



Defense Health Agency

ADMINISTRATIVE INSTRUCTION

NUMBER 1025.02

November 3, 2022

Incorporating Change 1, January 16, 2025

A&M (J-1)

SUBJECT: Standard Form 182 Administration

References: See Enclosure 1

1. PURPOSE. This Defense Health Agency-Administrative Instruction (DHA-AI), based on the authority of References (a) and (d), and in accordance with the guidance of References (e) through (r) establishes the Defense Health Agency (DHA) procedures for the Administration of Standard Form (SF) 182, “Authorization, Agreement, and Certification of Training.”
2. APPLICABILITY. This DHA-AI applies to the DHA Enterprise (components and activities under the authority, direction, and control of the DHA) to include assigned, attached, allotted, or detailed personnel, and contractors (when required by the terms of the applicable contract).
3. POLICY IMPLEMENTATION. It is DHA’s instruction, pursuant to References (d) through (r), that all federal civilian employees requesting DHA-funded training are required an SF-182.
4. RESPONSIBILITIES. See Enclosure 2.
5. PROCEDURES. See Enclosure 3.
6. PROPONENT AND WAIVERS. The proponent of this publication is the Director, Administration and Management (J-1). When Activities are unable to comply with this publication the activity may request a waiver that must include a justification, to include an analysis of the risk associated with not granting the waiver. The activity director or senior leader will submit the waiver request through their supervisory chain to the Director, J-1 to determine if the waiver may be granted by the Director, DHA, or their designee.

7. RELEASABILITY. **Cleared for public release.** This DHA-AI is available on the Internet from the Health.mil site at: <https://health.mil/Reference-Center/Policies> and is also available to authorized users from the DHA SharePoint site at: <https://info.health.mil/cos/admin/pubs/SitePages/Home.aspx>.

8. EFFECTIVE DATE. This DHA-AI:

- a. Is effective upon signature.
- b. Will expire 10 years from the date of signature if it has not been reissued or cancelled before this date in accordance with Reference (c).

9. FORMS.

a. Standard Form (SF)-182, Authorization, Agreement, and Certification of Training is available at: <https://www.gsa.gov/reference/forms/authorization-agreement-and-certification-of-training>.

b. DHA Form 39, DHA Continued Service Agreement (CSA) is available at: https://info.health.mil/cos/admin/DHA_Forms_Management/Lists/DHA%20Forms%20Management/AllItems.aspx.

10. SUMMARY OF CHANGES.

- a. Added the eligibility for training section.
- b. Made updates to the approval process and grammar.

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Enclosures

1. References
2. Responsibilities
3. Procedures

Glossary

ENCLOSURE 1

REFERENCES

- (a) DoD Directive 5136.01, “Assistant Secretary of Defense for Health Affairs (ASD(HA)),” September 30, 2013, as amended.
- (b) DoD Directive 5136.13, “Defense Health Agency (DHA),” September 30, 2013, as amended.
- (c) DHA-Procedural Instruction 5025.01, “Publication System,” April 1, 2022
- (e) United States Code, Title 5
- (g) Code of Federal Regulation, Title 5, Section 410.309
- (h) DHA-Administrative Instruction 043, “Continued Service Agreement (CSA),” June 19, 2018
- (i) Public Law 91-219, “Veterans Education and Training Act,” March 26, 1970
- (j) DoD Instruction 1322.06, “Fellowships, Legislative Fellowships, Internships, Scholarships, Training-with-Industry (TWI), and Grants Provided to DoD or DoD Personnel for Education and Training,” October 12, 2016
- (k) DoD Instruction 1400.25, Volume 410, “DoD Civilian Personnel Management: Training, Education, and Professional Development,” September 25, 2013, as amended.
- (l) DoD Instruction 1400.25, Volume 1703, “DoD Civilian Personnel Management: Retraining and Outplacement Assistance,” March 20, 2005, as amended
- (m) DoD Manual 8570.01-M “Information Assurance Workforce Improvement Program,” December 19, 2005, as amended.
- (n) United States Code, Title 44, Section 3604
- (o) DoD Manual 5400.07, “DoD Freedom of Information Act (FOIA) Program,” January 25, 2017
- (p) DoD Directive 5400.07, “DoD Freedom of Information Act (FOIA) Program,” April 5, 2019
- (q) DHA-Administrative Instruction 5015.01 “Records Management Program,” February 6, 2020
- (r) DoD Instruction 1442.02, “Personnel Actions Involving Civilian Attorneys,” September 30, 2010

ENCLOSURE 2

RESPONSIBILITIES

1. DIRECTOR, DHA. The Director, DHA, will ensure compliance and accountability across the agency with this DHA-AI.

2. CHIEF OF STAFF (CoS), ASSISTANT DIRECTORS (ADs), DEPUTY ASSISTANT DIRECTORS (DADs), J-DIRECTORS, AND SPECIAL STAFF, DHA. The DHA CoS, ADs, DADs, J-Directors, and Special Staff must:

- a. Endorse and adhere to the guidance within this DHA-AI.
- b. Ensure that there is adequate funding for all requested training.
- c. Ensure that their respective personnel are selecting the appropriate trainings for mission needs.
- d. Ensure that all the necessary and appropriate roles are identified and assigned within their respective directorates (e.g., SF 182/CSA Coordinator or Training Liaison, GPC Holder, Billing Official, and Budget Resource Manager).

3. DIRECTORS, DHA COMPONENTS

- a. Ensure the implementation and execution of SF182 Administration requirements established within this DHA-AI.
- b. Be responsible for their respective organization's SF182 management oversight.
- c. Ensure that there is adequate funding for all requested training.
- d. Ensure that their respective personnel are selecting the appropriate trainings for mission needs.
- e. Ensure that all the necessary and appropriate roles are identified and assigned within their respective components and activities (e.g., SF 182/CSA Coordinator or Training Liaison, GPC Holder, Billing Official, and Budget Resource Manager).

4. DIRECTOR, J-1, DHA. The Director, J-1, DHA, will maintain oversight and guidance for the SF 182 authorization process.

5. BUDGET PERSONNEL, FINANCIAL OPERATIONS (J-8), DHA. The J-8 Budget personnel will:

- a. Perform as the Level 4 (L4), Fund Certifier.
- b. Approve or disapprove funds: perform second Purchase Requisition (PR) certification.

6. BILLING OFFICIAL. The Billing Official will:

- a. Perform as the Level 1 (L1), Fund Certifier.
- b. Approve or disapprove PR: perform first PR certification.

7. GOVERNMENT PURCHASE CARD (GPC) HOLDER. The GPC Holder will:

- a. Review and approve or disapprove SF 182 requests within their respective DHA Activity prior to the Billing Official's review.
- b. Enter approved SF 182 requests into the General Fund Enterprise Business System.
- c. Pay invoices for requested training, once approved by the Billing Official.
- d. Issue the Training Authorization Letter after training has been paid, which is required for DHA personnel to attend requested training.

8. SF 182/CSA COORDINATOR OR TRAINING LIAISONS. The SF 182/CSA Coordinator or Training Liaison will:

- a. Communicate professional development opportunities and guidance to organization leaders and personnel by forwarding announcements via e-mail, in staff meetings, or by sharing with individuals.
- b. Provide a critical information link on any SF 182 updates (e.g., policy changes, form updates/changes, deadlines) to their respective area(s).
- c. Review all training requests originated in their organization and verify the inclusion of all required information within the SF 182 request package.
- d. Approve or disapprove SF 182 request packages and route them to the GPC Holder for review and approval or disapproval.

9. CHIEF, DHA WORKFORCE DEVELOPMENT BRANCH (WFD). The Chief, DHA WFD, will:

- a. Provide oversight and guidance for the SF 182 authorization process.
- b. Ensure supporting policy and guidebook documentation are kept current.

10. DHA SUPERVISORS. DHA Supervisors will:

- a. Endorse and adhere to the guidance within this DHA-AI.
- b. Ensure that there is adequate funding for all requested training. Provide concurrence or approval for all training requested by personnel in advance of the training dates. If training is not approved, provide counsel as needed. Ensure personnel who attend training comply with training process guidelines and mandatory training requirements in this DHA-AI.
- c. Ensure all requested training is documented within the requester's Individual Development Plan (IDP).
- d. Ensure that personnel conduct research analysis on available options for trainings. Where appropriate, select appropriate training sources and methods for subjects or curricula common to more than one occupation. Certify that each requested professional development event will satisfy an identified need, is mission-related, and eligibility requirements for the training are met.
- e. Approve competencies necessary for training purposes or required to be highly qualified for promotion across career program functional lines.
- f. Determine reasons for unsatisfactory or non-completion of training by any DHA personnel, notify WFD, and take appropriate action.

11. DHA PERSONNEL. DHA Personnel will:

- a. Adhere to the guidance established within this DHA-AI when requesting and participating in competitive and professional development activities.
- b. Maintain a current approved IDP, updating as new training is requested.
- c. Seek information from their supervisor and/or their designated SF 182/CSA Coordinator or Training Liaison concerning opportunities for advancement or career development.
- d. Attend and participate fully in all approved professional development activities.
- e. Submit an SF 182 at least 30 days in advance of training or event, including all required

documentation.

- f. Provide any requested documentation for auditing purposes in a timely manner.

ENCLOSURE 3

PROCEDURES

1. OVERVIEW. The SF 182 is a document implemented by the Office of Personnel Management across Federal agencies and must be completed and submitted no less than 30 days prior to the training start date or early bird registration date cutoff. SF 182 is designed to capture costs associated with training from outside vendors along with the funding information necessary to complete each transaction.

2. ELIGIBILITY FOR TRAINING.

a. Federal Civilian Employees. In general, training is unrestricted and available to permanent, full- time DHA federal civilian employees. Federal civilian employees may attend government training regardless of their length of Federal service, except in the Competitive Programs, which requires a minimum of one year of service at the DHA to participate.

b. Military Personnel. Career development of military personnel is subject to the requirements per Reference (g) and is not covered by this instruction. The military Departments have specific legislation that covers career development of officers and enlisted personnel. Accepting duplicate Federal payment for the same training is a punishable offense.

(1) This DHA-AI covers military personnel for internal purposes when the training program is directly relevant to their duties in their current DHA assignment.

(a) Military personnel are authorized to receive training under this DHA-AI when the training is required to improve competencies specifically needed for job performance in the serviced organization(s).

(b) DHA will pay for training for assigned military personnel only when the training is required for their current duties with DHA. However, certification exams (e.g., IT, Project Management Professional, etc.) cannot be funded by DHA, and must be paid by the Service member or the Military Department.

(c) Training requests for military personnel must include their anticipated rotation date on the SF 182. Normally, military personnel will not be approved for training within 6 months of completion of tour of duty.

c. Contractors. This DHA-AI only applies to contractor employees when DHA funded training is required by the terms of the applicable contract.

3. SF 182 REQUEST PACKAGE. Personnel should include the following information as part of their SF 182 request package:

- a. Complete SF 182 signed by the immediate supervisor.
- b. Funding information sheet/line of accounting.
- c. Roster with contact information (for group training requests only).
- d. Complete vendor information (includes contact information, registration link(s), eligible discount codes, etc.).
- e. Training vendor invoice (should include training or event information, membership/registration fees, etc.), as applicable.
- f. Expedited Training Request, if less than 30 days from actual training or event date.
- g. DHA Form 39, "Continued Service Agreement," as applicable (See Reference (h)).
- h. Mission-Essential Justification Letter, as applicable; and
- i. Third-party credit authorization in advance of training or event, as applicable.

4. APPROVAL PROCESS

- a. The SF 182 approval process requires the following steps:
 - (1) Completion of SF 182 Request Package.
 - (2) Sending Completed Package to SF 182/CSA Coordinator or Training Liaison.
 - (3) SF 182/CSA Coordinator or Training Liaison Review and Coordinate Request.
 - (4) Billing Official Initial Review/L1 Fund Certification.
 - (5) DHA J-8 Budget Personnel Second Review/L4 Fund Certification.
 - (6) GPC Holder Makes a Payment for the Training.
 - (7) Training Completion.
 - (8) Certificate Submission to SF 182/CSA Coordinator or Training Liaison.
- b. Training that is deemed no-cost, on-site training, whether that site is the DHA

Headquarters or other locations, will require advance registration with notice to the staff member immediate supervisor for their concurrence.

c. Training may also be immediately approved as mandatory by the Director, DHA if determined “essential” by an external entity such as the Department of Defense, Office of Management and Budget, or Federal regulation; or deemed as specific training in support of essential DHA functions. The Director, DHA may delegate this authority to the respective DHA Directorate Head or their delegate. When implementing essential training or career development, DHA leaders will follow the procedures outlined in this DHA-AI.

5. DELIVERY OF GOODS AND SERVICES IN A SUBSEQUENT FISCAL YEAR

a. Training and development expenses are charged to the fiscal year appropriation in which the obligation is incurred, although the training dates may extend into the following fiscal year.

b. Generally, DHA-funded courses may not be paid using previous year funds. The WFD reserves the option to appropriate current fiscal year funds for the cost of a training course, which is scheduled to begin in the next fiscal year, when the course meets a bona fide need, the scheduling date of the course is not flexible (i.e., beyond DHA's control), the time between payment and the course is not excessive, and payment is required prior to the start date of the course.

6. MEMBERSHIP IN PROFESSIONAL ORGANIZATIONS

a. In accordance with Reference (l), payment or reimbursement for initiation fees or periodic dues for membership in a professional organization or expenses for attendance of a member at meetings or conventions of the organization is prohibited unless:

(1) Membership or attendance is a prerequisite to acquiring or maintaining a required professional credential; or

(2) DHA pays for personnel to acquire or maintain a professional credential and the staff member maintains membership in the professional organization as an incidental by-product of acquiring or maintaining the credential and attends its meetings or conventions to maintain the credential.

b. DHA may reimburse its attorneys if a paid membership in the bar association is necessary to maintain a license to practice law.

7. CIVILIAN LICENSES AND CERTIFICATIONS

a. In accordance with Reference (k), DHA components may use appropriated funds or other

available funds to pay for or reimburse expenses for personnel to obtain professional credentials. This includes expenses for professional accreditation, state-imposed professional licenses and certification, and examinations to obtain such credentials. Payments under this authority are at the discretion of each organization.

b. Payment or reimbursement of membership fees in a professional organization is prohibited except as noted in Reference (k).

8. WITHDRAWAL FROM THE TRAINING

a. If the staff member voluntarily withdraws from a funded training course/program, then DHA requires that staff member provide a full refund for the cost of that course/program in accordance with References (f) and (g).

b. If the staff member is involuntarily removed from a funded training course/program (e.g., for performance-related issues), then they are required to reimburse DHA as agreed upon based on the recoupment procedures established within this DHA-AI.

9. NOT PASSING THE TRAINING. If the staff member does not successfully pass a funded training course/program, the staff member will be responsible for repaying the entire cost of the course/program in accordance with References (f) and (g).

GLOSSARY

PART I. ABBREVIATIONS AND ACRONYMS

AD	Assistant Director
CSA	Continued Service Agreement
CoS	Chief of Staff
DAD	Deputy Assistant Director
DHA	Defense Health Agency
DHA-AI	Defense Health Agency-Administrative Instruction
GPC	Government Purchase Card
IDP	Individual Development Plan
J-1	Administration and Management
J-8	Financial Operations
PR	Purchase Requisition
SF	Standard Form
WFD	Workforce Development Branch