

Military Evaluation (OER & NCOER)

Rater and Senior Rater Information

Purpose: to provide basic information on military evaluations (IAW AR 623-3 policy) with an emphasis on Rater and Senior Rater profiles.

Outline

- Evaluation System Information
 - General
 - Process
 - Timeliness
- OER Information (although much applies to NCOER)
 - System
 - Narratives
 - Process
 - Senior Rater (SR) Managed Profile Technique
- NCOER Information
 - System
 - Process
- Back Up Slides

Access SR Profile Report from USAHRC Home Page

HRC Homepage - Windows Internet Explorer

https://www.hrc.army.mil/site/index.asp

Live Search

HRC Homepage

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Or, find commonly-used evaluation report information & other HRC applications here (including Senior Rater Profile and Timeliness Reports) – Option two.

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Evaluation Systems Homepage

General Information	What's New	Key Items / Hot Links
<ul style="list-style-type: none"> Points of Contact 	<p>Evals & My Forms on AKO</p> <p>Welcome Contact Us</p> <p>Evaluations Branch Mission: Working from 4 locations, the Evaluations Branch creates, manages, and executes an evaluation system that allows the Army to identify suitable leaders for current and future operations and ensures positive individual leader development.</p> <p>Functions include: Policy, appeals and corrections, and reports processing.</p> <p>Briefings/Training</p> <p>Evaluation Information and OER Senior Rater Techniques</p> <p>For technical questions about the Web site contact the Webmaster. For functional questions please refer to the appropriate office.</p>	<ul style="list-style-type: none"> SOP for Eval By email Timeliness Update <p>Regulations</p> <ul style="list-style-type: none"> AR 623-3 DA Pam 623-3 <p>Key Areas</p> <ul style="list-style-type: none"> NCO-ER System Information Appeals and Corrections
<p>Application Links & SOPs</p> <ul style="list-style-type: none"> SR-2 OnLine IWRS - OER/NCOER 1LT Automated Promotions (AC) OMPF OnLine How to use SR Profile My ERB IWRS User Manual Evals from Deployed Units 		

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Links to IWRS, S-1's are responsible for checking and providing status of all evaluations. Can also be accessed by any Soldier with a AKO account.

Regulation covering NCOER's and OER's. Ensure you have researched, prior to contacting HRC.

Information Sources

- AR 623-3 and DA PAM 623-3: <http://www.apd.army.mil/>
- AKO Forms wizard and portal:
<https://myforms.ecms.army.mil/wps/myportal>
- AKO Forms Portal Assistance: email: apdfcmp@conus.army.mil, (703) 692-1306
- Evaluation Systems Office homepage: <http://www.hrc.army.mil/evaluations>
- Online applications and tools:
 - IWRS for all Active, Reserve OER & NCOER reports
<https://knoxhrc16.hrc.army.mil/iwrs/>
 - GKO has ARNG information.
 - Online Timeliness Report & OER SR Profile
<http://www.hrc.army.mil/evaluations>
- Human Resources Command offices:
 - Evaluation Policy & Questions: (502) 613-9019 (DSN: 983),
hrc.tagd.evalpolicy@conus.army.mil
 - Appeals & Corrections: (502) 613-9022 (DSN: 983)
hrc.tagd.evalappeals@conus.army.mil

Most Frequently Seen Errors

OER & NCOER:

- Signatures more than 14 days prior to the THRU date & sent to HQDA before THRU date
- Missing statement from senior rater explaining lack of Soldier signature (if CAC doesn't work Soldier can ink sign and mail evaluation to HRC)
- Missing actual date after word PASS or PROFILE in APFT section
- Missing YES or NO after HT/WT
- Using the wrong reason for submission
- Extended annuals reflecting more than 12 months and missing nonrated codes
- Beginning date (FROM) overlaps with THRU date from previous report
- Incorrect or inaccurate SSN for the rated Soldier and/or senior rater
- Missing administrative information (i.e., Senior rater unit, ranks)

NCOER:

- APFT FAILS or PROFILE assessments not explained IAW DA PAM 623-3 requirements
- Reviewer noncurrence not accompanying a potential assessment by rater & senior rater that are different. They can rate differently but reviewer must nonconcur with one or both and provide a memorandum in explanation.
- Bullet comments not double spaced, more than 2 lines, or oddly formatted
- Missing counseling dates without explanation by senior rater
- Reviewer is a SFC, 1SG, MSG or MSG(P) not filling CSM/SGM position (as required)

OER:

- OER contains negative comments but is not marked as referred (box checks in Part IId)
- Officer marked comments attached, but not physically attached, with referred OER
- Missing # of officers senior rated (in Part VIIa)

OER

OER (Goals)

- Provide selection boards and personnel managers adequate information to make decisions
- Allow for field impact on selection of future leaders
 - Opportunity to advance the “Best”
 - Establish Senior Rater Accountability
 - Confidence that others cannot inflate
 - Narratives focus on Quantitative Performance & Potential
- Enhance Leader Development
 - Focus on Officer Development at Company Grade Level
 - Basis in Army Values, Doctrine & Leadership
 - Emphasis on Counseling
 - Link with OPMS
- Link Performance to Mission

General Observations: What's Important to Board Members?

- Senior Rater Narrative
- Senior Rater Label
- Duty Description

Senior Rater “Rating Philosophy”

- **Mission: Identify your best**
- **Develop “Rating Philosophy” and consider communicating it to rated officers**
- **Counseling – ensure counseling is accomplished**
- **Decide how to assess (particularly) ACOM’s based on performance and potential (not position)**
- **Write well – quantify and qualify in narrative; correspond comments with box check as the system allows and if box check is used. If not, use the narrative to paint the picture**
- **Plan ahead, think series of reports (number of times you will senior rate an officer); use ACOMs sparingly**

What Selection Board Members have to say about narratives . . .

- “Given that the senior rater ratings are masked for WO1, 2LT & 1LT, it is imperative that raters and senior raters use clear, quantifiable descriptions in their comments for both in and above the zone and below the zone selections for those CPT’s & CW2’s that are going before a CW3 & MAJ selection boards.”
- “The current OER system works, especially the senior rater profile. Still, the Army must encourage, or impose, discipline on senior rater narratives. We saw an emerging trend where senior raters attempt to circumvent the strict requirements for an ACOM block check through unsubstantiated quantitative statements in COM narratives, and vice-versa. Inflated narratives could dilute the clear message of superior performance conveyed by an ACOM report in the future.”
- “Senior raters invariably have the most influence in how the board judges an individual officer’s performance. Those senior raters who were clear in identifying not only those officers with great potential and performance, but also, substandard performance or officers possessing limited potential and poor performance of duty greatly enhanced the selection process.”

Rater Narrative

Focus on specific, quantifiable performance –

- *What an officer did and how well*
- *Quantify and Qualify Performance and Potential*

- The rater is the first individual to write a narrative on the OER
- Narrative should explain what the rated officer did and how well he/she did it
- A laundry list of superlatives is not helpful to selection boards – more is not necessarily better
- Selection board members do use the rater's narrative in their file deliberations; more intensely when they are looking for in-depth information about a rated officer's performance and potential.
- When there is no senior rater (due normally to lack of rating official qualifications) the rater's narrative is the one which provides the input on both performance and potential
- Block Vc
 - Must include specific comments concerning rated officer potential
 - Emphasize potential for the near term (next 3-5 years: command, assignment, school and promotion)
- Block Vd – Ensure that you list any skill sets or professional qualifications that might be useful to future functional designation boards

Senior Rater Narrative

Should quantify and qualify the passion (or lack thereof) that senior rater has for rated officer's performance and potential

- Selection boards should understand what input the Senior Rater is providing without having to guess
- There are no “magic” or “buzz” words to convey Senior Rater intent
- Focus on potential (3 to 5 years; command, assignment, schooling and promotion)
- Cannot mention Box Check in the narrative (i.e., “ACOM Officer”, “If my profile allowed, I would rate this officer higher”)
- Avoid Disconnect with Box Check
 - Example: Large population, COM Box Check, but Exclusive Narrative
 - Exceptions: Immature profiles, Back to Back reports
- Be careful with your narrative – ***don't say the same thing for all your people (Boards can easily detect repeated verbiage)***

Senior Rating - Consistency

Recommendations:

• **Senior raters need to amplify their Potential box checks by using the narrative to clearly send the appropriate message to selection boards.** The following classification of types of narratives may serve as a guide and assist in sending a clear message:

* **Exclusive narratives.** Those which clearly describe superior performance/potential above that of the vast majority, associated with early promotion and are restrictive in nature (e.g. top 1%, 3%, 5%, etc. of all officers, the best among a select grade or group, promote below the zone).

Should only be used:

- for the best ACOM reports within a mature profile
- for COM reports that follow an ACOM for same rated officer
- with discretion, for the very best officers with COM reports in small population/immature profile situations

* **Strong narratives.** Those which describe significant performance accomplishments and enthusiastically recommend promotion, assignment to key duty positions linked to upward mobility and appropriate military schooling (e.g. among the best, easily in the top third of the officer corps, definitely promote this officer, below the zone potential, one of my best officers).

Should be used:

- for ACOM reports
- for the very best officers receiving COM reports

Senior Rater Bottom Line

- **Understand “How the Evaluation, Selection and Promotion system works”.**
- **Make the hard calls.**
- **Be fair and open. Communicate your philosophy, and counsel.**

Senior Rater Profile Policy and Processing (The Managed Profile Technique in Practice)

- Senior raters must maintain less than 50% for all reports written on officers in a single grade in the Above Center of Mass (ACOM) top box to retain the ACOM label at final processing.
- A rule in AR 623-3 allows any **one** of the first **four** OERs written in any grade to be an ACOM, even though the percentage will exceed the 50% rule. After the first four reports are rendered, any OERs for a given grade must maintain an ACOM percentage less than 50%.
- OER profiles are calculated based on date of receipt at HQDA. Multiple OERs received on the same day will profile as one and receive the same profile, which is a total of all reports previously at HQDA and those received that day.
- OERs process and profile at HQDA in date of receipt order. An OER received today will not complete processing and profiling before one of the same rank and same senior rater that arrived last week.
- The profile for any single grade may only be restarted if at least 3 OERs for the same grade have processed, senior raters obtain permission /authorization from their senior raters and if one OER in this grade has already been documented as a misfire. The senior rater must notify HQDA Evaluations Systems Office (HQDA-ESO) and both must agree to the effective date and grade(s) for the restart.

Senior Rater Profile Policy and Processing (Profile “Misfires”)

- A profile “misfire” is one where an OER has an ACOM box check which is not supported by the profile on the date the OER is received at HQDA. Misfired OERs receive a COM label and the profile builds as an ACOM meaning that a misfired ACOM still counts as a ACOM in the senior rater’s profile while the label generated would be a COM label.
- Misfires only happen after HQDA-ESO coordinate with senior raters. They don’t process automatically. HQDA –ESO runs a list of reports in potential misfire situations and contacts the senior raters to make sure the OER processes in accordance with their intent.
- Questions about reports found in the Online SR Profile can be answered by Evaluation Systems Office (email: hrc.tagd.evalpolicy@conus.army.mil, Telephone: (502) 613-9019).

Managed Profile Labeling

SENIOR RATER BOX CHECK

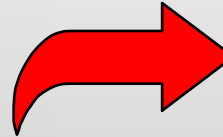
b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

ABOVE CENTER OF MASS
(Less than 50% in top box; Center of Mass if 50% or more in top box)

CENTER OF MASS

BELOW CENTER OF MASS
RETAIN

BELOW CENTER OF MASS
DO NOT RETAIN



LABEL

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

CENTER OF MASS

RO: COL DOE, JOHN 111111111

SR: LTG DOE 111111111

DATE: 98 07 18

TOTAL RATINGS: 20

RATINGS THIS OFFICER : 2

Rule #1:

SENIOR RATER BOX CHECK

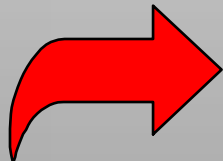
b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

ABOVE CENTER OF MASS
(Less than 50% in top box; Center of Mass if 50% or more in top box)

CENTER OF MASS

BELOW CENTER OF MASS
RETAIN

BELOW CENTER OF MASS
DO NOT RETAIN



LABEL

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

**BELOW CENTER OF MASS
RETAIN**

RO: COL DOE, JOHN 111111111

SR: LTG DOE 111111111

DATE: 98 07 18

TOTAL RATINGS: 20

RATINGS THIS OFFICER : 2

Rule #2:

Regardless of profile

Managed Profile Labeling

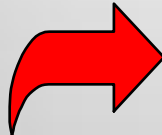
Top block check gets ONE of two labels...

At receipt at DA

PROFILE HISTORY IS:

3 17 0 0 20

ACOM, COM, BCOM 1&2, TOTAL



b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

ABOVE CENTER OF MASS
(Less than 50% in top box; Center of Mass if 50% or more in top box)

CENTER OF MASS

BELOW CENTER OF MASS
RETAIN

BELOW CENTER OF MASS
DO NOT RETAIN

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

ABOVE CENTER OF MASS

RO: COL DOE, JOHN 111111111
SR: LTG SMITH 111111111
DATE: 96 07 18
TOTAL RATINGS: 20
RATINGS THIS OFFICER : 2

Rule #3:

Labeled "above center of mass" when...

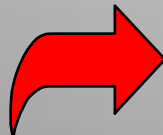
- Profile is less than 50% in top block
- Board sees only label and narrative

At receipt at DA

PROFILE HISTORY IS:

10 10 0 0 20

ACOM, COM, BCOM 1&2, TOTAL



HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

CENTER OF MASS

RO: COL DOE, JOHN 111111111
SR: LTG DOE 111111111
DATE: 96 07 18
TOTAL RATINGS: 20
RATINGS THIS OFFICER : 2

Rule #4: - Misfire -

Labeled "center of mass" when...

- Profile is equal to or more than 50% in top block
- Board sees only label and narrative

Completed Senior Rater Section

PART VII SENIOR RATER	
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE	
<input checked="" type="checkbox"/> BEST QUALIFIED <input type="checkbox"/> FULLY QUALIFIED <input type="checkbox"/> DO NOT PROMOTE <input type="checkbox"/> OTHER (Explain below)	
I currently senior rate <u>16</u> officer(s) in this grade A completed DA Form 87-9-1 was received with this report and considered in my evaluation and review <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO (Explain in c)	
CENTER OF MASS RO: MAJ DOE, JOHN 111111111 SR: COL DOE, 111111111 DATE: 98 07 18 TOTAL RATINGS: 17 RATINGS THIS OFFICER : 1	c. COMMENT ON PERFORMANCE/POTENTIAL MAJ. : is one of the best Majors I senior rate. I personally selected him from a group of carefully screened candidates as my XO. A consummate officer, MAJ leads by example, is soundly grounded on tactics, and shares his Soldiers' sacrifices and challenges. Send this joint operations experienced warrior to ILE and assign in operations positions or leadership positions at battalion or brigade level. He should command.
	d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE. Division Maintenance Officer, TRADOC instructor, CASCOM Doctrine writer

Reinforcing Rules:

- **First single top box** at a given grade will generate an **ACOM** label at DA, regardless of profile (of the first four OERs in a grade, by component, any one, but only one, can be an ACOM.)
- **Cannot mention box check in the narrative**
- **Restarts by grade, with SR's permission**, after 3 reports & a documented misfire in that grade have been processed at HQDA

What's a Misfire?

Definition: An OER with an ACOM box check that receives a COM DA Label because the senior rater profile (50% or greater) does not support an ACOM rating.

- Mechanism to prevent - Senior Rater Contact Program. Once OERs are processed, a daily Potential Misfire roster IDs problems. The SR is contacted and given options:
 - Submit COM OER(s) to support ACOM / and resequencing.
 - Withdraw / return potential misfire OER.
 - Give authorization to change box check to COM (SR should notify rated officer).
 - Officially misfire the report - What happens?
 - Rated officer receives a COM DA Label.
 - ACOM counts on senior rater profile, further limiting SR ability to give future ACOMs.
 - SR receives a Discipline MEMO thru their rating chain.
- Bottom line:
 - Know / manage your profile.
 - We will help and work with you. Questions can be answered by Evaluation Systems Office (email: hrc.tagd.evalpolicy@conus.army.mil, Telephone: (502) 613-9019).

Senior Rater Profile Report: DA FORM 67-9-2

A senior rater profile is separated by rated officer rank. Consolidation of all components occurred 22 May 07.



Available to senior raters:

Online with AKO Logon:

-HRC front page: www.hrc.army.mil

Email: hrc.tagd.evalpolicy@conus.army.mil

Telephone: (502) 983-9019 (DSN 983)

Online profile includes:

- Evaluation Timeliness Report
- Matrix of profile numbers (seen here)
- Names of officers in profile
- OERs working at HRC but not yet profiled.

SENIOR RATER PROFILE REPORT OFFICER EVALUATION REPORTING SYSTEM FOR USE OF THIS FORM, SEE AR 623-105; PROPONENT AGENCY IS ODCSPER								
A. NAME		B. SSN		C. RANK		D. DATE OF REPORT		
CURRENT OER PROFILE					PROFILE HISTORY			
	ACOM COM	COM	BCOM RETAIN	BCOM DO NOT RETAIN	Total Ratings	Total Ratings	1st Block COM	% Total 1st Block
MG	Do Not Receive block VIIb. Box Check							
BG								
COL								
LTC								
MAJ								
CPT								
1LT								
2LT								
CW5	Do Not Receive block VIIb. Box Check							
CW4								
CW3								
CW2								
WO1								

Develop a Senior Rater Rating Plan

Example

Name	Position	# of OERs previously received in current position (include previous SR's OERs)	Last OER/Type/Rating <u>Codes:</u> Change of Rater - CR Change of Duty - CD PCS - PCS Annual - AN Com the Record -CTR SR Option - SO Relief for Cause - RFC <u>Ratings:</u> ACOM/COM/BCOM	Projected OER Date of next OER	Projected Type Type of report (Use Codes)	Projected Rating How I would rate this officer if I rated everyone today <50% in ACOM (Adjust as events dictate)	OER to DA(90days) Date report needs to be at DA (except board reports need to get to DA per board message)	Subsequent OER Will the officer receive more reports from you after the proj OER, if so how many	Cohort YG	Next Board/Date Next selection board the officer would be eligible for (Use chart profile management board dates)	Projected Departure/ Promotion
	BN XO	1	Jun 04/CR/COM	Jun-05	AN	COM	Sep-05	Yes (1)	1991	BZ LTC- Mar-05	Nov-06
	BN S3	1	Jun 04/CR/ACOM	Dec-05	PCS	ACOM	Mar-05	No	1991	BZ LTC-Jan-06	Dec-06
	BN Cdr	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05	Yes (1)	1992	BZ COL-Jul-05	Jun-06
	BN XO	0	Jun 04/CR/COM	May-05	CD	COM	Aug-05	No	1992	BZ LTC-Jan-07	Jun-05
	BN S3	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05	Yes (1)	1991	BZ LTC-Jan-06	May-06
	BN Cdr								1990	BZ Col-Jul-05	Aug-06
	Bde S-1								1992	BZ LTC-Jan-07	Aug-07
	Bde CM Off								1991	BZ Major-Oct-05	Jun-06
	Bde S-3								1992	BZ LTC-Jan-07	Apr-06
	BN Cdr Support								1990	BZ Col-Jul-05	Jan-06

Any matrix that lists officers by rank along with some other helpful information will help Senior Raters (& their HR managers) to anticipate the next OER will help Senior Rater's manage and implement their rating philosophy.

Contact Evaluation Systems Office (email: hrc.tagd.evalpolicy@conus.army.mil, Telephone: (502) 613-9019) if you need help.

Note: Promotable Officers serving in position

This is on the OER Home Page Managing Your Senior Rater Profile

Understanding the order of eval processing:

Example for 1 senior rater (SR), many grades of rated Soldiers

Instructional Notes	Date of Receipt at HRC	RS Grade	THRU Date	RO in near term board?	Board MSG Received NLT Date	IWRS Status	HRC complete in this order:
Evals process in order to allow all to make boards and not mess up SR profile (for OER). Some may wait. HRC works fast as they can.	1May08	CW2	1Dec07	No		WORKING	
	2May08	SGM	15Dec07	Not at this time		COMPLETE	--NA--
While not destined for a near term board, this LTC OER (& all after it) has to profile/complete prior to other LTC OER that are.	3Jun08	LTC	15Dec07	↓		WORKING	1
OER will complete and be placed in OMPF & pulled automatically into board file. Received prior to date listed as suspense to HRC.	1July08	LTC	25Dec07	3SEP08	22Aug08	WORKING	2
	10Jul08	MAJ	1Jul08			WORKING	
	15Jul08	CW3	1Jul08			WORKING	
Processes by receipt not THRU date.	30Jul08	LTC	1Dec07			WORKING	3
	2Aug08	MAJ	1Jul08			WORKING	
	18Aug08	CW3	1Jul08			WORKING	
OER will complete and be placed in OMPF to be pulled automatically into board file. Action might be 1-2 days after MBF closes but will be BEFORE voting starts. Dates are set to give HRC time to complete this mission.	22Aug08	LTC	5Jun07	3SEP08	22Aug08	WORKING	4
OER will complete but not in time for board. It was received <u>after</u> the suspense for receipt of all evals stated in board message.	30Aug08	LTC	5Jun07	3SEP08	22Aug08	WORKING	5

NCO-ER

Key NCOER System Components

- Rating scheme establishing rating officials
- NCOER Counseling & Support Form (DA Form 2166-8-1, dated Mar 06)
 - Mandatory face to face counseling (documented)
 - Conducted within first 30 days of rating period and quarterly thereafter
- NCOER (DA Form 2166-8, dtd Mar 06)
 - Duty description
 - Senior rater portion
- Developmental Counseling (DA Form 4856-E)
 - Not a requirement for submission of evaluations
 - Recommend it as requirement in your unit

Reviewer Responsibilities

- Overall caretaker of system (honest-broker)
 - Reviews reports to ensure consistency, accuracy, and fairness
 - Resolves discrepancies between rater and senior rater
 - If discrepancy can't be resolved after discussing with both rating officials, then reviewer nonconcur and attaches memorandum
 - If rater and senior rater agree on evaluation but reviewer does not, then reviewer 'may' nonconcur but must clearly articulate reason for nonconcurrence (creates question of integrity in rating officials)
 - Army trusts rater and senior rater to be fair and accurate in rendering reports - reviewer's role is not to provide a 3rd evaluation

NCOER Tips

- Ensure counseling is happening; spot check rater's checklist/record
- Best NCO receives 2 or 3 Excellence bullets, not 5-0 or 4-1 (success in PT)
- Justify Excellence Bullets - Tell the story ...
- If you give a Success box check – must add bullet comment (s); can't leave it blank
- Ensure Junior Officers and NCOs know system
- Senior Rater Narrative - Focus on Performance + Potential
 - promotion, school and assignments
- Create Excellence Opportunities - Tell NCOs how to achieve excellence
- NCO-ER Quality Control - suggest using CSM
- OER's must be at HRC within 90 days from the thru date