Infantry Battalion S4 Operations in Garrison

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The roles of the S4 section during combat operations and in the field are well documented for any Infantryman to read and understand.[1] However, the majority of junior captains and promotable first lieutenants assigned as an S4 officer-in-charge (OIC) will struggle to systemize the diverse and technical duties that fall under battalion sustainment while in garrison. It is far more intuitive to physically request and move supplies than it is to digitally forecast and manage a budget.

Based on the experience of the 1st Battalion, 325th Airborne Infantry Regiment during 11 months of force generation before and after a nine-month deployment in support of Operation Inherent Resolve, this article is a technical primer and proposed operational framework within the modified table of organization and equipment (MTOE) for infantry officers serving as the S4 OIC. While an S4 is explicitly responsible "for logistics planning and operations, supply, maintenance, transportation, services, field services, distribution, and operational contract support," their duties can be informally summarized as advising the battalion commander on anything that affects the battalion's money or combat power.[2]

S4 Composition by MTOE

The FY2018 MTOE for an infantry battalion within an infantry brigade combat team authorizes five Soldiers for the sustainment section. These Soldiers and their roles within this framework are the S4 OIC (O-3, 11A) with duties as the sustainment planner and billing official (BO); the senior supply sergeant (E-7, 92Y) with duties as the S4 NCOIC, supervisor of all property book activity, manager for requisition, and alternate billing official (ABO); one supply specialist (E-4, 92Y) with duties as the S4 training resources coordination meeting (TRCM) representative; one supply specialist (E-3, 92Y) with duties as the Defense Travel System (DTS) clerk and battalion Government Purchase Card (GPC) holder; and one supply specialist (E-3, 92Y) as the Government Travel Card (GTC) clerk. The following sections are ordered by which topics a new S4 OIC will have to master first.

Property Management

All property within the infantry battalion is hand receipted from the brigade or installation Property Book Office's (PBO's) accountable officer to the company commanders as primary hand receipt holders (PHRHs). All property management within the battalion is fundamentally managed within each company's Commander's Supply Discipline Program (CSDP), but the S4 shop is critical in making sure companies understand their responsibilities and perform them well.[3] While most PBOs will communicate directly with PHRHs for routine property tasks, it is essential that the S4 NCOIC aggressively assists both the PBO and the companies in conducting inventories, maintaining property accountability, and executing directives. The S4 OIC should provide administrative oversight and assist commanders in understanding the effects of their property activities.

The decisive point for property management is the proper conduct of inventories: don't sign for something that you haven't touched. It is essential that the outgoing PHRH, incoming PHRH, company supply sergeant, and sub-hand receipt holder are all physically present for the inventory and that they:

- Conduct the inventory off an appropriate training manual or component listing;

- Complete quality DA Form 2062s before putting the property back in storage; and

- Ensure that the company supply sergeant digitally assigns that property to the sub-hand receipt holder within the Global Combat Support System (G-Army).

The S4 does not need a representative at each inventory, but the S4 NCOIC must ensure that companies are fully trained on inventory procedures beforehand if he or she will

Table 1 — Battalion Sustainment Roles

	Log Plans	Property	Requisition	Maintenance	Mobility	TRCM	TDY
S4 OIC	X	O	BO	O	X	O	BO
S4 NCOIC		/	ABO			/	ABO
92Y TRCM			O			X	
92Y DTS						Alt	X
92Y GPC			X				/
Companies	X	X	X	X	X	X	X

Advise Companies: O
Manage Companies: /
Personally Execute: X

not be physically present to assist. One of the easiest ways for the S4 NCOIC to spot-check the companies is to query the commanders' storage location hand receipts on G-Army and confirm imminent property moves for each item listed.

Even after property has been issued down by the company commander, the continuing accountability of that property remains a company responsibility. NCOs and Soldiers will already be aware of some best practices in physically securing their property as end-users, but the S4 NCOIC needs to assist the companies by ensuring the supply sergeants retain accurate and well-organized physical copies of inventory paperwork. The most important documents are: signed G-Army hand receipts; signed DA Form 2062s as hand receipts; signed DA Form 2062s as shortage annexes; and PHRH-signed component listings or training manuals that were used to validate shortage annexes. A successful CSDP will also keep copies with each sub-hand receipt holder and then produce those copies at each subsequent monthly, cyclic, and change-of-command inventory to make sure all document changes are adding up. Good documentation is the first line of defense against property loss; it is also the first avenue of approach when something does go missing.

Accounting for lost property is fully covered in Chapter 13 of Army Regulation (AR) 735-5, *Property Accountability Properties*. Investigations generally stay as a company responsibility, but the S4 OIC and NCOIC should both be experts on using the Army Financial Liability Investigation of Property Loss (FLIPL) Tracker (AFT) website and coordinate directly with their brigade legal office and PBO in order to assist the companies in meeting their administrative suspenses.

Even within a successful CSDP, S4 shops have to manage directives. Directives are orders from a higher echelon to either give or receive property book items and usually have one of three purposes: to correct discrepancies between equipment on hand and a unit's MTOE; to issue new equipment; or to dispose of old equipment. While company supply sergeants are responsible for physically executing directives via DD Form 1348 and DA Form 3161, the S4 NCOIC should facilitate directives by communicating with PBO and the brigade S4 NCOIC to contact gaining or receiving parallel units, disseminate coordinating instructions for issue, integrate with local Defense Logistics Agency (DLA) offices for turn-in procedures, and report directives completion within the Logistics Information Warehouse (LIW) website's Decision Support Tool (DST) application. It is essential that the S4 OIC retain full visibility of pending directives in order to provide commanders with an understanding of how directives will affect their combat power: Don't wait until after the Mortar Training and Evaluation Program (MORTEP) to order those new 81mm

sights. Good forecasting will allow commanders to synchronize equipment changes with their training calendar, and provide critical feedback to the S4 OIC and PBO if a pending directive needs to be reconsidered to support company missions.

Requisition

The Army, through PBO and directives, will provide an infantry battalion with the majority of its property book items. It is an S4 OIC's responsibility to ensure that the battalion, as ordered by commanders, requisitions all other commodities and services either through G-Army, the battalion's GPC, or a government contract. Requisition is a broad and complicated function, but it is one of the primary ways a successful S4 can provide combat power to the battalion.

The largest requisition source for an infantry battalion is G-Army. Each September, the brigade finance officer (S8) will provide the battalions with the brigade commander's spending guidance, glide path, and budget for that year. It is then the S4 OIC's responsibility to integrate the battalion commander's guidance and disseminate a more refined budget to the companies. Companies perform most of the battalion's requisitions for Class II and Class IX as routine functions against internal requirements and within higher echelons' spending guidance. When commanders identify a valid requirement worthy of their funds and within budget guidance, their supply clerks will digitally order those items within G-Army. That order is then processed by the battalion and brigade combat team to pay the vendor out of the General Fund Enterprise Business System (GFEBS) to allow the physical movement of the items. The items move from the manufacturer to DLA and from DLA to a brigade Supply Support Activity (SSA) where the ordering unit will physically pick up their order.

An important design feature of G-Army is that S4 shops are not procedurally integrated into ordering and must instead take individual initiative to oversee or expedite orders. To prevent erroneous purchases, the S4 OIC and S4 NCOIC should alternate checking the entire battalion's daily orders within G-Army. The S4 OIC should pay particular attention to each company's cumulative expenditure for the fiscal year while the S4 NCOIC should conduct physical spot checks of each supply cage against that company's orders to ensure that supplies are being appropriately forecasted, received, and consumed.

The most powerful role of the S4 within G-Army ordering is the ability to expedite mission-essential items. The S4 OIC should communicate directly with the PBO and brigade's SSA accountable officer in order to gain contact with DLA customer support and parallel SSAs. A successful S4 OIC or NCOIC can identify any excess items available for transfer from a nearby unit to cut down order lead times. If an item is delayed anywhere along the DLA logistics chain, the S4 OIC can still communicate with them to facilitate manufacturer outreach and delivery methods. DLA can tailor the truck, vessel, or flight path to a unit's individual needs. Successful G-Army requisition depends on S4 shops training the companies in executing their routine supply

Table 2 — FLIPL Authorities by Total Loss

	Appointing Authority	Approving Authority
< $5,000	O-5	O-6
< $100,000	O-6	First general officer (GO)
≥ $100,000	First GO	First GO

	Start of Cycle	Ordering	Funding	Delivery	Pick Up	Required Date
The Company	Identify the need and confirm that what you're ordering will meet that need	Confirm ordering within guidance and execute in MB21	Check progress in ZPROSTAT	Check progress in ZPROSTAT	Pick it up from the SSA	Inventory IAW CSDP and hand receipt to end user
The S4	Disseminate BCT/BN spending guidance and spend plan	Confirm ordering within guidance	Check progress in ZPROSTAT	Expedite through DLA or parallel SSAs as necessary		
The Funds	Sitting in GFEBS	Sitting in GFEBS	Obligated by the S8 in ZPARK to the vendor	Spent		
The Stuff	Sitting with vendor	Sitting with vendor	Sitting with vendor	Moves from the vendor to DLA, and then from DLA to the SSA	Sitting at SSA	

Table 3 — G-Army Ordering by Business Code (T-Codes)

tasks effectively and then focusing the battalion's resources on high-priority or non-standard items.

An alternate method for requisitioning Class II — and the primary method for purchasing services for the infantry battalion — is the GPC. Just as with G-Army, funds for the GPC exist digitally within GFEBS. Unlike G-Army, the S4 OIC or S4 NCOIC, as the BO and ABO respectively, must generate a purchase requisition (PR) in GFEBS prior to each month's GPC billing cycle. Once the PR is approved by S8 within GFEBS, the battalion is free to generate requirements, receive commander approval, and execute purchases within installation Defense Finance Accounting Service (DFAS) regulations. While the GPC holder is the only one allowed to physically "swipe" the card or pay over the phone, the purchase's end-user should be responsible for confirming the exact item and vendor; the best Soldier to pick something off the shelf is the same one whose combat effectiveness depends on the item. At the end of each month's billing cycle, the GPC holder, BO, and ABO are each directly responsible for matching and approving every single purchase within the Access US Bank website. S4 OICs have to micromanage these administrative tasks each month or risk getting their account shut off by DFAS.

The GPC is uniquely valuable to the infantry battalion. The GPC can be used to purchase almost any non-standard item or service if coordinated by the BO or ABO directly with their local DFAS office, and it is the fastest method for requisitioning mission-critical goods or services valued at less than $3,500.[4] Successful S4 shops will effectively reserve their battalion's GPC funds for essential purchases by exhausting other requisition methods first.

The final requisition method available to an infantry battalion is contracting. Items and services that lack a national item identification number (NIIN), cost more than $3,500, or are recurring mission requirements are examples of requisitions that would have to be contracted. The Army contracting process is dependent on local finance unit SOPs, but the S4 OIC should personally manage each tentative contract to ensure that it meets all administrative requirements as communicated by S8.

Maintenance

The S4's roles within maintenance are the least defined because the infantry battalion already has a maintenance officer and section billeted against the problem. The S4 OIC assists with maintenance at the intersection of requisition and property management by ensuring that commanders understand the effects of maintenance on their combat power while expediting any mission-critical Class IX requisitions. The battalion's maintenance officer will already manage Class IX ordering, the equipment status report, mandatory modification orders, and the battalion's relationship with the brigade logistics support team (BLST) and maintenance chief. The S4 OIC should assist the companies by integrating his or her personal knowledge of the budget, directives, and future sustainment

Table 4 — Key G-Army Business Code (T-Codes)

	Use	Frequency
MM03	Any user checks the admin data for a desired item	With every order
MB21	Companies enter orders with necessary admin data	With every order
ZPROSTAT	Companies track their own orders while S4 inspects for budget compliance	Daily
MMBE	Companies or S4 check parallel SSAs for excess items to "walk-through" rather than order	Before battalion maintenance meeting
ME5A	S4 checks the battalion's orders pending ZPARK approval because ZPARK is restricted to S8 access	Before battalion budget meeting

	Request	Generated By	Forward To	Confirmed By
Trans (Buses)	D-60	Companies	Installation through SPO	Installation D-30
Trans (MTVs)	D-60	Companies	Support Brigade through SPO	Support Brigade D-30
Chow (MRE)	D-30	Companies	SSMO through BCT Food Service Tech	DFAC NCOIC D-7
Chow (DFAC)	D-30	Companies	DIV Food Service Tech through BCT Food Service Tech	DFAC NCOIC D-7
Chow (Field Kitchen)	D-90	TRCM Rep	FSC Commander through S-4 OIC	FSC Commander D-45

Table 5 — S4 TRCM Representative Responsibilities

operations to synchronize maintenance operations with the training calendar.

In coordination with the forward support company (FSC) commander, the S4 OIC will generally maintain visibility on maintenance in order to add value as the BO and sustainment planner rather than directly managing maintenance. At the end of the day, the S4 OIC must always be prepared to advise the battalion commander on the unit's combat power.

Mobility

Within infantry battalion S4 operations, mobility is any movement of personnel or equipment that requires the coordination of ground, air, or naval assets through the brigade mobility technician. Because of national physical limitations and the dollar-costs involved, mobility assets can take several months to coordinate through the installation transportation office up to Transportation Command. Mobility operations will only be successful if companies can understand their requirements early enough to provide the S4 OIC with accurate personnel and equipment movement numbers.

The S4 OIC is responsible for planning mobility operations and managing their execution through the companies' unit movement officers (UMOs). Upon receipt of a mobility mission, it is essential that the S4 OIC assist the companies involved in validating the admin data on their organizational equipment listing (OEL) and generating a tentative unit deployment list (UDL) against their anticipated mission requirements. Company UMOs are responsible for digitally generating their UDLs within the Transportation Coordinators' - Automated Information for Movements System (TC-AIMS), while the S4 OIC is responsible for providing UDLs to the brigade mobility section. The brigade mobility section is then responsible for coordinating with the installation transportation office for the physical assets necessary to drive, rail, lift, or float the battalion's personnel and equipment, but brigade will generally rely on the S4 OIC to finalize the plan for actual deployment and receipt activities. The S4 OIC should disseminate this plan as early as possible to allow companies maximum time to complete bumper-number swaps, DA Form 1750s, hazardous material declarations,

container certification, and rolling stock serviceability validation.

Training Resources

The majority of Infantry officers are already familiar with their battalion's TRCM and can effectively manage the S4 shop's role through the S4 92Y TRCM rep. Successful TRCM reps will:

- Track requirements upon notification,
- Assist companies in completing request forms,
- Coordinate directly with the brigade support office (SPO) for transportation confirmation,
- Coordinate directly with the FSC field feeding section NCOIC and Subsistence Supply Management Office (SSMO) for Class I confirmation, and
- Maintain direct communication with the brigade food service technician for any emergent requirements.

Temporary Duty

The majority of Infantry officers and NCOs are already familiar with the Defense Travel System (DTS) and understand its proper use as an individual responsibility. The GTC clerk is directly responsible for helping travelling Soldiers apply for a Government Travel Card (GTC) within the Citi Bank website. The DTS clerk is directly responsible for helping each travelling Soldier create their authorization in DTS. The DTS clerk is also responsible for "15-level" approval of all travel authorizations and vouchers. The BO and ABO are directly responsible for "25-level" approval of all travel authorizations and vouchers within DTS. The S4 NCOIC must assist companies in ensuring that their Soldiers get paid and then pay off their GTCs by periodically providing a delinquency list to the first sergeants.

Key Products

The S4 OIC and NCOIC should maintain digital and physical copies of the following products on hand: a FLIPL tracker specifying each investigation's current administrative gate; a directives tracker specifying each company's equipment gains and losses; a battalion-wide budget specifying dollar amounts spent and remaining by class of supply and source; a high-priority requisition tracker in case of emergently available funds; a combat slant specifying each company's weapon systems and rolling stock by serviceability; a battalion-consolidated UDL organized by combat power generation; an S4 TRCM tracker; a DTS voucher delinquency tracker; and a GTC payment delinquency tracker.

Recommendations

Battalions can improve sustainment effectiveness by making two changes from common S4 billeting. First, battalions tend to assign a first lieutenant as the S4 OIC. Instead, units should

	Log Plans	Property	Requisition	Maintenance	Mobility	TRCM	TDY
S4 OIC	X	O	O	O	O		
A/S4		O	BO		X	O	BO
S4 NCOIC		/	ABO			/	ABO
11B TRCM			O			X	X
92Y GPC			X			Alt	/
Companies	X	X	X	X	X	X	X
Advise Companies: O Manage Companies: / Personally Execute: X							

Table 6 — Recommended Role Changes to Allow Greater Logistics Planning

assign a pre-command captain as the S4 OIC and one 11-series second or first lieutenant as the assistant S4. This allows the S4 OIC to focus on sustainment planning and logistics during the operations process without degrading S3 capabilities, all while the A/S-4 maintains BO, DTS, and G-Army longevity. Second, battalions tend to be below MTOE on supply specialists. To mitigate this, units should assign an assistant operations sergeant (11B, E-5) from the operations section to the S4 as the combined TRCM rep and GTC clerk. This change provides an infantry sergeant with valuable sustainment and administrative experience while providing an additional supply specialist to the companies.

Notes

[1] Army Techniques Publication (ATP) 3-21.20, *Infantry Battalion*, Appendix H.

[2] Ibid, 1-128.

[3] Army Regulation (AR) 735-5, *Property Accountability Policies*, 2-8.

[4] Federal Acquisition Regulation Part 13.301.

Other References

AR 725-50, *Requisitioning, Receipt, and Issue System*.

Army Doctrine Publication 4-0, *Sustainment*.

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Photo courtesy of authors

A Soldier with the 1st Battalion, 325th Airborne Infantry Regiment conducts redeployment activities from Fort Polk, LA. Redeployment matches battalion-level planning with installation-level funds and national-level assets.