APPENDIX A

UNIT INTELLIGENCE TRAINING CHECKLIST

This checklist will help a newly assigned brigade or battalion S2 maintain technical and tactical intelligence proficiency. Its building-block approach is systematic. The phases are supported by tasks to be completed for certification during the time specified. Some tasks may not apply to a particular echelon of staff.

PHASE I - ORIENTATION PHASE

This phase covers basic orientation to the division and the unit's mission. **This phase should be completed within the first 30 days**. The goal is to quickly acquaint the S2 with an understanding of the battalion, brigade, and division roles within corps, possible missions, and deployment areas.

<table>
<thead>
<tr>
<th>Initial/Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Coordinate with and receive briefing from outgoing S2.</td>
</tr>
<tr>
<td></td>
<td>Review unit's intelligence library of publications listed in Appendix J.</td>
</tr>
<tr>
<td></td>
<td>Read unit METL and latest training brief to determine overall unit missions and status.</td>
</tr>
<tr>
<td></td>
<td>Receive unit CDR in-brief.</td>
</tr>
<tr>
<td></td>
<td>Talk with unit CDR; ask what are his desires for intelligence and intelligence products. Tailor intelligence to the needs of the CDR.</td>
</tr>
<tr>
<td></td>
<td>Visit and receive briefing from ACoS G2, Deputy G2, G2 Operations Chief, G2 Plans Chief, G2 Training Chief.</td>
</tr>
<tr>
<td></td>
<td>Meet with subordinate S2's and gain an understanding of—</td>
</tr>
<tr>
<td></td>
<td>• Their commander’s intelligence priorities.</td>
</tr>
</tbody>
</table>
Personnel and equipment status.

Training proficiencies and deficiencies.

Areas where they need your echelon’s help.

Visit MI battalion or DS MI Co commander for unit and equipment briefings, display, and demonstrations.

Study division, brigade, and battalion OPLANs.

Review and evaluate intelligence annex to unit SOPs. (Use FM 34-1, FM 101-5, your SOP, and intelligence annex to the division SOP.) Provide CDR an updated evaluation of the unit intelligence annexes. Develop an SOP if one is missing or outdated.

Receive an organizational and functional briefing from the next higher G2/S2.

Study the CDR’s current PIR and IR as developed.

Meet and discuss intelligence missions, products, and training with the—

- Scout platoon leader.
- GSR platoon leader.
- Local division CI team.
- ACT.
- ACE Chief, IPS Chief, and CM Chief.
- EWO.
- Terrain detachment team.

Determine all organic or assigned division intelligence collection assets that may support collection efforts. (See Appendix G.)

Learn to use section’s automation equipment and programs.
Learn the connectivity, reporting, and requesting procedures.

Meet with next higher echelon G2/S2 to discuss the CM process.

Review unit's collection plan.

Become knowledgeable of the unit's and division's FSOP, RSOP, and deployment procedures.

Read unit and division history.

Obtain SI access through the SSO and review SCI billets for unit.

Review unit's arms room security SOP.

Inventory all sensitive items in one company.

Review key control program SOP.

Review physical security and crime prevention SOP.

Receive a crime prevention and physical security program briefing from the MP and Directorate of Security.

Become familiar with the S2 section vehicles and generators, as necessary.

Become familiar with the TOC SOP, setup, and multisystem, multiechelon connectivity.

Visit G2 training for intelligence training products.

Test an arms room’s J-SIIDS.

Visit unit staff sections and attached sections from other units (FSO, ADA, NBC, SOCCE, and ENGR).
FM 34-8-2

——— Develop and implement a detailed internal security inspection program that covers intelligence areas within the unit.

——— Develop working relationship with higher echelon G2/S2.

——— Review mission and section METL and battle tasks. Have section members give their assessment of current training level.

**PHASE II - FUNDAMENTAL PHASE**

This is the most critical phase for the newly assigned S2. The knowledge, insight, and assessments of I&S will establish the foundation for future development. This phase focuses on the IPB process, intelligence production and dissemination, collection operations, and security. This phase should be completed within 90 days.

<table>
<thead>
<tr>
<th>Initial/Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>————</td>
<td>Present to unit personnel an officer professional development class on the threat.</td>
</tr>
<tr>
<td>————</td>
<td>Update unit's collection plan as needed; submit revisions to the CDR and forward a copy to higher HQ G2/S2.</td>
</tr>
<tr>
<td>————</td>
<td>Brief the CDR on division and corps IEW assets.</td>
</tr>
<tr>
<td>————</td>
<td>Brief next lower units on division and corps IEW assets.</td>
</tr>
<tr>
<td>————</td>
<td>Inspect unit map program. Identify basic map load and training requirements.</td>
</tr>
<tr>
<td>————</td>
<td>Inspect and evaluate unit training for intelligence tasks, including awareness of AR 381-10.</td>
</tr>
<tr>
<td>————</td>
<td>Determine country and area study requirements from open and classified sources based on contingency and assigned OPLANs.</td>
</tr>
</tbody>
</table>
Begin country studies.

Understand additional duty responsibilities as required:

- Security manager.
- Physical security officer.
- Personnel security officer.
- Crime prevention officer.
- Key custodian.
- Top secret document custodian.
- Information systems security officer.

Receive briefing and training from unit SIGO on communications procedures and communications equipment PMCS.

Become familiar with capabilities, limitations, and vulnerabilities of unit's equipment (tanks, Bradleys, other assigned, attached, DS systems, or OPCON BOS operating in the unit's battlespace; particularly the TA and information dissemination capabilities).

Update, as needed, the unit's—

- Arms room SOP.
- Physical security SOP.
- Key control SOP.
- Crime prevention program.

Conduct random unannounced security spot checks. Report the results and any recommendations to the CDR.

Brief CDR on the unit's intelligence estimate.

Brief CDR on the intelligence collection and reporting system from platoon through corps.

Develop, update, and evaluate an S2 section METL and battle tasks.
Be knowledgeable on CTC threat vehicles, E-O devices, doctrine, and tactics. Teach a class on this subject at least once in this phase.

Visit nearest battle simulation center and become familiar with computer operations.

Visit and observe training of primary weapon systems in the division.

Understand current division policy on CONUS and OCONUS transportation of classified material.

Work with commanders. Ask what intelligence they want during FTXs and OPORD briefings.

Know how to read a TACFIRE direction system message. Let FSO know you want to receive these during FTXs and deployments.

Work with FSO to develop and review unit targeting and BDA procedures.

Know unit air LNO. Request BDA and in-flight reports that will bolster reporting.

Obtain recent CTC and applicable CALL. Develop plan to correct any deficiencies.

Obtain inspector general checklist and CIP checklists; conduct internal inspection on all S2 functional areas. Brief CDR on inspection results and solutions.

Review language proficiency requirements; assist S3 in coordinating training. Retain list of unit’s capabilities; include unpaid abilities.

Conduct classified materials inventory; learn destruction and verification methods; review destruction and transfer SOPs.
Constantly review clearance requirements, applications, and updates.

PHASE III - DEVELOPMENTAL PHASE

This phase will build and expand on the knowledge gained during Phase II. It will cover the same basic intelligence functions but in greater detail. **This phase should be completed within 180 days.**

<table>
<thead>
<tr>
<th>Initial/Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fully understand the functions of the S2 at the unit's TOC and how S2 functions drive other TOC functions.</td>
</tr>
<tr>
<td></td>
<td>Submit REDTRAIN requests through applicable higher S2 to G2 training, as required.</td>
</tr>
<tr>
<td></td>
<td>Review threat OB holdings and files. Order update material as required.</td>
</tr>
<tr>
<td></td>
<td>Determine available intelligence databases and actually &quot;work the system&quot; to obtain data in support of a CONPLAN. Brief CDR on the results.</td>
</tr>
<tr>
<td></td>
<td>Identify gaps of information in battle books, OB holdings and files, and intelligence annexes. Submit RIIIs to satisfy intelligence requirements.</td>
</tr>
<tr>
<td></td>
<td>Identify S2 and intelligence weaknesses from the last EXEVAL and present a correction plan to the CDR.</td>
</tr>
<tr>
<td></td>
<td>Evaluate intelligence training classes and provide written results to the CDR.</td>
</tr>
<tr>
<td></td>
<td>Evaluate unit soldier's knowledge of intelligence training tasks and provide a written report to the CDR.</td>
</tr>
<tr>
<td></td>
<td>Determine if all ADP systems are accredited. Brief CDR on steps needed to correct any problems.</td>
</tr>
</tbody>
</table>
Demonstrate a thorough understanding of the intelligence reporting system during FTXs.

Act as threat CDR during the wargaming process and TF rehearsals.

Develop an internal S2 section intelligence cross-training program. Have section soldiers teach the classes.

Determine unit's security posture during FTXs and recommend corrective actions to the CDR.

Become familiar with and teach a class on doctrine, tactics, and current vehicles of a CONPLAN threat.

PHASE IV - ADVANCE PHASE

This phase will take the S2 who has mastered the intelligence fundamentals through the first year, during which the unit will have participated in the full annual training program.

<table>
<thead>
<tr>
<th>Initial/Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Successfully complete an EXEVAL.</td>
</tr>
<tr>
<td></td>
<td>Successfully deploy section and perform S2 operations during a CTC rotation.</td>
</tr>
<tr>
<td></td>
<td>Successfully deploy section and perform S2 operations during a BCTP Warfighter Exercise.</td>
</tr>
<tr>
<td></td>
<td>Qualify or familiarize yourself on all unit weapon systems.</td>
</tr>
<tr>
<td></td>
<td>Update unit's intelligence annex as required.</td>
</tr>
<tr>
<td></td>
<td>Research a classified intelligence topic that is relevant to the unit's mission and brief the CDR on the conclusion.</td>
</tr>
</tbody>
</table>
Accurately predict threat actions during FTXs using IPB and all intelligence assets.

Successfully integrate with higher echelon G2/S2.