

**RECORD OF ENLISTED PERFORMANCE QUALIFICATIONS
STOREKEEPER (SK)**

INSTRUCTIONS

Record of Enlisted Performance Qualifications (EPQ) shall be completed for enlisted personnel of the Coast Guard as outlined in the Enlisted Performance Qualifications Manual, COMDTINST M1414.8 (series). Personnel are required to demonstrate proficiency in all performance qualifications for the next higher pay grade to be eligible for advancement. As proficiency in each performance qualification is demonstrated by actually performing the task listed, the DATE and INITIALS column shall be completed by a designated supervisor (E-5 or above) at least one pay grade higher than the student and preferably of the same occupational specialty. Form CG-3303C becomes official documentation to be kept in the member's Personnel Data Record (PDR) denoting eligibility for administration of the rating End of Course Test (EOCT) and, if applicable, participation in a Service Wide Exam competition (SWE). Some EPQ include Supervisory Guidelines (SupGuide) which will assist in clarifying the intent and proper execution of the task that is to be performed. Personnel are reminded that although demonstration and sign-off of any new EPQ at or below the current pay grade is not required, the EPQ will be used to develop course materials and SWE questions. It is the member's responsibility to be proficient in all currently published performance qualifications, up to and including those of their present pay grade for their specific rating to facilitate the mentoring of junior personnel.

Performance Qualifications numbering system: Example 5.A.01

- The number **5** indicates an E-5 level qualification requirement.
- The letter **A** indicates the subject section within the qualification requirements.
- The sequence number **01** indicates the 1st qualification within the subject section.

Rating courses are developed using reference material denoting official policy and/or technical standards. Reference material is generally incorporated into lessons at an adequate level to complete the course. If more guidance is required, or should further study be desired, reference material is available online through the Coast Guard Directives System at the CG-Central website, Resources tab, located at <http://cgcentral.uscg.mil>. Other reference material supporting the EPQ may also be obtained from the unit's library, TRACEN course writers, CG Institute, or other government sources. A reference material list is located at the end of this document. If any reference material is found to be in contradiction the cited Coast Guard reference shall take precedence.

The Rating Force Master Chief of this occupational specialty is the primary proprietor of these EPQ. The most up to date EPQ revisions are available digitally from the CG Learning Portal at <http://learning.uscg.mil> or through the CG-Central website, My Workspace : Career Management : Enlisted : My Ratings : Advancement, located at <http://cgcentral.uscg.mil>. EPQ paper copies are also available from the unit's Education Services Officer (ESO) or Career Development Advisor (CDA).

If members have completed tasks on the previous edition of the EPQ that cross-reference then supervisor signatures should be transferred for those completed tasks to this new edition.

SUMMARY OF CHANGES: Procurement guidelines and references updated to reflect DHS policy.

RATING STOREKEEPER			ABBREVIATION SK		
DATE COMPLETED ALL PERFORMANCE QUALIFICATIONS FOR RATE LEVEL					
E-4		E-5		E-6	
E-7		E-8		E-9	
NAME <i>(Last, First, Middle Initial)</i>				EMPLID NUMBER	

RATING: STOREKEEPER	INIT	DATE
<p>A. <u>SUPPLY SUPPORT</u></p> <p>4.A.01 PREPARE the following MILSTRIP documents as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series) and NAVSUP P-409 – MILSTRIP/MILSTRAP DESK GUIDE:</p> <ul style="list-style-type: none"> • Requisition • Follow-up • Modification • Cancellation <p><i>SupGuide: Member must construct each of the MILSTRIP documents and understand which data/codes are entered in each record position. Member must understand the sequence of acquiring materiel. Member must know the appropriate approval levels for procurement of hazardous material, safety equipment, and reportable property.</i></p> <p>4.A.02 PREPARE formatted and narrative MILSTRIP messages for the following types of requests as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series), and NAVSUP P-409 – MILSTRIP/MILSTRAP DESK GUIDE:</p> <ul style="list-style-type: none"> • Requisition • Follow-up • Modification • Cancellation <p><i>SupGuide: The member should choose the applicable message type and understand the rules that govern when each message is used. Member should understand which data/codes are entered in each record position.</i></p> <p>4.A.03 PROCESS incoming inventory materiel as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series) and Storage and Materials Handling, DOD 4145.19-R-1.</p> <p><i>SupGuide: The member should sign, inspect, count, and process incoming material. This includes proper handling of receipt documents, marking of materials for storage and material receipt acknowledgement. Member should also recognize if material is hazardous.</i></p>		
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<p>5.A.01 PREPARE a Supply Discrepancy Report (SDR) SF-364 as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series) for the following:</p> <ul style="list-style-type: none"> • Shipping Discrepancy • Packaging Discrepancy <p>SupGuide: <i>The member should understand when to submit an SF-364, the uses and response requirements, time standards for submission and how to distribute the completed form.</i></p> <p>5.A.02 PREPARE a Quality Deficiency Report (QDR) SF-368 as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series).</p> <p>SupGuide: <i>The member should understand when to submit an SF-368 and how to notify the proper source of supply. The member must also know the time standards for submission, how to distribute the form and understand disposition and credit procedures for QDR material.</i></p> <p>5.A.03 PROCESS Mandatory Turn-in Repairable (MTR) and Depot Level Repairable (DLR) items as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series).</p> <p>SupGuide: <i>The member should understand MTR and DLR uses and response requirements and time standards for submission and how to distribute the completed form.</i></p> <p>6.A.01 PREPARE the following documents for supplies and services as per the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1, the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series); the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series); and Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series):</p> <ul style="list-style-type: none"> • Requisition and Invoice/Shipping Document, Form DD-1149 • Military Interdepartmental Purchase Request (MIPR), Form DD-448 <p>SupGuide: <i>The member should understand when and how to use each form for purchase/transfer of fuel, petroleum oil and lubricants or services and supplies from a DOD/OGA source. Member should also know the proper fund and accounting line for each type of request.</i></p>		
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<p>B. <u>INVENTORY MANAGEMENT</u></p> <p>4.B.01 PERFORM physical count of materiel inventory as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series).</p> <p><i>SupGuide: Member must be able to identify the appropriate types of inventory for particular situations and when they are required to be conducted.</i></p> <p>5.B.01 PERFORM Research/Adjustment analysis of a physical inventory as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series).</p> <p><i>SupGuide: The member shall follow documented inventory procedures, reconcile any discrepancies, prepare required reports and memorandums.</i></p> <p>6.B.01 SUPERVISE an inventory of materiel as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series).</p> <p><i>SupGuide: Member shall follow documented inventory procedures. Organize and oversee personnel to ensure reports and materiel-handling equipment is available.</i></p> <p>C. <u>SIMPLIFIED ACQUISITION PROCEDURES</u></p> <p>4.C.01 PREPARE an order for supplies and services OF-347 within the micro-purchase threshold as per Federal Acquisition Regulations (FAR); Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series); the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1 ; the Homeland Security Acquisition Regulations (HSAR); the Homeland Security Acquisitions Manual (HSAM); Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p><i>SupGuide: The member should understand the entire purchasing process following the seven basic steps to procurement, including any necessary waivers, proper documentation, and necessary clauses. Member must also understand the breakdown of the accounting line and Procurement Instrument Identifiers (PIID).</i></p>		
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<p>4.C.02 PROCURE supplies or services within the micro purchase threshold using the Government wide commercial purchase card as per Federal Acquisition Regulations (FAR); Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series); the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1; the Homeland Security Acquisition Regulations (HSAR); the Homeland Security Acquisitions Manual (HSAM); Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p><i>SupGuide: The member should understand the entire purchasing process following the seven basic steps to procurement, including any necessary waivers, proper documentation, and necessary clauses. Member must also understand the breakdown of the accounting line and Procurement Instrument Identifiers (PIID).</i></p> <p>4.C.03 VERIFY bankcard statement as per the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1 and the Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p>5.C.01 PREPARE an order for supplies and services SF-1449 greater than the micro-purchase threshold as per Federal Acquisition Regulations (FAR); Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series); the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1; the Homeland Security Acquisition Regulations (HSAR); the Homeland Security Acquisitions Manual (HSAM); Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p><i>SupGuide: The member should understand the entire purchasing process following the seven basic steps to procurement, including any necessary waivers, proper documentation, and necessary clauses. Member must also understand the breakdown of the accounting line and Procurement Instrument Identifiers (PIID).</i></p>		
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<p>5.C.02 REVIEW Procurement Requests for completeness as per the Financial Resources Management Manual (FRMM), COMDTINST M7100.3 (series); the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series), and the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1.</p> <p><i>SupGuide: Member will ensure the following is correct: accounting data, approval signature, certification of funds, description, delivery date, sources of supply, sole source (if applicable), property review, RCRA review and Pollution Prevention Coordinator (PPC) review. Member must also ensure conditions have been met for any special procurement items.</i></p> <p>5.C.03 PREPARE an Amendment of Solicitation/Modification of Contract as per Federal Acquisition Regulations (FAR), Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series); the Finance Center Standard Operating Procedures (SOP) Manual FINCENSTIFINST M7000.1; Homeland Security Acquisitions Manual (HSAM); the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <p><i>SupGuide: Member shall understand the different types of modifications and the reasons one is issued.</i></p> <p>6.C.01 AUDIT procurement files for compliance as per the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series); and the Financial Resource Management Manual (FRMM), COMDTINST M7100.3 (series) and Federal Acquisition Regulations (FAR).</p> <p><i>SupGuide: Member should be able to make determination that the file has enough documentation to withstand audit on its own.</i></p> <p>7.C.01 REVIEW ratification documents as per the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series); Homeland Security Acquisitions Manual (HSAM); and the Coast Guard Acquisition Procedures (CGAP), COMDTINST M4200.19 (series).</p> <p>7.C.02 APPROVE bankcard statement as per the Finance Center Standard Operating Procedures (SOP) Manual, FINCENSTIFINST M7000.1 and the Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p>		
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<p>D. <u>FINANCIAL MANAGEMENT</u></p> <p>8.D.01 PREPARE a unit spend plan as per the Financial Resource Management Manual (FRMM), COMDTINST M7100.3 (series).</p> <p><i>SupGuide: Member will coordinate the approval and execution of the budget within the command including collection of data, backlog lists, and use budget worksheets to forecast the needs of departments for future procurement requirements.</i></p> <p>E. <u>PROPERTY</u></p> <p>4.E.01 TRANSFER property between government agencies utilizing the following forms as per the Property Management Manual, COMDTINST M4500.5 (series); and the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p> <ul style="list-style-type: none"> • DOD Single Line Item Release/Receipt Document (DD-1348-1) • Requisition and Invoice/Shipping Document (DD-1149) <p><i>SupGuide: The intent of this task is to instill basic principles of Property Management Policy; reportable/non-reportable property, and governance of excess property. The skill set acquired includes screening, approval and documentation requirements using the current property tracking system and proper submission of custody forms for supervisor review.</i></p> <p>5.E.01 PROCESS a property report of a physical inventory as per the Property Management Manual, COMDTINST M4500.5 (series).</p> <p><i>SupGuide: The member must know how to produce the report and understand when an inventory is required. The member will ensure all required information is included and correct any discrepancies.</i></p> <p>5.E.02 AMEND unit property report as per the Property Management Manual, COMDTINST M4500.5 (series) to include the following:</p> <ul style="list-style-type: none"> • additions • deletions • modifications <p>5.E.03 TRANSFER property to Defense Reutilization Marketing Office (DRMO) as per the Property Management Manual, COMDTINST M4500.5 (series); and the Coast Guard Simplified Acquisition Procedures Handbook, COMDTINST M4200.13 (series).</p>		
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<p>6.E.01 PREPARE and submit a Report of Excess Personal Property SF-120 as per the Property Management Manual, COMDTINST M4500.5 (series).</p> <p><i>SupGuide: The member must know the entire process of reporting excess property, including timeframes, where to submit and proper approval. The member must understand where to obtain all required data, how to withdraw or cancel an existing SF-120. Member will understand action necessary to release or ship material requested.</i></p> <p>6.E.02 PROCESS excess property for Abandonment/Destruction CG-5598 as per the Property Management Manual, COMDTINST M4500.5 (series).</p> <p>7.E.01 REVIEW a Report of Survey CG-5269 as per the Property Management Manual, COMDTINST M4500.5 (series).</p> <p><i>SupGuide: The member must know survey and final approving authority requirements. The member must also know board convening composition and special item requirements. The member will ensure all required information is included and make the mandatory distribution depending on the type of property involved.</i></p> <p>7.E.02 PRODUCE End of Year Property Report as per the Property Management Manual, COMDTINST M4500.5 (series).</p> <p>F. <u>TRANSPORTATION</u></p> <p>4.F.01 PREPARE non-hazardous small parcel for shipment through a government approved carrier as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series); the Transportation of Freight Manual, COMDTINST M4610.5 (series); Packaging of Material, Preservation, NAVSUP Pub 502, Vol I; Packaging of Material, Packaging, NAVSUP Pub 503, Vol III; and Storage and Materials Handling, DOD 4145.19-R-1.</p> <p><i>SupGuide: Member will prepare material, including those requiring special handling for carrier pickup. This will include, labeling, measuring, packaging and weighing.</i></p>		
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<p>4.F. 02 PREPARE non-hazardous freight materials for shipment through a government approved carrier as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series); the Transportation of Freight Manual, COMDTINST M4610.5 (series); Packaging of Material, Preservation, NAVSUP Pub 502, Vol I; Packaging of Material, Packaging, NAVSUP Pub 503, Vol III; and Storage and Materials Handling, DOD 4145.19-R-1.</p> <p><i>SupGuide: Member will prepare material, including those requiring special handling for carrier pickup. This will include, labeling, measuring, packaging and weighing.</i></p> <p>4.F.03 REQUEST a Commercial Bill of Lading (CBL) for shipment as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series); and the Transportation of Freight Manual, COMDTINST M4610.5 (series).</p> <p>5.F.01 PREPARE a Transportation Discrepancy Report SF-361 as per the Supply Policy and Procedures Manual, COMDTINST M4400.19 (series); and the Transportation of Freight Manual, COMDTINST M4610.5 (series).</p> <p><i>SupGuide: The member should understand when to submit an SF-361, the uses and response requirements, time standards for submission and how to distribute the completed form.</i></p> <p>--END of EPQ--</p>		
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GLOSSARY

AMEND – To change or modify for the better; improve. To alter content formally by deleting or adding.

APPROVE – To accept as satisfactory. To give formal or official sanction.

AUDIT - An official examination and verification of accounts and records. To physically sight and count a random selection of supplies or property and document the results.

PERFORM – To carry out an action or pattern of behavior. To begin a task and carry through to completion in accordance with applicable instructions and regulations.

PREPARE - To plan, gather, and assemble information to produce a document (i.e. forms & reports).

PROCESS – To initiate a series of actions or operations leading to a particular end. Example: To receive, record, and account for incoming material.

PRODUCE – To develop or create.

REQUEST – To ask for something or to ask someone to do a particular task.

REVIEW - To examine a document or process for accuracy in content and/or format and report errors or updates to the author or controlling authority.

SUPERVISE - To oversee. To critically watch, motivate and direct the activities of subordinates. To direct an action or evolution as the leader (Supervisor).

TRANSFER – To convey materiel or property from a person or place to another.

VERIFY – To confirm or establish the accuracy or truth of something. To determine the accuracy of recorded information by comparing to physical evidence.

Physical Inventory Control Officer (PICO) – The PICO has the responsibility of the physical inventory process, designation of personnel, documentation, root cause analysis, and reporting results. The PICO has access to stock records on-hand quantities and the storeroom/warehouse.

Count Team (CT) – The CT are comprised of two individuals who have access to the storeroom/warehouse for conducting counts. The CT does not have access to the stock record and on-hand quantities before and during the count.

Research/Adjustment Analyst (RA) – The RA has access to the stock records. The RA does not have access to the storeroom/warehouse during the count.

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REFERENCE MATERIAL (hyperlinks provided where available)[CMPlus](#) Job Aids and [CMPlus](#) User ManualCoast Guard Acquisition Procedures (CGAP), [COMDTINST M4200.19](#) (series)

Defense Logistics Agency (DLA) Customer Handbook

Federal Acquisition Regulations (FAR)

Finance Center Standard Operating Procedures (SOP) Manual FINCENSTIFINST M7000.1 (series)

Financial Resource Management Manual (FRMM), [COMDTINST M7100.3](#) (series)

Homeland Security Acquisition Manual (HSAM)

Homeland Security Acquisition Regulations (HSAR)

IFAMS Software User Operator Manual, (User's Guide)

Inspection, Packaging, Handling, Storage and Transportation Handbook, [COMDTINST M4450.1](#)

Finance and Procurement Desktop (FPD) User's Guide

MILSTRIP/MILSTRAP Desk Guide (NAVSUP PUB 409)

Packaging of Material, Packaging NAVSUP Pub 503, Vol III

Packaging of Material, Preservation NAVSUP Pub 502, Vol I

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Property Management Manual, [COMDTINST M4500.5](#) (series)Simplified Acquisition Procedures Handbook, [COMDTINST M4200.13](#) (series)

Storage and Materials Handling, DOD 4145.19-R-1

Supply Policy and Procedures Manual, [COMDTINST M4400.19](#) (series)Transportation of Freight Manual, [COMDTINST M4610.5](#) (series)

A reading list containing and links to references is located at the Storekeeper Subject Matter Specialist webpage, available at <http://www.uscg.mil/hq/tcpet/tpf/sksms/sksms.htm>

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