties.
2. A foundation of specialties is the inclusion of Competencies per Reference (b). Competencies along with formal training, higher education, and professional certifications/licenses are a building block for specialties. Obtainment of a specialty designation is accomplished by completion of certain tasks associated with the specialty.
3. Each specialty must have an appropriate opportunity for positions of the next higher paygrade. A billet structure which affords upward mobility via the promotion system is paramount. The pyramid for an individual specialty should, as close as possible, mirror the overall officer pyramid for paygrades O-3 to O-6. Subspecialties do not necessarily mirror the overall officer structure, however when combined into a single specialty, should provide a sustainable pyramid and career path for the member to follow.
4. Another benefit with OSMS is as a career planning tool for junior officers. With OSMS, officers are able to view sanctioned documents which describe various officer career fields and their nature of work, as well as the pathway to enter such career fields. In essence, managers of specialties can advertise their career field and increase their likelihood of obtaining motivated officers pursuing professional, career enhancing goals.
5. Besides career planning, OSMS benefits professional development with the ability to formally set forth criteria for obtaining higher skill levels. Managers of specialties

can establish milestones of achievement to reach the pinnacle of professionalism within their specialty. This optional tool 'Honors Our Profession' and supports the Commandant's vision statement.

6. In addition to the above, the Commandant may employ the Enhanced Status Quo (ESQ) promotion tool, authorized in the Coast Guard Authorization Act of 2010. This tool was designed to meet Service needs with regards to specialty management while preserving the tenets of the best-qualified promotion system. Before ESQ can be employed, the service must fully establish OSMS and gain a high degree of confidence in its fidelity.
7. OSMS applies to both the Active Duty Promotion List (ADPL) and the Inactive Duty Promotion List (IDPL). OSMS has limited applicability to officers in the Reserve Program Administrator (RPA) corps or Permanent Commission Teaching Staff (PCTS). The Band Officer is not included in OSMS.

## B. System Overview

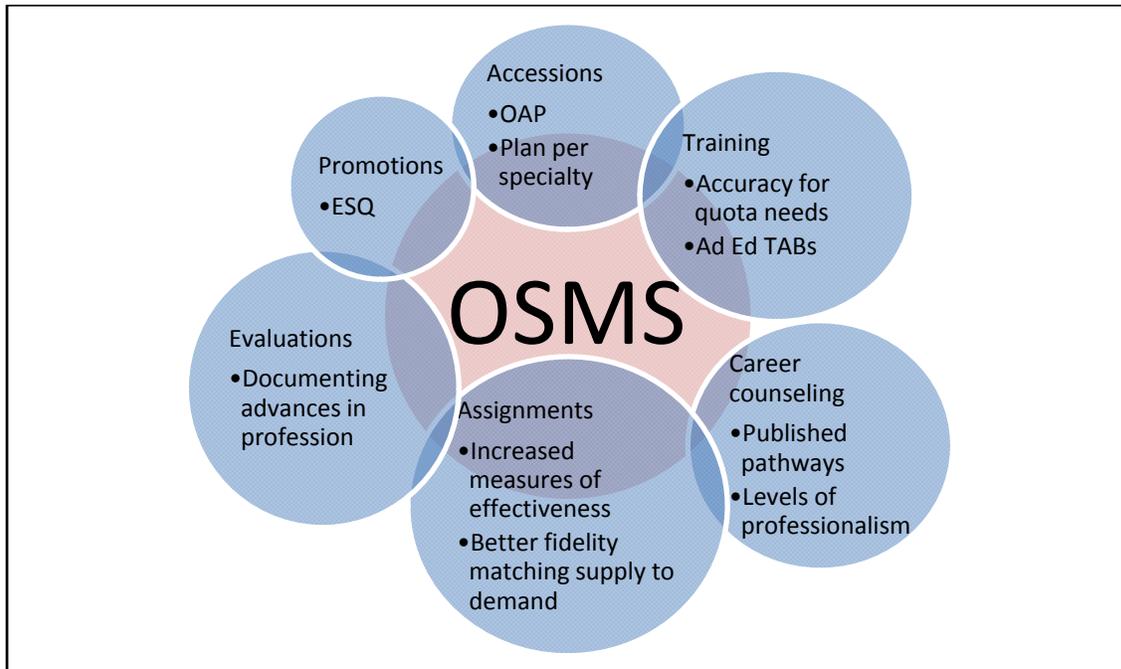
1. OSMS contains three organizational layers:
  - a. Two Communities – Mission Execution and Mission Support.
  - b. Specialties – lie within a Community.
  - c. Subspecialties – lie within a Specialty.
2. Specialty vs Subspecialty: Some specialties have no subspecialties within them, i.e. Finance, while others have many and may include subspecialties owned by different Assistant Commandants or Directorates. In general, a subspecialty means inclusion in, but not necessarily compliance with, the larger specialty. By design, a subspecialty is a focused area of the general specialty with narrower, defined requirements yet is not obligated to fit the requirements of the general specialty. A benefit to the general specialty is that it can serve the demand side by identifying billets which can be successfully filled by officers with one of the subspecialty designations. For some cases, the general specialty code may be a 'catch-all' that allows officers who do not fit into one of the subspecialties but still share common KSAs and warrant identification. Appendix B lists the specialties and subspecialties approved by the Commandant at the time of printing. PSC-OPM-3 maintains via their CGPortal page the most current list of approved specialties and subspecialties.
3. Specialty Managers (SM) provide the requirements for their specialties via an Officer Specialty Requirement (OSR), Form CGHQ-5318. After completing the requirements within a specialty, an officer can request assignment of an Officer Specialty Code (OSC) for entry into their official military record. Likewise, failure to maintain requirements within a specialty can result in an officer losing their OSC. Integrity of the OSMS is important since the data can be used in making some personnel management decisions.
4. PSC-OPM-3 is the Program Manager for the OSMS, and manages the assignment and deletion of OSCs from officers' records. PSC-RPM-2 assists with the management of assigning/deleting OSCs for IDPL officers. OSMS is not designed to benefit the management of the RPA corps or PCTS. Those two cadres have a well-defined

system under current policies for balancing supply and demand. However, officers within the RPA corps or PCTS staff will be assigned their specialty codes (CG-NAP14 and CG-NAP12 respectfully) upon their permanent commissioning. They may also earn, and are not prevented from earning, additional specialty codes if appropriate.

5. Claimants of billets (Area Commanders, Program Managers, etc.) are responsible for assigning appropriate OSCs to their billets via Commandants (CG-833) and (CG-1B1) and procedures for doing such are covered in Reference (c). Generally speaking, billets coded with a general specialty (e.g. “Response - Ashore”) imply that an officer with a subspecialty designation inside the specialty (e.g. “Defense Operations/Readiness”) is capable of fulfilling that position.

C. OSMS in Officer Personnel Management Decisions

1. While OSMS will provide many benefits for tactical applications in managing the officer corps, holistically speaking it gives workforce planners and managers a means to measure demands, supplies and network flows. Discretely within the management of the officer corps, OSMS will improve the following areas: accession planning, right-sizing training needs, career counseling, assignments, evaluations, and promotions.



**Figure 1-1 OSMS**

2. Accessions: Annually the Officer Accession Plan (OAP) establishes accession targets for the service. The OAP also contains accession targets by specialty to meet the current and forecasted needs of our service. OSMS refines the science of forecasting needs for specialties and accessing a sufficient supply to meet future demands.

3. Training: OSMS supports better decision making with respect to accurately modeling training quotas needed to meet demand and keep a sufficient flow of officers into pipeline training.
4. Career Counseling: Reference (d) defines the use of the Individual Development Plans (IDP). The applicable OSR(s) can assist supervisors and junior officers in the development of the IDP and provides additional officer career path guidance\*. The OSR contains requirements for continued progression within a chosen specialty and can easily be incorporated into the IDP. OSMS provides our officer corps with pathways to professional development.
5. Assignments: OSMS is designed to support the goal within officer personnel management to systematically assign the right officer, with the right skills, to the right job. The assignment of specialties, subspecialties, and competencies to a billet is a means for the claimant of billets to communicate a need for certain skills to the Assignment Officers (AO) who in turn can query the service's personnel management database to find those officers meeting the requirements. In addition, OSMS allows us to measure our ability to meet billet demands with the right stock of specialists. The goal is to supply sufficient numbers of qualified officers for the assignment process. OSMS is merely a tool to support the assignment process. It is not meant to restrict the assignment process or limit opportunities for officers.
6. Evaluations: Competencies and specialty designations can be a key part of performance evaluations and should be a topic of discussions at the beginning and end of each performance period. In the evaluation process, supervisors should take into consideration each member's demonstrated mastery of competencies and their designated specialty or subspecialty. They should monitor subordinates' pursuit of additional competencies related to their designated specialties or subspecialties and their position.
7. Promotions: The ESQ promotion tool provides the service the ability to balance the best-qualified promotion system with specialty needs. Chapter 5 of this Manual explains the ESQ tool in more detail.

## CHAPTER 2. PROGRAM ROLES AND RESPONSIBILITIES

### A. OSMS Roles and Responsibilities

1. Table 2-1 summarizes OSMS roles and responsibilities.

Office/Entity	Roles and Responsibilities
COMDT (CG-1)	<ul style="list-style-type: none"> <li>Approves any modifications to existing specialties or subspecialties, as well as the creation or disestablishment of subspecialties. The creation or deletion of a <i>specialty</i> or <i>community</i> rests with the Commandant.</li> </ul>
COMDT (CG-1B1)	<ul style="list-style-type: none"> <li>Examines the need for the creation or disestablishment of any specialty.</li> <li>Assigns specialty codes to billets when prompted by the appropriate Program Managers via a Request To Assign Competencies, Education, or Officer Specialty To A Position, Form CG-5311.</li> </ul>
COMDT (CG-12A)	<ul style="list-style-type: none"> <li>Provides workforce modeling support as appropriate to PSC-OPM and PMs/SMs in the management of the OSMS.</li> <li>Builds the Officer Corps Management Plan (OCMP) and recommends the quantity of specialty needs for use with ESQ.</li> <li>Builds the OAP addressing officer needs amongst the various specialties.</li> </ul>
COMDT (CG-6)	<ul style="list-style-type: none"> <li>Provides necessary support through its management of Direct Access (DA).</li> <li>Provides support with OSMS forms.</li> </ul>
COMDT (CG-095)	<ul style="list-style-type: none"> <li>Supports use of the Employee Summary Sheet (ESS) with CGBI.</li> </ul>
PSC	<ul style="list-style-type: none"> <li>Reviews appeals from officers per Chapter 4 of this Manual.</li> </ul>
PSC-OPM	<ul style="list-style-type: none"> <li>Provides overall management of the OSMS.</li> <li>Publishes authorized scenarios when bulk uploads of OSCs can occur for ADPL, RPA, or PCTS officers.</li> </ul>
PSC-RPM	<ul style="list-style-type: none"> <li>Oversees management of the OSMS for the IDPL.</li> <li>Publishes authorized scenarios when bulk uploads of OSCs can occur for the IDPL.</li> </ul>
PSC-OPM-3	<ul style="list-style-type: none"> <li>Program Manager for the OSMS (ADPL and IDPL), responsible for maintaining this Manual and all associated OSMS forms.</li> <li>Maintains a centralized web portal for OSMS that contains at a minimum: <ul style="list-style-type: none"> <li>COMDT approved list of all approved specialties</li> </ul> </li> </ul>

Office/Entity	Roles and Responsibilities
	<p>and subspecialties,</p> <ul style="list-style-type: none"> <li>○ All approved OSRs,</li> <li>○ List of all SMs,</li> <li>○ Links to all OSMS forms and this Manual.</li> </ul> <ul style="list-style-type: none"> <li>● Coordinates the vetting of all requests to add or delete an officer's OSC for both ADPL and IDPL.</li> <li>● Is final approval authority for all changes to an officer's OSC (excluding IDPL).</li> <li>● Updates an officer's OSC via DA.</li> <li>● Notifies the appropriate AOs and SMs when an officer's OSC has been deleted.</li> <li>● Informs officers of any pending action to remove their OSC following periodic review by SMs, AOs, or other administrative means.</li> <li>● Maintains records of any actions taken towards an officer's OSC.</li> <li>● Ensures the integrity of the OSMS system via the periodic review of DA and the OER validation process.</li> </ul>
<p>Assignment Officers { PSC-OPM-2 and PSC-RPM-2 (IDPL)}</p>	<ul style="list-style-type: none"> <li>● Conduct periodic review of officers assigned within their accounts to ensure continued compliance to OSRs. Inform PSC-OPM-3 of any officers who no longer meet OSR requirements.</li> <li>● Provide PSC-OPM-3 a list of officers eligible for an OSC via an approved bulk upload as allowed.</li> <li>● Remain informed of OSRs to ensure appropriate career counseling.</li> </ul>
<p>Career Management (PSC-OPM-4)</p>	<ul style="list-style-type: none"> <li>● Remains knowledgeable of OSRs to ensure appropriate career counseling.</li> </ul>
<p>PSC-RPM-2</p>	<ul style="list-style-type: none"> <li>● Assists PSC-OPM-3 with applications from IDPL officers to change OSCs.</li> <li>● Assists PSC-OPM-3 with updating an officer's OSC via DA.</li> <li>● Notifies the appropriate AOs and SMs when an officer's OSC has been deleted.</li> <li>● Is final approval authority for all changes to IDPL officer's OSC.</li> <li>● Informs IDPL officers of any pending action to remove their OSC following periodic review by SMs, AOs, or other administrative means.</li> <li>● Maintains records of any actions taken towards an officer's OSC.</li> <li>● Ensures the integrity of the OSMS system for the IDPL via</li> </ul>

Office/Entity	Roles and Responsibilities
	the periodic review of DA and the OER validation process.
Claimant of Billets	<ul style="list-style-type: none"> <li>• Determine appropriate OSC for new or modified billets and work with COMDT (CG-1B1) to assign code to the PAL.</li> </ul>
Program Managers	<ul style="list-style-type: none"> <li>• Submit a Request To Assign Competencies, Education, or Officer Specialty To A Position, Form CG-5311 per Reference (b) to COMDT (CG-1B1) to assign a specialty code to a billet.</li> <li>• Provide guidance to SMs regarding program direction.</li> </ul>
Specialty Managers	<ul style="list-style-type: none"> <li>• Establish OSRs and manage the specialties for positions within their programs. Each Assistant Commandant shall set their own requirements for approval level of OSRs (e.g. delegated to the PM or SM).</li> <li>• Conduct analyses of competencies and specialties to ensure they are compatible with current program missions.</li> <li>• Review and validate OSRs on an annual basis and before their specialty is eligible for ESQ in any given promotion year cycle. Provide PSC-OPM-3 the most current, approved OSR on file.</li> <li>• Participate in the vetting of OSC applications with PSC-OPM-3.</li> <li>• Provide PSC-OPM-3 a list of officers eligible for an OSC via an approved bulk upload as allowed.</li> <li>• May conduct periodic review of officers assigned within their specialties to ensure continued compliance to OSRs. Inform PSC-OPM-3 of any officers who no longer meet OSR requirements.</li> </ul>
Commanding Officers	<ul style="list-style-type: none"> <li>• Review OSC Application, Form CG-5319 or OSC Application, Form CG-5319A submitted by officers desiring to add or delete an OSC. Ensure completion of all requirements within the respective OSR before forwarding to PSC-OPM-3.</li> <li>• Ensure OSC(s) are verified by the rating chain via an officer's ESS during OER processing.</li> <li>• Contact PSC-OPM regarding administrative or disciplinary action which may impact an officer's OSC.</li> <li>• Provide feedback, concerns about OSRs to SMs at HQ via the chain of command.</li> </ul>

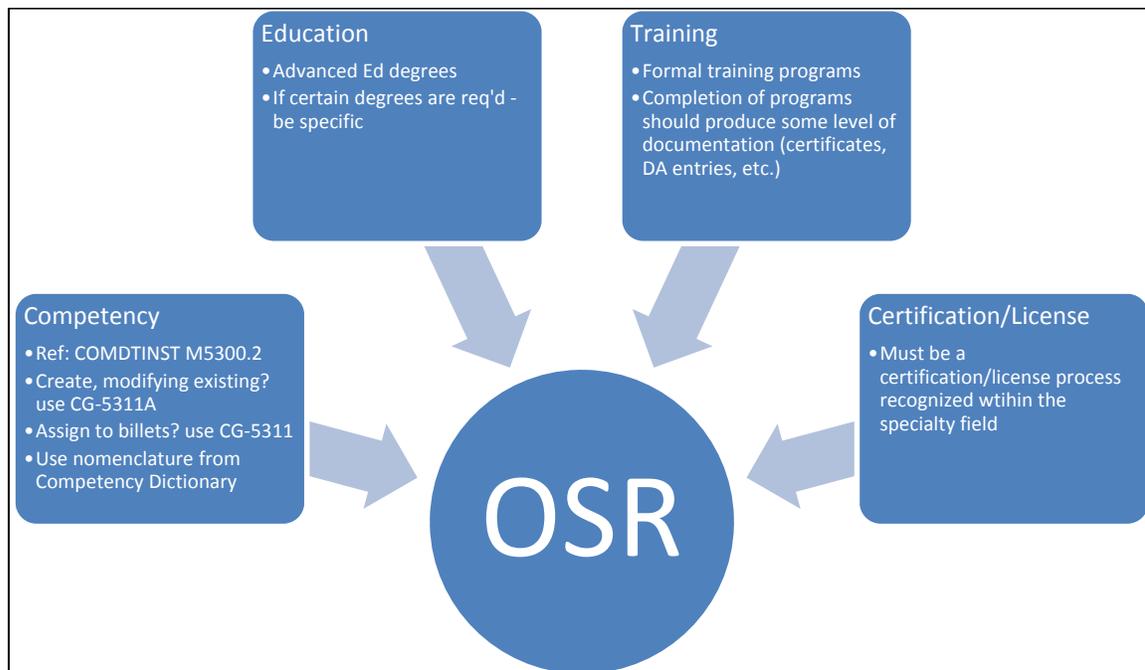
Individual Officers	<ul style="list-style-type: none"><li>• Review OSRs for potential career fields and interests.</li><li>• Submit a OSC Application, Form CG-5319A or OSC Application, Form CG-5319 when applicable to add or delete an OSC.</li><li>• Frequently review applicable OSRs for compliance.</li><li>• Direct specific questions about OSRs to PSC-OPM-3 at <a href="mailto:ARL-PF-CGPSC-OPMOSMS@uscg.mil">ARL-PF-CGPSC-OPMOSMS@uscg.mil</a></li></ul>
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**Table 2-1 OSMS Administration, Processes, Roles, & Responsibilities**

## CHAPTER 3. OFFICER SPECIALTY REQUIREMENTS (OSR)

### A. Purpose

- OSRs represent the requirements (competencies, education, training, and certification/licensing) necessary to earn a specific OSC. These requirements are established by the SM and reflect the tasks necessary to demonstrate proficiency in areas of knowledge, skills, and abilities. The OSR is also the official means to set forth the requirements for achieving Apprentice, Journeyman, and Master (AJM) levels within a given specialty, should that specialty opt to employ the AJM tool.
- The scope and the detail of the OSRs are unique to each specialty. While SMs should consult with PSC-OPM-3 about the content of their OSRs, the responsibility for development and currency of the OSRs rests with the individual SMs. An SM should paint a picture that is more black and white and less gray with respect to requirements. The more ambiguous the requirements within the OSR are stated the less effective the OSR becomes to the user and the specialty. Likewise, the more stringent the OSR becomes with requirements, the less practical application it has. Crafting an OSR requires balancing needs and desires; it is part art and part science. Each specialty will have various needs for all of its billets, but a majority of the billets require certain fundamental KSAs to safely and effectively fill the job. Design the OSRs around the majority of the needs, yet account for those certain KSAs which the specialty cannot afford failure even if they only represent a minority of the jobs. For example, if 30% of jobs within a given specialty require a certain license per Federal law, then the OSR should require that license.



**Figure 3-1 Building the OSR**

- Those specialties which exist to support billet needs where the SM has decided not to apply the category to the workforce should state the same in the OSR. For example, CG-

MED10, the Medical specialty is used to identify billets which can be filled by an officer possessing either of the subspecialties, CG-MED11 – Physician Assistant, or CG-MED12 – Medical Administration. All officers considered Medical specialists fall within one of the two subspecialties, and as such, the OSR for the general specialty states no officer will be assigned the OSC CG-MED10.

B. Approval Authority

1. Each Assistant Commandant shall designate appropriate approval authority for modifying OSRs. This designation need not be formal. This authority shall be no lower than the SM and is recommended to remain at or above the Office Chief level. Assistant Commandants and Directorates shall ensure that OSR submissions and modifications are reviewed by other Assistant Commandants and Directorates affected and the impacts of OSR modifications are evaluated prior to approval. For those specialties with subspecialties residing in other Assistant Commandants or Directorates (e.g. Prevention – Ashore (Commandant (CG-7)) and Waterways Operations and Management (Commandant (CG-5))), it is recommended that the two Assistant Commandants or Directorates establish a mutual understanding and list of business rules for developing OSRs. The Assistant Commandant responsible for a subspecialty decides the approving authority for their OSR regardless of the overarching specialty (i.e. in the aforementioned example, Commandant (CG-5) decides who approves the Waterways Operations and Management OSR). The Assistant Commandant responsible for the overarching general specialty does not establish ownership of the subspecialty OSR.
2. The Officer Specialty Requirement (OSR), Form CGHQ-5318 is the means for publishing specialty requirements. PSC-OPM-3's CGPortal page provides guidance on completing and interpreting the form.
3. SMs shall review their OSRs on an annual basis, annotating the document with the most current effective date via signature. Forward updated versions to PSC-OPM-3 for review and validation and official posting. PSC-OPM-3 validation process is to ensure consistency in content and messaging to the field so that the reader sees similar language from one OSR to another. PSC-OPM-3's validation process is not to question the contents of the OSR (i.e. why was this competency added?). See Chapter 5 of this Manual regarding impacts on ESQ. PSC-OPM-3 will assist SMs with this process and remind SMs when their OSRs are up for review.
4. PSC-OPM-3 maintains a central repository of all OSRs for the field via their CGPortal page.

C. Developing Officer Specialty Requirements

1. SMs have the responsibility for establishing OSRs for their specialty(ies). SMs should consult with Commandant (CG-12A) and PSC-OPM-3 before submitting proposals to update, modify, or create new specialty requirements via an Officer Specialty Requirement (OSR), Form CGHQ-5318. The following process is established as a baseline to ensure consistency among the specialties:
  - a. Determine the underlying Knowledge, Skills and Abilities (KSAs) required of the subspecialty. An online database, O\*net, created by the Department of Labor, can be

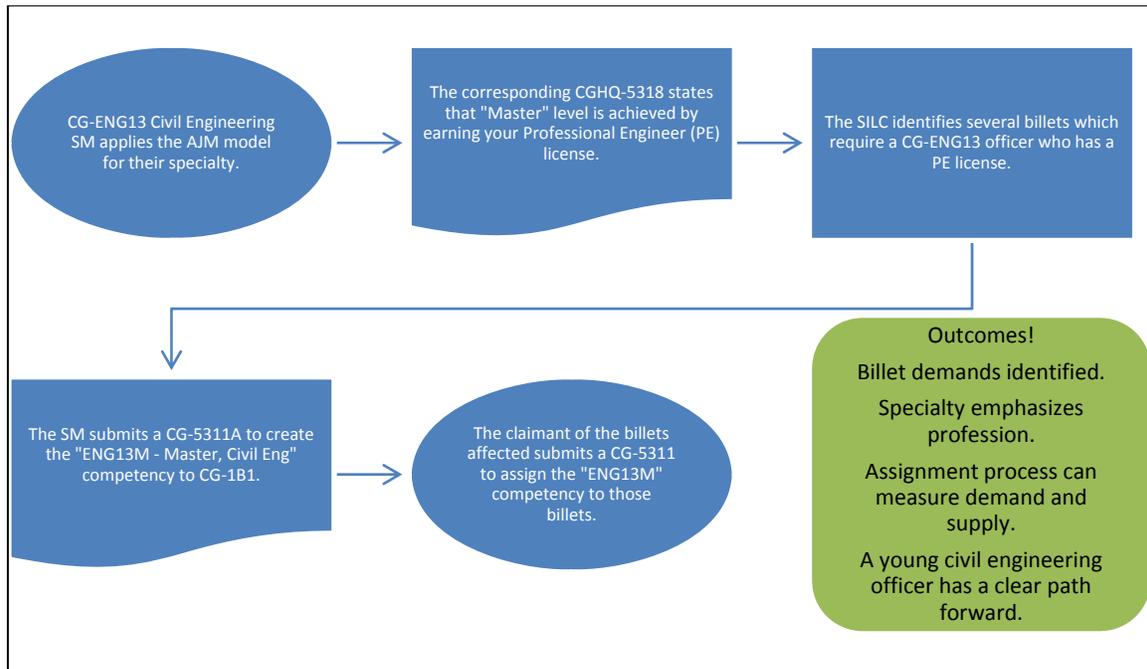
- used as a starting point for this determination. O\*Net has detailed descriptions of the world of work for a wide variety of occupations. The O\*Net can be found on the Internet at <http://online.onetcenter.org>.
- b. Determine existing measures of knowledge skills and abilities. This is typically a listing of current competencies (see the competency dictionary: <http://www.uscg.mil/ppc/da/CompetencyDictionary.xls>), educational degrees, training courses available, and certifications/licenses respected within the specialty's field of work.
  - c. Create a linkage between KSAs and measures. This ensures that the underlying KSAs have appropriate measures and can be addressed with the appropriate competencies, education, training and certifications/licenses. Several KSA areas may have multiple measures of proficiency.
  - d. When an SM changes an OSR they must address the impacts to those officers who currently hold the respective OSC. Are those officers required to meet the new requirements or are they grandfathered? If so, what is the required timeframe? It is critical that SMs clearly list the impacts in the Officer Specialty Requirement (OSR), Form CGHQ-5318 on those officers previously assigned. Any substantial changes to an OSR will be announced via record message traffic from PSC-OPM-3 via an ALCGOFF message with input from the responsible SM. The record message traffic will also address impacts on previously designated specialists. Appendix D provides a sample template.

#### D. Interpreting the Officer Specialty Requirements

1. While the SM drafts the OSR, the primary user of the OSR is the officer in the field. At the end of the day, the OSR must be crafted so that the officer, their chain of command, and PSC-OPM-3/RPM-2 can understand the requirements. A significant part of this clarity is using standard terminology which appears in the ESS under the "Education", "Training", "Competencies", and "Certifications & Licenses" fields.
2. Unless otherwise stated, the Officer Specialty Requirement (OSR), Form CGHQ-5318 lists minimum requirements which must be met for earning the specialty code. For example, the OSR may contain a list of three competencies an officer must earn, or wording that says an officer must have "two of the following five". The structure and design of the Officer Specialty Requirement (OSR), Form CGHQ-5318 cannot address each of the 49 specialties' needs and as such, contains areas where the SM can - with free text - explain requirements.
3. A SM may list 'experience in lieu of' for some requirements. This is a means for the specialty to accept officers with notable field experiences to compensate for other criteria mentioned (e.g. education). These should be the exception and not the norm.
4. In addition, some SMs may discuss the ability to waive some requirements within the OSR. The preferred method for doing this is to annotate the criteria with "(may be waived by SM)" (e.g. Training: LOG-101 – DAU Acquisition Logistics Fundamentals (may be waived by SM)). Caution should be used in listing criteria within the OSR which may be waived as it creates a higher probability of SM involvement during processing of the OSC applications from the field.

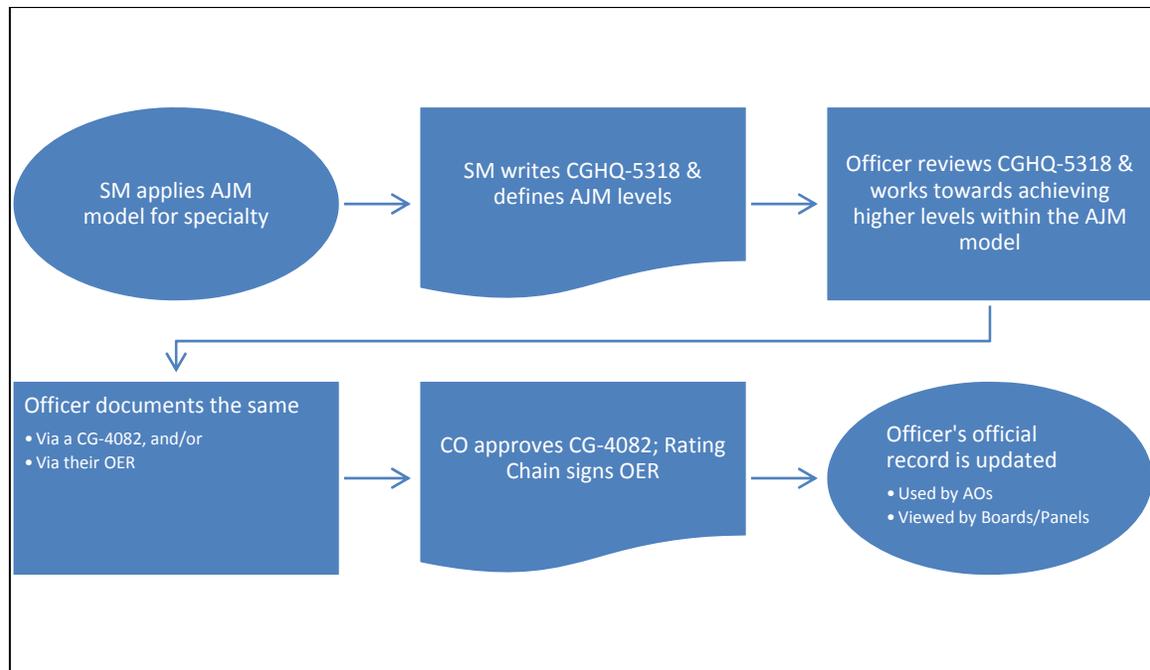
E. Optional Use of Levels of Expertise – Apprentice, Journeyman, Master (AJM)

1. SMs have the option of establishing levels of expertise referred to as “AJM levels”. These three varying levels of expertise allow SMs to set forth more specific guidelines for their specialty to encourage professional growth and to meet demands. The SM can spell out the criteria for the three AJM levels via their Officer Specialty Requirement (OSR), Form CGHQ-5318. The ability to progress between levels could be based on obtaining certain competencies, promoting to certain ranks, completing certain training courses, or achieving certain milestones or qualifications. As a general rule, officers who enter a specialty that employs the AJM tool are considered Apprentice, and the OSR sets forth the requirements to progress towards Journeyman and Master.
2. If a claimant of a billet desires to identify certain billets with the need for an officer with certain levels of AJM, then they can pursue creating a competency per Reference (b) and then assigning that competency to the billet. Figure 3-2 shows an example of how OSMS can improve the process and help match the appropriate officer with the right skillset to the right job.



**Figure 3-2 Benefits of AJM**

3. While DA is not designed to support officers obtaining AJM codes as a subcategory to OSCs, officers may still document obtaining such levels with either a Record of Professional Development, Form CG-4082 or an OER (e.g. list obtainment under the Professional Competence performance dimension). The specialty’s Officer Specialty Requirement (OSR), Form CGHQ-5318 serves as official promulgation of these levels of expertise. Figure 3-3 shows how an officer can document obtaining higher levels of professionalism within their specialty when the AJM model is applied.

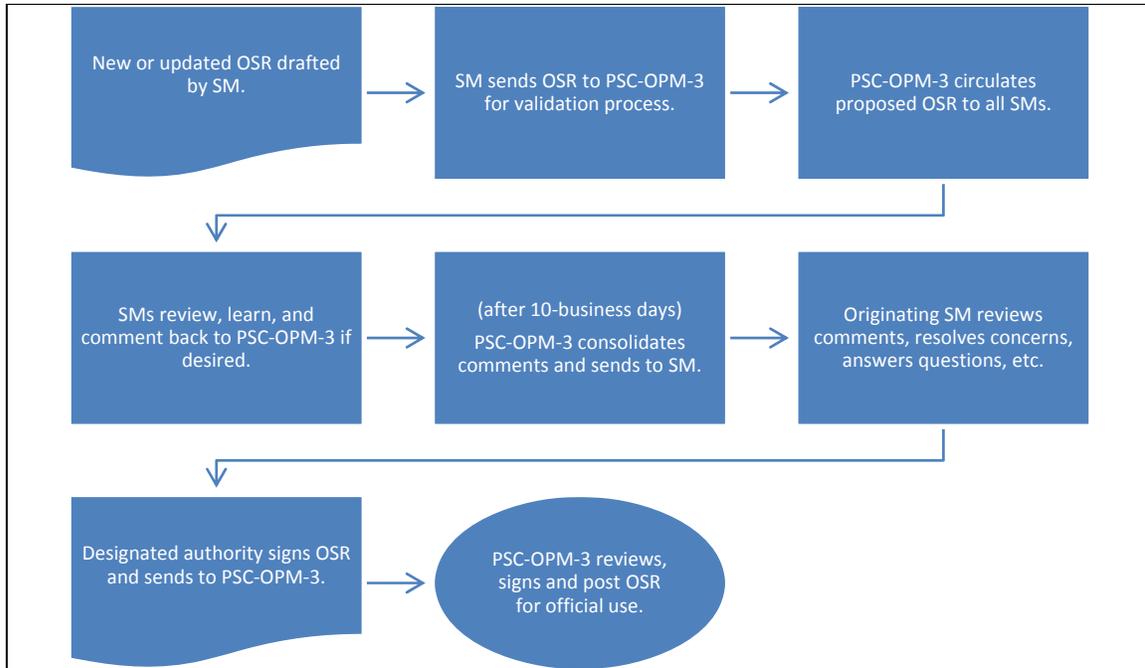


**Figure 3-3 Documenting Achievements in the AJM Model**

**F. Completing the Officer Specialty Requirement (OSR), Form CGHQ-5318**

1. Directions for completing the Officer Specialty Requirement (OSR), Form CGHQ-5318 are available from PSC-OPM-3's CGPortal page. The Officer Specialty Requirement (OSR), Form CGHQ-5318 is used by SMs to establish the requirements to obtain and hold an OSC for the given specialty/subspecialty. The form is available via the CGPortal via References > Forms > Coast Guard Headquarters.
2. Each Assistant Commandant shall establish who is authorized to approve OSRs for their given specialties/subspecialties. It is recommended for parity across OSMS that approval level remain at or above the Office Chief level. Assistant Commandants should ensure that OSR submissions and modifications are reviewed by other offices affected and the impacts of OSR modifications are evaluated prior to final approval.
3. SMs shall at a minimum review their perspective OSRs on an annual basis to ensure thoroughness and compliance with current applicable policy, regulations, and laws if applicable. This annual review requires a signature to show effective date. PSC-OPM-3 will coordinate and remind SMs of the annual review and ensure that all OSRs have an effective date within 15-months. Those OSRs with effective dates older than 15-months are still valid but may negatively impact the specialty benefiting from other officer personnel management tools (see Chapter 5 of this Manual).
4. PSC-OPM-3 is responsible for final validation of OSRs. Prior to validating and posting OSRs in a central repository, PSC-OPM-3 shares the OSRs with other SMs. Circulating the OSRs with all the SMs promotes learning amongst the SMs on how to craft requirements, employ AJM, etc., and also provides an opportunity to address any concerns from other offices. PSC-OPM-3 will allow 10-business days for comments and then consolidate the same and return them to the originating SM of the OSR. After the

Assistant Commandant’s office responsible for the OSR receives the feedback from PSC-OPM-3, they shall amend the OSR if needed, and sign and approve. The OSR is then submitted to PSC-OPM-3 for publishing. The OSR is not official for the field’s use until it has been signed and published by PSC-OPM-3. Figure 3-4 describes the validation process.



**Figure 3-4 Validating the OSR**

5. SMs must realize that changes to an OSR impact those officers who currently possess the OSC for the given specialty. SMs shall address impacts in the Officer Specialty Requirement (OSR), Form CGHQ-5318. For example, if a competency is added to the requirements, be sure to note what is expected from officers currently in the specialty who do not possess that competency (e.g. “Widget Operator – required for all new specialists, optional for currently assigned specialists” or “Widget Operator – required for all new specialists, mandatory by 31Dec14 for all currently assigned specialists”).

**CHAPTER 4. OFFICER SPECIALTY CODE (OSC)**

**A. Establishing and Modifying Officer Specialties and Subspecialties**

1. Appendix B is an example of an approved list of specialties and subspecialties. The most current list is found at PSC-OPM-3’s CGPortal page.
2. There is a consistent methodology used in the assignment of the OSCs nomenclature. Table 4-1 describes how the terminology is established.

<b>Standard: CG – letter letter letter number number</b>	
<p>The <b>first three letters</b> are the abbreviated term for the specialty’s name (e.g. LGL = Legal)</p>	<p>A <b>two digit sequential number</b> starting at “10” for each Specialty. The first listed Subspecialty would have the number “11” assigned, the next “12” and so forth. If a Specialty has more than nine Subspecialties, then the next Subspecialty would have the number “20” assigned.</p>

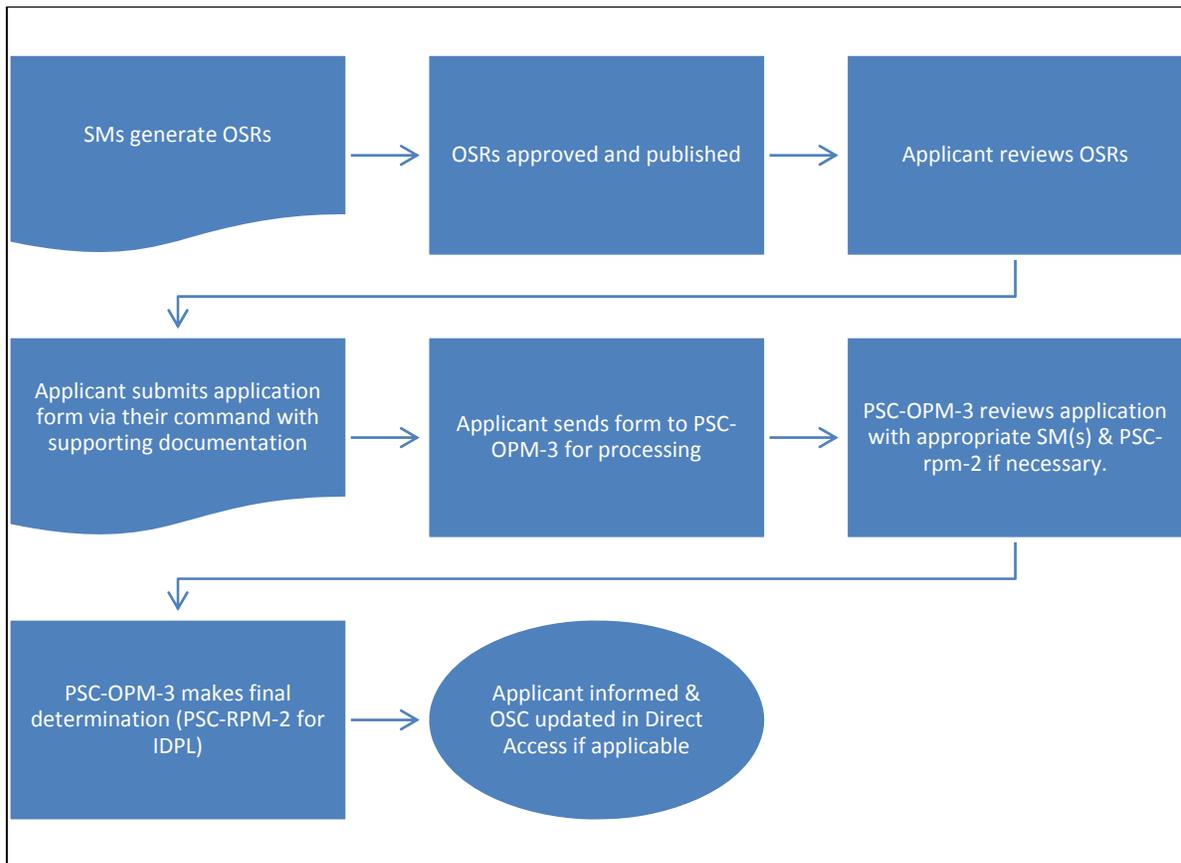
**Table 4-1 OSC Terminology**

3. Over time the list of specialties may require modification. The Commandant is the approving authority for the establishment of any new *Community* and *Specialty*, or the disestablishment of any existing Community or Specialty. Commandant (CG-1) approves changes to Subspecialties. Such actions are normally the result of changes in policy or law, new missions, duties, responsibilities or, simply new insights or a better understanding of the existing work environment and population of officers performing particular types of work.
4. If making specialty or subspecialty change recommendations to the Commandant or Commandant (CG-1) (respectively) then provide the following information:
  - a. The number of officers and billets impacted by the change (i.e. those officers who need to be re-designated as a result of the change).
  - b. Clearly provide a crosswalk for officers and billets to move between previous OSCs and the requested OSCs. The request must address how PSC-OPM-3 is to update impacted officers’ OSCs. Such a change will be announced via message by PSC-OPM to inform officers impacted by the change and how their official military record will be updated. Reference (c) describes the process for updating billets.
  - c. Commandant (CG-12A) reviews all proposals, applies workforce modeling, and advises the appropriate approving authority.
  - d. A request to change the officer specialties or subspecialties must include the new OSRs to be implemented.
  - e. With defined rules provided to PSC-OPM-3 for updating officer OSCs, bulk uploads referenced below, are applied to complete the transition. PSC-OPM-3 or PSC-RPM-2 notifies officers impacted once their record has been updated unless covered by a record message announcing the change.

f. Appendix C provides a sample memo format for requesting such a change.

**B. Applying for, or Deleting an OSC – Member Initiated**

1. Corrections or updates to OSCs must be submitted to PSC-OPM-3 for processing and approval. PSC-OPM-3 coordinates the processing of applications with the appropriate SM(s) and PSC-RPM-2 if appropriate, and is the only office authorized to modify an officer’s OSC. If officers have not received a response from their application at 60-days, they should contact PSC-OPM-3. Local Servicing Personnel Offices (SPO) are not authorized to assign or delete an OSC to an officer’s record.
2. To apply for, or to delete an OSC, an officer must submit either an Officer Specialty Code Application (OSA) Form CG-5319A, for addition, or an Officer Specialty Code Application (OSA) Form CG-5319, for deletion. If the request is denied at any point, the officer will be notified and may appeal the determination to the PSC Flag Officer with a memo via their rating chain. A sample memo is available from PSC-OPM-3. PSC’s review process is internally established and may range from simple review by the Flag Officer to convening a panel of officers to review the application and make a recommendation. If denied by the PSC Flag Officer, the officer may pursue a correction to their military record via an appeal to a Personnel Records Review Board (PRRB) or file a Board for Correction of Military Records (BCMR) action as outlined in Reference (e).

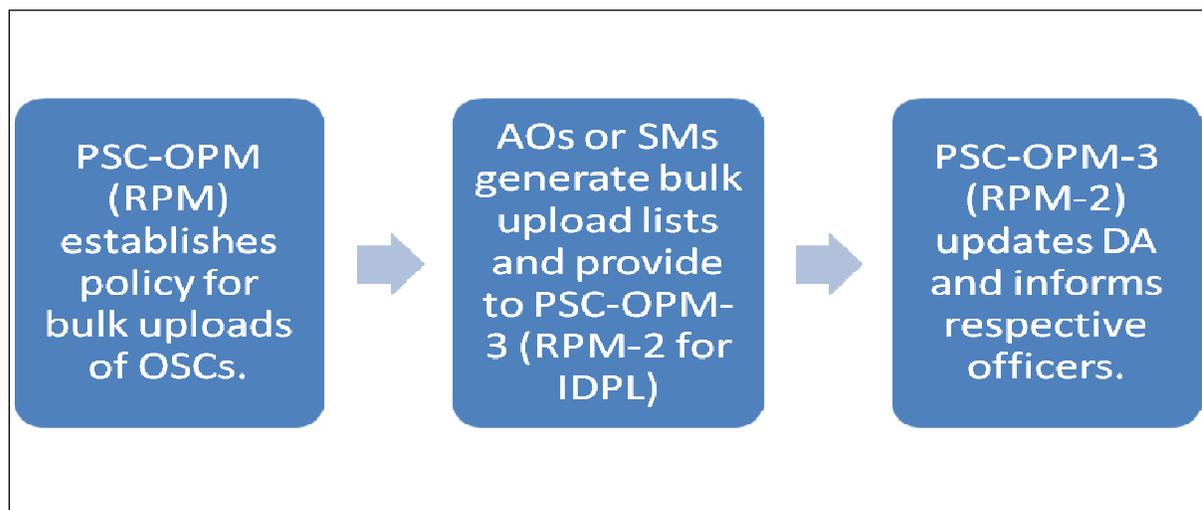


**Figure 4-1 OSC Application Process**

3. Figure 4-1 shows the process for how an OSC is changed when an officer initiates. It begins with the development of the OSRs by the SMs. Each individual officer is responsible for reviewing the appropriate OSRs. If an officer has questions regarding the contents of the OSR, they should direct those questions to PSC-OPM-3 who will engage the appropriate SM if needed for clarity. Upon determining that they meet the requirements for a given specialty, the officer initiates the process via the appropriate application (Officer Specialty Code Application (OSA), Form CG-5319 or Officer Specialty Code Application (OSA), Form CG-5319A) by providing their designated command approving authority the necessary documentation. Only those applications favorably endorsed by the command are forwarded to PSC-OPM-3 for approval. The Commanding Officer or their designee should only return those applications that clearly do not meet the requirements of the OSR, or lack the verification (e.g. missing certificates, no record of competencies). If there is any doubt or uncertainty, contact PSC-OPM-3 for additional guidance before returning the application to the officer.
4. Once an OSC is deleted from DA for an officer, no historical information remains for that OSC in their military record. PSC-OPM-3 will provide the officer notification of the deletion with a memo which can be retained for future use such as a DD-214. PSC-OPM-3 will maintain a record as well.

C. Adding or Deleting an OSC – Specialty Manager and/or Assignment Officer Initiated

1. In addition to an individual officer applying for, or deleting an OSC, PSC-OPM-3/RPM-2 can accept bulk uploads from AOs or SMs under certain conditions (e.g. graduates from flight school, commission of DCOs). CG PSC-OPM and PSC-RPM shall formally establish policy under which conditions PSC-OPM-3/RPM-2 can upload OSCs to officers' records given notification from appropriate sources (see Figure 4-2). PSC-OPM-3 or PSC-RPM-2 enters such OSCs per established guidelines and notifies the individual officers of the changes.
2. SMs desiring to add conditions subject to bulk uploads should contact PSC-OPM/RPM with their desires.



**Figure 4-2 Bulk Uploads**

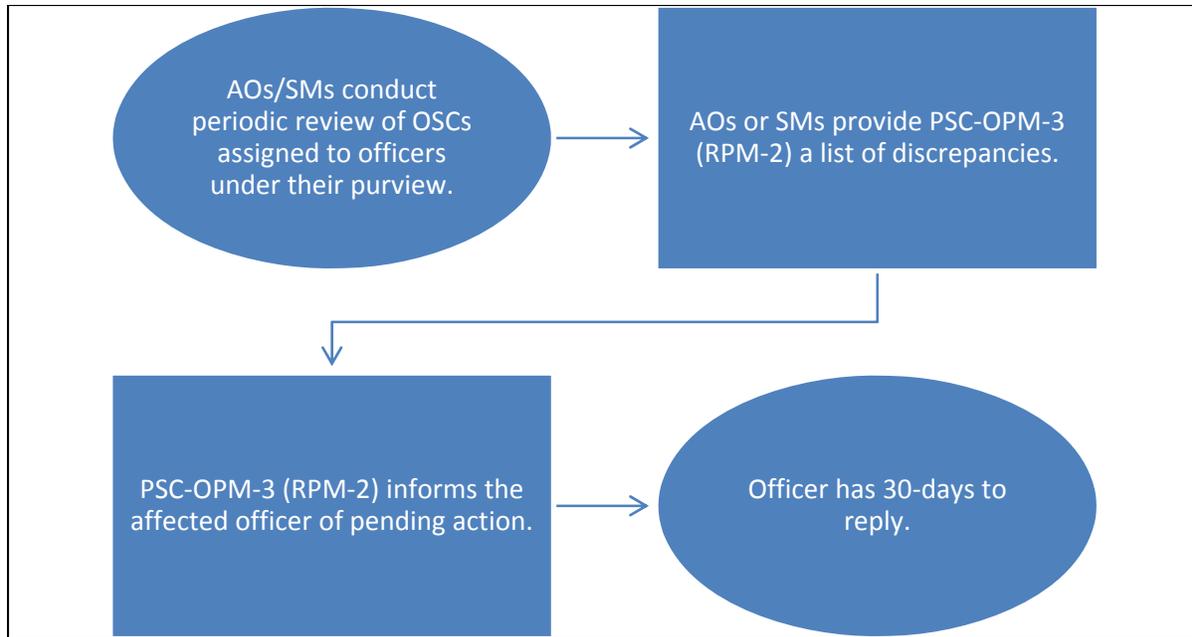
D. Adding or Deleting an OSC – Periodic Review and/or other Administrative Actions

1. In addition to individual officers initiating a change to their OSC, or bulk uploads, SMs and AOs may conduct periodic reviews of those officers under their purview to ensure accuracy and compliance with OSRs. The length of time between reviews may vary. AOs should conduct reviews during the assignment and screening processes, or unit visits. PSC-OPM-4 may conduct reviews during career counseling sessions. There is no mandate for SMs to conduct a review within a certain timeframe since some specialties are extremely large and insufficient staffing is available along with the fact that access to personnel information is restricted. However, some SMs have smaller accounts and desire closer scrutiny and are afforded the option of reviewing those officers with their specialty code to ensure compliance. At a minimum, it is recommended for SMs to review with their replacement the list of officers assigned their specialty code. An SM may contact PSC-OPM-3 for a list of officers assigned their specialty code or can obtain the information from CGBI following the steps in Figure 4-3. There is no requirement to document these reviews.

- Go to CGPortal
- Select Business Intelligence
- Select Unit
- Change Unit to “Commandant”
- Select “Training” tab
- Select “Competency by Name”
- Scroll down to “OSC competency”
- Select appropriate OSC

**Figure 4-3 OSC Query Path**

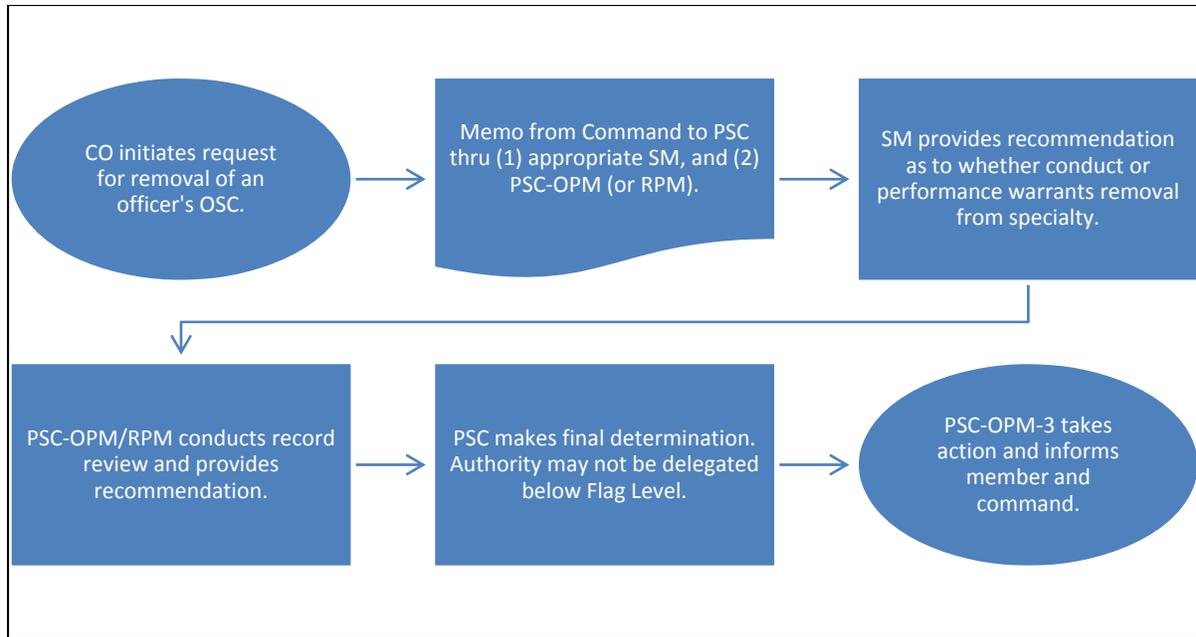
2. If a SM or an AO discovers an officer no longer meets the requirements of a given specialty, they notify PSC-OPM-3. PSC-OPM-3 confirms non-compliance with the published and approved OSR, consults with PSC-RPM-2 for IDPL officers, and notifies the officer of pending deletion of the subject OSR.
3. After receiving notification, the officer has 30-days to reply to PSC-OPM-3 or PSC-RPM-2 documenting that they meet the requirements of the OSR for the specialty in question (see Figure 4-4).
4. If an officer disagrees with the deletion, they may appeal to the PSC Flag Officer with a memo via their rating chain. A sample memo is available through PSC-OPM-3 via an email request to: [ARL-PF-CGPSC-OPMOSMS@uscg.mil](mailto:ARL-PF-CGPSC-OPMOSMS@uscg.mil). PSC’s review process is internally established and may range from simple review by the Flag Officer to convening a panel of officers to review the application and make a recommendation. If denied by the PSC Flag Officer, the officer may pursue a correction to their military record via an appeal to a PRRB or file a BCMR action as outlined in Reference (e).



**Figure 4-4 Periodic Review**

**E. Command Initiated Action**

1. Commanding Officers may recommend removal of an officer's specialty code as a result of certain administrative or disciplinary actions (NJP, Court Martial, Admin Investigations, etc.) where they believe the officer's conduct or performance does not meet the spirit of the specialty. Commanding Officers should consult with PSC-OPM (or RPM for IDPL officers) when considering such actions.
2. Such requests from commands shall be sent to PSC via memo thru the appropriate SM and PSC-OPM (or RPM) for review and recommendations. PSC-OPM-3 can provide a sample memo format with an email request to: [ARL-PF-CGPSC-OPMOSMS@uscg.mil](mailto:ARL-PF-CGPSC-OPMOSMS@uscg.mil).
3. Final authority to remove an officer's OSC rests with PSC and shall not be delegated below the Flag Officer level. After a determination is made, PSC-OPM-3 takes appropriate action and informs the member and command. Figure 4-5 shows the process for a Commanding Officer to initiate removal of an officer's OSC.
4. SMs are not required to list certain conduct or performance as grounds for removal of an officer's OSC. Absence of such parameters does not negate grounds for removal; however, the basis for the removal must be significant enough that the service would be at risk with the officer serving in their specialty (e.g. an officer found guilty at Court Martial for misuse of government funds continuing to be a CG-FIN10 specialist).
5. If an officer disagrees with the deletion, they may pursue a correction to the military record via an appeal to a PRRB or file a BCMR action as outlined in Reference (e).



**Figure 4-5 Command Initiated**

**F. Validation Via the Officer Evaluation System**

1. Commanding Officers are the first level of review to ensure the integrity of the OSMS. During review of an officer's OER, the Commanding Officer should ensure that members of the rating chain verify the officer's OSC(s) are accurate as reflected on the officer's ESS.
2. Any discrepancies noted during this review should be addressed by the Reported-On Officer or command using either procedures in Paragraph 4.B or Paragraph 4.D above as needed.

**G. Completing the Officer Specialty Code Application (OSC), Form CG-5319 - Deletion Form**

1. Appendix E contains direction for completing the Officer Specialty Code Application (OSA), Form CG-5319. The Officer Specialty Code Application (OSA), Form CG-5319 is used by officers to request deletion of an assigned OSC to their military record. The form is available via the CGPortal via References > Forms.
2. Each individual officer is responsible for both reviewing their ESS for assigned OSCs and submitting the appropriate application and supporting documentation (if needed) to change their OSCs.
3. The Officer Specialty Code Application (OSA), Form CG-5319 application allows the officer to delete assigned OSCs which are either no longer valid, or incorrectly assigned. The officer must carefully review the respective OSR and confirm they either no longer meet the requirements, or never met the requirements.
4. Upon completion of the application, the officer forwards the form to their Commanding Officer for review and endorsement. The officer provides their Commanding Officer the OSR in question and all supporting documentation. The officer's ESS is considered a

snapshot of official entries and may be used to verify Licenses, Competencies, etc. Only those Officer Specialty Code Application (OSA), Form CG-5319s favorably endorsed by the Commanding Officer are forwarded to PSC-OPM-3 for further processing.

Commanding Officers can delegate the “Command Approval” to a subordinate provided such delegation is formally established either via a unit organization manual, assignment to duties, designation memo, etc. That delegation shall be no lower than the Executive Officer or Deputy. A Flag Officer/SES may designate an O-6/GS-15 as approval authority. Command approval applies for Coast Guard officers assigned to another service (e.g. the Commanding Officer of a USN ship to which that officer is assigned is considered command approval).

5. After receiving a favorable command endorsement, the officer submits the Officer Specialty Code Application (OSA), Form CG-5319 to PSC-OPM-3 for processing. Enclose all supporting documentation as well, if it is not readily apparent from the officer’s ESS. The application package (Officer Specialty Code Application (OSA), Form CG-5319 plus supporting documents) may be emailed as an Adobe file, faxed, or mailed for processing. (Note: The preferred method is electronic submission to the PSC-OPM-3 OSMS email repository - [ARL-PF-CGPSC-OPMOSMS@uscg.mil](mailto:ARL-PF-CGPSC-OPMOSMS@uscg.mil)). There is no need to provide documentation for licenses, certifications, training course, etc, if the officer’s ESS correctly displays those items. Simply attach the ESS to the application package, as the ESS is considered official documentation by PSC-OPM/RPM. Each SPO verifies appropriate documents prior to updating DA which subsequently feeds the ESS. Individual commands may require those source documents before endorsing the applications.
6. PSC-OPM-3 will process the application and work with the appropriate SM as needed to ensure compliance with an OSR. Final decision authority to delete an OSC rests with PSC-OPM-3 (or RPM-2 for IDPL officers).
7. Officers should understand that no historical information is kept for deleted OSCs. PSC-OPM-3 (or RPM-2 for IDPL officers) will provide the officer notification of the deletion which can be retained for future use towards a DD-214. PSC-OPM-3 will maintain a copy for record as well.

#### H. Completing the Officer Specialty Code Application (OSC), Form CG-5319A Addition Form

1. Appendix F contains direction for completing the Officer Specialty Code Application (OSA), Form CG-5319A. The Officer Specialty Code Application (OSA), Form CG-5319A is used by officers to request addition of an assigned OSC to their military record. The form is available via the CGPortal via References > Forms.
2. Each individual officer is responsible for both reviewing their ESS for assigned OSC(s) and submitting the appropriate application and supporting documentation (if needed) to change their OSC.
3. The Officer Specialty Code Application (OSA), Form CG-5319A application allows the officer to request to add an OSC to their official record. The officer shall carefully review the respective OSR and confirm they meet the requirements.
4. Upon completion of the application, the officer forwards the form to their Commanding Officer for review and endorsement. The officer must provide their Commanding Officer

the OSR in question and all supporting documentation. The officer's ESS is considered a snapshot of official entries and may be used to verify licenses, competencies, etc. Only those Officer Specialty Code Application (OSA), Form CG-5319As favorably endorsed by the Commanding Officer are forwarded to PSC-OPM-3 for further processing. Commanding Officers may delegate the "Command Approval" to a subordinate provided such delegation is formally established either via a unit organization manual, assignment to duties, designation memo, etc. That delegation shall be no lower than the Executive Officer or Deputy. A Flag Officer/SES may designate an O-6/GS-15 as approval authority. Command approval applies for Coast Guard officers assigned to another service (e.g. the Commanding Officer of a USN ship to which that officer is assigned is considered Command Approval).

5. After receiving a favorable command endorsement, the officer submits the Officer Specialty Code Application (OSA), Form CG-5319A to PSC-OPM-3 for processing, using the same procedures detailed for processing an Officer Specialty Code Application (OSA), Form CG-5319 in Paragraph G.5 above.
6. PSC-OPM-3 will process the application and work with the appropriate SM as needed to ensure compliance with an OSR. Final decision authority to award an OSC rests with PSC-OPM-3 (or RPM-2 for IDPL officers).

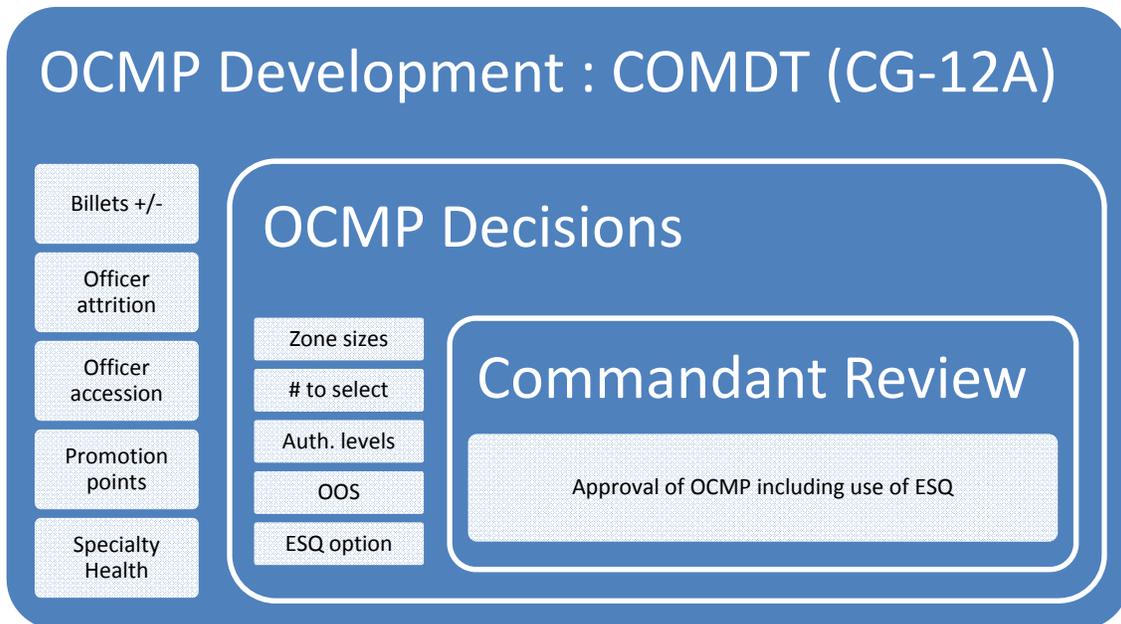
**CHAPTER 5. ENHANCED STATUS QUO**

**A. Authority**

1. The Coast Guard Authorization Act for Fiscal Years 2010 and 2011 authorized the Commandant to furnish promotion boards a list of specialty needs which may be used to meet service needs. Termed “Enhanced Status Quo” (ESQ), this tool balances our best qualified promotion board process with the ability to select fully qualified officers possessing certain needed skills for promotion. The number to select with ESQ is limited to no more than the percentage of officers who may be selected from below zone. ESQ is only applicable to the ADPL.
2. The OCMP shall identify the Coast Guard’s critical specialties and subspecialties based on forecasted billet need and expected officer supply. Commandant will designate specialties or subspecialties subject to ESQ in the OCMP when applicable.

**B. Determination**

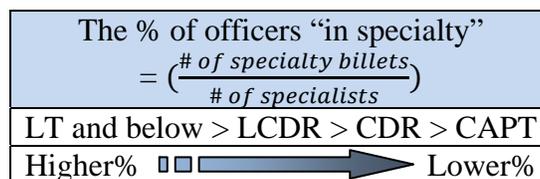
1. The OCMP is the annual document which provides the Commandant with the forecasted needs for the ADPL officer corps. In building the OCMP, Commandant (CG-12A) factors in: billet growth/decline, attrition rates, accessions, promotion points and the health of each specialty amongst many other workforce forecasting issues. For the upcoming Promotion Year (PY), which commences July 1<sup>st</sup> of each year, the OCMP recommends the ADPL authorization levels for the controlled grades, projected selection numbers, zone sizes, and opportunities of selection (OOS). Portions of the OCMP discuss the health of certain officer specialties.
2. Within the OCMP, Commandant (CG-12A) determines the need for and recommends the use of the ESQ tool during the upcoming promotion boards. The decision to employ ESQ rests with the Commandant.



**Figure 5-1 OCMP Development and ESQ**

C. Health of Specialties and Subspecialties

1. One item closely monitored by workforce planners and managers is the ‘*health*’ of a specialty. Health refers to the billet structure of a specialty and its ability to support upward growth associated with the military’s workforce pyramid. A pyramid with too large of a base can mean fewer opportunities for upward movement within the specialty, and likewise a pyramid too narrow can create vacancies at the senior paygrades.
2. A specialty’s billet pyramid structure that is less than ideal can be offset by the workforce’s (supply side) time-in-service (TIS) profile. For example, a billet structure with a wide base can be supported by a cadre of specialists who are commissioned with several years of service already (e.g. CWO to LT) and tend to attrite before reaching the more senior paygrades. Specialties without a complementing TIS profile require close monitoring and attention to ensure an adequate supply of officers to meet demand.
3. Additionally, a specialty should have a sufficient supply of officers to support “out-of-specialty” opportunities. If the ratio of specialists to billets is so close that the assignment process is forced to keep them in specialty continuously, then it may negatively impact other personnel management decisions. Ideally, officers should be able to balance proficiency and expertise in their specialty with opportunities to broaden their skillsets in other areas throughout their career. Figure 5-2 shows a general relationship used as one factor in measuring a specialty’s health with regards to having a sufficient supply of officers. As the table shows for example, we would desire a higher percentage of Lieutenants “in specialty” than we would for a Commander. Those specialties with a higher percentage “in specialty” have an insufficient supply, while those with a smaller percentage have an excess.



**Figure 5-2 Specialty Health**

4. While having a sufficient supply of officers within a specialty to support out of specialty opportunities is important to specialty health, the priority for the use of ESQ is to ensure body-to-billet ratios of at least 1:1. The use of ESQ after achieving a 1:1 body-to-billet ratio to improve specialty health is a secondary need. It is important to understand that there is no direct linkage between the use of ESQ and the assignment process. The goal behind ESQ is to ensure a sufficient supply of specialists exists for assignment.

D. Impacts on OSMS

1. Due to the impacts of ESQ, officers in zone for the upcoming PY may experience blackout dates for changing their OSC. PSC-OPM (RPM) shall notify the field each year of those officers who may be in-zone for promotion in order to prepare and meet OER submission schedules. That message also describes impacts on the officer’s ability to make any changes to their OSC. The blackout dates do not preclude other authorized changes to an officer’s OSC such as: bulk uploads, administrative actions, and command initiated procedures.

2. Accuracy of an officer's OSC is paramount for ESQ. Primary responsibility rests with the individual officer and their respective Commanding Officers to ensure accuracy. Officers are required to submit to their rating chain their ESS during their OER submission. This affords the opportunity to verify an officer's OSC. This annual review is one part of a multi-part process to ensure the integrity of the system.

E. ESQ Mechanics

1. Specific processes for using ESQ shall be established separately for selection boards. The Assistant Commandant for Human Resources (CG-1) has the responsibility for generating those procedures in a future update to Chapter 6 of Reference (f) before ESQ can be implemented.
2. The use of ESQ is decided per promotion year, per selection board by the Commandant via the OCOMP and is driven by qualitative analysis well-defined with supporting data and not perceived needs.



**CHAPTER 6. EMPLOYEE SUMMARY SHEET (ESS)****A. Purpose**

1. The ESS provides a condensed history of each officer's personnel information, including personal data, rank history, position history, training, tests, competencies, boards and memberships, medals and awards, certificates and licenses. The ESS is a multi-purpose tool used by AOs in developing assignment slates and by Boards and Panels to enhance evaluations.
2. PSC-OPM-3 is the Program Manager for the ESS. They specify which fields are displayed. Commandant (CG-095) controls the means of providing the information via CGBI.
3. Access the ESS via the CGBI tool as follows: <http://cgbi.osc.uscg.mil> (Launch CGBI) > **"Personal"** view tab > **"Skills"** tab > **"Summary Sheet"**.
4. Table 6-1 below summarizes the various fields within the ESS and their content. Individual officers are responsible for producing documentation for justification of any changes to their ESS.

<b>ESS/DA Field</b>	<b>Comments</b>
Position History	While this is important information, DA does not currently provide a method for individual officers to correct this data. AOs can correct some data in Position History, but assistance from COMDT (CG-833) may be needed to complete certain corrections. Corrections that can be addressed are handled by CG PSC-OPM. The PRIMARY DUTY block in an officer's OER should match verbatim the "Position Description".
Education	This includes College/University Degrees, College/University Majors, Dates acquired, and Grade Point Averages (GPA) (optional). Members should submit a Record of Professional Development, Form CG-4082 to their SPO for entry into DA in the event of incorrect or missing data. Once updated, the SPO forwards the Record of Professional Development, Form CG-4082 to PSC-PSD-mr for insertion into the member's record.
Training	This refers to "formal" training courses. Training courses must have a Training Course Number (TCN). Members submit a Record of Professional Development, Form CG-4082 to their SPO in the event of incorrect or missing data. Once updated, the SPO forwards the Record of Professional Development, Form CG-4082 to PSC-PSD-mr for insertion into the member's record.

ESS/DA Field	Comments
Tests	This includes Armed Services Vocational Aptitude Battery (ASVAB), American College Test (ACT), Scholastic Aptitude Test (SAT), Graduate Record Examination (GRE), etc. Members submit a Record of Professional Development, Form CG-4082 to their SPO for entry into DA in the event of incorrect or missing data. Once updated, the SPO forwards the CG-4082 to PSC-PSD-mr for insertion into the member's record.
Competencies	A complete listing of current competency codes and definitions are found in the Competency Dictionary. Officers can access the Competency Dictionary via CGPortal and follow the instructions to access and validate their competencies. Members submit a Record of Professional Development, Form CG-4082 to their SPO for entry into DA in the event of incorrect or missing data. Once updated, the SPO forwards the Record of Professional Development, Form CG-4082 to PSC-PSD-mr for insertion into the member's record.
Specialties	List of current OSC(s) maintained by the officer. The "Effective Date" category is the date the OSC was assigned by PSC-OPM/RPM.
Boards & Memberships	Boards include membership on Coast Guard, DHS, or Department of Defense (DoD) promotion boards, selection boards, or assignment panels. Memberships pertain to Coast Guard and specialty-related associations such as the Coast Guard Officers Association (CGOA), the Chief Warrant Officers Association (CWOA), the American Bar Association (ABA), or the American Medical Association (AMA). Members submit a Record of Professional Development, Form CG-4082 to their SPO for entry into DA in the event of incorrect or missing data. Once updated, the SPO forwards the Record of Professional Development, Form CG-4082 to PSC-PSD-mr for insertion into the member's record.
Medals & Awards	List of medals and awards entered into DA.
Certifications & Licenses	Certifications and licenses can be corrected through the SPO using the Record of Professional Development, Form CG-4082. Once updated, the SPO forwards the Record of Professional Development, Form CG-4082 to PSC-PSD-mr for insertion into the member's electronic PDR.

**Table 6-1 ESS Data**

**B. Documenting Purposes**

1. PSC-OPM-3 accepts an officer's ESS as verification that certain Education, Training, Tests, Competencies, or Certifications & Licenses are present for an OSC application.

SPOs require certain source documents (pilot's license, transcripts, etc) prior to entering certain codes into DA. Officers should consult with their SPOs for required source documents.



**APPENDIX A KEY TERMS AND DEFINITIONS**

Table A-1 Key Terms and Definitions contains a list of the key terms and definitions.

<b>Term</b>	<b>Definition</b>
Apprentice, Journeyman, and Master (AJM) levels	AJM are the three levels of expertise that an SM can use to further employ the OSMS tools. SMs set forth criteria to achieve the various levels of expertise in their OSR. While not tracked via OSCs, individual officers can list achievement of these milestones within their OER or via a Record of Professional Development, Form CG-4082.
Apprentice	Optional designation used by SMs for their specialties. This level of expertise is typically entry level and is characterized by an individual with the required qualifications for the specialty but is still learning how to apply those skills.
Broadened Specialist	An officer who possesses in-depth knowledge and skills in two or more officer specialties or subspecialties and earned subsequent designation.
Career Broadening	Individual development, normally beyond that available within a single specialty.
Certification	An endorsement by a recognized authority, government or private firm confirming that specific standards of knowledge or performance have been met in a particular subject area (e.g., Department of Homeland Security (DHS) Program Management Level 3 Certification).
Community	A collection of Specialties who share missions, skills, and/or organizational constructs.
Competency	A collection of tasks with the associated KSAs, and wherewithal (tools, methods, information, doctrine, procedures, materials, etc.) needed to perform the tasks to a predetermined, measurable, performance standard. The tasks are usually related as parts of a larger process in support of or contributing to the goals of the organization, unit or work group.
Enhanced Status Quo (ESQ)	Authorization to select a limited number of officers for promotion based on known specialty needs of the CG.
Journeyman	Optional designation used by SMs for their specialties. This level of expertise is typically mid level and is characterized by an individual beyond the Apprentice level who has acquired additional qualifications.
License	A legal document issued by a government, state, or local authority giving permission to recipients to perform certain acts or to carry on a certain business (e.g., a Third Mate's license).

Term	Definition
Master	Optional designation used by SMs for their specialties. This is the highest level of expertise characterized by obtaining those additional qualifications typically via a formal means or process (certification boards, professional licenses, PhDs, etc.).
Officer Specialty	An area of expertise defined by a unique set of KSAs which have a well supported billet structure capable of sustaining a viable population of career specialists with requisite competencies, education, training, and certifications/licenses. An officer specialty may contain subspecialties which could be narrower in scope, or possess similar KSAs but have sufficient differences to warrant their own definition.
Officer Specialty Code Application (OSA) Form	An Officer Specialty Application (OSA), Form CG-5319 or Officer Specialty Application (OSA), Form CG-5319A submitted by an officer to request assignment of a currently approved specialty or subspecialty to their official military record.
Officer Specialty Code (OSC)	<p>A seven digit code used in the Coast Guard’s Human Resources personnel management database system to identify an officer specialty or subspecialty. For example, CG-AVI10 identifies the “Aviation” Specialty, and CG-AVI11 identifies the Subspecialty, “Fixed-Wing Aviation.” All Specialties are identified with the number 10, while Subspecialties are identified with numbers 11 through 1X, depending on how many subspecialties are assigned to the primary specialty.</p> <p>Officers earn and acquire OSCs throughout their career and it is probable that all ADPL officers have at least one OSC by mid-grade. Most senior officers will have earned multiple OSCs.</p> <p>OSCs are assigned to billets as well to categorize job requirements. Presence of an OSC in an officer’s record does not dictate assignments to a billet of the same category, nor does lack of an OSC prevent assignments.</p>
Officer Specialty Requirements (OSRs)	<p>The list of competencies, education, training, and the certifications/licenses requirements required to earn a specific specialty or subspecialty set by SMs. The OSR is the cornerstone document of the specialty and subspecialty. It serves as both a framework for preparing the workforce to meet the demands of the billets, as well as a career planning tool for junior officers.</p> <p>An OSR may also define requirements for earning AJM levels of</p>

Term	Definition
	<p>expertise. Not all OSRs incorporate the AJM principles, but those that do provide a higher level of professional guidance to their workforce.</p> <p>Some OSRs exist only to document billet demands and as such provide no pathway for earning an OSC (e.g. CG-MED10).</p> <p>All OSRs are maintained in a central repository by PSC-OPM-3 and are available via CGPortal for viewing. OSRs are reviewed at least annually for accuracy by SMs.</p>
Officer Subspecialty	<p>A focused area of expertise within a Specialty defined by a narrower set of KSAs which have a well supported billet structure capable of sustaining a viable population of career specialists with requisite competencies, education, training, and certifications/licenses. Officers assigned a Subspecialty may also be assigned the overarching general Specialty by default.</p> <p>More often than not, an officer assigned a Subspecialty is capable of filing a billet with the general Specialty code. The inverse, however, is normally not true.</p>
Specialty Manager (SM)	<p>The individual designated by, and accountable to the Program Office for the detailed management of a Coast Guard specialty. An SM is expected to be a subject matter expert in their field who maintains awareness of:</p> <ul style="list-style-type: none"> <li>• the demands of the jobs,</li> <li>• growing trends and needs within the field of work, and</li> <li>• changes to policies/regulations/laws which impact the specialty.</li> </ul>
Specialist	<p>An officer who possesses in-depth knowledge and skills in a specialty or subspecialty acquired through competencies, education, training, and certifications/licenses.</p>

**Table A-1 Key Terms and Definitions**



## APPENDIX B      OFFICER SPECIALTIES

Officer Specialty/Subspecialty Title	OSC Code	Specialty Manager
<b>Command, Control, Communications, Computers &amp; Information Technology (C4IT)</b>	CG-C4I10	DCMS-81
Information Systems Management	CG-C4I11	DCMS-81
Electrical and Electronics Engineering	CG-C4I12	DCMS-81
Communications Management	CG-C4I13	DCMS-81
<b>Engineering</b>	CG-ENG10	DCMS-81
Ocean Engineering	CG-ENG11	COMDT (CG-43)
Naval Engineering	CG-ENG12	COMDT (CG-452)
Civil Engineering	CG-ENG13	COMDT (CG-43)
Industrial Engineering	CG-ENG14	COMDT (CG-452)
Aeronautical Engineering	CG-ENG15	COMDT (CG-41)
<b>Finance</b>	CG-FIN10	COMDT (CG-8R)
<b>Human Resources</b>	CG-HRM10	COMDT (CG-1B)
HR Management	CG-HRM11	COMDT (CG-1B)
Recruiting	CG-HRM12	COMDT (CG-122)
Training	CG-HRM13	FC-T
<b>Intelligence</b>	CG-INT10	COMDT (CG-212)
<b>Legal</b>	CG-LGL10	COMDT (CG-0948)
<b>Management</b>	CG-MGT10	COMDT (CG-843)
Command and Staff	CG-MGT11	---
External Affairs	CG-MGT13	COMDT (CG-0922)
International Affairs	CG-MGT14	CG-DCO-I
Enterprise Policy, Planning, Budgeting and Management	CG-MGT15	CG-DCO-81
Acquisition Project Management	CG-MGT16	COMDT (CG-9211)
Planning	CG-MGT17	---
<b>Medical</b>	CG-MED10	COMDT (CG-1121)
Physician Assistant	CG-MED11	COMDT (CG-1121)
Medical Administration	CG-MED12	COMDT (CG-1123)
<b>Prevention – Afloat</b>	CG-OAF10	COMDT (CG-751)
Aids to Navigation	CG-OAF11	COMDT (CG-NAV-1)
Ice Operations	CG-OAF12	COMDT (CG-WWM-3)
<b>Prevention – Ashore</b>	CG-OAP10	COMDT (CG-741)
Vessel Inspections	CG-OAP11	COMDT (CG-CVC)
Marine Investigations	CG-OAP12	COMDT (CG-INV)
Waterways Operations and Management	CG-OAP13	COMDT (CG-WWM)
Port and Facility Safety and Security	CG-OAP14	COMDT (CG-FAC)
Auxiliary Operations Coordination	CG-OAP15	COMDT (CG-BSX)
Marine Safety Engineering	CG-OAP16	COMDT (CG-ENG)

<b>Officer Specialty/Subspecialty Title</b>	<b>OSC Code</b>	<b>Specialty Manager</b>
<b>Response – Afloat</b>	CG-OAF10	COMDT (CG-751)
Cutter based LE/HLS	CG-OAF13	COMDT (CG-MLE)
<b>Response – Ashore</b>	CG-OAR10	COMDT (CG-741)
Search and Rescue Coordination	CG-OAR11	COMDT (CG-SAR)
Defense Operations/Readiness	CG-OAR12	COMDT (CG-DOD)
Maritime Law Enforcement/PWCS Ops	CG-OAR13	COMDT (CG-MLE)
Boat Forces Operations	CG-OAR14	COMDT (CG-731)
Marine Environmental Response	CG-OAR15	COMDT (CG-MER)
Incident Management and Preparedness	CG-OAR16	COMDT (CG-CPE)
<b>Response – Aviation</b>	CG-AVI10	COMDT (CG-7111)
Fixed Wing Aviation	CG-AVI11	COMDT (CG-7111)
Rotary Wing Aviation	CG-AVI12	COMDT (CG-7111)
<b>Non-ADPL Programs</b>	CG-NAP10	n/a <sup>Note 1</sup>
Public Health Services	CG-NAP11	n/a <sup>Note 1</sup>
Permanent Commission Teaching Staff	CG-NAP12	n/a <sup>Note 1</sup>
Chaplains	CG-NAP13	n/a <sup>Note 1</sup>
Reserve Program Administrators	CG-NAP14	COMDT (CG-131)
Other Governmental Program	CG-NAP15	n/a <sup>Note 1</sup>

**Table B-1 Specialty Codes and Specialty Managers**

Note 1: These specialties and subspecialties are tracked for billets and are not part of OSMS. No Specialty Managers are designated for these programs.

**APPENDIX C      SAMPLE MEMO FOR REQUESTING CHANGES TO  
OFFICER SPECIALTY CODE STRUCTURE**

**MEMORANDUM**

From: COMDT (CG-(Assistant Commandant affected))  
To: CCG (address to CCG if it concerns a Specialty or Community; address to CG-1 if it concerns a Subspecialty)  
Thru:  
    (1) PSC-OPM  
    (2) COMDT (CG-12) (include an endorsement from a workforce analysis review by CG-12A)  
    (3) COMDT (CG-1) (delete if the request concerns a Subspecialty)  
    (4) (list affected Directorates, if any)  
    (5) DCMS (delete if the request concerns a Subspecialty)  
Subj: REQUEST TO ADD, DELETE, CHANGE AN OFFICER SPECIALTY (or SUBSPECIALTY) GROUP  
Ref: (a) CG Officer Specialty Management System Manual, COMDTINST M5300.3 (series)

1. Per the provisions set forth in Article #.# of Reference (a), I request the (addition, deletion, modification) of the (list the Specialty [or Subspecialty] nomenclature being added, deleted, or modified).
2. (Briefly state need for change to current OSMS structure).
3. (State impacts to current OSMS structure ... will this request impact officers currently assigned an OSC? Address those items in Chapter 4.A.2 of reference M5300.3)
4. Recommend the following nomenclature be assigned for the Specialty (or Subspecialty): CG-(3 letter and 2 number combination) – (title of Specialty).
5. Officer Specialty Requirement (OSR): Enclosed is the proposed OSR for the Specialty (or Subspecialty) which captures the competencies, education, training, and licenses/certifications required to earn this specialty code. (this paragraph may not be necessary if you are only requesting a change in nomenclature ... if so, state “no change in the current OSR is needed”)

6. Decisions.

a. Specialty (or Subspecialty) (addition, deletion, modification):

Approved: \_\_\_\_\_ Disapproved: \_\_\_\_\_ Date: \_\_\_\_\_

b. Nomenclature: CG-(3 letter and 2 number combination) – (title of Specialty (or Subspecialty))

Approved: \_\_\_\_\_ Disapproved: \_\_\_\_\_ Date: \_\_\_\_\_



**APPENDIX D            SAMPLE MESSAGE TRAFFIC**

P ddtttt MMM YY (*message should go out Priority*)

FM COMCOGARD PSC ARLINGTON VA

TO ALCGPSC

BT

UNCLAS //N05300//

ALCGOFF ###/YY

SUBJ: CHANGE TO AN OFFICER SPECIALTY REQUIREMENT (OSR) – (*list affected Specialty/Subspecialty ex. CG-ENG13 CIVIL ENGINEERING*)

A. Coast Guard Officer Specialty Management System Manual, COMDTINST M5300.3 (series)

1. Officer Specialty/Sub-specialty Requirements (OSR), Form CGHQ-5318 was (created/modified) by COMDT (CG-###) to (*briefly state reasons for change in a few sentences*)
2. The new OSR incorporates the following changes:
  - A: Competency:
    - (1) Added “WIDGET” competency code
    - (2) Deleted “BODE” competency code
  - B: Education: no change.
  - C: Training: no change.
  - D: Licenses/Certifications:
    - (1) Added Professional Engineer license to requirement for “Master” level.
    - (2) Clarified “Journeyman” level.
3. Impacts to officers currently assigned OSC code (*list OSC here*): (*briefly state impacts of change to those officers who had the OSC code prior to the change – no impacts, grandfathered, must obtain new competency by ... date, etc.*)
4. Questions on an individual basis regarding the change should be directed to PSC-OPM-3. Concerns or feedback from the field should be routed up through the chain of command to the appropriate SM at HQ. OPM-3 point of contact is: Brandon Chittum at 202-###-#### or ALR-PF-CGPSC-OPMOSMS(at)uscg.mil.
5. The current OSR for (*fill in appropriate nomenclature, ex. CG-ENG13*) is attached and is also available via PSC-OPM-3’s CGPortal page:
6. CAPT ( ...), PSC-OPM, sends.
7. (*state if internet release is authorized*)



**APPENDIX E OFFICER SPECIALTY CODE APPLICATION (OSA), FORM CG-5319 – DELETION FORM**

DEPARTMENT OF HOMELAND SECURITY U.S. Coast Guard <b>OFFICER SPECIALTY CODE APPLICATION - DELETION</b> <i>Reference: COMDTINST M5300.3(series)</i>			
<b>Section I Applicant Information</b>			
Name – First, MI, Last	Rank	Employee ID	Date
Email Address		Applicant's Signature	
<b>Section II Request to Delete an Officer Specialty Code (OSC)</b> <i>(One application needed per each OSC deletion)</i>			
<b>Note: No historical record will remain after deleting an OSC from their record.</b> Link to CGBI <a href="http://cgbi.osc.uscg.mil/2.0/contentpages/personal_files/summary_sheet.cfm">http://cgbi.osc.uscg.mil/2.0/contentpages/personal_files/summary_sheet.cfm</a> Link to OSR: <a href="http://www.uscg.mil/psc/opm/Opm3/opm-3OSMS.asp">http://www.uscg.mil/psc/opm/Opm3/opm-3OSMS.asp</a>			
Specialty	Justification of Change		
Ex. CG-LGL 10	Law license has expired; no longer meet the requirements of the Law program's OSR.		
<b>Section III Command Endorsement (Only forward those favorably endorsed)</b>			
Command Approval Name – First, MI, Last	Rank	Signature	Date
Command Comments <i>(if needed)</i>			
After completing above information, electronically submit to OPM-3: <a href="mailto:ARL-PF-CGPSC-OPMOSMS@uscg.mil">ARL-PF-CGPSC-OPMOSMS@uscg.mil</a> Supporting Documentation verifying OSC requirements <b>MUST</b> accompany Officer Specialty Application			
<b>Section IV Specialty Manager Review and Recommendation</b>			
Specialty Manager Name – First, MI, Last	Rank	OSC Account	
Specialty Manager Recommendation <input type="checkbox"/> Concur <input type="checkbox"/> Non-concur	Signature		Date
Comments			
<b>Section V CG PSC-OPM 3 Final Review and Disposition</b>			
OPM-3 Reviewing Official's Name – First, MI, Last	Signature		Date
OPM-3 Reviewing Official's Final Disposition <input type="checkbox"/> Approved <input type="checkbox"/> Disapproved	OSC Deleted from Applicant's Record		
OPM-3 Reviewing Official's Comments			

Once approved OPM-3 will update Direct Access by deleting the OSC.  
 CG-5319 (2/12)

## Appendix E of COMDTINST M5300.3

### 1. Form Requirements:

- a. Section I: Self explanatory. Applications missing the member's signature are returned without processing.
- b. Section II: Use the approved Specialty code per Appendix B. **Submit one application per deletion.** Do not combine multiple deletions into one Officer Specialty Code Application (OSA), Form CG-5319. Briefly state the justification for the change. If more space is required, state "see attached documents" and continue on a separate document (MS Word document is appropriate).
- c. Section III: Self explanatory. Use the comments section if needed otherwise leave blank.
- d. Section IV: Use the approved Specialty code per Appendix B for "OSC Account". Use the comments section if desired. Applications are returned to the officer after final action. Any comments listed are available to the applicant.
- e. Section V: Self explanatory. Final approval for deletion of an OSC rests with the OPM-3 Branch Chief.

**APPENDIX F OFFICER SPECIALTY CODE APPLICATION (OSA), FORM CG-5319A  
– ADDITION FORM**

DEPARTMENT OF HOMELAND SECURITY U.S. Coast Guard <b>OFFICER SPECIALTY CODE APPLICATION - ADDITION</b> <i>Reference: COMDTINST M5300.3 (series)</i>			
<b>Section I Applicant Information</b>			
Name – First, MI, Last	Rank	Employee ID	Date
Email Address	Applicant's Signature		
<b>Section II Request to Add an Officer Specialty Code (OSC)</b> <i>(One application needed per each OSC addition)</i>			
<b>Note: Applicant must document meeting all requirements established by the OSR of the specialty(ies).</b> Link to CGBI <a href="http://cgbi.osc.uscg.mil/2.0/contentpanes/personal_files/summary_sheet.cfm">http://cgbi.osc.uscg.mil/2.0/contentpanes/personal_files/summary_sheet.cfm</a> Link to OSRs <a href="http://www.uscg.mil/psc/opm/Opm3/opm-3OSMS.asp">http://www.uscg.mil/psc/opm/Opm3/opm-3OSMS.asp</a>			
Specialty	Description of Change (Justifying comments if lacking requirements stated in OSR)		
Ex. CG-C4I12	Completed all requirements w/in the OSR for C4IT – Electrical Engineering specialty		
<b>Section III Command Endorsement (Only forward those favorably endorsed)</b>			
Command Approval Name – First, MI, Last	Rank	Signature	Date
Command Comments <i>(if needed)</i>			
<b>After completing above information, electronically submit to OPM-3: <a href="mailto:ARL-PF-CGPSC-OPMOSMS@uscg.mil">ARL-PF-CGPSC-OPMOSMS@uscg.mil</a> Supporting Documentation verifying OSC requirements <i>MUST</i> accompany Officer Specialty Application</b>			
<b>Section IV Specialty Manager Review and Recommendation</b>			
Specialty Manager Name – First, MI, Last	Rank	OSC Account	
Specialty Manager Recommendation <input type="checkbox"/> Concur <input type="checkbox"/> Non-concur	Signature	Date	
Comments			
<b>Section V CG PSC-OPM 3 Final Review and Disposition</b>			
OPM-3 Reviewing Official's Name – First, MI, Last	Signature	Date	
OPM-3 Reviewing Official's Final Disposition <input type="checkbox"/> Approved <input type="checkbox"/> Disapproved	OSC Added to Applicant's Record		
OPM-3 Reviewing Official's Comments			

Once approved OPM-3 will update Direct Access with the new OSC.  
CG-5319A (2/12)

Page 1 of 1

## Appendix F of COMDTINST M5300.3

### 1. Form Requirements:

- a. Section I: Self explanatory. Applications missing the member's signature are returned without processing.
- b. Section II: Use the approved Specialty code per Appendix B. **Submit one application per addition.** Do not combine multiple additions into one Officer Specialty Code Application (OSA), Form CG-5319A. Briefly state the justification for the change. If more space is required, state "see attached documents" and continue on a separate document (MS Word document is appropriate).
- c. Section III: Self explanatory. Use the comments section if needed otherwise leave blank.
- d. Section IV: Use the approved Specialty code per Appendix B for "OSC Account". Use the comments section if desired. Applications are returned to the officer after final action. Any comments listed are available to the applicant.
- e. Section V: Self explanatory. Final approval for addition of an OSC rests with the OPM-3 Branch Chief.