

FSO-PVA (FOT) Course
Unit 11. FSO RESPONSIBILITIES
Lesson 1. FSO RELIEF

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Lesson 1: FSO RELIEF

Introduction

Lesson Overview

When an incoming FSO relieves a departing “outgoing” FSO, the incoming FSO must create an “FSO RELIEF MEMORANDUM”.

This FSO Relief Memorandum is based off actions the incoming FSO performs when they first arrive to the new unit, such as completing a physical inventory and confirming the ASDR (Accounts Status Detail Report) has no discrepancies (e.g., red rows), and the dining facility is in good standing with FINCEN.

This lesson provides a lecture on how an FSO creates a Relief Memorandum, followed by a practice activity and assessment where students create a Relief Memorandum.

Objective(s)

After this lesson, students should be able to:

- Given a designation for your new FSO assignment, computer with CS Portal access, a Purchase vs. Allowance Inventory System Workbook (PVAISW), an FSO Relief Memorandum template, and Job Aid “How to Document Relief of an FSO”, **DOCUMENT** an FSO Relief with 100% accuracy. (TPO)


References

- Coast Guard Food Service Manual COMDTINST M4061.5A (series); MAR 2009
-

Lesson Structure

Lesson Structure and Required Materials

This table explains how to complete this lesson. If you lack materials or experience technical difficulties, contact Lesson instructor through email or phone.

Lesson Title	Set Up PVAISW
Lesson Schedule	<u>Mode: Online Self-Directed</u> <ul style="list-style-type: none"> • <u>Recommended Start:</u> Day 11 by 0930 PST • <u>Complete:</u> Day 11 by 1130 PST • <u>Duration Range:</u> 60 min. – 120 MIN.
Paper Materials 	Job Aid Booklet: <ul style="list-style-type: none"> • Job Aid, “How to Document an FSO Relief.”
1. Develop Knowledge	This lesson provides a recorded lecture discussing how an arriving, “incoming” FSO documents relief of a departing, “outgoing” FSO.
1. Complete Practice	This lesson includes one practice activity. Refer to the Practice Section in this User Guide for instructions.
2. Complete Assessment	This lesson includes one assessment activity. Refer to the Assessment Section in this User Guide for instructions.
End of Lesson Structure	

Knowledge Development: FSO RELIEF

Instructions for Knowledge Development

When an FSO arrives at a new unit to begin a new assignment, they create an FSO Relief Memorandum.

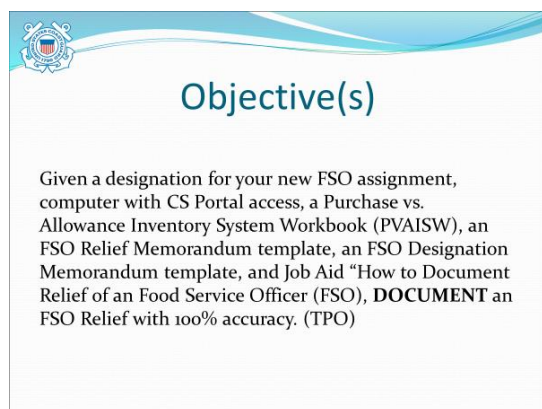
This lesson begins with a lecture introducing how to create an FSO Relief Memorandum.

Instructions:

1. Access Job Aid, "How to Document a Relief for a New Month".
2. If possible, print this User Guide so as to take notes while viewing the Lecture recording described in the next steps.
3. Go to milSuite for course materials (link below):
<https://www.milsuite.mil/book/groups/fso-pva-course>
2. Click "Knowledge Development" link under Unit 11, Lesson 1.
3. Click on LECTURE link.
4. After viewing the lecture, if you have any questions, email your instructor.
5. Proceed to the PRACTICE section in this User Guide.

Lecture Slides on next page

Knowledge Development: LECTURE SLIDES




Continued next page

Knowledge Development: LECTURE SLIDES

Types of Relief

- 1. Informal Relief**
 1. Temporary (*temporary = incoming FSO will be in role 30 days or less*)
 2. CO/OIC designates FSO in writing within 30 days (*of incoming FSO start date*) specifying duties and responsibilities.
- 2. Formal Relief**
 1. Permanent Relief of FSO
 2. Must be a Commissioned Officer or Culinary Specialist (CS) in paygrade E5 or above

FSO Relief Memorandum

14-00000 14-00000 	Form 100-10 100-10 100-10 100-10	100-10 100-10 100-10 100-10	100-10 100-10 100-10 100-10	100-10 100-10 100-10 100-10
MEMORANDUM				
To: <u>TO: [Redacted]</u>				
From: <u>FROM: [Redacted]</u>				
Subject: <u>SUBJECT: [Redacted]</u>				
1. [Redacted]				
2. [Redacted]				
3. [Redacted]				
4. [Redacted]				
5. [Redacted]				
6. [Redacted]				
7. [Redacted]				
8. [Redacted]				
9. [Redacted]				
10. [Redacted]				
11. [Redacted]				
12. [Redacted]				
13. [Redacted]				
14. [Redacted]				
15. [Redacted]				
16. [Redacted]				
17. [Redacted]				
18. [Redacted]				
19. [Redacted]				
20. [Redacted]				
21. [Redacted]				
22. [Redacted]				
23. [Redacted]				

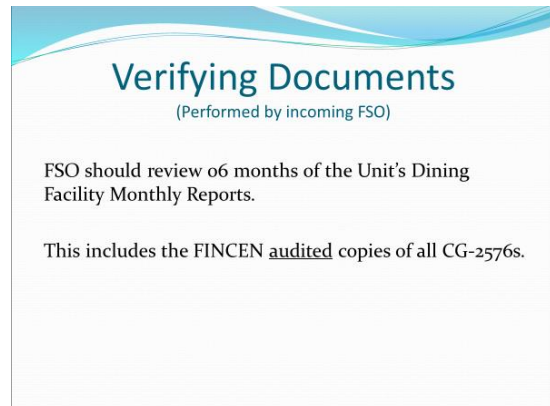
Relief Paperwork

(Performed by incoming FSO)

1. Relief at End-of-Month
 - Normal Monthly Paperwork can be submitted to FINCEN
 - Incoming and Outgoing FSOs both sign IMWPVA (in corresponding rows)
2. Relief Mid-Month
 - Paperwork must be completed up to that date (ie. 15 May Report)
 - Incoming and Outgoing FSOs both sign IMWPVA (in corresponding rows)
 - End-of-Month must also be completed at the end of the month by new FSO

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Knowledge Development: LECTURE SLIDES

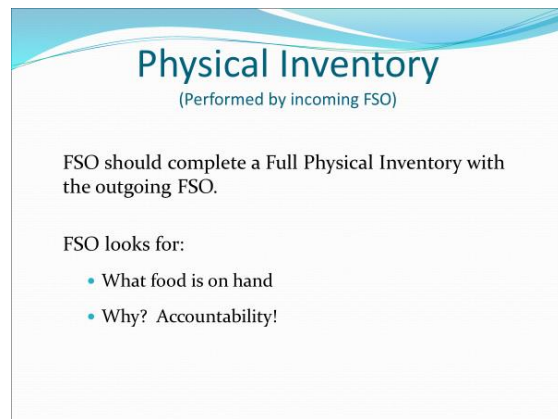


Verifying Documents

(Performed by incoming FSO)

FSO should review 06 months of the Unit's Dining Facility Monthly Reports.

This includes the FINCEN audited copies of all CG-2576s.



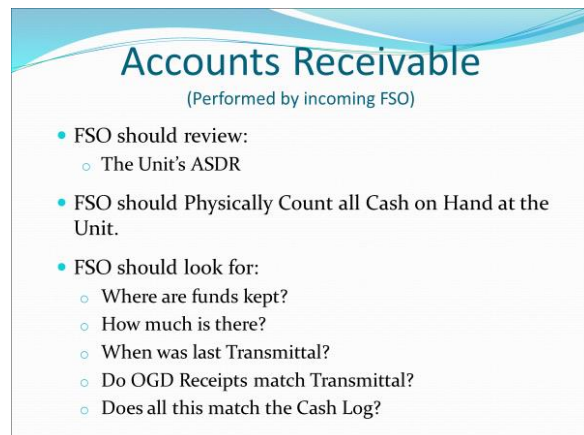
Physical Inventory

(Performed by incoming FSO)

FSO should complete a Full Physical Inventory with the outgoing FSO.

FSO looks for:

- What food is on hand
- Why? Accountability!



Accounts Receivable

(Performed by incoming FSO)

- FSO should review:
 - The Unit's ASDR
- FSO should Physically Count all Cash on Hand at the Unit.
- FSO should look for:
 - Where are funds kept?
 - How much is there?
 - When was last Transmittal?
 - Do OGD Receipts match Transmittal?
 - Does all this match the Cash Log?

Continued next page

Knowledge Development: LECTURE SLIDES

Vendor Verification

(Performed by incoming FSO)

FSO should Verify the Account Standings with Vendors:

- Don't allow vendors to file purchase card information
- Check for pending charges
- Check for recurring charges

Purchase Cards

- Outgoing FSO shall give Purchase Card cancellation notice 2 weeks prior to relief
- Prior to reporting, the Incoming FSO shall contact Approving Official (AO) at new Unit to start the process for obtaining a Purchase Card

FSO Relief Memorandum

U.S. Department of Defense
Department of Defense
Department of Defense

MEMORANDUM
Date: 14 May 2020

To: CHIEF OF FSO SERVICE OFFICE

From: FSO Service Office

Subject: RELIEF OF FSO SERVICE OFFICE

Ref: (1) Read Service Manual COMDTSTN 10000.1 (10000.1)
(2) Read Service Manual COMDTSTN 10000.1 (10000.1)
(3) Read Service Manual COMDTSTN 10000.1 (10000.1)

1. The information in this memorandum is a summary of the information provided to the FSO Service Office by the FSO Service Office. The information is provided to the FSO Service Office for the purpose of providing information to the FSO Service Office. The information is provided to the FSO Service Office for the purpose of providing information to the FSO Service Office.

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3. A FSO Service Office memorandum is required to be provided to the FSO Service Office. All FSO Service Office memorandums are required to be provided to the FSO Service Office. All FSO Service Office memorandums are required to be provided to the FSO Service Office.

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5. The FSO Service Office memorandum is required to be provided to the FSO Service Office. The FSO Service Office memorandum is required to be provided to the FSO Service Office. The FSO Service Office memorandum is required to be provided to the FSO Service Office.

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9. All FSO Service Office memorandums are required to be provided to the FSO Service Office. All FSO Service Office memorandums are required to be provided to the FSO Service Office. All FSO Service Office memorandums are required to be provided to the FSO Service Office.

10. All FSO Service Office memorandums are required to be provided to the FSO Service Office. All FSO Service Office memorandums are required to be provided to the FSO Service Office. All FSO Service Office memorandums are required to be provided to the FSO Service Office.

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Knowledge Development: LECTURE SLIDES

FSO Relief Memorandum, continued

U.S. Department of Homeland Security United States Coast Guard		Commanding Officer UNIT NAME HERE	Units address here City, State, Zip Code Phone ()
MEMORANDUM From: FSO's name and rank To: COMMAND NAME HERE Subj: RELIEF OF FOOD SERVICE OFFICER Ref: (a) Food Service Manual COMDTINST M4061.5A (series) (b) Coast Guard Food Service Practical Handbook COMDT PUB P4061.4 (c) Food Safety and Sanitation Program Tactics, Techniques, and Procedures (TTP)		4061 01 May 2020	

FSO Relief Memorandum, continued

- In accordance with reference (a), a joint complete physical inventory was conducted on Date, Month, and Year. Verifying the count and total dollar value of subsistence items in stock. Prices were reviewed, and no (if discrepancies list below) discrepancies were noted. The total dollar amount of subsistence items listed on the Previous Inventory Report (CG-4361) and the Dining Facility Operating Statement (CG-2576) is \$XXXX.XX as of Date, Month, Year.
- Accounts receivable is in good standing. There are (no) receivables to be collected by the CGDF (if applicable, list amount to be collected here). The Account Status Detail Report (ASDR) indicated no balances past due and no surplus balances on account (if applicable, list ASDR discrepancies).
- A FINCEN XSG purchase recon was completed on Date, Month, Year. All purchase adjustments claimed on the Month/Year CGDF Operating Statement as per FINCEN guidance. (Contact FINCEN to verify).
- All subsistence invoices are paid to date.
- The dining facility currently has an unused allowance of \$XXXX.XX.
- The Coast Guard Dining Facility records have no discrepancies at this time. (If discrepancies list below).
- The last required Annual Audit Verification was completed on Date, Month, Year. (Note if past due when the unit will complete).
- The last FSAT visit was completed on Date, Month, Year.
- All food service tools and equipment are in good condition and/or operating properly in accordance with reference (b). (If applicable, list all discrepancies).
- All food service preparation areas, dining areas, and scullery's are in good/sanitary condition in accordance with reference (c). (If applicable, list all discrepancies).

FSO Relief Memorandum, continued

Subj: RELIEF OF FOOD SERVICE OFFICER 11. I am familiar with and understand my duties and responsibilities as outlined in reference (a). 12. As of Date, Month, Year, I, incoming FSO's name request permission to relieve outgoing FSO's name of all duties as FSO onboard Unit name. # Enclosure: (1) Dining Facility Operating Statement (CG-2576) (2) Provision Inventory Report (CG-4361) (3) FSO Designation Memorandum (4) Supply Fund Report (SFR) (5) Tour Receipt Report (SRP if applicable) (6) Custodian Count of Cash (CG-4971 if applicable) Copy: HSWLSC Subsistence Product Line (SPL) FINCEN (OGD) FORCECOM (PC-Acfat)	4061 23 Jun 2019
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Knowledge Development: LECTURE SLIDES

FSO Designation Memorandum

Summary and Review

- Types of Relief
- Relief Paperwork
- Verifying Documents
- Physical Inventory
- Cash Count
- Vendor Verification
- Purchase Cards
- Relief Memorandum
- Designation Memorandum
- Questions?



Congratulations!

You have completed the LECTURE for Unit 11.

Lesson 1. FSO RELIEF



Next Steps:

1. Refer to User Guide (Unit 11, Lesson 1) for instructions on how to complete PRACTICE.
2. Access MySuite Unit 11 "PRACTICE" section to complete Practice.
3. Submit your practice to instructor for feedback.
4. After successful completion of your practice activity, access User Guide and MySuite to complete ASSESSMENT, then submit for instructor evaluation.

End of Lecture Slides

Practice: FSO Relief

Instructions for Practice

To complete this practice, follow these steps:

Access Practice Materials Online

1. Access Job Aid, “How to Document a Relief for a New Month”.
2. Go to milSuite:
<https://www.milsuite.mil/book/groups/fso-pva-course>
6. Click “Practice” link under Unit 11, Lesson 1.
7. Listed on this screen are the materials you need to complete your practice activity, including:
 - FSO RELIEF MEMORANDUM template
 - FSO DESIGNATION MEMORANDUM template
 - PVAISW

Complete Practice

8. You will complete an (1) FSO RELIEF MEMORANDUM and a (2) FSO DESIGNATION MEMORANDUM using the templates downloaded from milSuite.
9. Use the following parameters to complete this PRACTICE:

DATE	01 April 2020
UNIT NAME	USCGC Pacific
ADDRESS	100 Coast Guard Way, Petaluma, CA 94952
INVENTORY	31 March 2020
XS6	25 February 2019, claimed on March report
ANNUAL AUDIT	31 January 2020
LAST FSAT VISIT	24 October 2019
EQUIPMENT STATUS	Equipment is good

10. Success criteria for this Practice:

- Completed FSO Relief Memo IAW Food Service Manual.
- Completed FSO Designation Memo IAW Food Service Manual.

Continued next page

Practice: FSO Relief, CONT.

**Instructions
for Practice,
CONT.**

11. After you have created the (1) FSO RELIEF MEMO and (2) FSO DESIGNATION MEMO, SAVE both to your computer.

Recommended naming convention:

- U11L1_FSO-RELIEF-MEMO_PRACTICE_(**Your Last Name**)
- U11L1_FSO-DESIGNATION-MEMO_PRACTICE_(**Your Last Name**)

Submit Completed Practice Form

12. UPLOAD your PRACTICE DOCS into the CS Portal folder that has your last name.

13. SEND an email to instructor CSCS Ciurlino (Anthony.J.Ciurlino@uscg.mil):

- Subject: U11L1 PRACTICE (**Your Last Name**)
- Body of Email: Include this description
 - Unit/Lesson # and Practice (U11L1 FSO RELIEF)
 - Sample description in body of email: *"U11L1 FSO RELIEF Practice now uploaded to Portal and ready for your review and feedback."*
 - Email Signature: Your full name, time zone, your email address for receiving instructor feedback, and your cell phone.

Continued next page

Practice: FSO Relief, CONT.

**Instructions
for Practice,
CONT.**Receive Instructor Feedback on Practice

14. If you do not receive instructor feedback within 30 min., email your instructor to confirm they know you have submitted your practice assignment.
15. Your instructor will contact you with feedback using the email or phone number you included in your email.
16. Instructor feedback on your practice:

IF	THEN
Your practice was correct	Proceed to Assessment
Your Practice had errors.	<ol style="list-style-type: none">1. Take notes on instructor feedback.2. Ask questions for clarification.3. Discuss with instructor. Are you ready for the assessment or do you wish to practice again?4. Pursue action determined with instructor in Step 3.

End of Practice

Assessment: FSO RELIEF

Instructions for Assessment

To complete your Assessment, follow the instructions below.

Access Assessment Materials Online

1. Reminder: Questions are not permitted during an Assessment. You have three attempts to pass this assessment.
2. Access Job Aid, "How to Document a Relief for a New Month".
3. Go to milSuite:
<https://www.milsuite.mil/book/groups/fso-pva-course>
4. Click "ASSESSMENT" link under Unit 11, Lesson 1.
5. Listed on this screen are the materials you need to complete your assessment activity, including:
 - FSO RELIEF MEMORANDUM template
 - FSO DESIGNATION MEMORANDUM template
 - PVAISW

Complete Assessment

6. Using templates downloaded from milSuite, you will complete:
 - (1) FSO RELIEF MEMORANDUM and a
 - (2) FSO DESIGNATION MEMORANDUM
7. Use the following parameters to complete this ASSESSMENT:

DATE	01 May 2020
UNIT NAME	USCGC Atlantic
ADDRESS	100 Munro Drive, Norfolk, VA 23324
INVENTORY	30 April 2020
XS6	14 January 2019, claimed on February report
ANNUAL AUDIT	17 November 2019
LAST FSAT VISIT	03 August 2019
EQUIPMENT STATUS	<ul style="list-style-type: none">• Stack oven is OOC (Engineering already knows about it),• Ice Machine is OOC

Continued next page

Assessment: FSO RELIEF, Continued

Instructions for Assessment, CONT.

8. Success criteria per the Performance Test Checklist (PTC) for this Assessment include:
 - Completed FSO Relief Memo IAW Food Service Manual.
 - Completed FSO Designation Memo IAW Food Service Manual.
9. After you have created the (1) FSO RELIEF MEMO and (2) FSO DESIGNATION MEMO, SAVE both to your computer.
Recommended naming convention:
 - U11L1_FSO-RELIEF-MEMO_ASSESSMENT_(Your Last Name)
 - U11L1_FSO-DESIGNATION-MEMO_ ASSESSMENT_(Your Last Name)

Submit Completed Assessment

10. UPLOAD your PRACTICE DOCS into the CS Portal folder that has your last name.
11. SEND an email to instructor CSCS Ciurlino (Anthony.J.Ciurlino@uscg.mil):
Suggested structure of your email:
 - Subject: U11L1 ASSESSMENT (Your Last Name)
 - Body of Email: Include this description
 - Unit/Lesson # and ASSESSMENT (U11L1 FSO RELIEF)
 - Sample description in body of email: *"U11L1 FSO RELIEF ASSESSMENT now uploaded to Portal and ready for your review and feedback."*
 - Email Signature: Your full name, time zone, your email address for receiving instructor feedback, and your cell phone.

Continued next page

Assessment: FSO RELIEF, Continued

**Instructions
for
Assessment,
CONT.**Receive Instructor Feedback on Assessment

1. Your instructor will contact you with feedback using the email or phone number you included in your email.
2. Instructor feedback on your assessment:

IF	THEN
Your assessment was correct	Congratulations! You are proficient in this skill!
Your Practice had errors.	<ol style="list-style-type: none">1. Take notes on instructor feedback.2. Ask questions for clarification.3. Discuss with instructor. Are you ready to try the assessment again or do you need more practice time?4. Pursue action determined with instructor to successfully complete assessment

End of Assessment