# Evaluation Entry System (EES)

# User's Guide

**Fort Knox, KY**
**14 April 2017**

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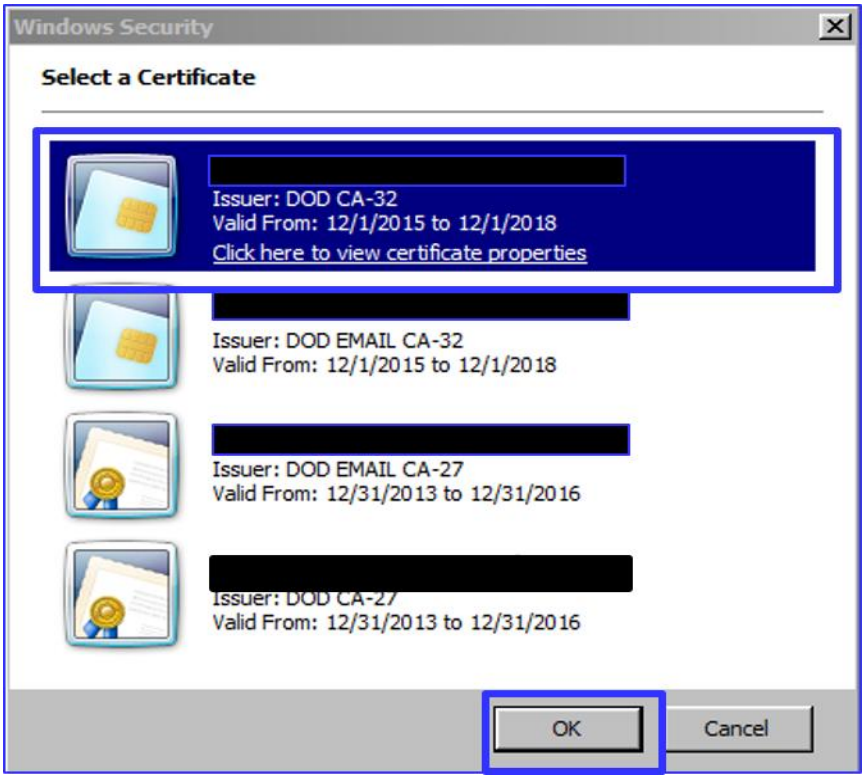
## Accessing the Evaluation Entry System (EES)

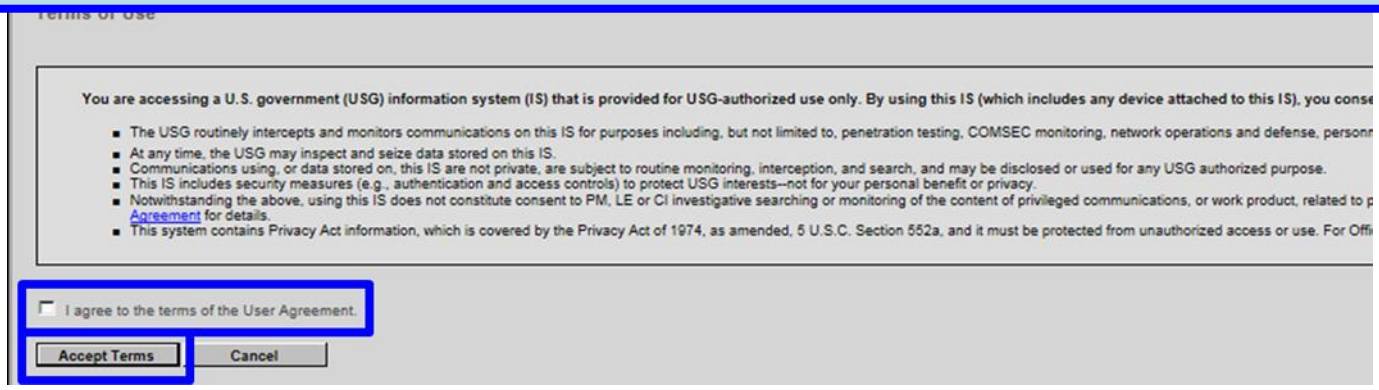
**Users must use the https://evaluations.hrc.army.mil/ web address to access EES.**

**Users must possess a valid DOD CAC.**

**Users will select their Digital Certificate and select *"OK."***




**After users select the appropriate CAC card certificate, the web address will take users to the *"Terms of Use"* page. Users will select *"I agree to the terms of the User Agreement"* and select *"Accept Terms."***



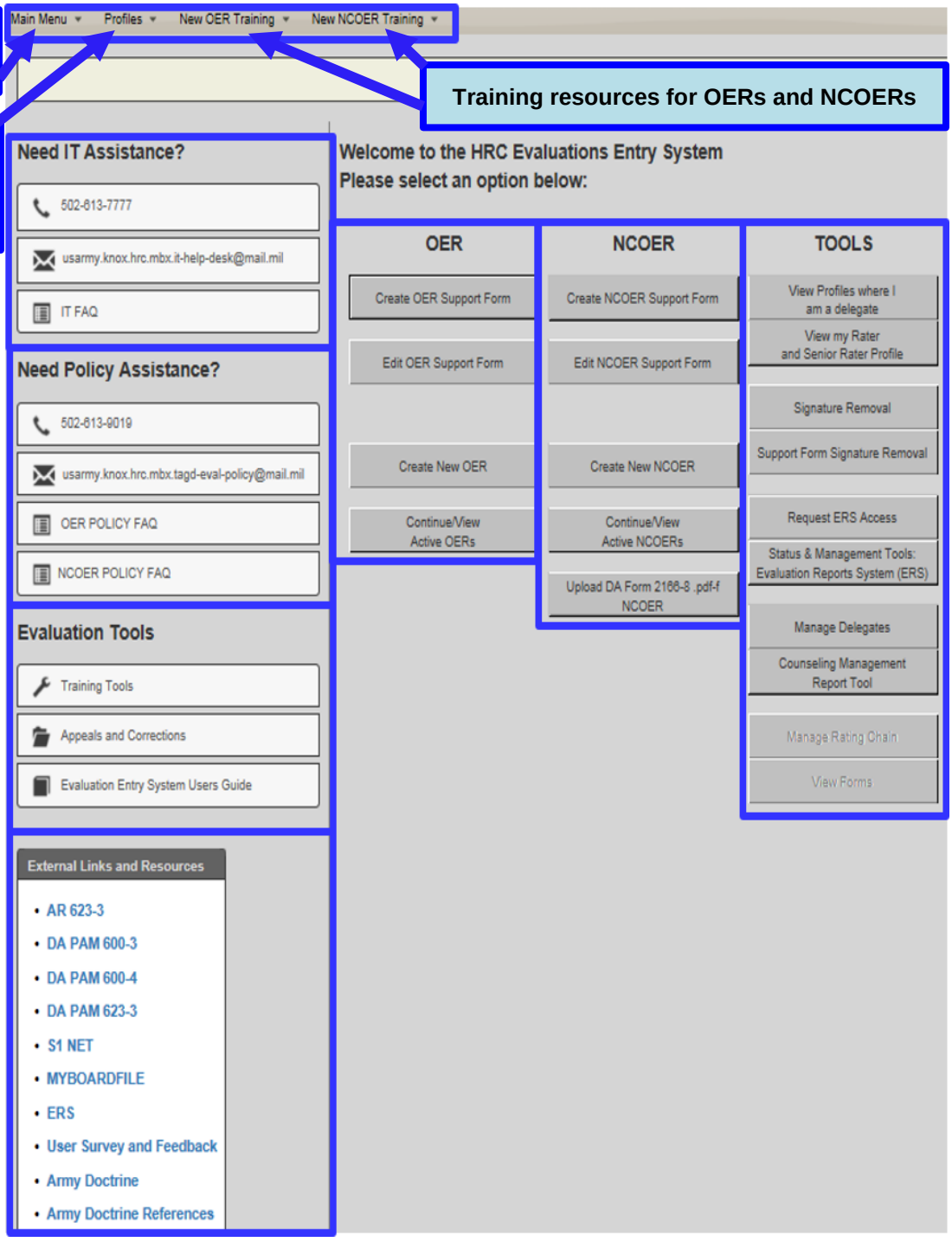
## Navigating EES

**Users can navigate EES's various functions from its *Home Page*.**

**To return "Home" or logout the system**

**To view your profile and/or the profiles of individuals that you are a delegate for**

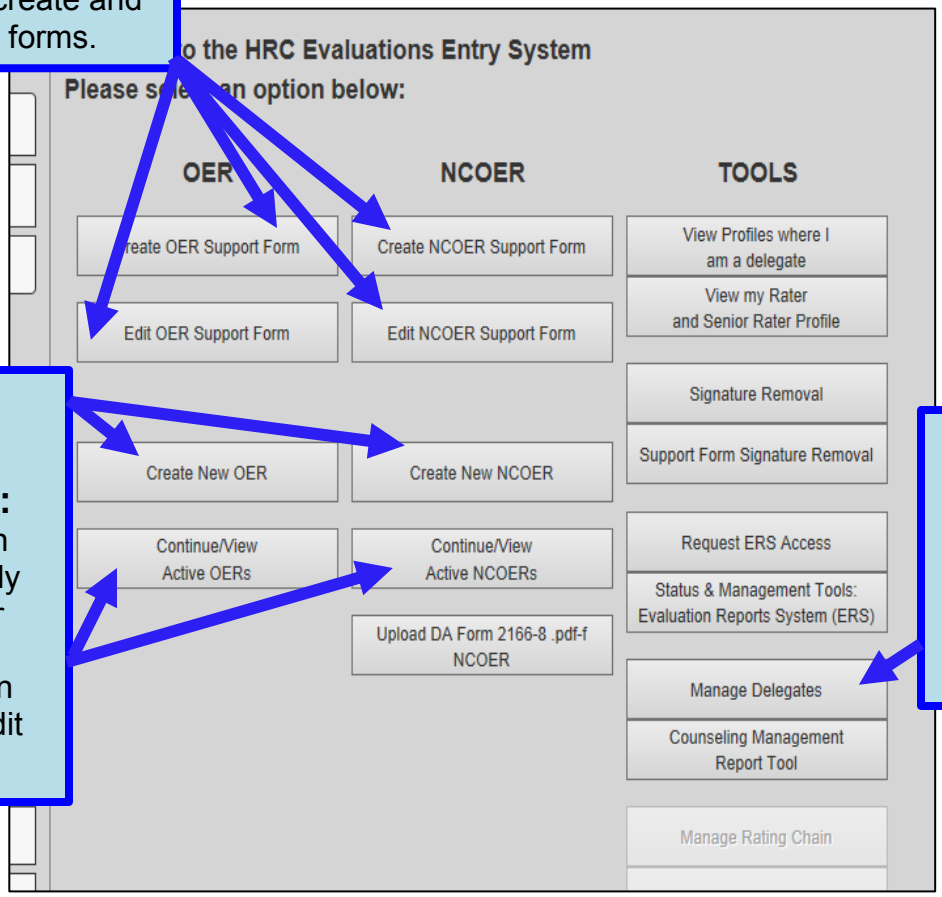
**Training resources for OERs and NCOERs**



**Create / Continue Support Form:**
ANYONE can create and edit support forms.

**Create / Continue Evaluation:**
ANYONE can create, but only Rater, Senior Rater, and Delegates can view and/or edit once saved.

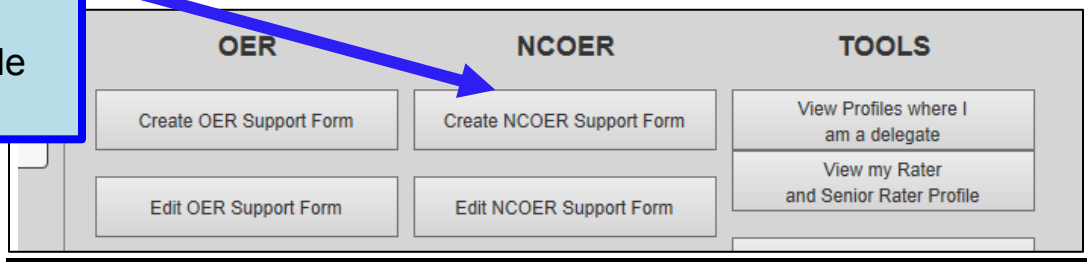
**Manage Delegates:**
Go here to assign delegates.

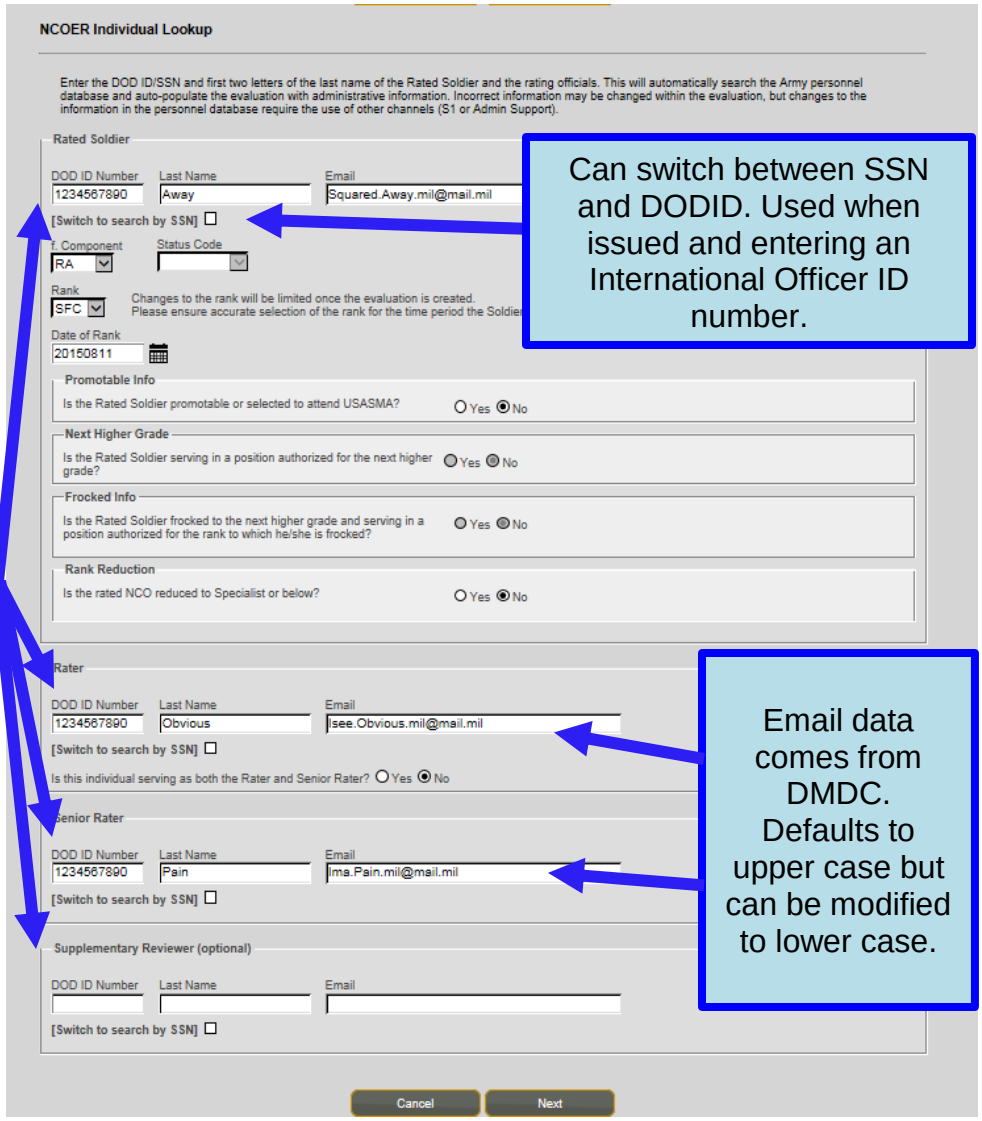



Creation of an NCOER Support Form and corresponding NCOER

## Creating a NCOER Support Form

**Create Support Form:**
Click on applicable button.



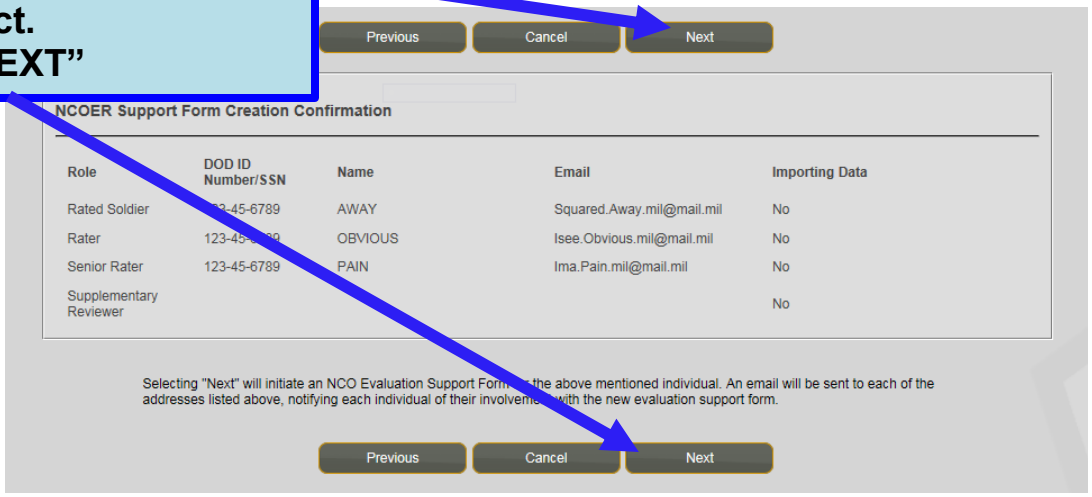



Can switch between SSN and DODID. Used when issued and entering an International Officer ID number.

**Enter applicable information for:** Rated NCO, Rater, Senior Rater, and Supplementary Reviewer (if applicable)

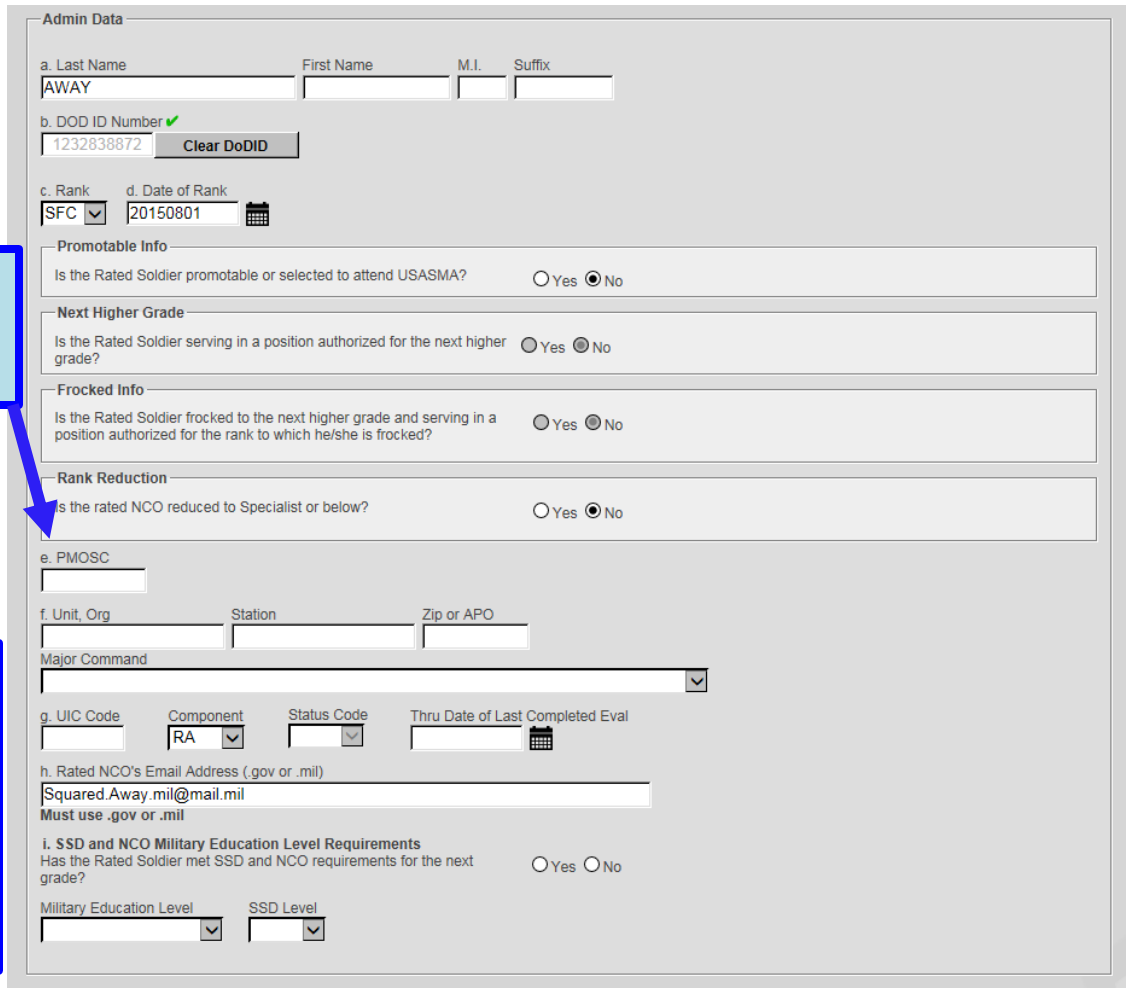
Email data comes from DMDC. Defaults to upper case but can be modified to lower case.

**Confirm applicable information is correct.**
**Click "NEXT"**

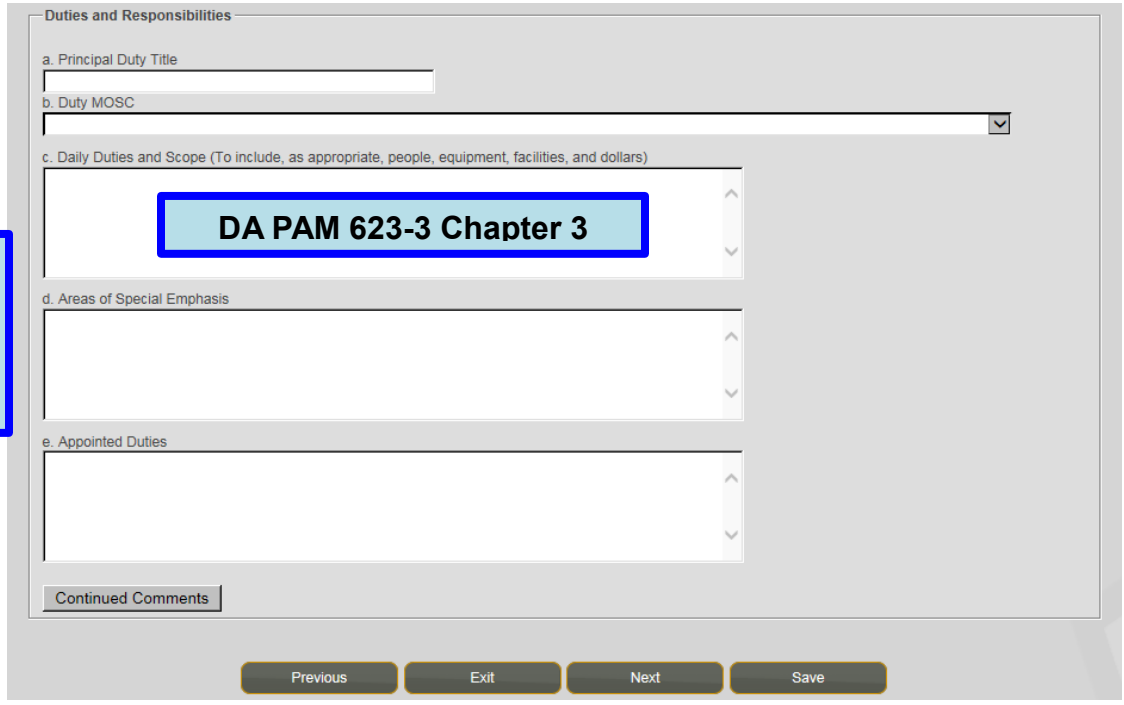


**Complete filling out the Part I Admin data.**

**Click "NEXT," and complete Part II Authentication (Rater/ Senior Rater/ Reviewer Info)**



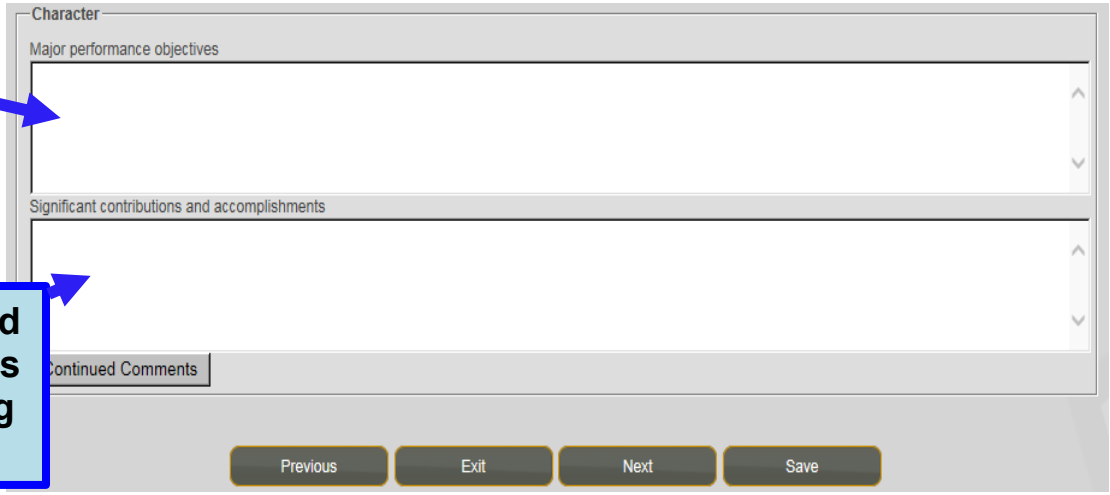

**Complete filling out the Part III – Duty Description.**



**Indicate your Performance Goals and Expectations During the Rating Period in Part IV – Performance Goals and Expectations.**

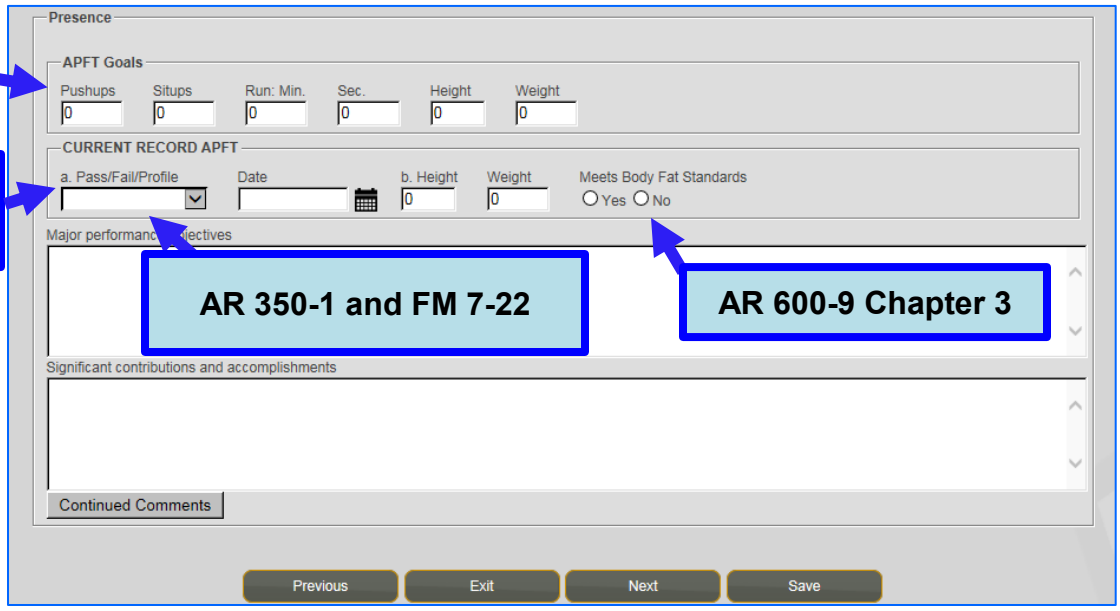
**Objectives to be accomplished during the Rating Period**

**Contributions and Accomplishments during the Rating Period**




**APFT Goals**

**Actual APFT Results**




**AR 350-1 and FM 7-22**

**AR 600-9 Chapter 3**

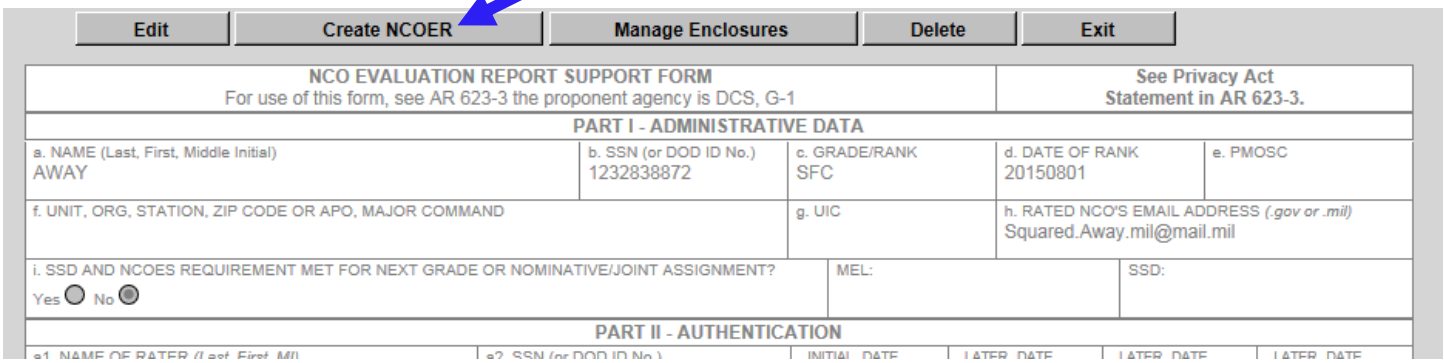
**Continue to indicate performance objectives and record significant contributions in Part V, blocks (c) - (f).**

**Senior Rater Comments in Part VI**

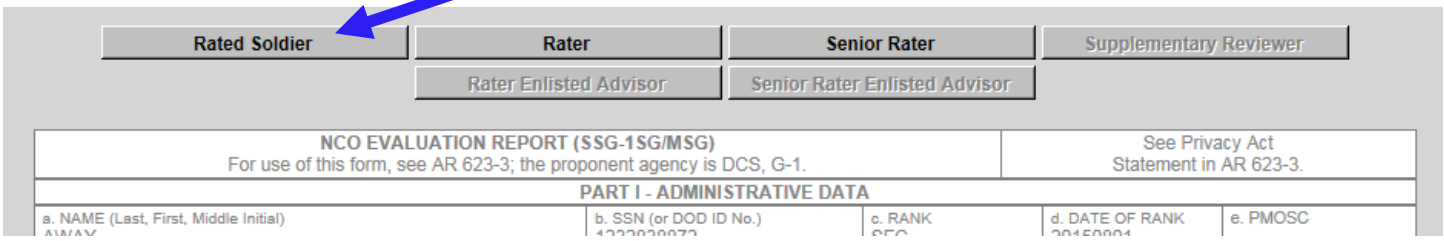
## Creating a NCOER

*Failing to comply with the error messages generated within EES could result in the inability to sign the evaluation or result in the evaluation being returned for corrections.

**Select the "Create NCOER" button on the top of the NCOER support form**

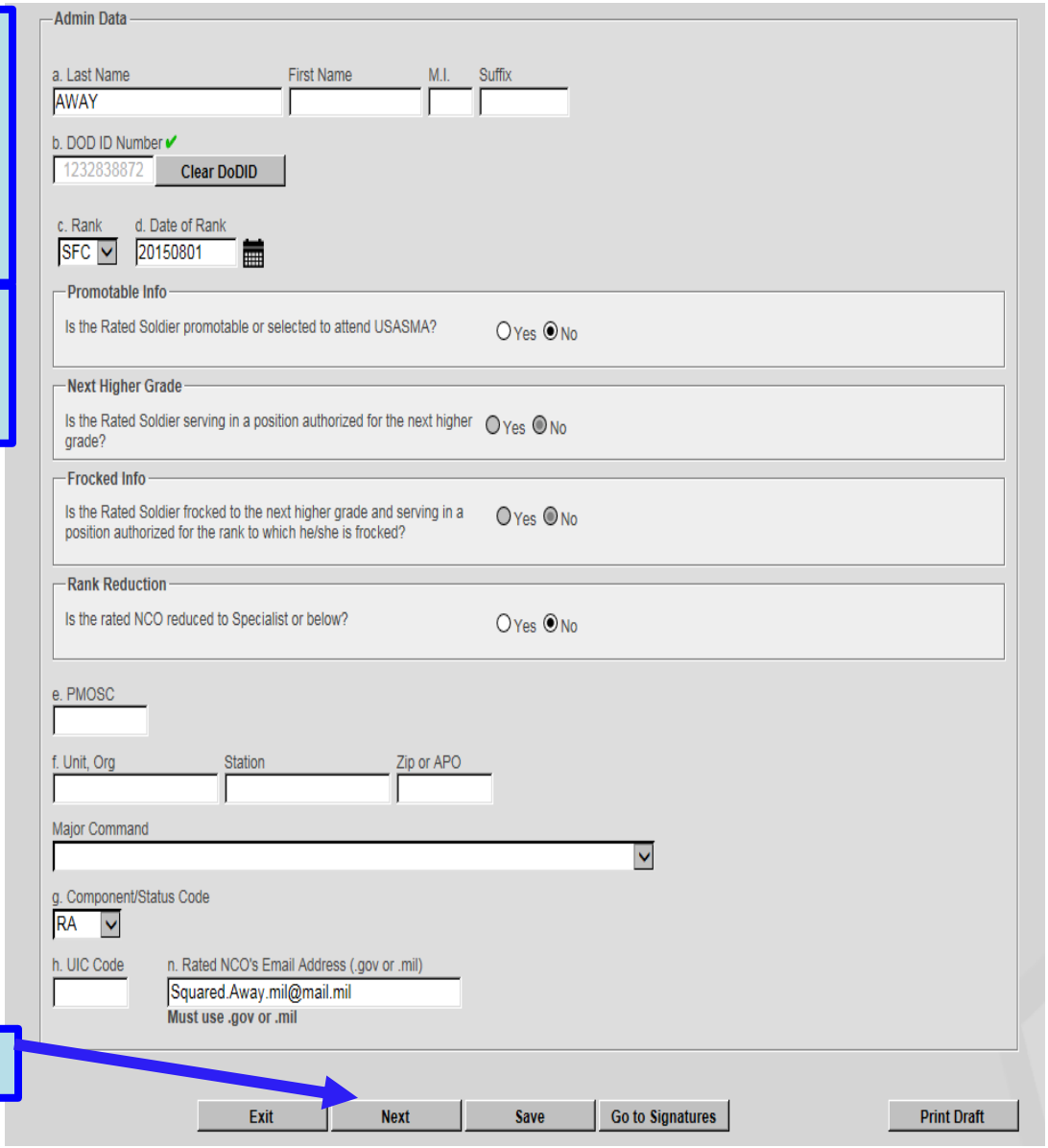



**Select the "Rated Soldier" button on the top of the NCOER**

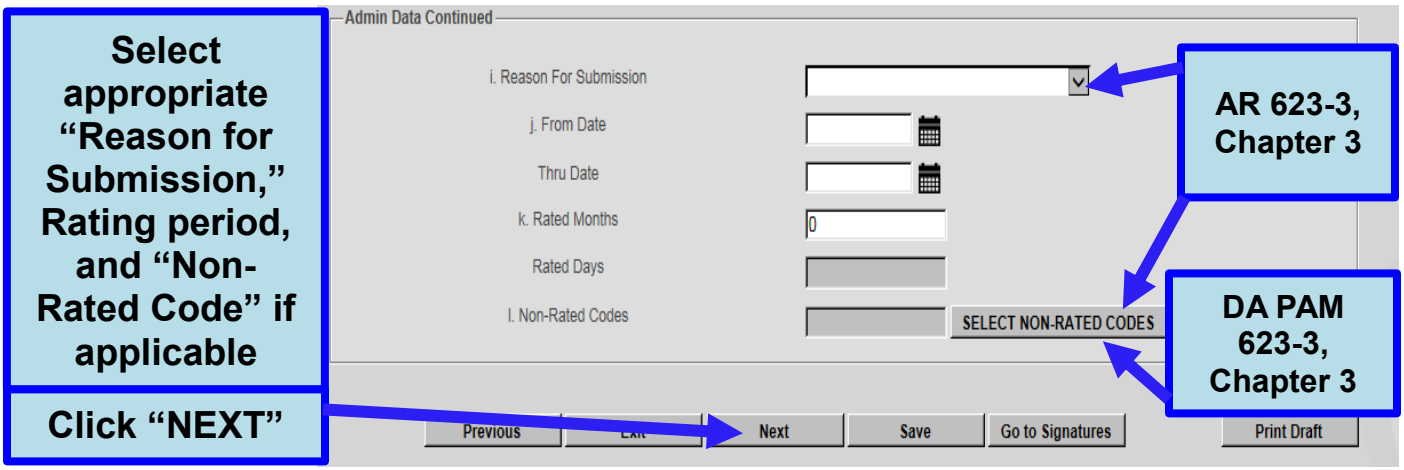


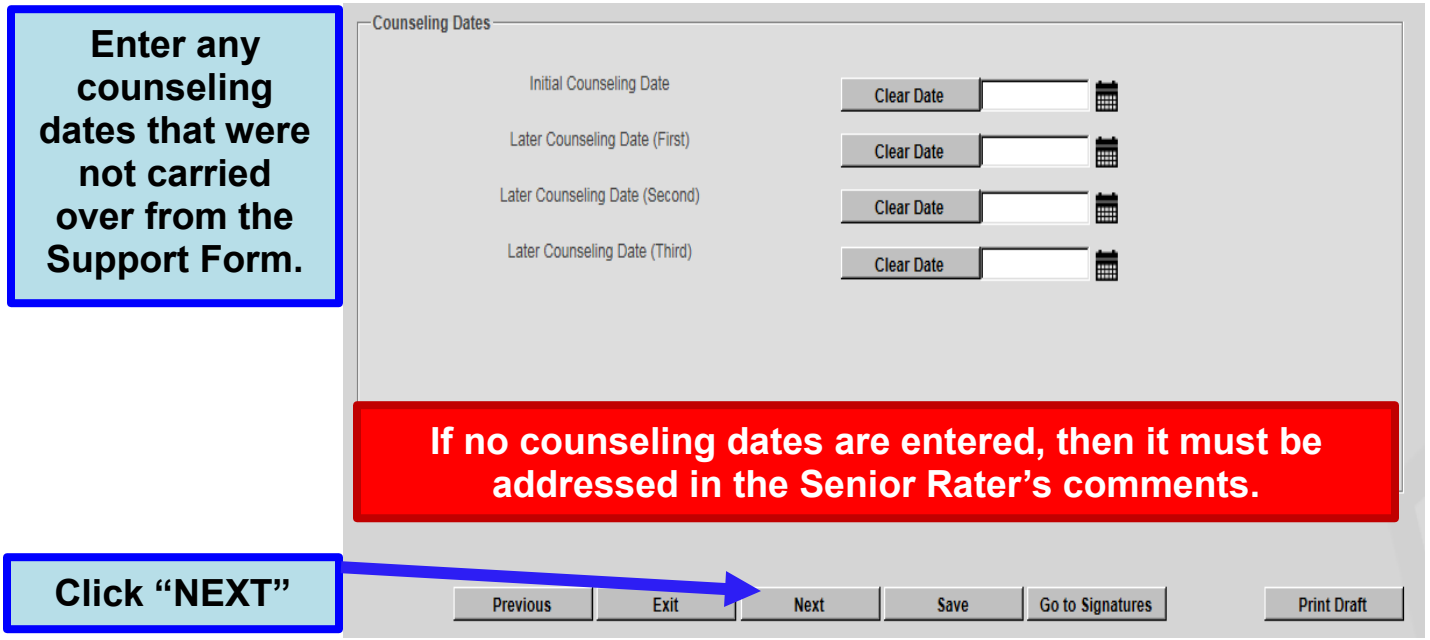
**Complete filling out any Admin data that was not carried over from the Support Form.**

**Refer to DA PAM 623-3, Chapter 3**

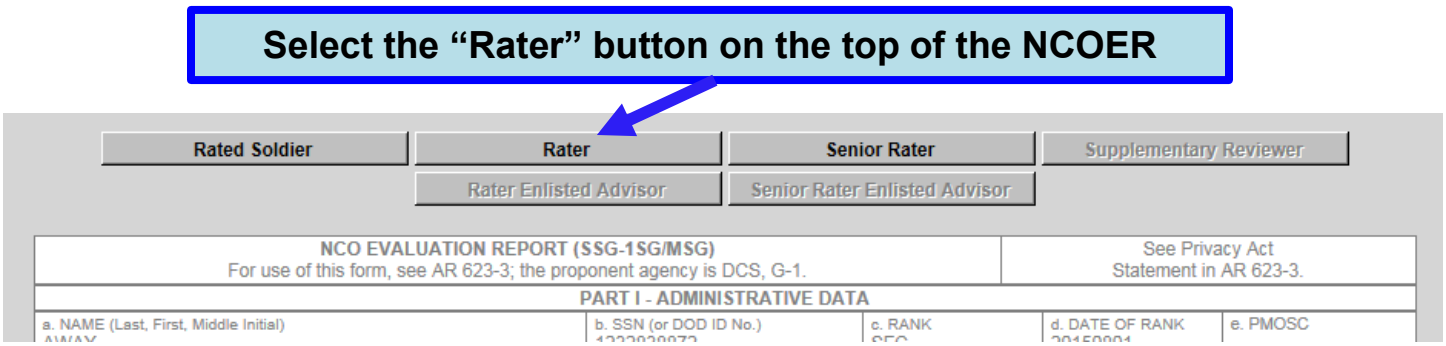



**Click "NEXT"**

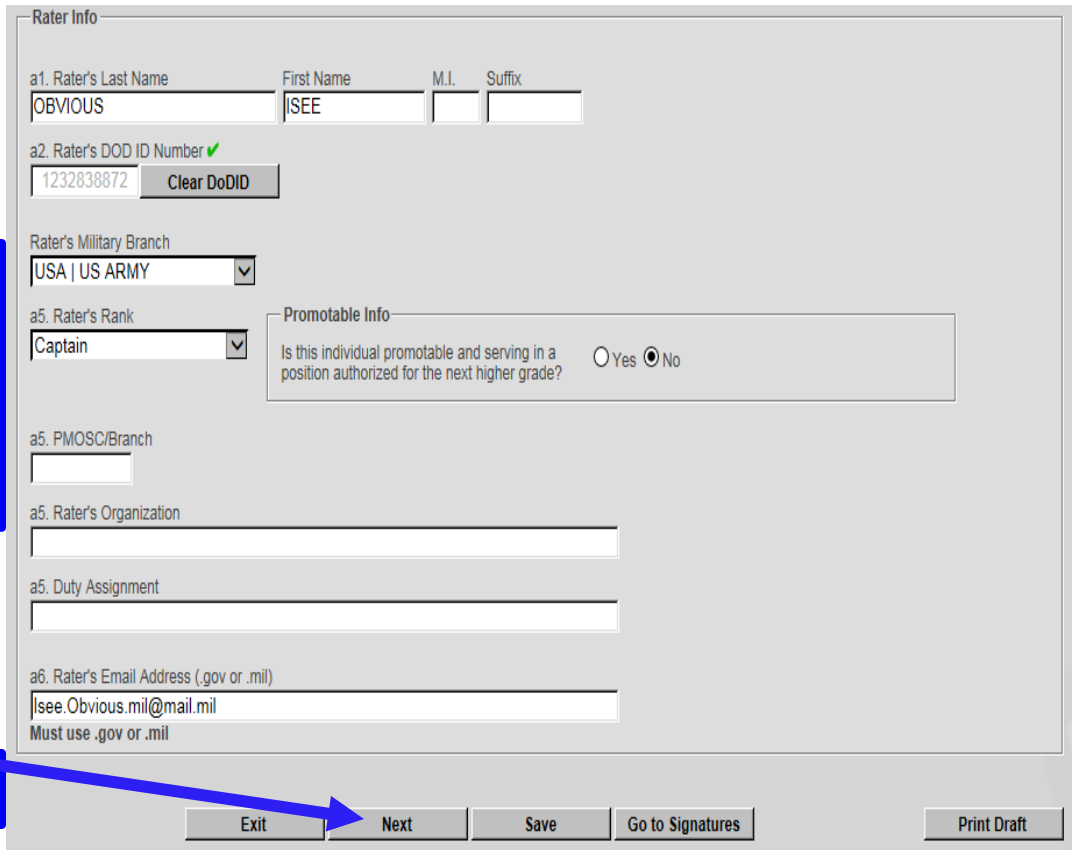



- AR 623-3, Chapter 3 - When applicable, enter a senior rater statement in part V, block b of the NCOER explaining the reason why counseling was not accomplished when counseling was not completed and counseling dates are omitted from the NCOER.



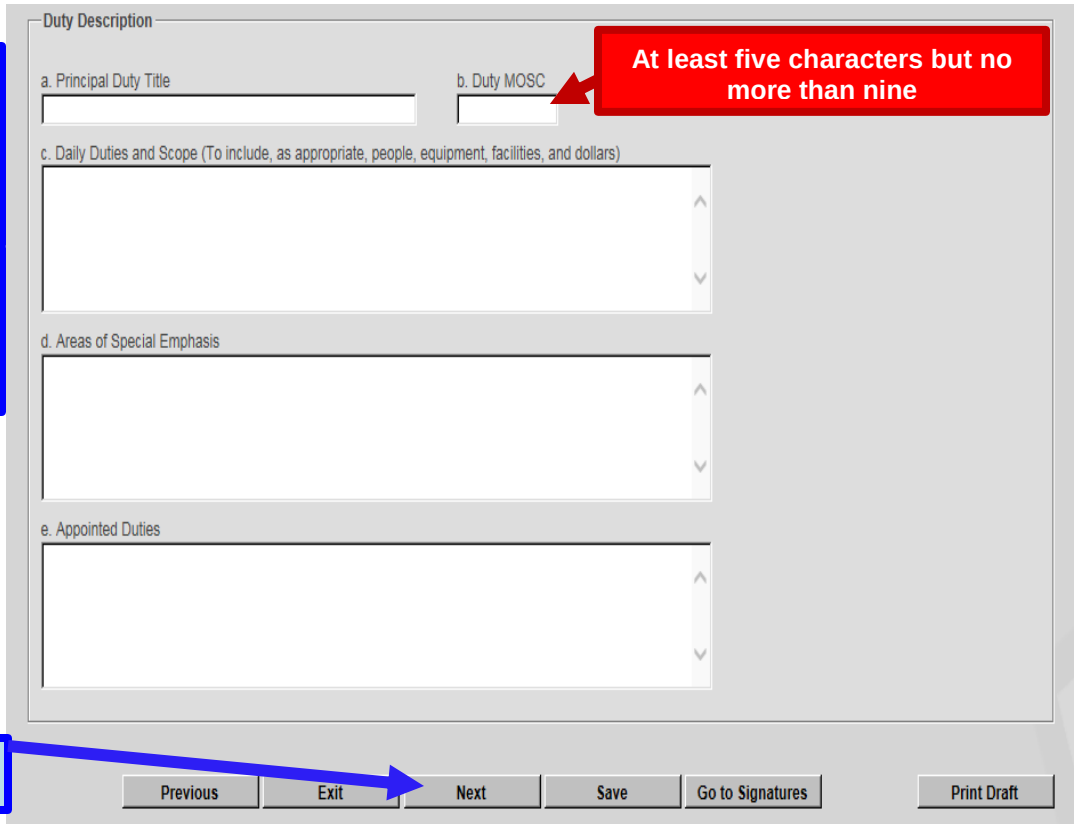
**Complete filling out any Admin data that was not carried over from the Support Form.**




**Click "NEXT"**

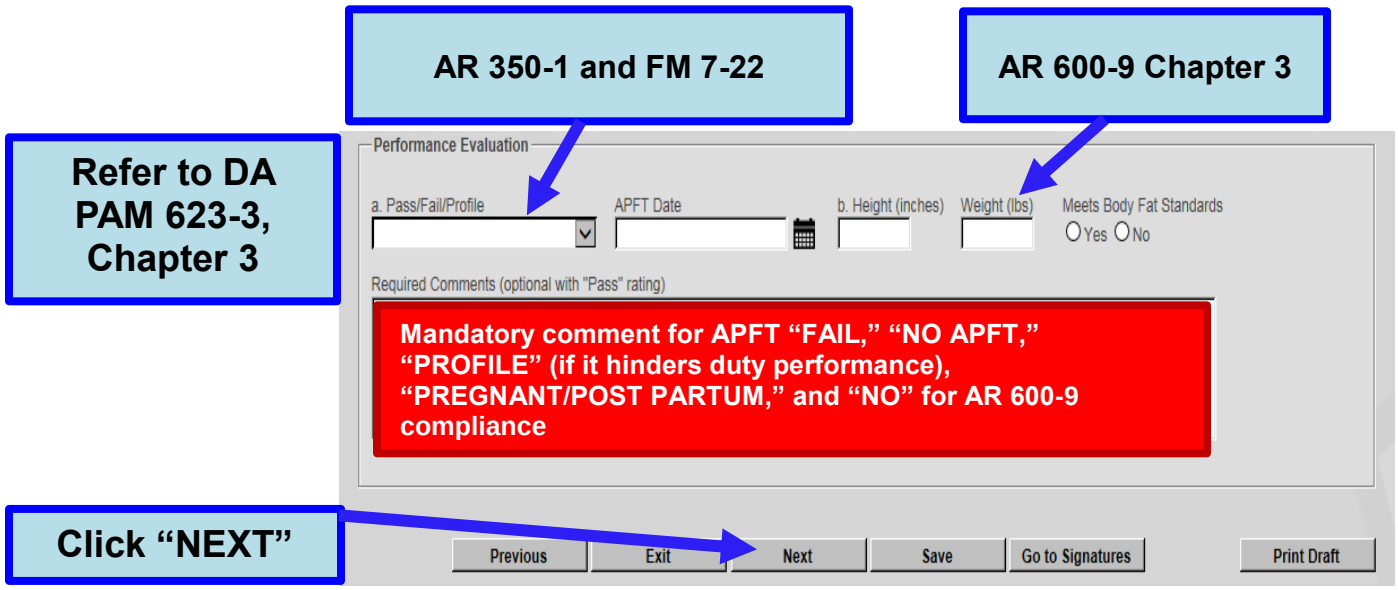
**Complete filling out the Duty Description**

**Refer to DA PAM 623-3, Chapter 3**

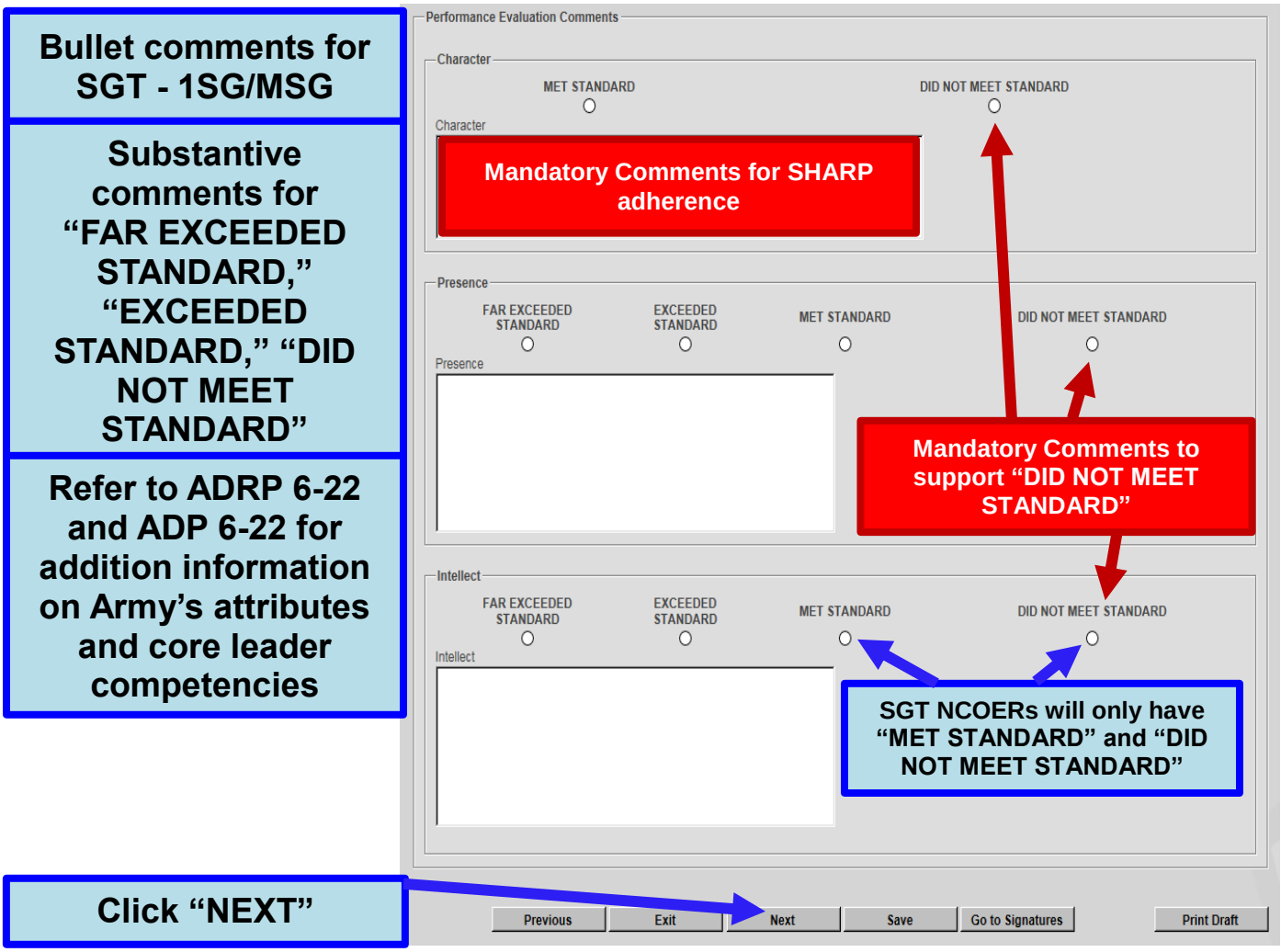



**Click "NEXT"**

- DA PAM 623-3, Chapter 3, block b—Duty MOSC - Enter duty military occupational specialty code (MOSC) (at least five characters but no more than nine). If ASI and/or language skill identifier are required, the duty MOSC will be either seven or nine characters; if the position does not require ASI or language skill identifier only five characters will be used. In cases where the rated NCO is filling an officer position, enter the enlisted MOSC that best matches the officer position.




- DA PAM 623-3, Chapter 3 - In the space after the word "APFT" the rater will enter "PASS" or "FAIL" and the date (YYYYMMDD) of the most recent record APFT administered by the unit; it will be within the 12–month period prior to the "THRU" date of NCOER. However, the APFT date does not have to fall within the period covered by the NCOER. If the NCO was unable to participate in the most recent record APFT (for example, due to a profile or pregnancy), his or her status at that time will be documented appropriately. The APFT for Soldiers without profiles consists of push-ups, sit-ups, and a 2–mile run.




- DA PAM 623-3, Chapter 3 - block c—Character - Rating officials will comment on how well the rated NCO promoted a climate of dignity and respect and adherence to the requirements of the SHARP Program. This assessment should identify, as appropriate, any significant actions or contributions the rated NCO made toward—

    1. Promoting the personal and professional development of subordinates.

    2. Ensuring the fair, respectful treatment of unit personnel.

    3. Establishing a workplace and overall command climate that fosters dignity and respect for all members of the unit.

    4. This assessment should also identify any failures by the rated NCO to foster a climate of dignity and respect and adherence to the SHARP Program.

- DA PAM 623-3, Chapter 3 - Bullet comments are mandatory regardless of the box check rating given (at least one bullet will be entered in each block of c through i). Standardized rules apply to bullet comments on NCOER. Bullet comments will—

    1. Be short, concise, to the point. Bullets will not be longer than two lines, preferably one, and no more than one bullet to a line.

    2. Start with action words (verbs) or possessive pronouns (his or her); personal pronouns (he or she) may be used; use past tense when addressing how the NCO performed and his or her contributions made during the rating period.

    3. Be double-spaced between bullets.

    4. Be preceded by a small letter “o” to designate the start of the comment. Each bullet comment must start with a small letter unless it is a proper noun (name) that is usually capitalized.

    5. Support the box checks by rating officials.

    6. Use a specific example only once; therefore, the rater must decide under which attribute and/or competencies the bullet fits best (or is most applicable).

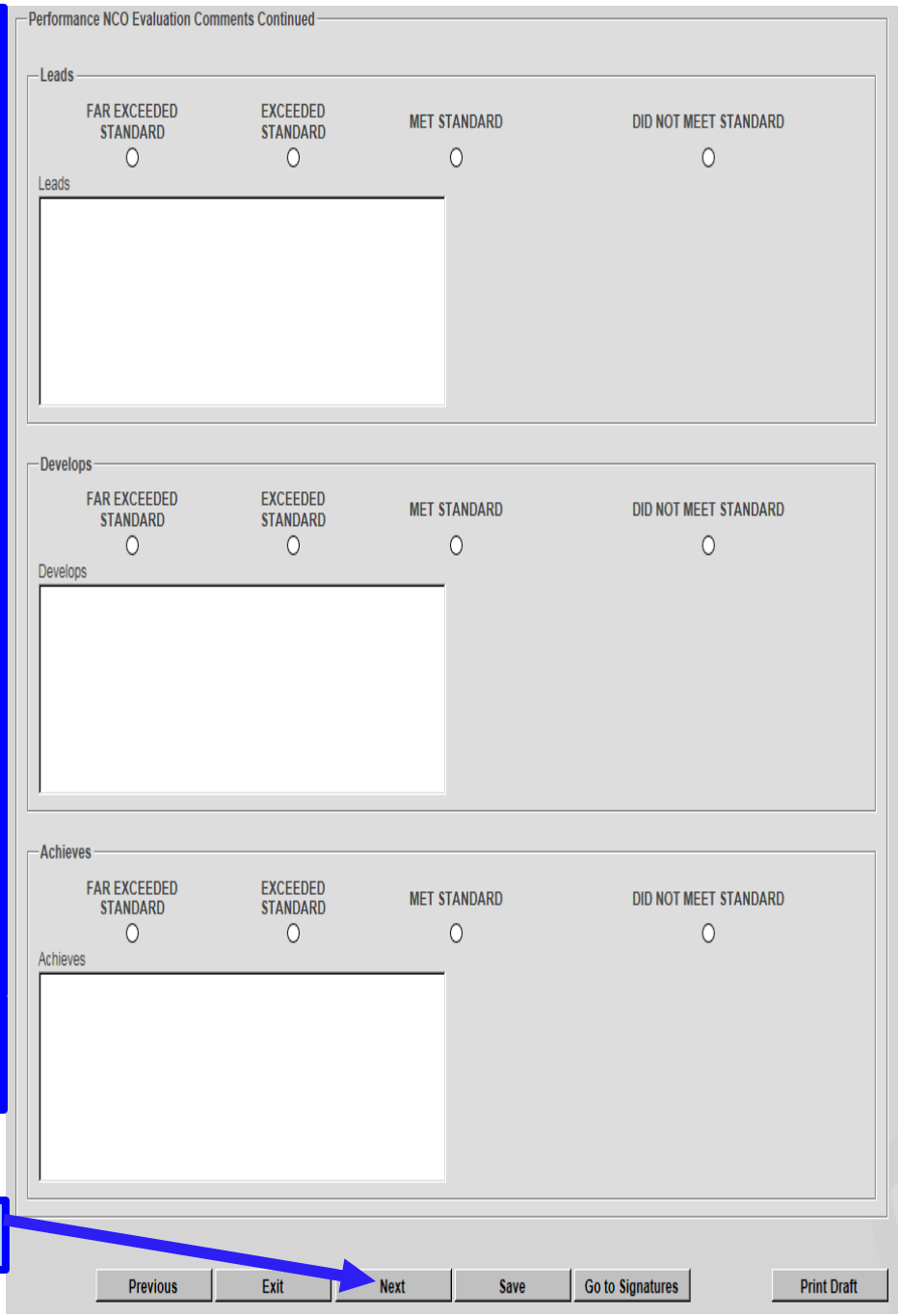
**Bullets should be short, concise, to-the-point comments starting with action words (verbs) or possessive pronoun (his or her). Bullet comments will not be longer than two lines.**

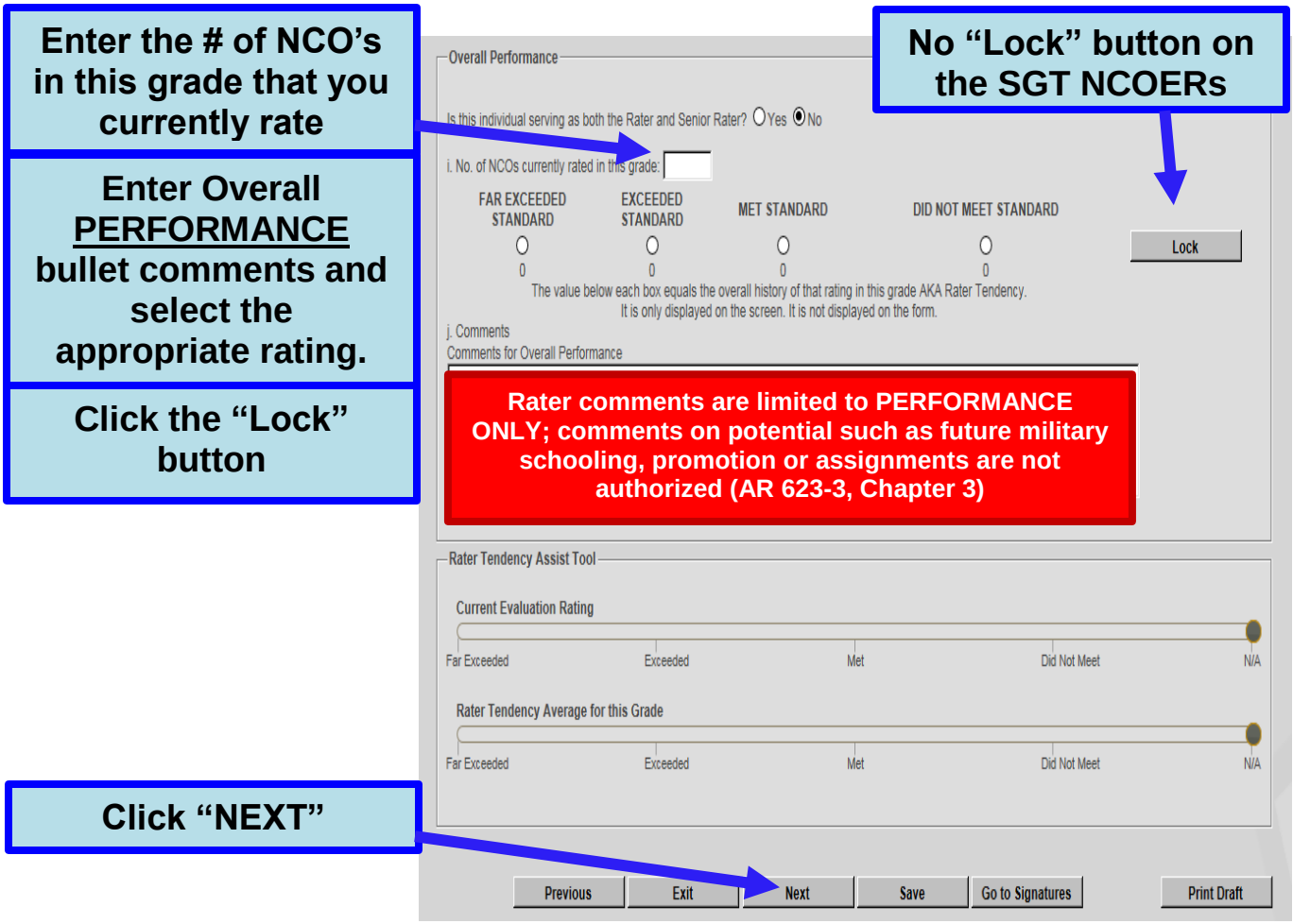
**Comments must be preceded by a small "o" and start with a small letter unless it is a proper noun that is usually capitalized.**

**Bullet comments must be double spaced between bullets and a specific bullet can only be used once.**

**DA PAM 623-3, Chapter 3**

**Click "NEXT"**



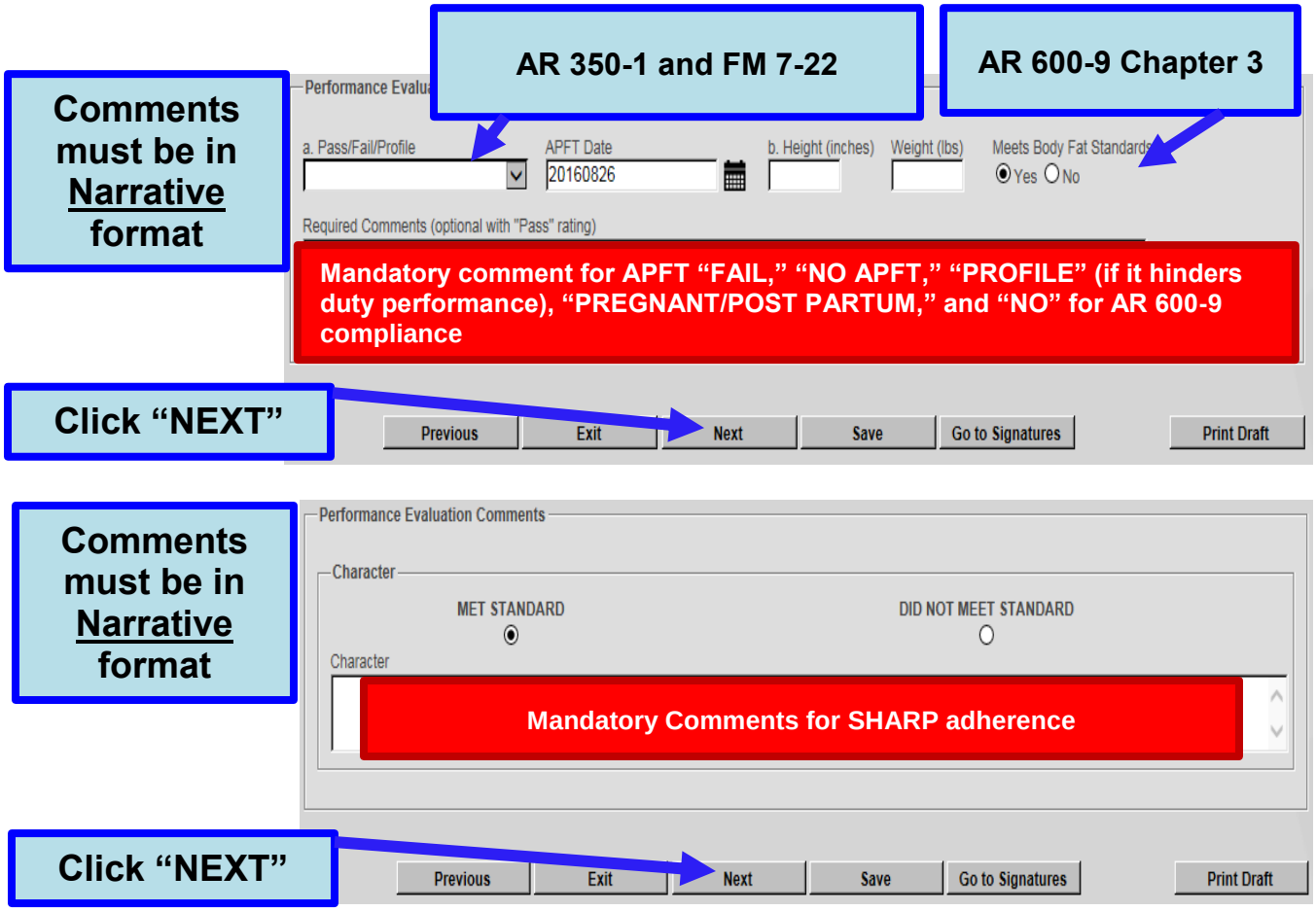



- DA PAM 623-3, Chapter 3 — Rater Overall Performance
    1. The rater makes an assessment of the rated NCO's overall **performance** when compared with all other NCOs of the same rank the rater has previously rated or currently has in his or her rated population. This **performance** is evaluated in terms of the majority of NCOs in the rater's population. If the **performance** assessment is consistent with the majority of NCOs in that grade the rater will place an "X" in the "MET STANDARD" box. If the rated NCO's performance exceeds that of the majority of NCOs in the rater's population, the rater will place an "X" in the "EXCEEDED STANDARD" or "FAR EXCEEDED STANDARD" box. (The intent is for raters to use these two boxes when identifying the upper third of NCOs for each rank, with further stratification of the upper third of NCOs placed within the "FAR EXCEEDED STANDARD" box). If the rated NCO's **performance** is below the majority of NCOs in the rater's population for that grade and the rater believes the rated NCO should be further developed, and/or the rated NCOs **performance** has not met standards required of an Army NCO, the rater will place an "X" in the "DID NOT MEET STANDARD" box.
    2. An assessment of "DID NOT MEET STANDARD" in previous blocks c through h by the rater results in only an overall **performance** assessment of "MET STANDARD" or "DID NOT MEET STANDARD" able to be rendered by the rater.

3. Bullet comments are mandatory and should compare the **performance** of the rated NCO with his or her contemporaries during the evaluation period (see AR 623-3). The focus is on **performance** results achieved and the manner by which they were achieved.

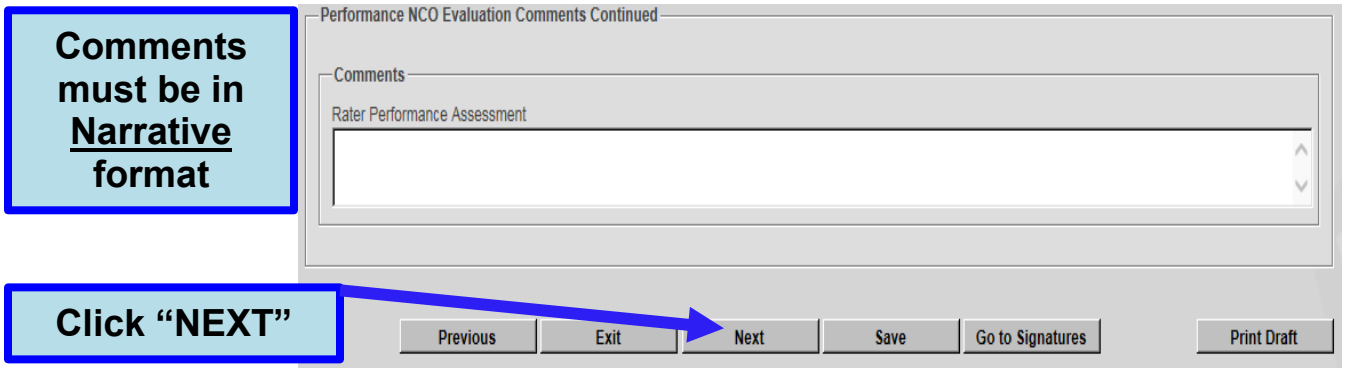
The Rater can now click on the "Click Here to Sign" button on the evaluation and sign the NCOER.

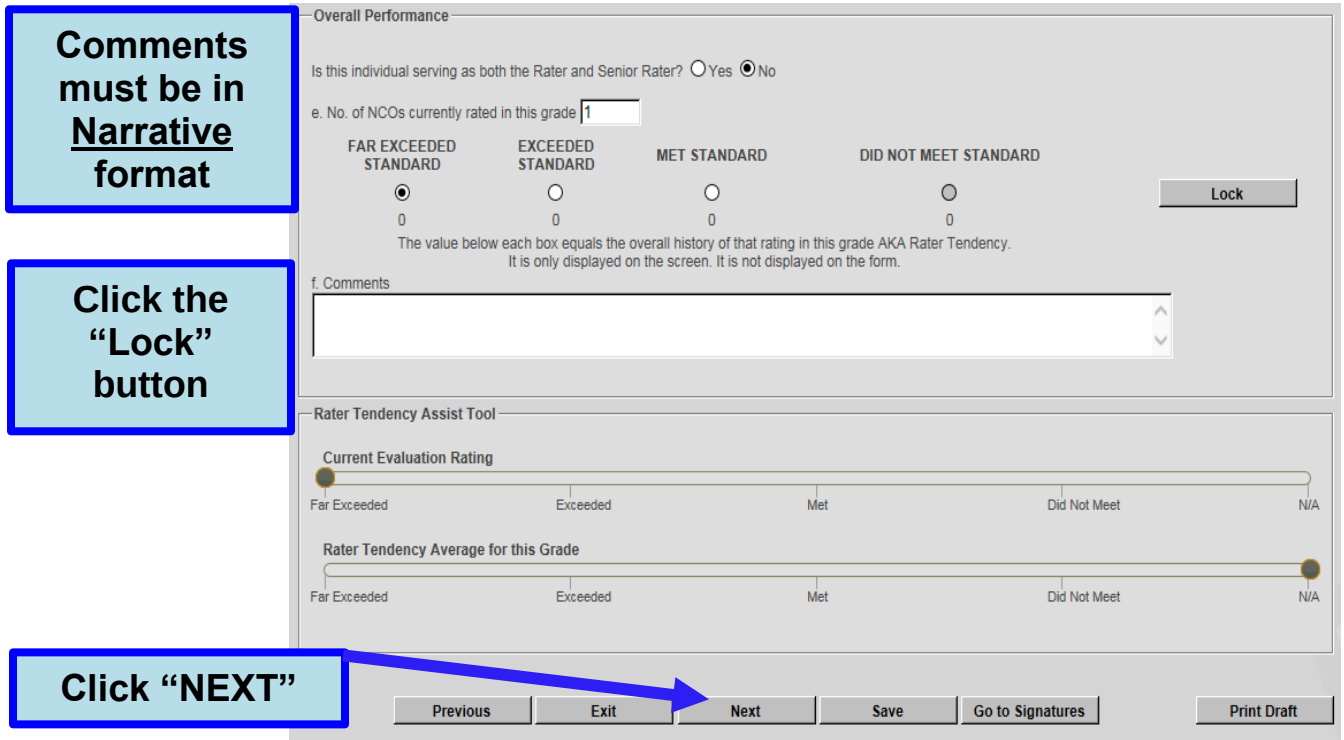
**SGM/CSM NCOER Part IV**
(Refer to DA PAM 623-3, Chapter 3)




- DA PAM 623-3, Chapter 3 - In the space after the word "APFT" the rater will enter "PASS" or "FAIL" and the date (YYYYMMDD) of the most recent record APFT administered by the unit; it will be within the 12–month period prior to the "THRU" date of NCOER. However, the APFT date does not have to fall within the period covered by the NCOER. If the NCO was unable to participate in the most recent record APFT (for example, due to a profile or pregnancy), his or her status at that time will be documented appropriately. The APFT for Soldiers without profiles consists of push-ups, sit-ups, and a 2–mile run.

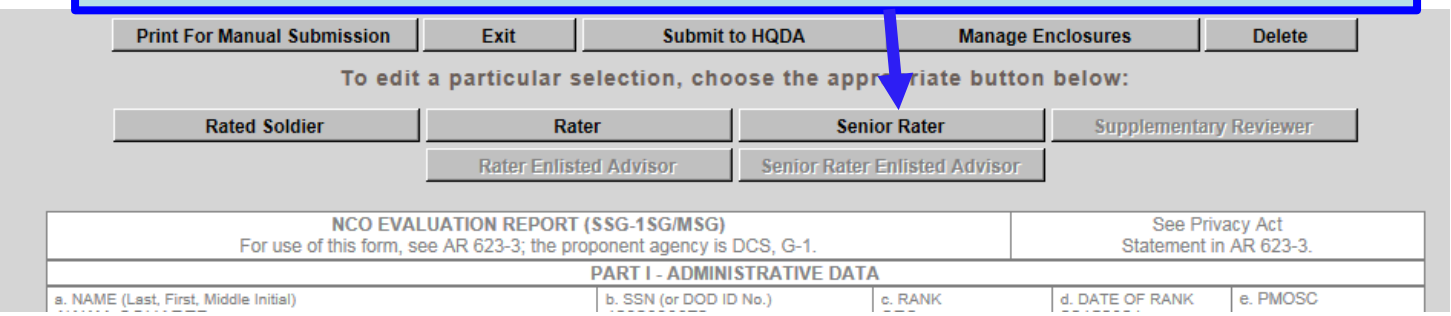
- DA PAM 623-3, Chapter 3 - block c—Character - Rating officials will comment on how well the rated NCO promoted a climate of dignity and respect and adherence to the requirements of the SHARP Program. This assessment should identify, as appropriate, any significant actions or contributions the rated NCO made toward—
    1. Promoting the personal and professional development of subordinates.
    2. Ensuring the fair, respectful treatment of unit personnel.
    3. Establishing a workplace and overall command climate that fosters dignity and respect for all members of the unit.
    4. This assessment should also identify any failures by the rated NCO to foster a climate of dignity and respect and adherence to the SHARP Program.



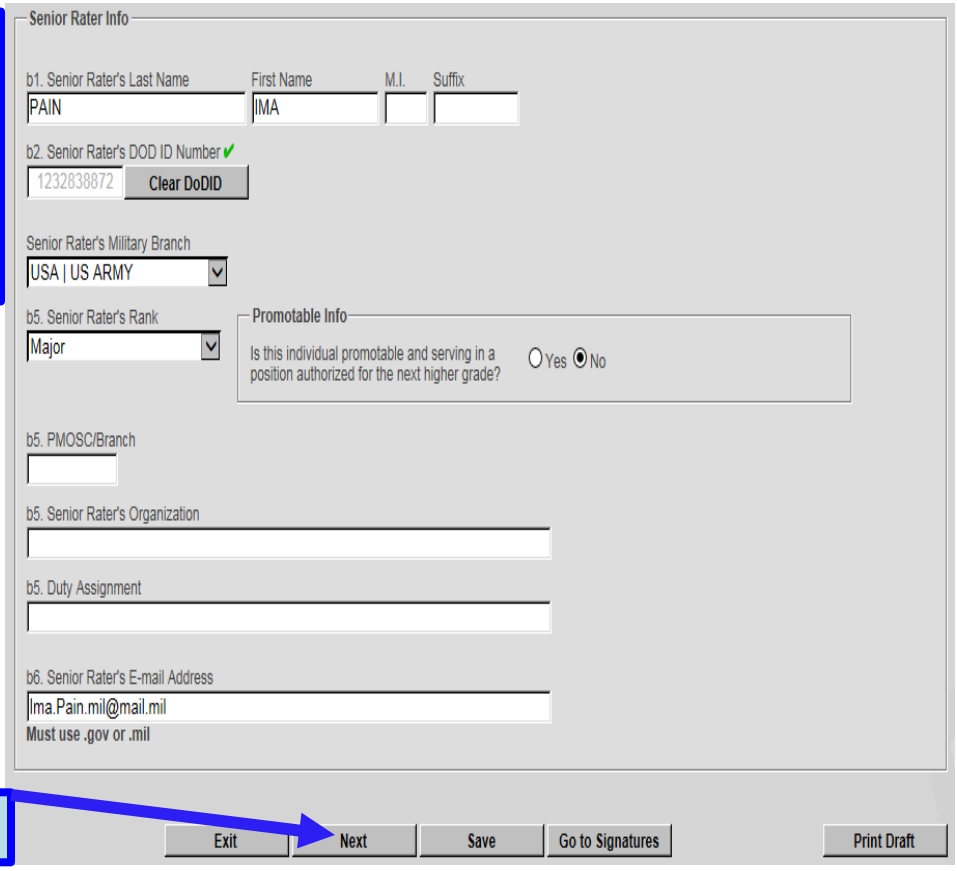



**The Rater can now click on the "Click Here to Sign" button on the evaluation and sign the NCOER.**

**Click the "Senior Rater" button**




**Complete any administrative data that was not carried over from the NCOER support form.**



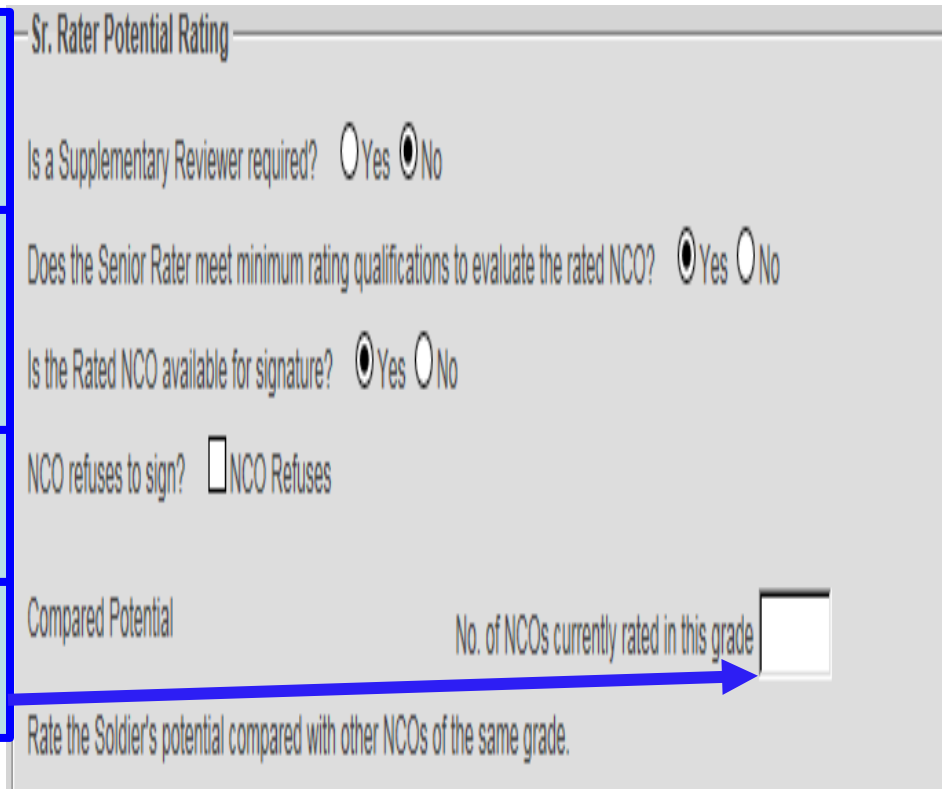

**Click "NEXT"**

**Determine if a Supplementary Reviewer is required (AR 623-3, Chapter 2)**

**Is the Rater and/or Senior Rater an Army: E-9, CW-3 thru CW-5, or O-3 or higher?**

**AR 623-3, Chapter 2 for Senior Rater qualifications**

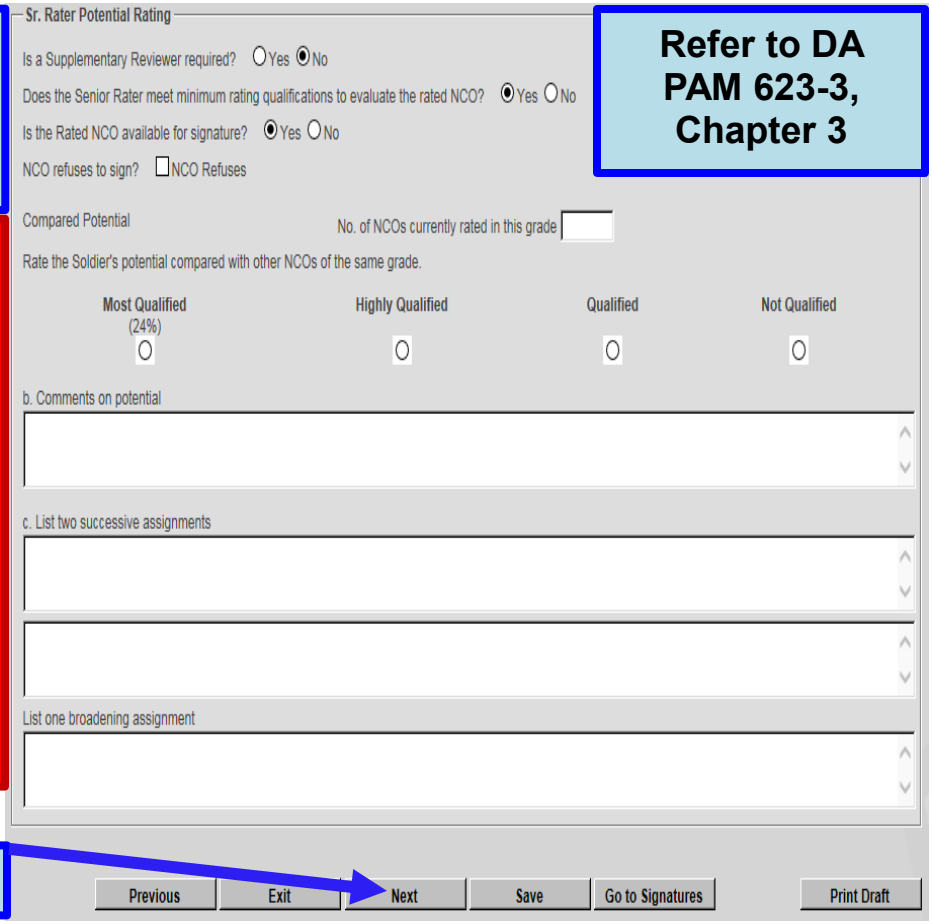
**Enter the # of NCOs in this grade that you currently rate**



**Senior Rater comments must address the Soldier's potential.**

**Cannot mention box check or board language in the narrative (i.e., "MOST QUALIFIED NCO", "6+ NCO", "If my profile allowed, I would rate this NCO higher."); these are considered prohibited narrative**

**Refer to DA PAM 623-3, Chapter 3**




**Click "NEXT"**

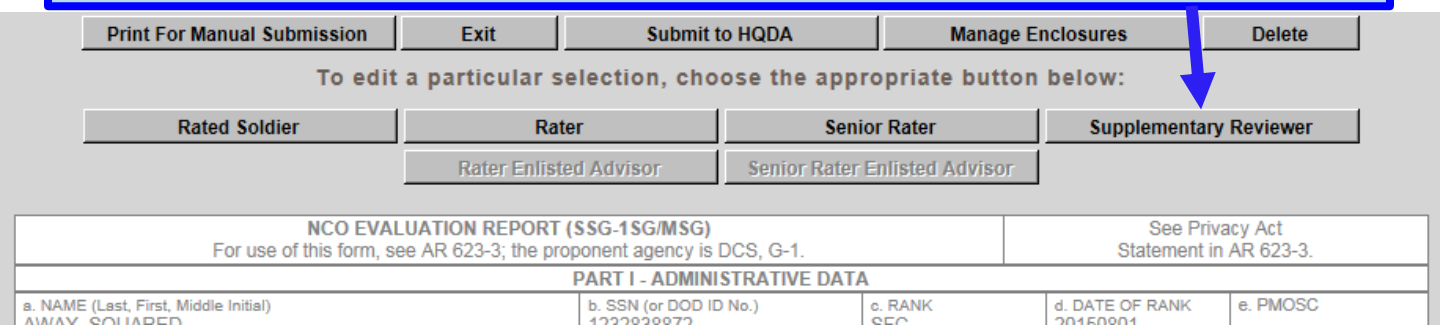
- AR 623-3, Chapter 3 - Any technique aimed at making specific words, phrases, or sentences stand out from the rest of the narrative, including, but not limited to the following: Inappropriate references to box checks (OERs and NCOERs) (for example, a senior rater may not refer to the box check that would have been given to a rated officer or NCO if his or her profile supported it, or characterization of the rated officer or NCO as a "top box", "MOST QUALIFIED",). Specific selection board-type language. Examples of this include, "definitely a 6+ Soldier".

**The Senior Rater can now click on the "Click Here to Sign" button on the evaluation and sign the NCOER.**

**The Rater Soldier can now click on the "Click Here to Sign" button on the evaluation and sign the NCOER.**

**If a Supplementary Reviewer is not required (AR 623-3, Chapter 2), the evaluation can now be submitted to HQDA for processing.**

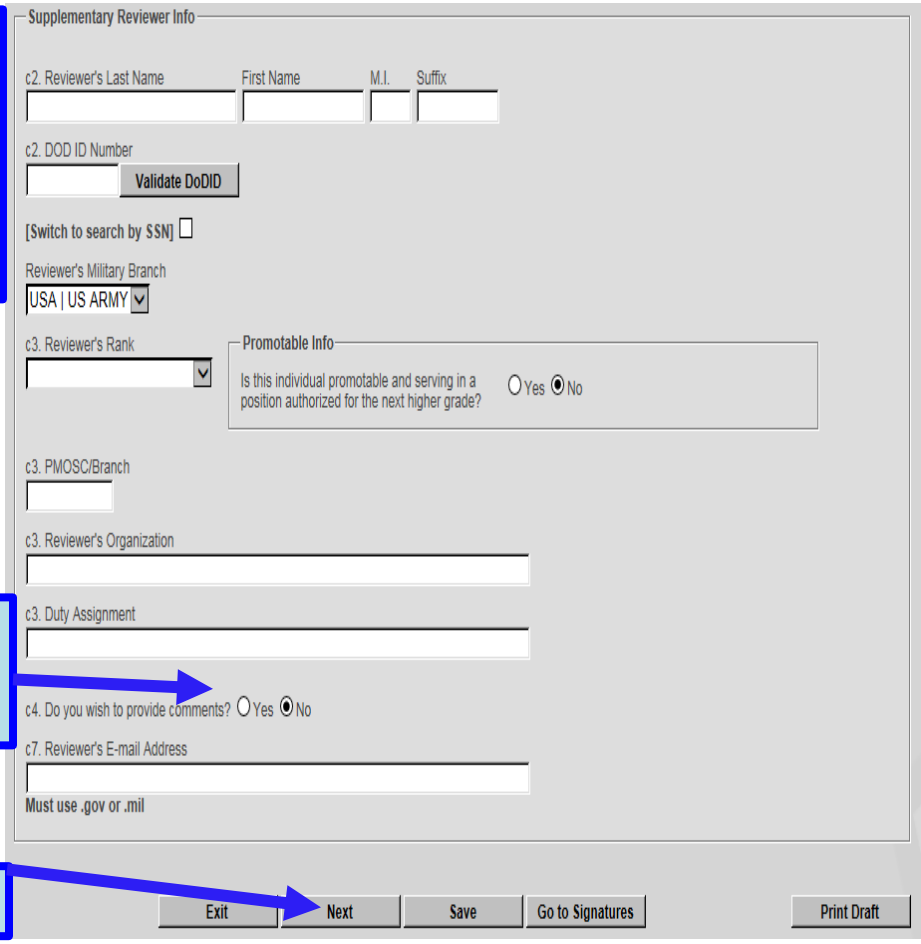
**Click the "Supplementary Reviewer" button, if applicable**




**Complete any administrative data that was not carried over from the NCOER support form.**

**Indicate if you desire to provide any comments**

**Click "NEXT"**

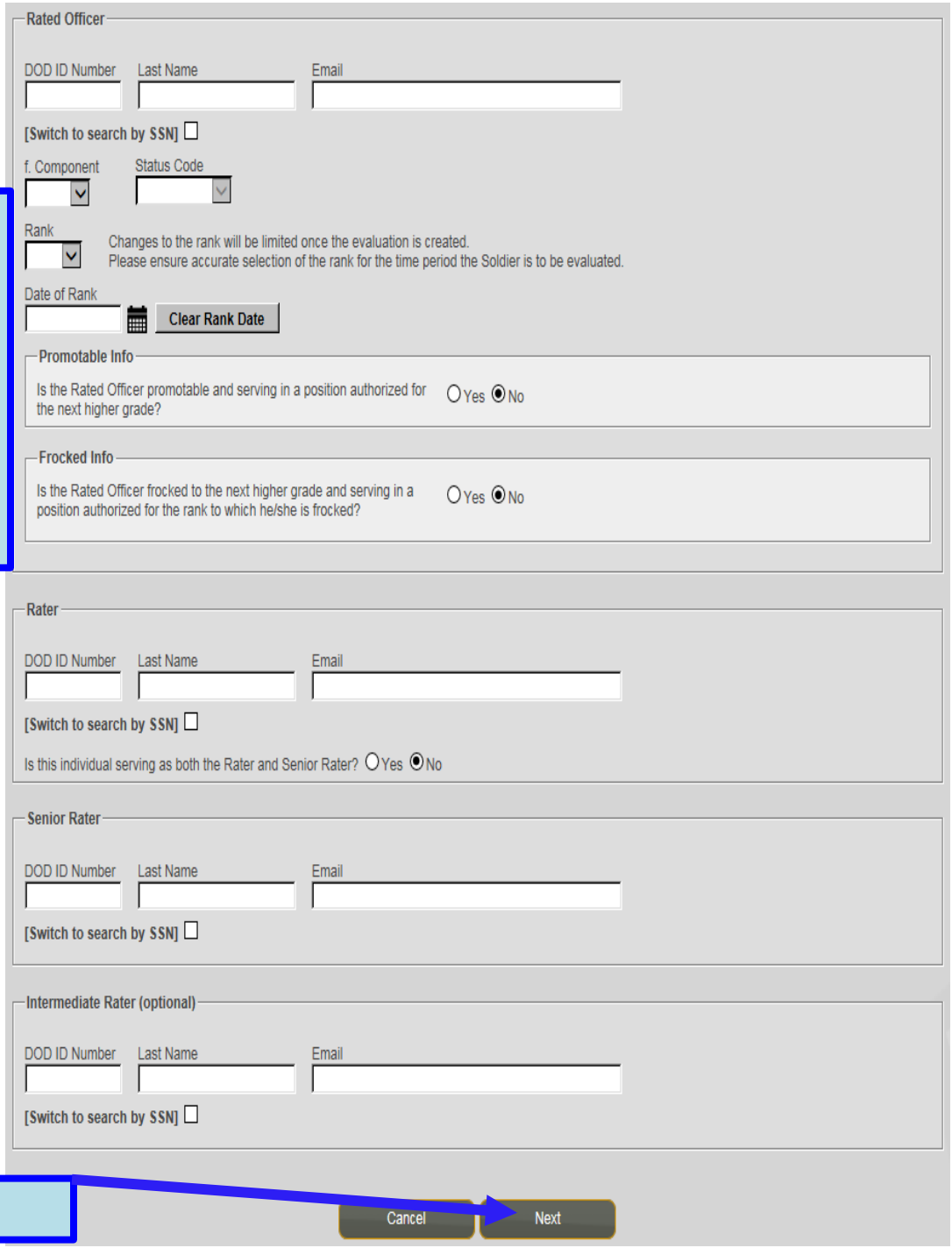



**The Supplementary Review can now click on the "Click Here to Sign" button on the evaluation and sign the NCOER.**

**The evaluation can now be submitted to HQDA for processing**

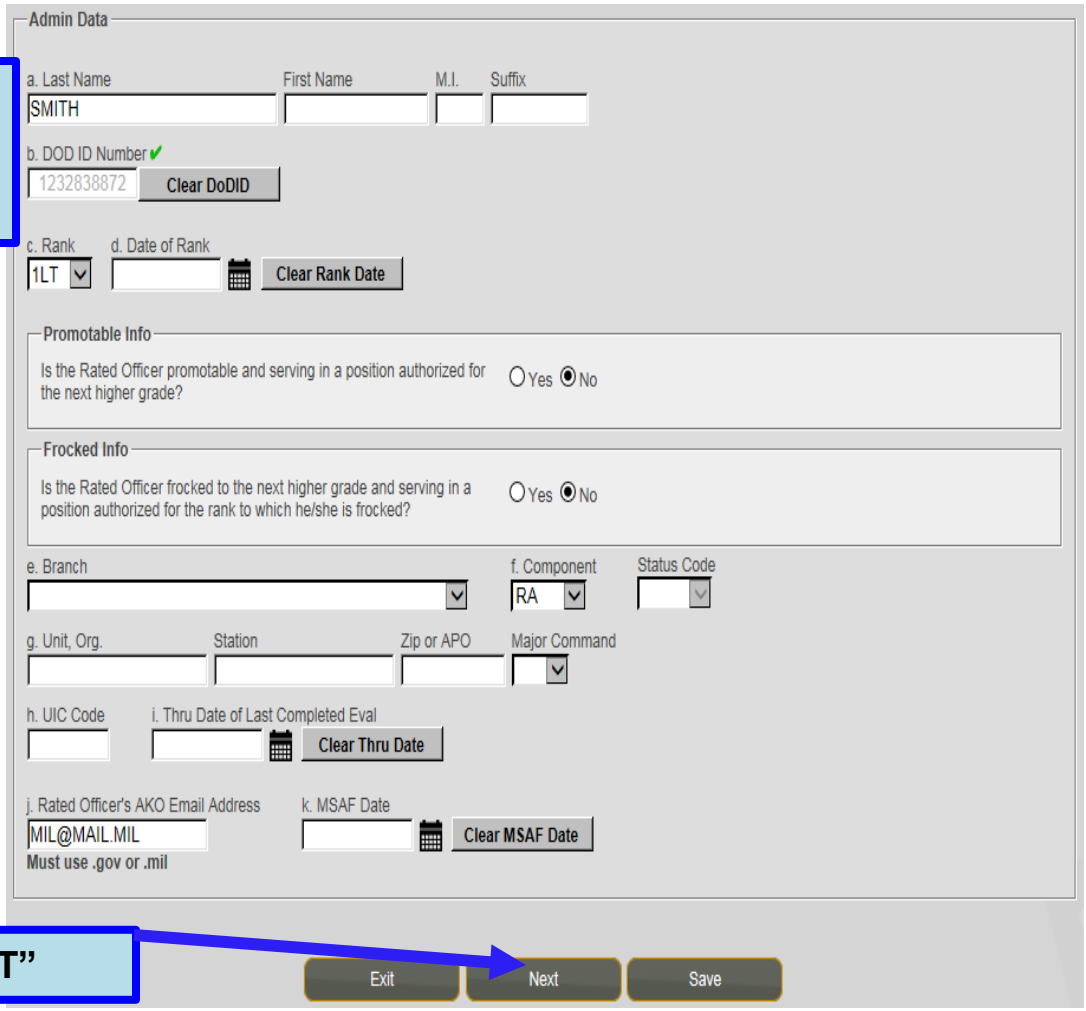
## Creating an OER Support form

**Enter applicable information for:**
Rated Officer,
Rater,
Senior Rater, and
Intermediate Rater
(if applicable)



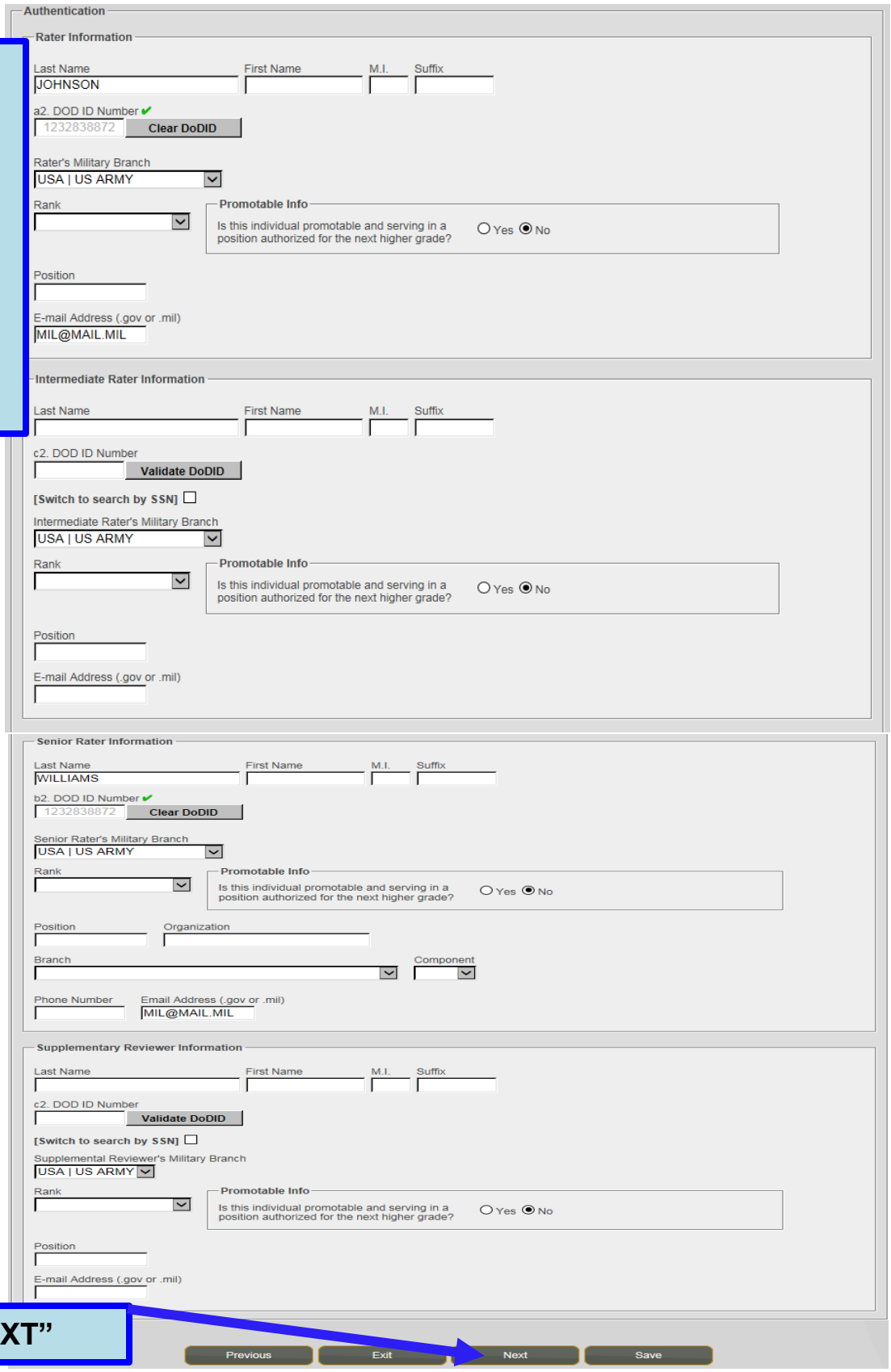

**Click "NEXT"**

**Complete the Admin Data for the Rated Officer**




**Click "NEXT"**

**Complete the Admin Data for the Rater, Senior Rater, Intermediate Rater (if applicable), and Supplementary Reviewer (if applicable)**

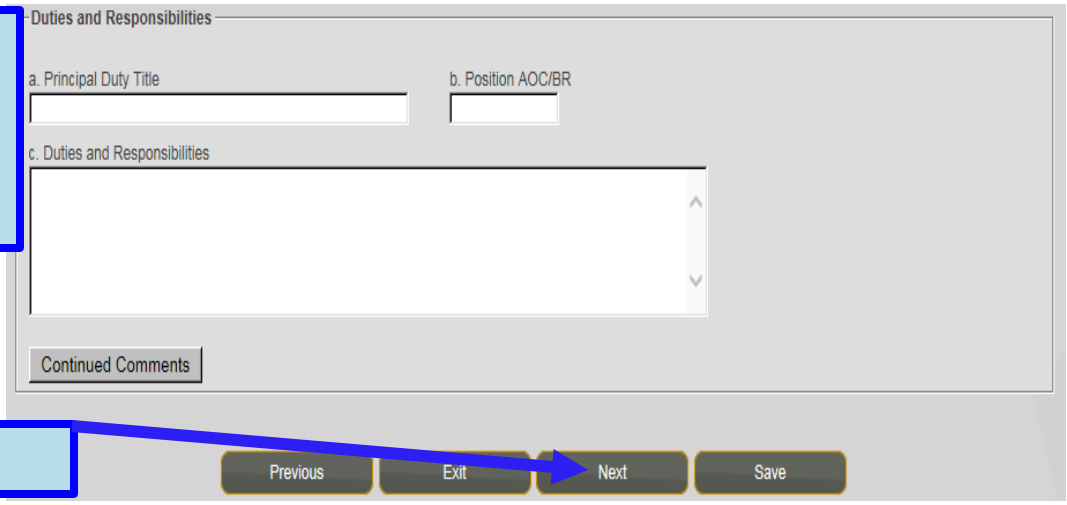



**Click "NEXT"**

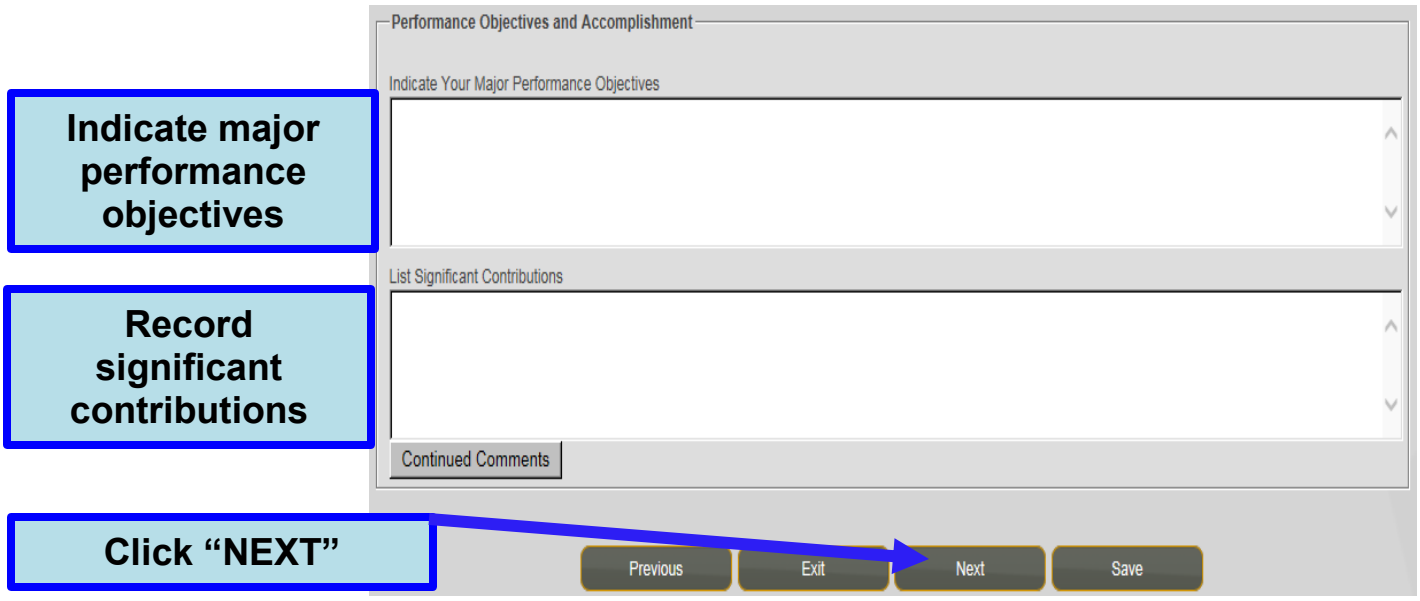
**Enter appropriate Counseling dates**

**Click "NEXT"**

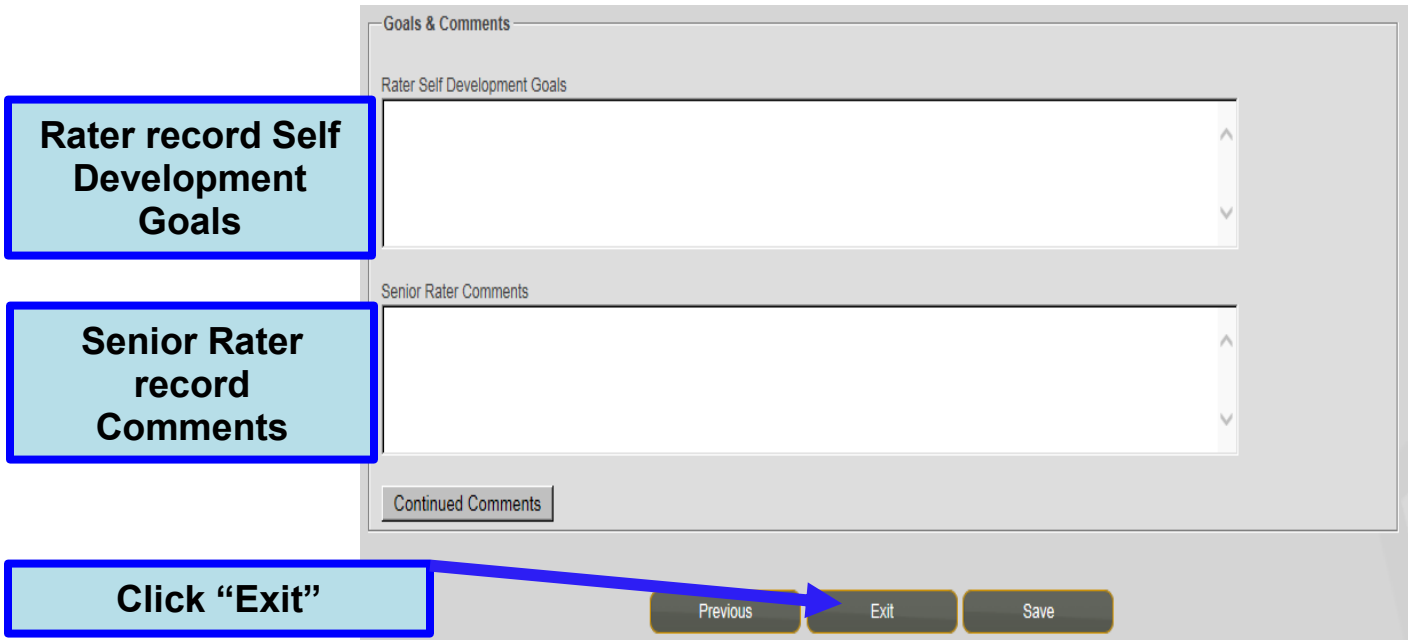
**Identify the Principal Duty Title, Position, and Duties and Responsibilities**




**Click "NEXT"**



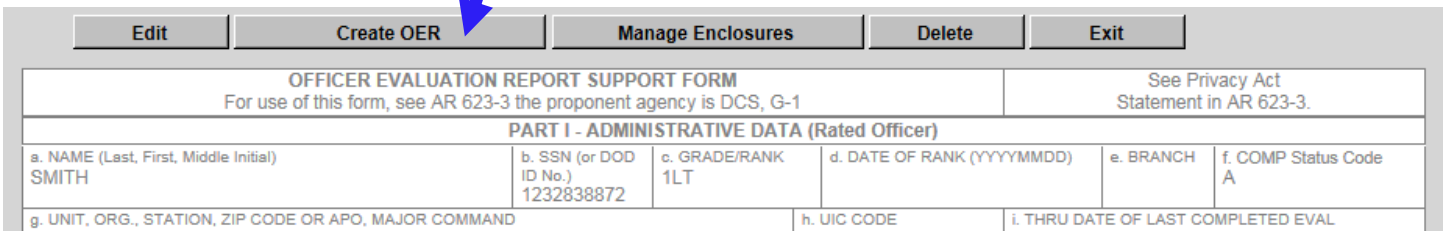

**Repeat the above step for Part V, A - F**



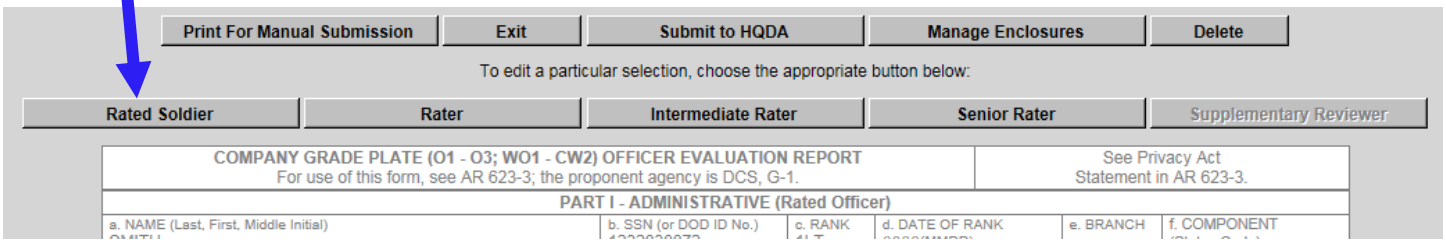
## Creating an OER

*Failing to comply with the error messages generated within EES could result in the inability to sign the evaluation or result in the evaluation being returned for corrections.

**Select the "Create OER" button on the top of the OER support form**

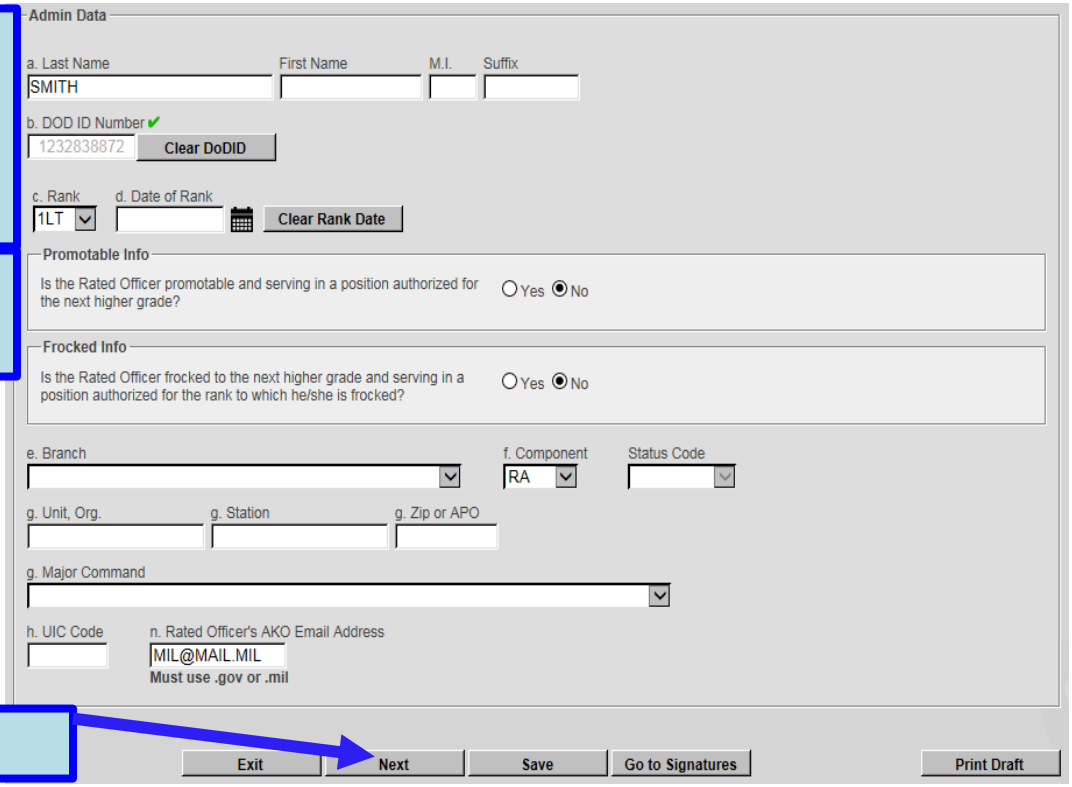



**Select the "Rated Soldier" button**

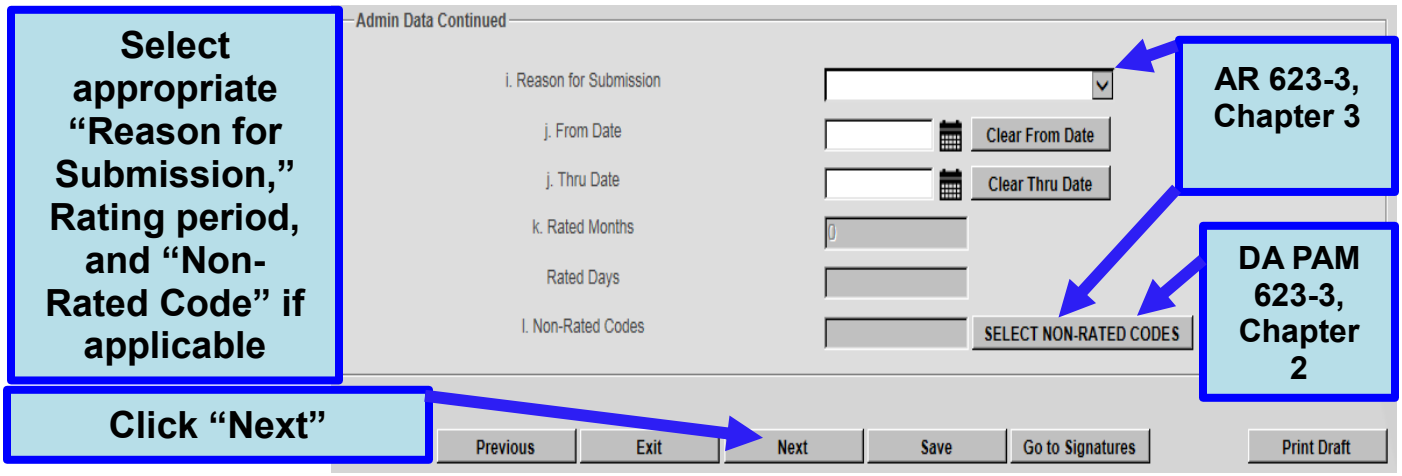


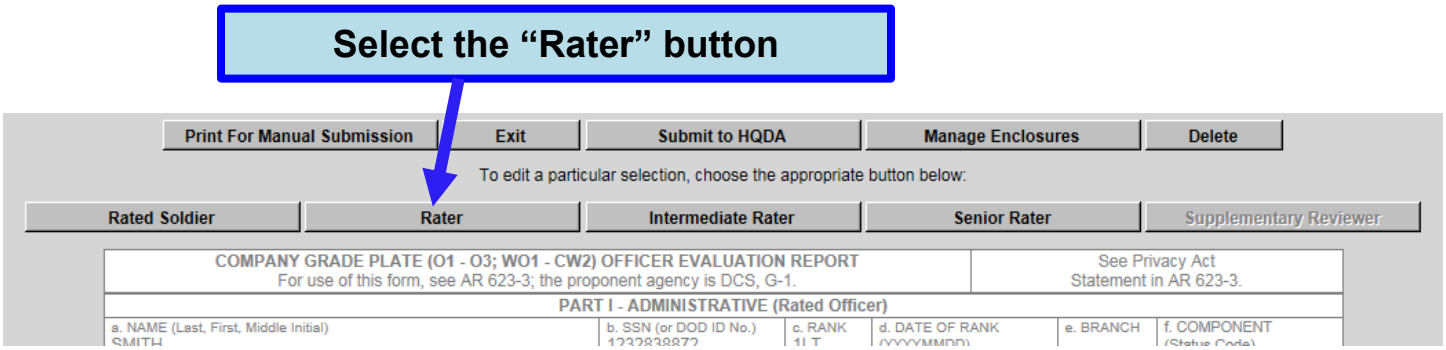

**Complete all Admin Data not auto populated from the support form**

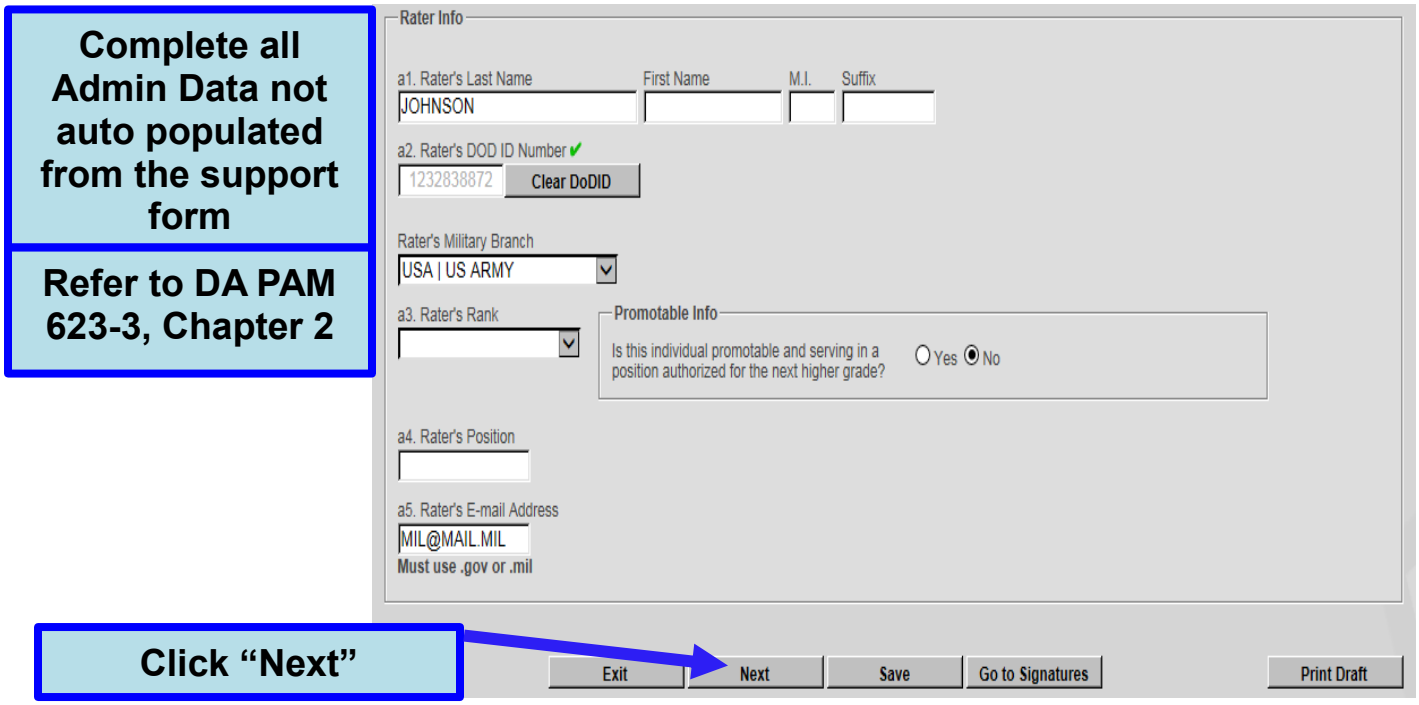
**Refer to DA PAM 623-3, Chapter 2**

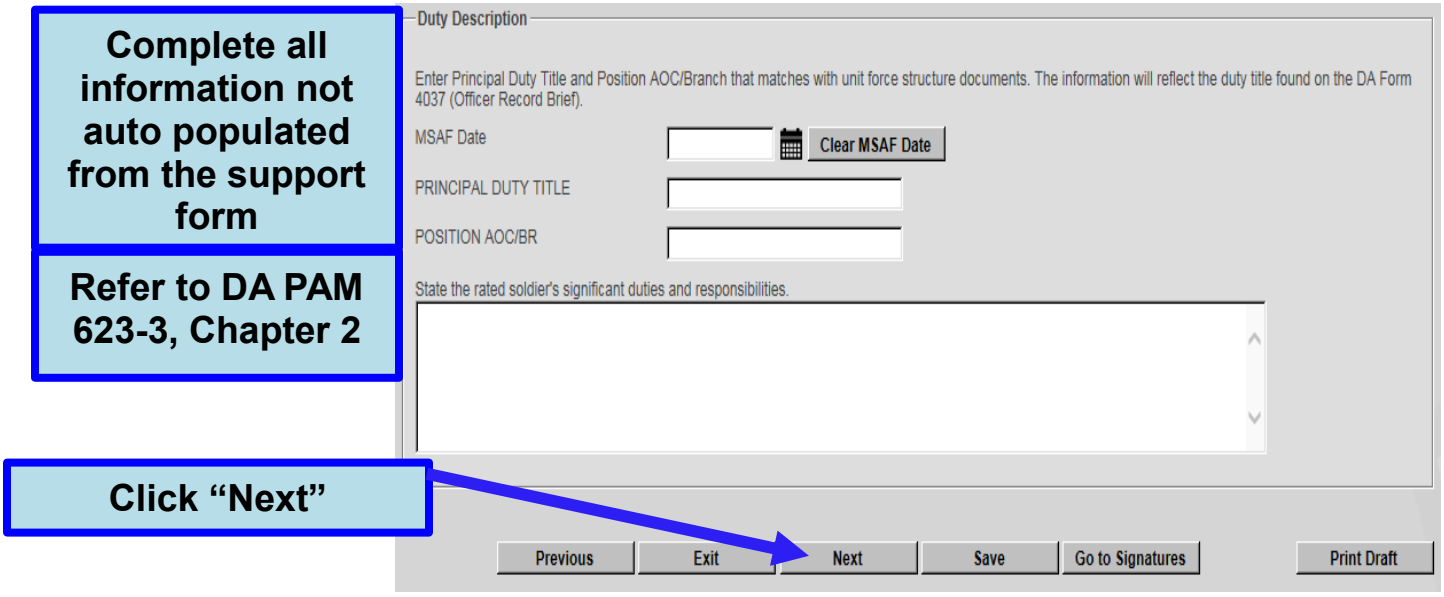


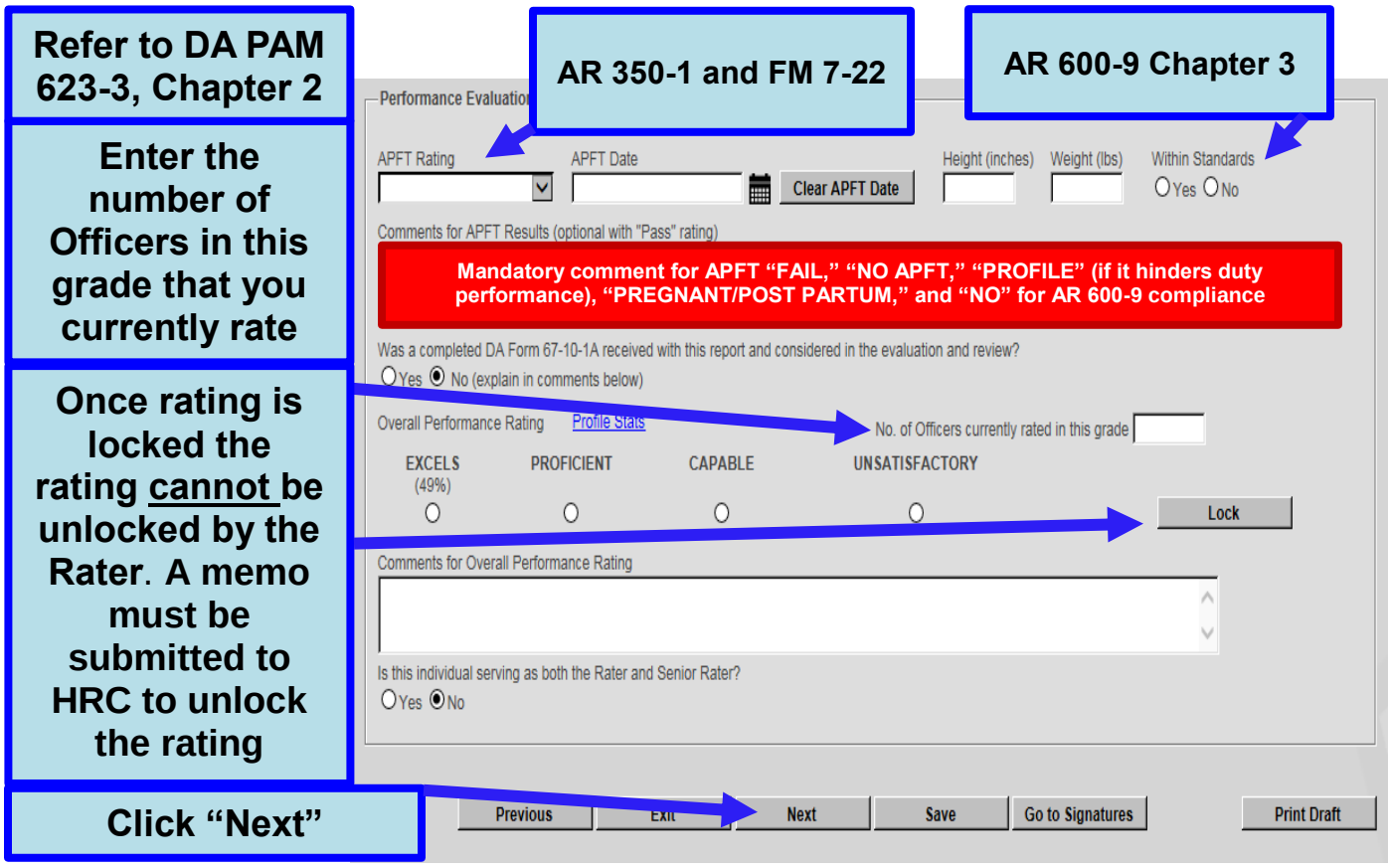

**Click "Next"**


Select appropriate "Reason for Submission," Rating period, and "Non-Rated Code" if applicable
Admin Data Continued
i. Reason for Submission
j. From Date
Clear From Date
j. Thru Date
Clear Thru Date
k. Rated Months
Rated Days
l. Non-Rated Codes
SELECT NON-RATED CODES
AR 623-3, Chapter 3
DA PAM 623-3, Chapter 2
Click "Next"
Previous
Exit
Next
Save
Go to Signatures
Print Draft


Select the "Rater" button
Print For Manual Submission
Exit
Submit to HQDA
Manage Enclosures
Delete
To edit a particular selection, choose the appropriate button below:
Rated Soldier
Rater
Intermediate Rater
Senior Rater
Supplementary Reviewer
COMPANY GRADE PLATE (O1 - O3; WO1 - CW2) OFFICER EVALUATION REPORT
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.
See Privacy Act Statement in AR 623-3.
PART I - ADMINISTRATIVE (Rated Officer)
a. NAME (Last, First, Middle Initial)
b. SSN (or DOD ID No.)
c. RANK
d. DATE OF RANK
e. BRANCH
f. COMPONENT

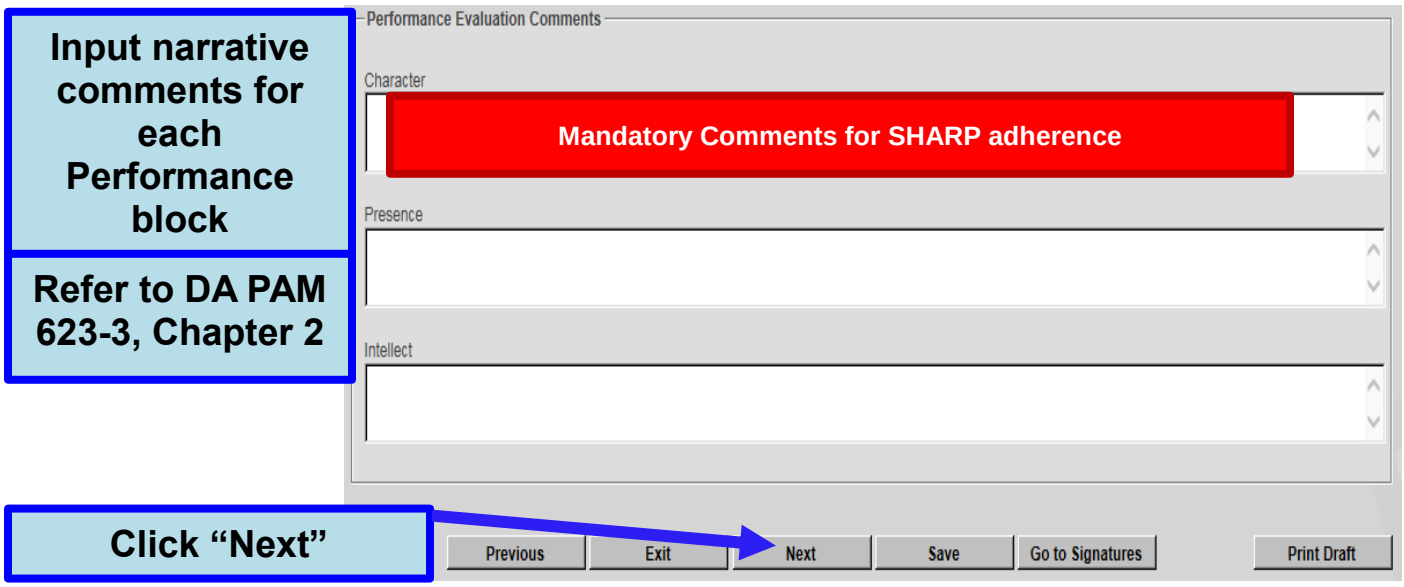

Complete all Admin Data not auto populated from the support form
Refer to DA PAM 623-3, Chapter 2
Rater Info
a1. Rater's Last Name
JOHNSON
First Name
M.I.
Suffix
a2. Rater's DOD ID Number
1232838872
Clear DoDID
Rater's Military Branch
USA | US ARMY
a3. Rater's Rank
Promotable Info
Is this individual promotable and serving in a position authorized for the next higher grade?
Yes
No
a4. Rater's Position
a5. Rater's E-mail Address
MIL@MAIL.MIL
Must use .gov or .mil
Click "Next"
Exit
Next
Save
Go to Signatures
Print Draft




- DA PAM 623-3, Chapter 2 - In the space after the word "APFT" the rater will enter "PASS" or "FAIL" and the date (YYYYMMDD) of the most recent record APFT administered by the unit; it will be within the 12–month period prior to the "THRU" date of the DA Form 67-10-1. However,

the APFT date does not have to fall within the period covered by the DA Form 67-10-1. If the rated officer was unable to participate in the most recent record APFT (for example, due to a profile or pregnancy), his or her status at that time will be documented appropriately. The APFT for Soldiers without profiles consists of push-ups, sit-ups, and a 2–mile run.




- DA PAM 623-3, Chapter 2 - block c—Character - Rating officials will comment on how well the rated officer promoted a climate of dignity and respect and adherence to the requirements of the SHARP Program. This assessment should identify, as appropriate, any significant actions or contributions the rated officer made toward—

    1. Promoting the personal and professional development of subordinates.

    2. Ensuring the fair, respectful treatment of unit personnel.

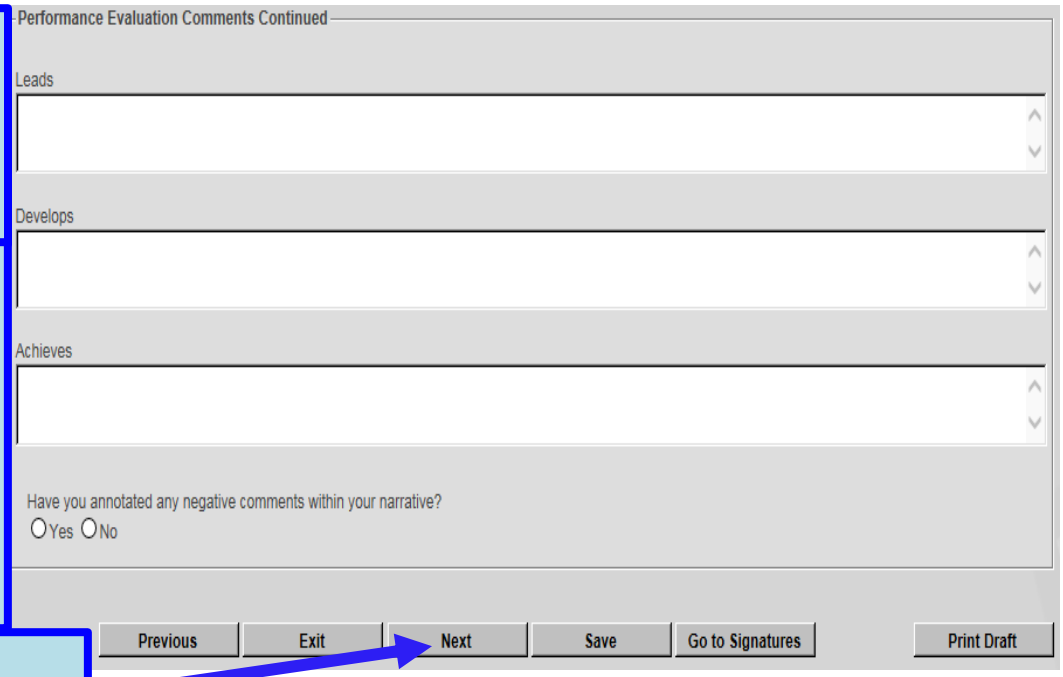
    3. Establishing a workplace and overall command climate that fosters dignity and respect for all members of the unit.

    4. This assessment should also identify any failures by the rated officer to foster a climate of dignity and respect and adherence to the SHARP Program.

**Input narrative comments for each Performance block**

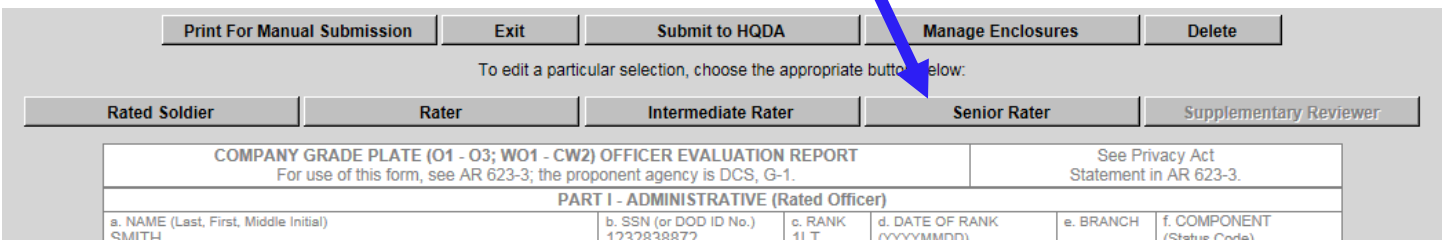
**Refer to ADRP 6-22 and ADP 6-22 for addition information on Army's attributes and core leader competencies**

**Click "Next"**



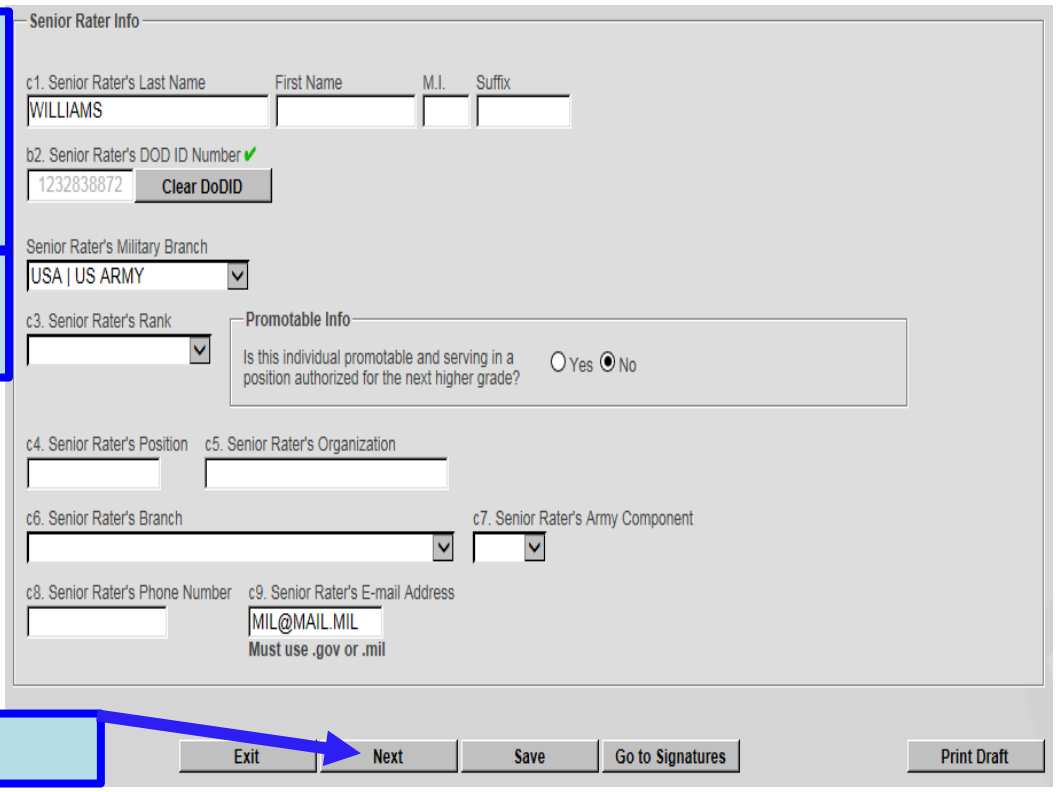

**The Rater can now click on the "Click Here to Sign" button on the evaluation and sign the OER.**

**Select the "Senior Rater" button**



**Complete all Admin Data not auto populated from the support form**

**Refer to DA PAM 623-3, Chapter 2**

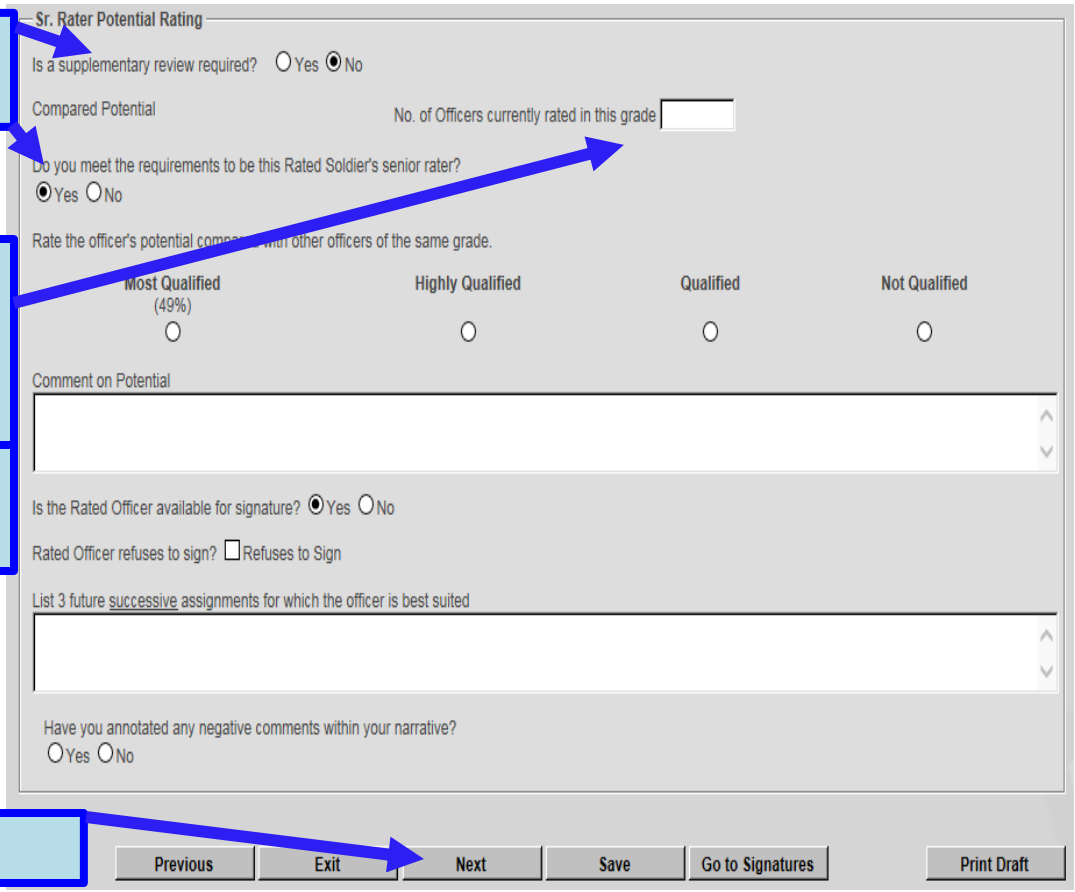



**Click "Next"**

**See AR 623-3 Chapter 2**

**Enter the number of Officers in this grade that you currently rate**

**Refer to DA PAM 623-3, Chapter 2**

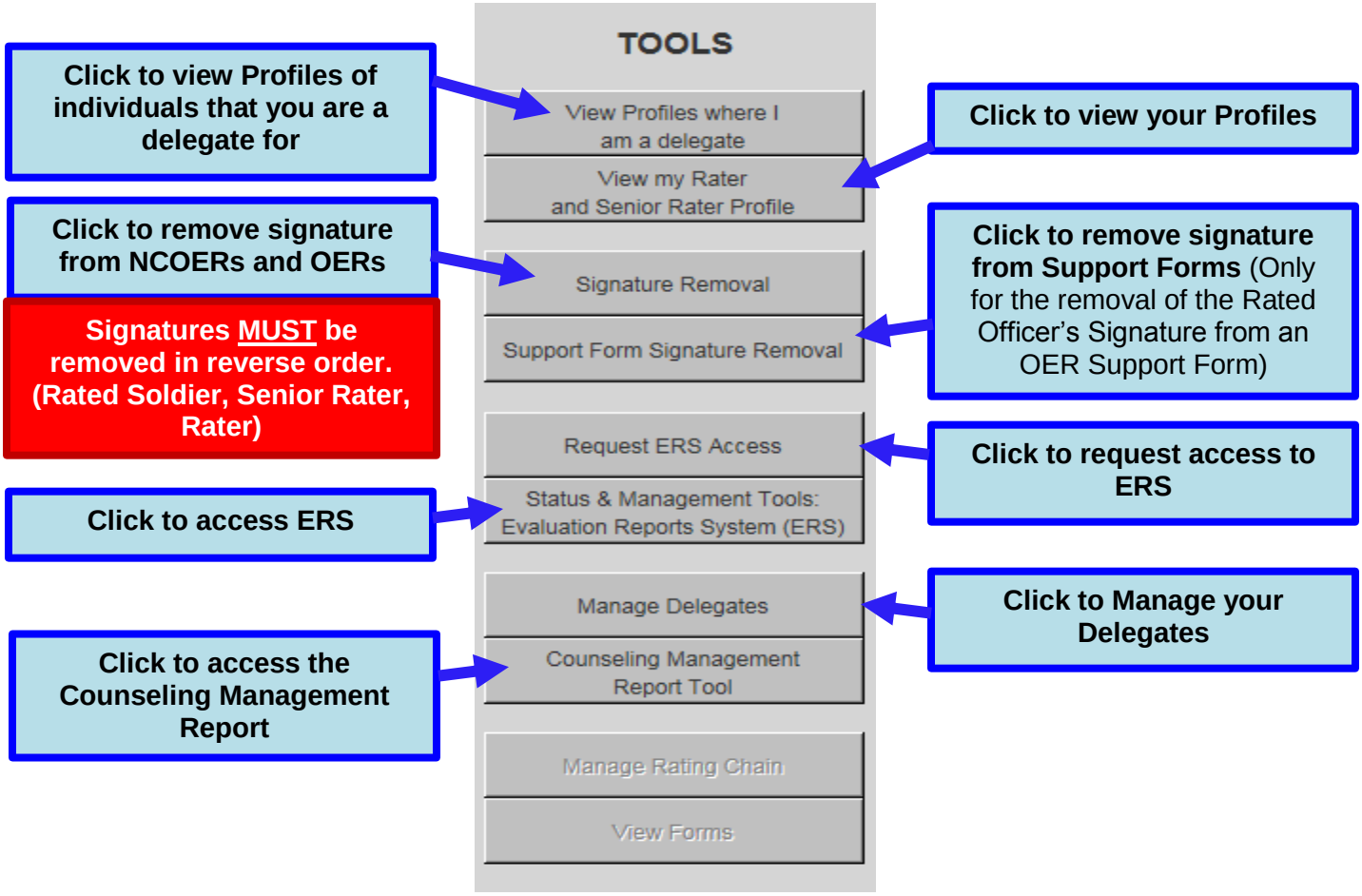



**Click "Next"**

**The Senior Rater can now click on the "Click Here to Sign" button on the evaluation and sign the OER.**

**If there is no Intermediate rater and/or Supplementary Reviewer, the OER can now be signed by the Rated Officer and submitted to HQDA.**

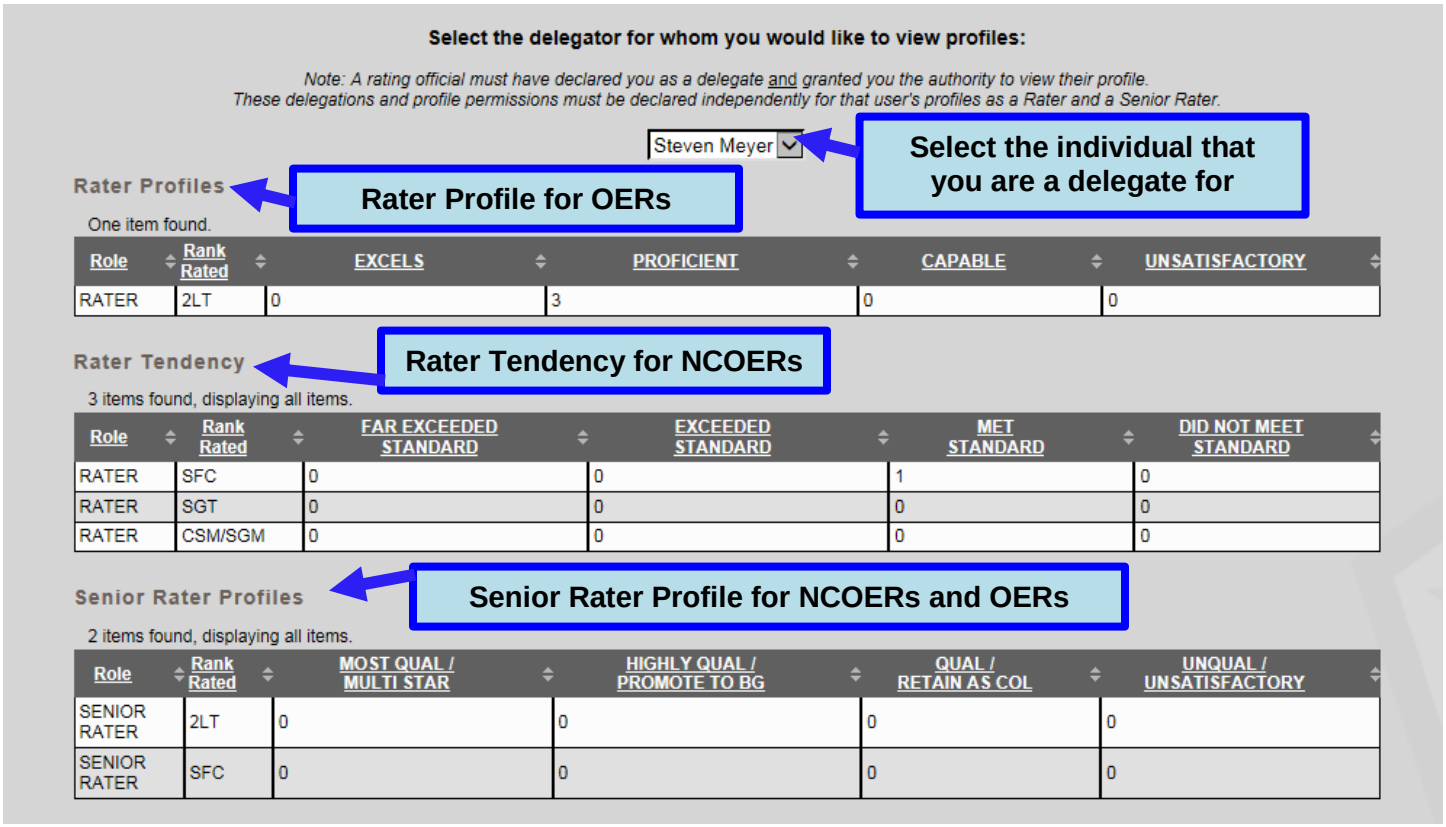
# EES TOOLS




- **Signatures must be removed in reverse order (Supplementary Reviewer, Rated Soldier, Senior Rater, and then Rater). Failure to remove signatures in reverse order will result in locking individuals out of the report**.

- **If signatures are removed in the incorrect order, have all individuals re-sign the evaluation and then remove signatures in the proper sequence.**

## View Profiles where I am a delegate

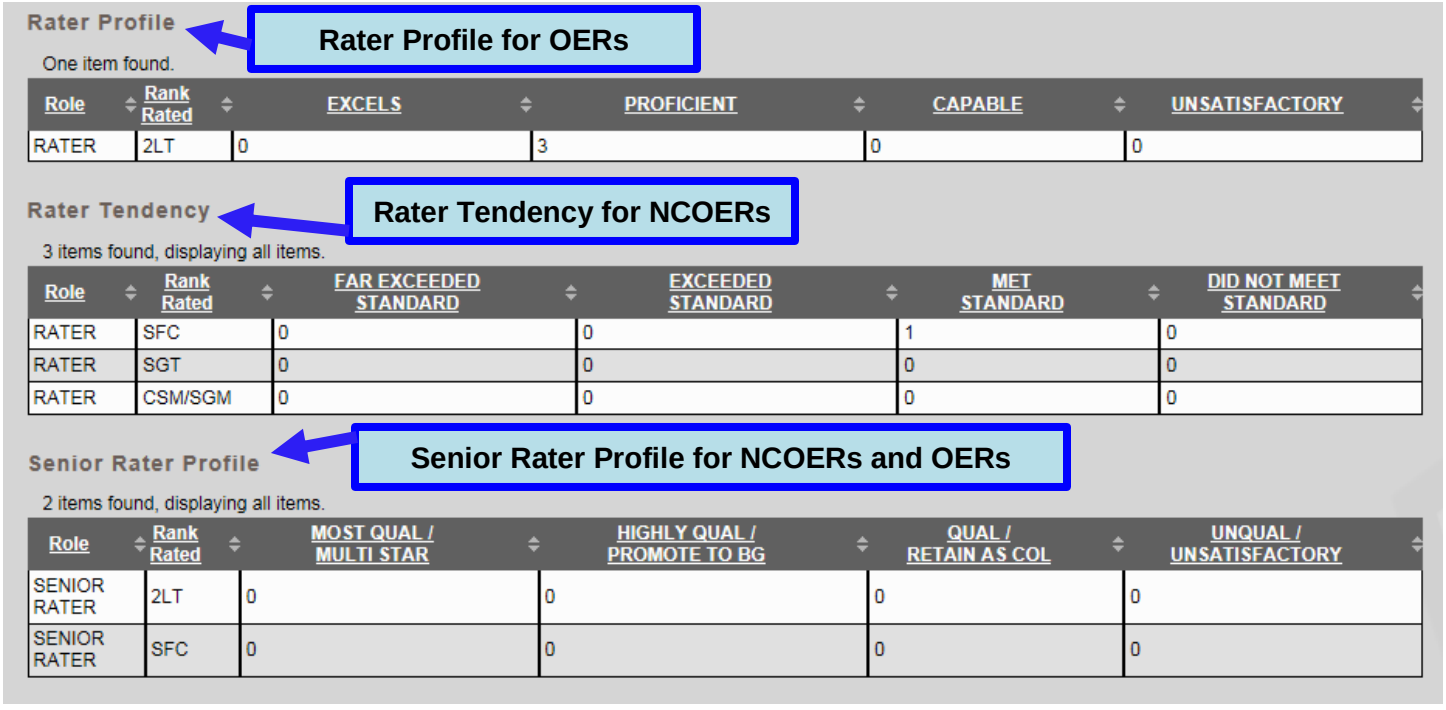



| Role | Rank Rated | EXCELS | PROFICIENT | CAPABLE | UNSATISFACTORY |
|---|---|---|---|---|---|
| RATER | 2LT | 0 | 3 | 0 | 0 |

| Role | Rank Rated | FAR EXCEEDED STANDARD | EXCEEDED STANDARD | MET STANDARD | DID NOT MEET STANDARD |
|---|---|---|---|---|---|
| RATER | SFC | 0 | 0 | 1 | 0 |
| RATER | SGT | 0 | 0 | 0 | 0 |
| RATER | CSM/SGM | 0 | 0 | 0 | 0 |

| Role | Rank Rated | MOST QUAL / MULTI STAR | HIGHLY QUAL / PROMOTE TO BG | QUAL / RETAIN AS COL | UNQUAL / UNSATISFACTORY |
|---|---|---|---|---|---|
| SENIOR RATER | 2LT | 0 | 0 | 0 | 0 |
| SENIOR RATER | SFC | 0 | 0 | 0 | 0 |

## View my Rater and Senior Rater Profile

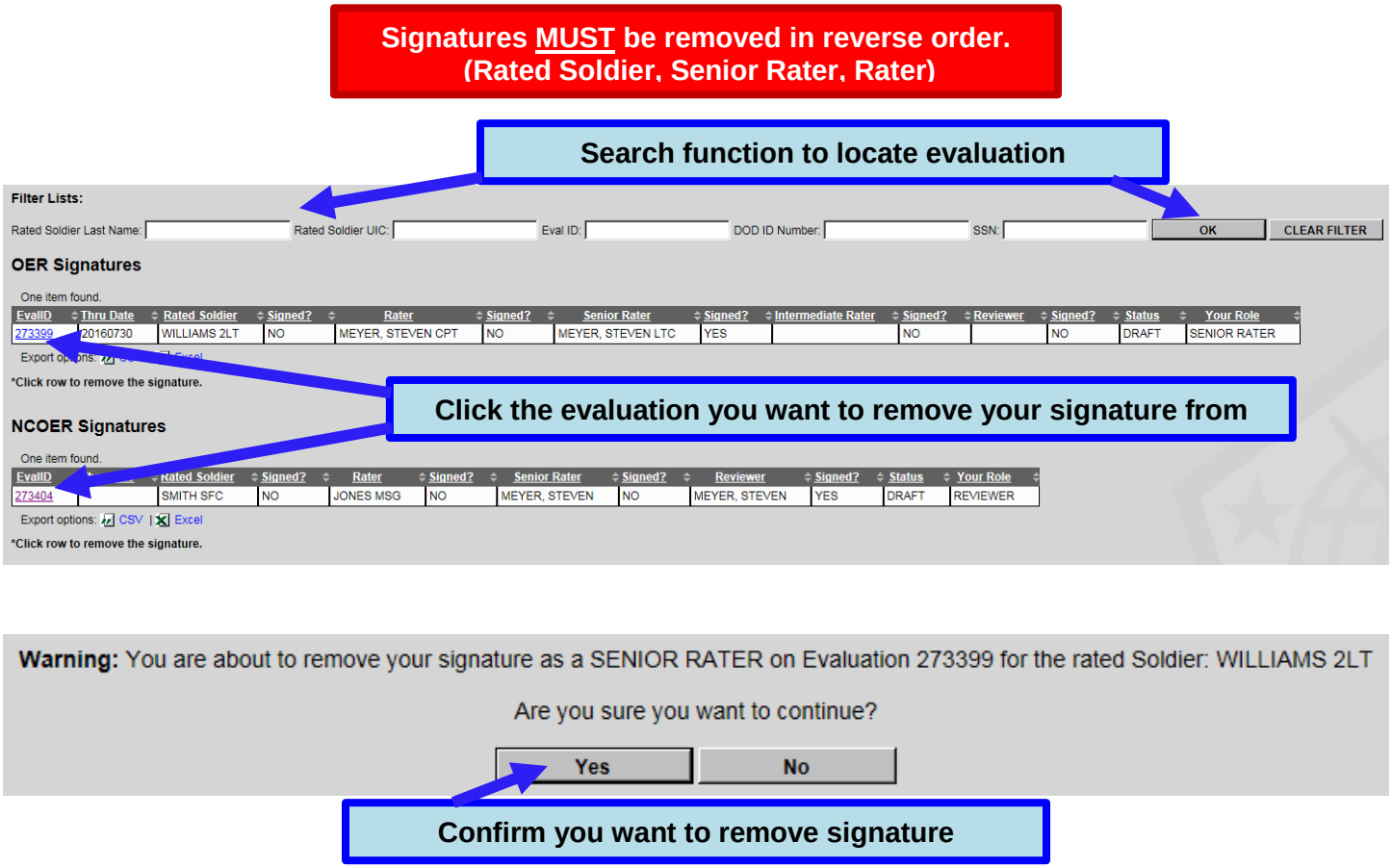



| Role | Rank Rated | EXCELS | PROFICIENT | CAPABLE | UNSATISFACTORY |
|---|---|---|---|---|---|
| RATER | 2LT | 0 | 3 | 0 | 0 |

| Role | Rank Rated | FAR EXCEEDED STANDARD | EXCEEDED STANDARD | MET STANDARD | DID NOT MEET STANDARD |
|---|---|---|---|---|---|
| RATER | SFC | 0 | 0 | 1 | 0 |
| RATER | SGT | 0 | 0 | 0 | 0 |
| RATER | CSM/SGM | 0 | 0 | 0 | 0 |

| Role | Rank Rated | MOST QUAL / MULTI STAR | HIGHLY QUAL / PROMOTE TO BG | QUAL / RETAIN AS COL | UNQUAL / UNSATISFACTORY |
|---|---|---|---|---|---|
| SENIOR RATER | 2LT | 0 | 0 | 0 | 0 |
| SENIOR RATER | SFC | 0 | 0 | 0 | 0 |

**Signature Removal** – Signatures can also be removed directly from the signature page





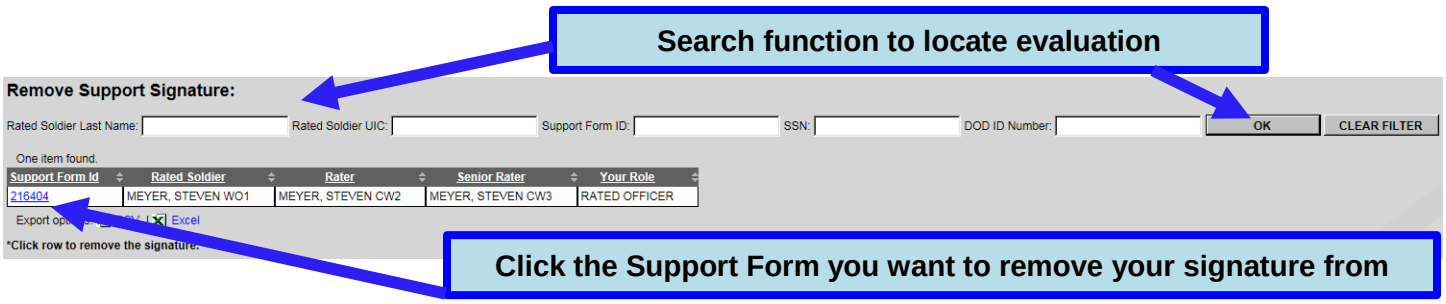


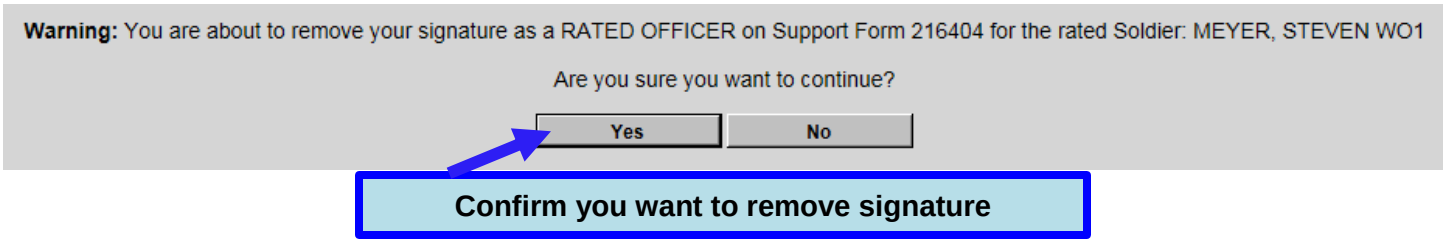
- Signatures must be removed in reverse order (Supplementary Reviewer, Rated Soldier, Senior Rater, and then Rater). Failure to remove signatures in reverse order will result in locking individuals out of the report.

- If signatures are removed in the incorrect order, have all individuals re-sign the evaluation and then remove signatures in the proper sequence.

**Support Form Signature Removal**

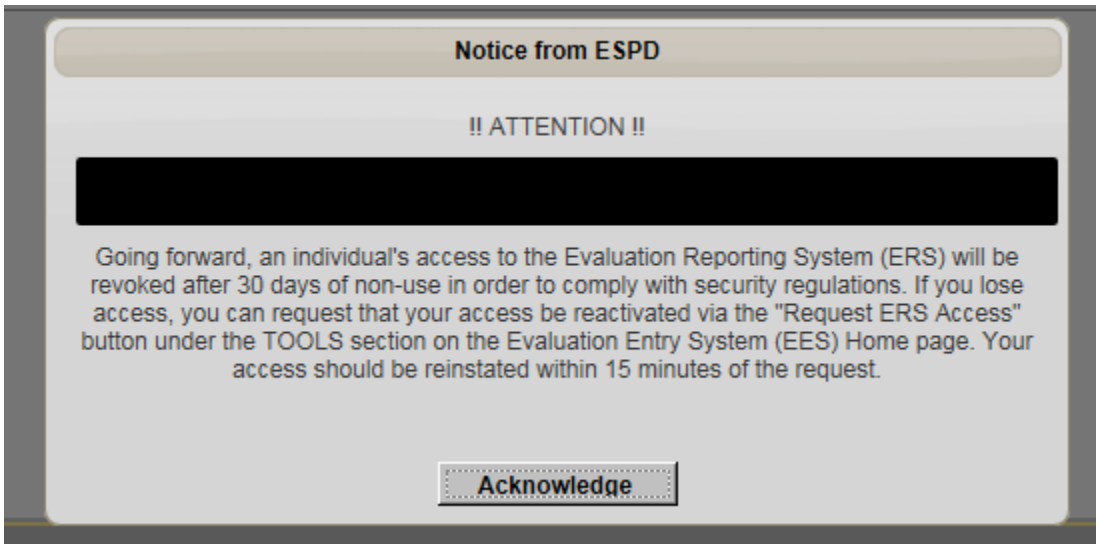
- Only for removal of Rated Officer's signature from an OER Support Form
- Signature and initials can also be removed directly from the signature page



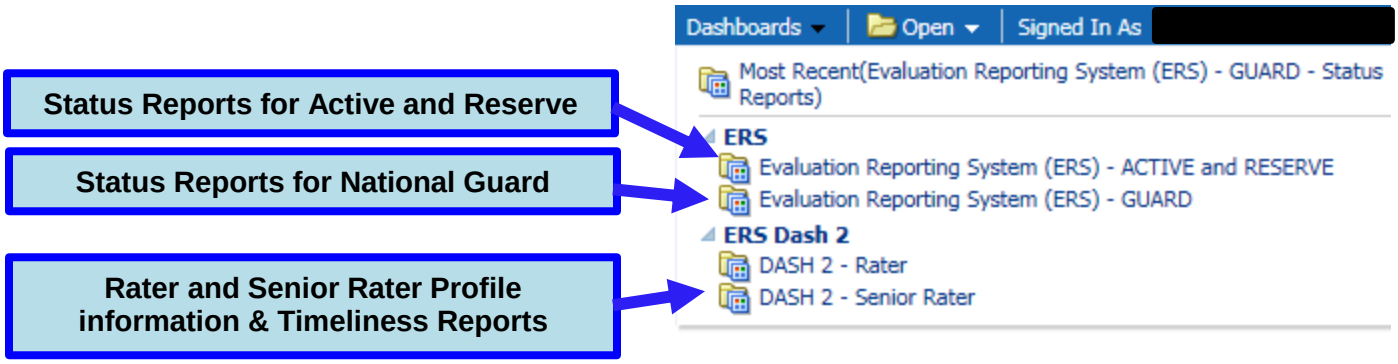



## Request ERS Access

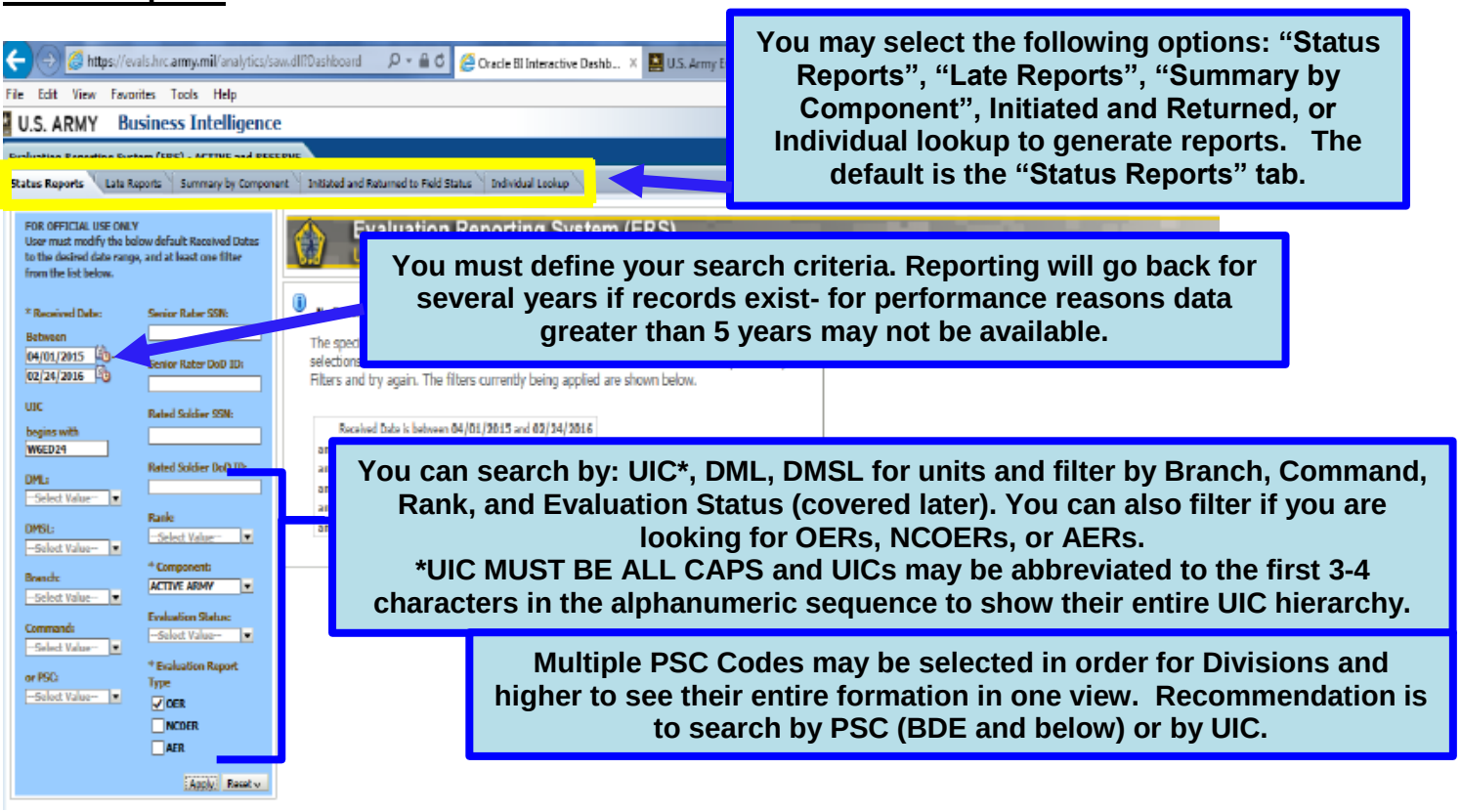
- Access should be granted within 15 minutes
- Access is revoked after 30 days of non-use
    - If access is revoked, the user will have to request access be reactivated



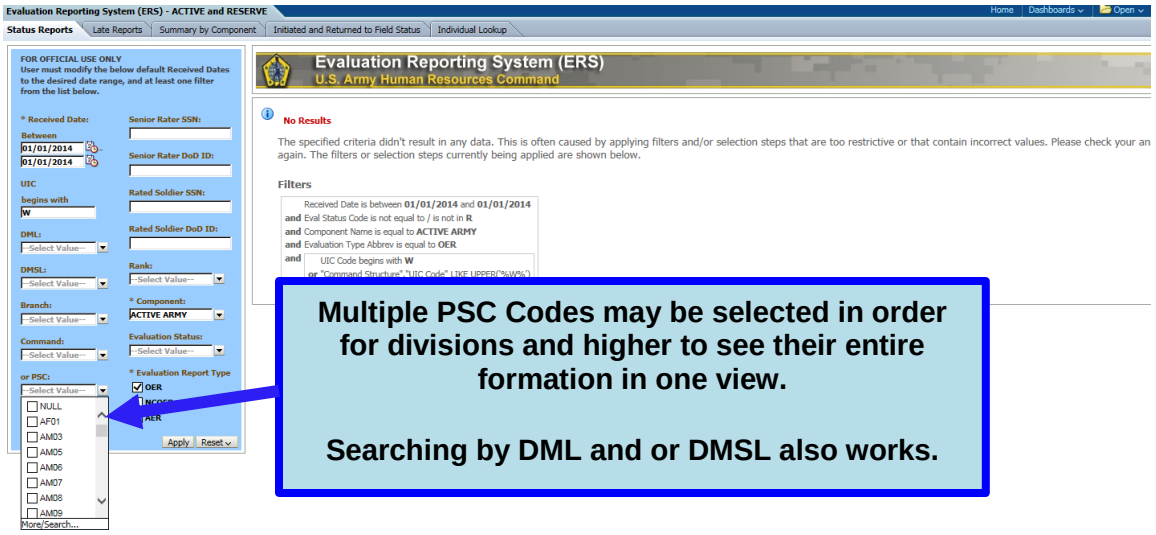

## Status & Management Tools: Evaluation Reports System (ERS)

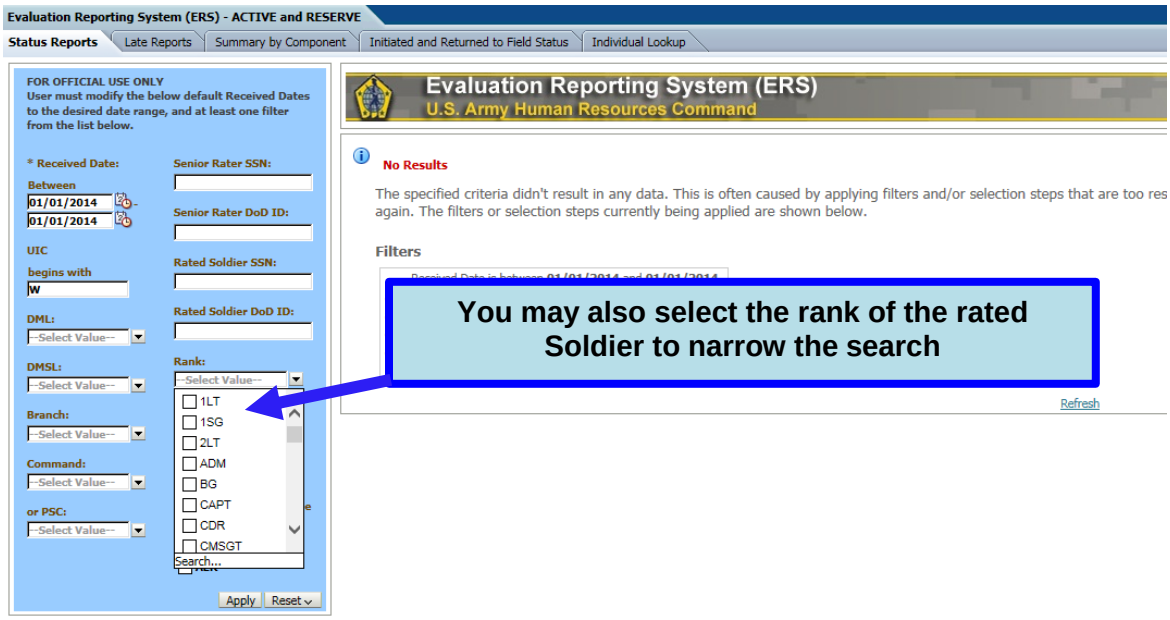


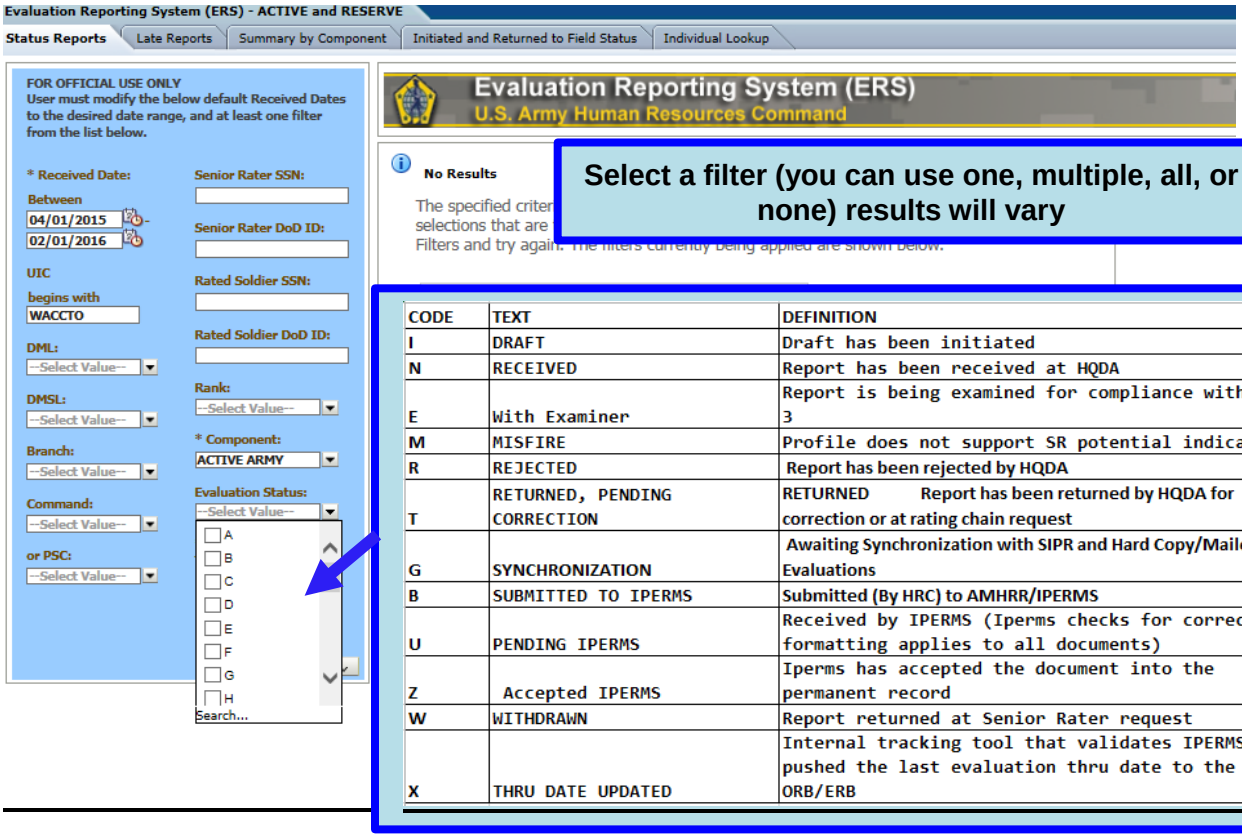

## Status Reports



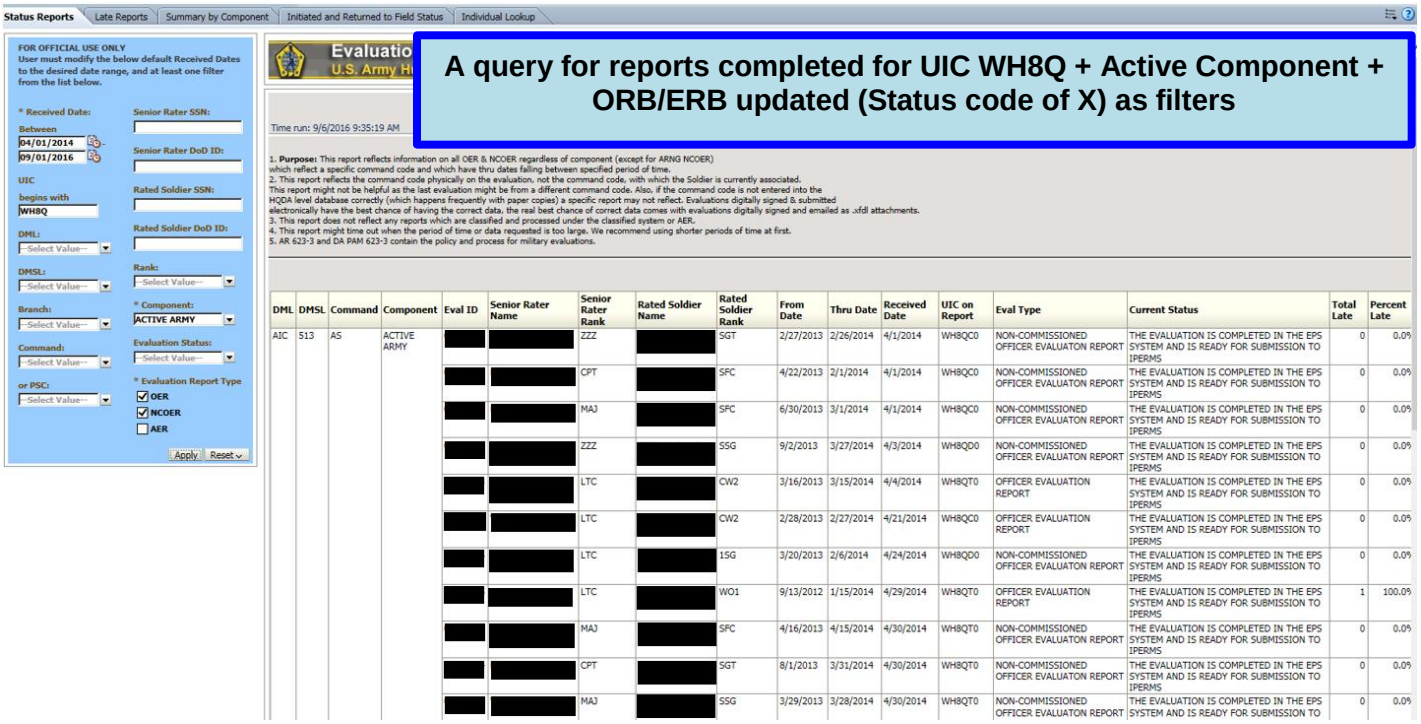

- Status Reports – allows lookup by any status
- Late Reports – displays late rate by unit or by rating official
- Summary by Component – Allows comparison of late reports by Component against total reports submitted
- Initiated and Returned – helps filter search to ONLY Reports in Draft (initiated) and/or Returned for correction. Does not require delegate authority from EES
- Individual Lookup- allows queries for individual Soldiers


Evaluation Reporting System (ERS) - ACTIVE and RESERVE
Status Reports
Late Reports
Summary by Component
Initiated and Returned to Field Status
Individual Lookup
FOR OFFICIAL USE ONLY
User must modify the below default Received Dates to the desired date range, and at least one filter from the list below.
Evaluation Reporting System (ERS)
U.S. Army Human Resources Command
No Results
The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your an again. The filters or selection steps currently being applied are shown below.
Filters
Multiple PSC Codes may be selected in order for divisions and higher to see their entire formation in one view.
Searching by DML and or DMSL also works.


Evaluation Reporting System (ERS) - ACTIVE and RESERVE
Status Reports
Late Reports
Summary by Component
Initiated and Returned to Field Status
Individual Lookup
FOR OFFICIAL USE ONLY
User must modify the below default Received Dates to the desired date range, and at least one filter from the list below.
Evaluation Reporting System (ERS)
U.S. Army Human Resources Command
No Results
The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too res again. The filters or selection steps currently being applied are shown below.
Filters
You may also select the rank of the rated Soldier to narrow the search
Refresh

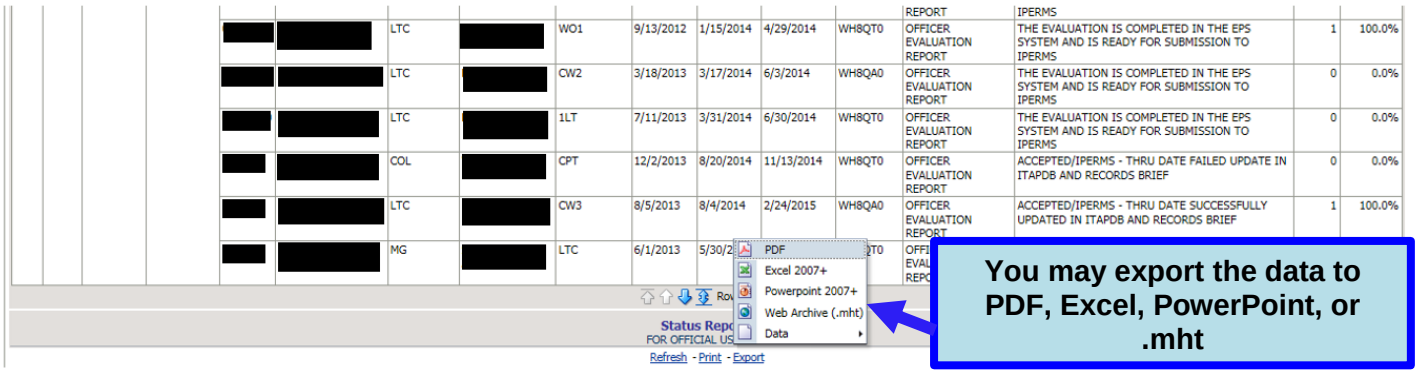



| CODE | TEXT | DEFINITION |
|---|---|---|
| I | DRAFT | Draft has been initiated |
| N | RECEIVED | Report has been received at HQDA |
| E | With Examiner | Report is being examined for compliance with AR623-3 |
| M | MISFIRE | Profile does not support SR potential indication |
| R | REJECTED | Report has been rejected by HQDA |
| T | RETURNED, PENDING CORRECTION | RETURNED Report has been returned by HQDA for correction or at rating chain request |
| G | SYNCHRONIZATION | Awaiting Synchronization with SIPR and Hard Copy/Mailed Evaluations |
| B | SUBMITTED TO IPERMS | Submitted (By HRC) to AMHRR/IPERMS |
| U | PENDING IPERMS | Received by IPERMS (Iperms checks for correct formatting applies to all documents) |
| Z | Accepted IPERMS | Iperms has accepted the document into the permanent record |
| W | WITHDRAWN | Report returned at Senior Rater request |
| X | THRU DATE UPDATED | Internal tracking tool that validates IPERMS has pushed the last evaluation thru date to the ORB/ERB |




| DML | DMSL | Command | Component | Eval ID | Senior Rater Name | Senior Rater Rank | Rated Soldier Name | Rated Soldier Rank | From Date | Thru Date | Received Date | UIC on Report | Eval Type | Current Status | Total Late | Percent Late |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| AIC | 513 | AS | ACTIVE ARMY | [redacted] | [redacted] | ZZZ | [redacted] | SGT | 2/27/2013 | 2/26/2014 | 4/1/2014 | WH8QC0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | CPT | [redacted] | SFC | 4/22/2013 | 2/1/2014 | 4/1/2014 | WH8QC0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | MAJ | [redacted] | SFC | 6/30/2013 | 3/1/2014 | 4/1/2014 | WH8QC0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | ZZZ | [redacted] | SSG | 9/2/2013 | 3/27/2014 | 4/3/2014 | WH8QD0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | LTC | [redacted] | CW2 | 3/16/2013 | 3/15/2014 | 4/4/2014 | WH8QT0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | LTC | [redacted] | CW2 | 2/28/2013 | 2/27/2014 | 4/21/2014 | WH8QC0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | LTC | [redacted] | 1SG | 3/20/2013 | 2/6/2014 | 4/24/2014 | WH8QD0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | LTC | [redacted] | WO1 | 9/13/2012 | 1/15/2014 | 4/29/2014 | WH8QT0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 1 | 100.0% |
| | | | | [redacted] | [redacted] | MAJ | [redacted] | SFC | 4/16/2013 | 4/15/2014 | 4/30/2014 | WH8QT0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | CPT | [redacted] | SGT | 8/1/2013 | 3/31/2014 | 4/30/2014 | WH8QT0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | | | | [redacted] | [redacted] | MAJ | [redacted] | SSG | 3/29/2013 | 3/28/2014 | 4/30/2014 | WH8QT0 | NON-COMMISSIONED OFFICER EVALUATON REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO | 0 | 0.0% |

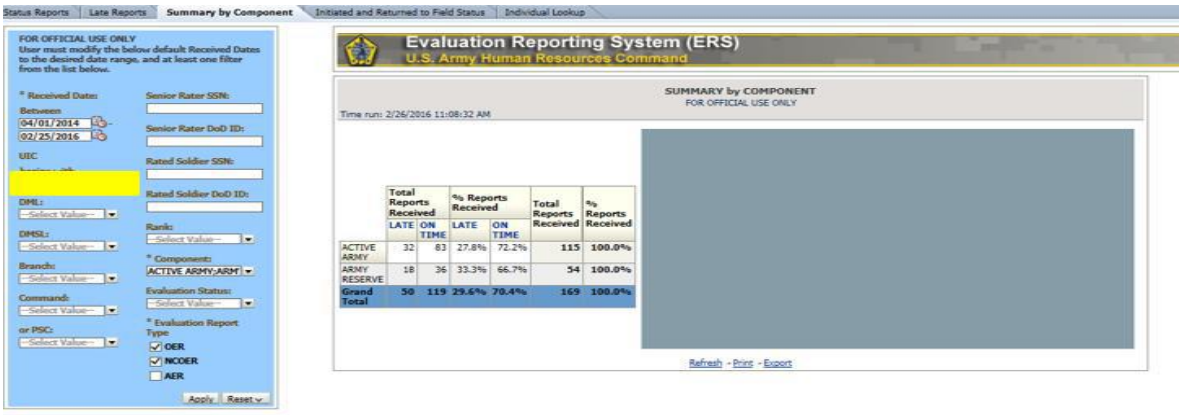
Note derivatives of UIC WH8Q appear



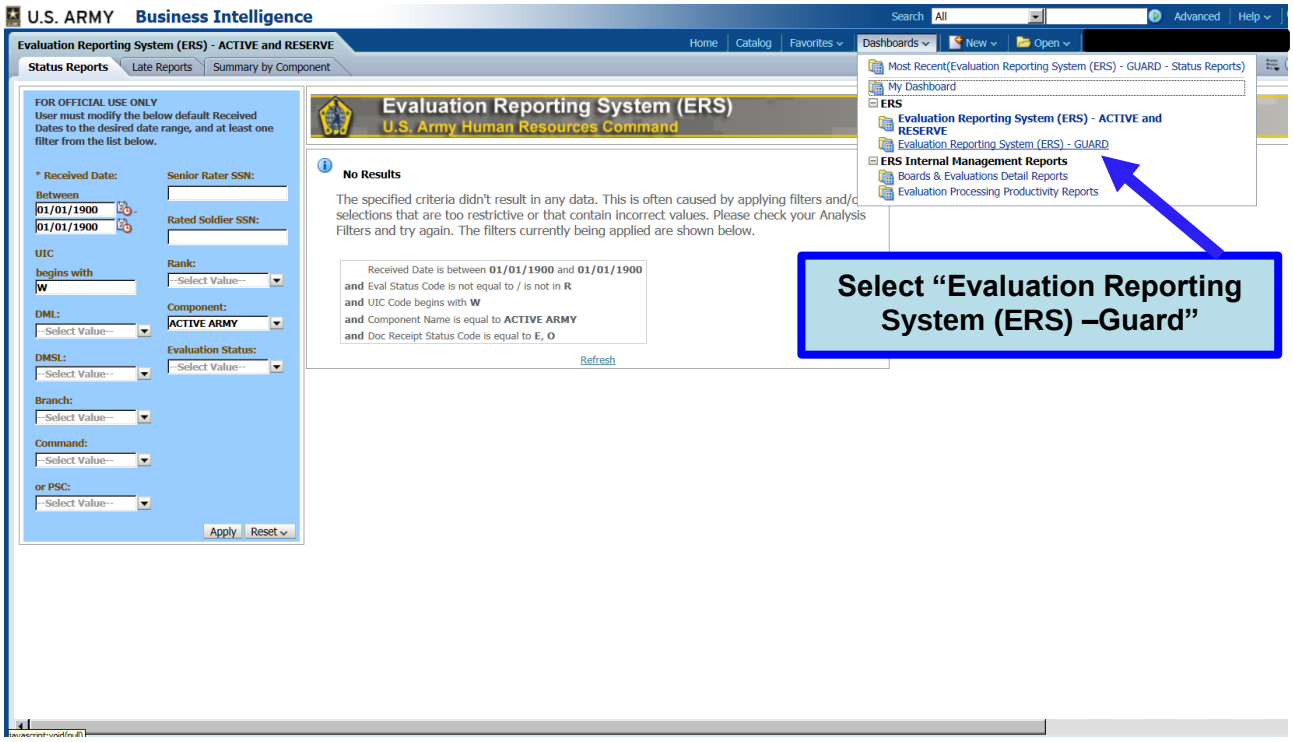

| | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | REPORT | IPERMS | | | |
| | [redacted] | [redacted] | LTC | [redacted] | WO1 | 9/13/2012 | 1/15/2014 | 4/29/2014 | WH8QT0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 1 | 100.0% |
| | [redacted] | [redacted] | LTC | [redacted] | CW2 | 3/18/2013 | 3/17/2014 | 6/3/2014 | WH8QA0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | [redacted] | [redacted] | LTC | [redacted] | 1LT | 7/11/2013 | 3/31/2014 | 6/30/2014 | WH8QT0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| | [redacted] | [redacted] | COL | [redacted] | CPT | 12/2/2013 | 8/20/2014 | 11/13/2014 | WH8QT0 | OFFICER EVALUATION REPORT | ACCEPTED/IPERMS - THRU DATE FAILED UPDATE IN ITAPDB AND RECORDS BRIEF | 0 | 0.0% |
| | [redacted] | [redacted] | LTC | [redacted] | CW3 | 8/5/2013 | 8/4/2014 | 2/24/2015 | WH8QA0 | OFFICER EVALUATION REPORT | ACCEPTED/IPERMS - THRU DATE SUCCESSFULLY UPDATED IN ITAPDB AND RECORDS BRIEF | 1 | 100.0% |
| | [redacted] | [redacted] | MG | [redacted] | LTC | 6/1/2013 | 5/30/2 | | [redacted]T0 | OFFI EVAL REPO | | | |

Status Rep
FOR OFFICIAL US

| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Status Reports | | | | | | | | | | | | | | | | |
| 2 | FOR OFFICIAL USE ONLY | | | | | | | | | | | | | | | | |
| 3 | Time run: 9/6/2016 10:15:21 AM | | | | | | | | | | | | | | | | |
| 5 | 1. **Purpose:** This report reflects information on all OER & NCOER regardless of component (except for ARNG NCOER) | | | | | | | | | | | | | | | | |
| 6 | which reflect a specific command code and which have thru dates falling between specified period of time. | | | | | | | | | | | | | | | | |
| 7 | 2. This report reflects the command code physically on the evaluation, not the command code, with which the Soldier is currently associated. | | | | | | | | | | | | | | | | |
| 8 | This report might not be helpful as the last evaluation might be from a different command code. Also, if the command code is not entered into the | | | | | | | | | | | | | | | | |
| 9 | HQDA level database correctly (which happens frequently with paper copies) a specific report may not reflect. Evaluations digitally signed & submitted electronically have the best chance of having the correct data, the real best chance of correct data comes with evaluations digitally signed and emailed | | | | | | | | | | | | | | | | |
| 10 | as .xfdl attachments. | | | | | | | | | | | | | | | | |
| 11 | 3. This report does not reflect any reports which are classified and processed under the classified system or AER. | | | | | | | | | | | | | | | | |
| 12 | 4. This report might time out when the period of time or data requested is too large. We recommend using shorter periods of time at first. | | | | | | | | | | | | | | | | |
| 13 | 5. AR 623-3 and DA PAM 623-3 contain the policy and process for military evaluations. | | | | | | | | | | | | | | | | |
| 15 | **DML** | **DMSL** | **Command** | **Component** | **Eval ID** | **Senior Rater Name** | **Senior Rater Rank** | **Rated Soldier Name** | **Rated Soldier Rank** | **From Date** | **Thru Date** | **Received Date** | **UIC on Report** | **Eval Type** | **Current Status** | **Total Late** | **Percent Late** |
| 16 | AIC | 513 | AS | ACTIVE ARMY | [redacted] | [redacted] | MAJ | [redacted] | CW2 | 10/3/2012 | 10/2/2013 | 1/7/2014 | WH8QA0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 1 | 100.0% |
| 17 | | | | | [redacted] | [redacted] | LTC | [redacted] | CPT | 4/26/2013 | 1/8/2014 | 1/10/2014 | WH8QC0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 0 | 0.0% |
| 18 | | | | | [redacted] | [redacted] | LTC | [redacted] | 1LT | 10/25/2012 | 7/10/2013 | 1/14/2014 | WH8QT0 | OFFICER EVALUATION REPORT | THE EVALUATION IS COMPLETED IN THE EPS SYSTEM AND IS READY FOR SUBMISSION TO IPERMS | 1 | 100.0% |
| 195 | **Grand Total** | | | | | | | | | | | | | | | **44** | **24.6%** |
| 197 | Status Reports | | | | | | | | | | | | | | | | |
| 198 | FOR OFFICIAL USE ONLY | | | | | | | | | | | | | | | | |

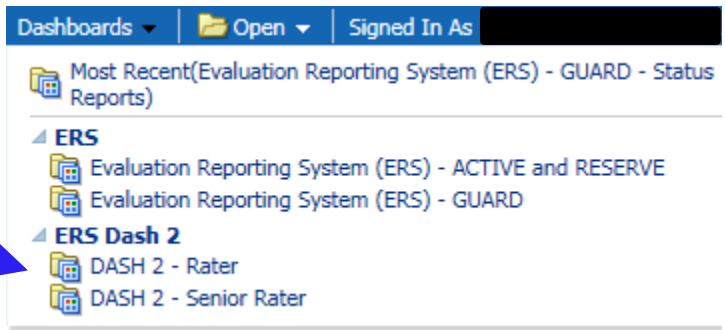



## Status Reports ARNG

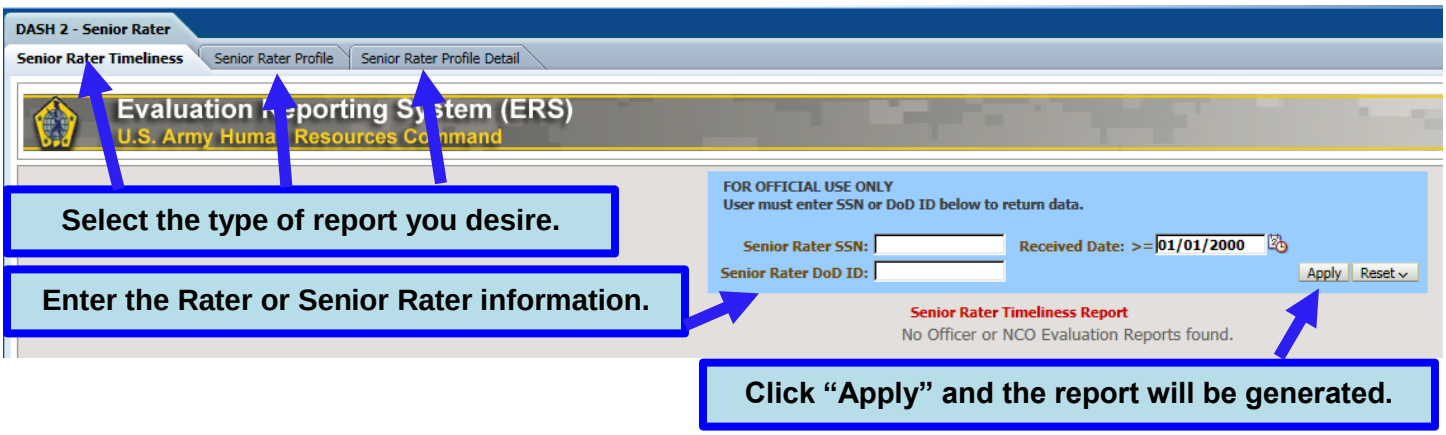


## DASH 2 Rater/Senior Rater Profile Manager

**Rater and Senior Rater Profile information & Timeliness Reports**




* The steps are the same for both the Rater and Senior Rater DASH 2




**Names of Profiled Reports**
**For use of this form, see AR 623-3; Proponent Agency is AcofS, G-1**
**FOR OFFICIAL USE ONLY**

1. **Purpose:** This report displays information on all OERs and NCOERs regardless of the component which reflects a specific command code and which have through dates falling between a specified period of time.
2. This report displays the command code which is physically on the evaluation not the command code the Soldier is currently associated with. This report may not be helpful as the last evaluation might have a different command code. Also, if the command code is not entered into the HQDA level database correctly (which happens frequently with paper copies), a specific report may not be displayed. Evaluations digitally signed and submitted electronically have the best chance of having the correct data especially if they are emailed as .xfdl attachments.
3. This report does not display any reports which are classified and processed under the classified system or AER.
4. This report may time out when the time period or the data set requested is too large. We recommend using shorter time periods or smaller data sets at first.
5. AR 623-3 and DA PAM 623-3 contain the policies and processes for military evaluations.

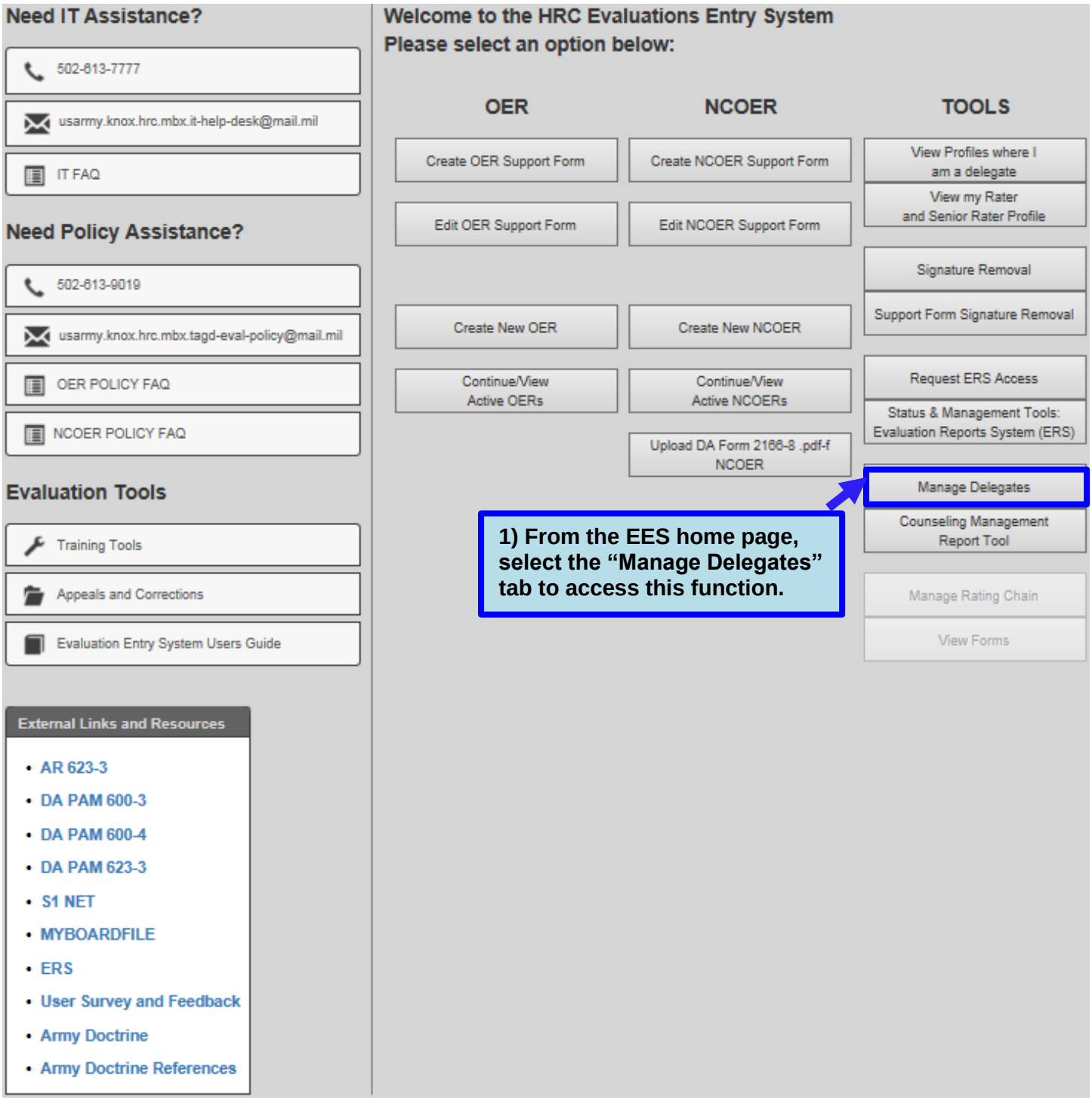
| Senior Rater Name | Senior Rater Rank | Senior Rater SSN | Senior Rater DoD ID | Evaluation Report Type |
|---|---|---|---|---|
| [redacted] | MG | [redacted] | ZZZZZZZZZZ | OER |
| | COL | | ZZZZZZZZZZ | OER |
| | MG | | ZZZZZZZZZZ | OER |
| | OTH | | ZZZZZZZZZZ | OER |
| | | | ZZZZZZZZZZ | OER |

| Rated Soldier Name | Rated Soldier Rank | Eval Received Date | Block | Label | Box 1 | Box 2 | Box 3 | Box 4 | Total Evals | Eval Period End Date | % Box1 / Total | % Box (1+2) / Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| WISHING WELL L | MAJ | 10/26/2015 | 1 | MOST QUALIFIED | 1 | 0 | 0 | 0 | 1 | 04/15/2015 | 100.00% | 100.00% |
| NOBODY EVERYBODY | CPT | 10/26/2015 | 2 | HIGHLY QUALIFIED | 1 | 1 | 0 | 0 | 2 | 07/30/2014 | 50.00% | 100.00% |
| WHITEHEAD MEETING L | CPT | 10/26/2015 | 1 | MOST QUALIFIED | 1 | 0 | 0 | 0 | 1 | 06/18/2014 | 100.00% | 100.00% |
| TEST NAME1 HERE | 1LT | 05/14/2015 | 2 | HIGHLY QUALIFIED | 1 | 1 | 0 | 0 | 2 | 06/22/2015 | 50.00% | 100.00% |
| TEST NAME2 HERE | 1LT | 09/03/2014 | 1 | MOST QUALIFIED | 1 | 0 | 0 | 0 | 1 | 06/01/2014 | 100.00% | 100.00% |

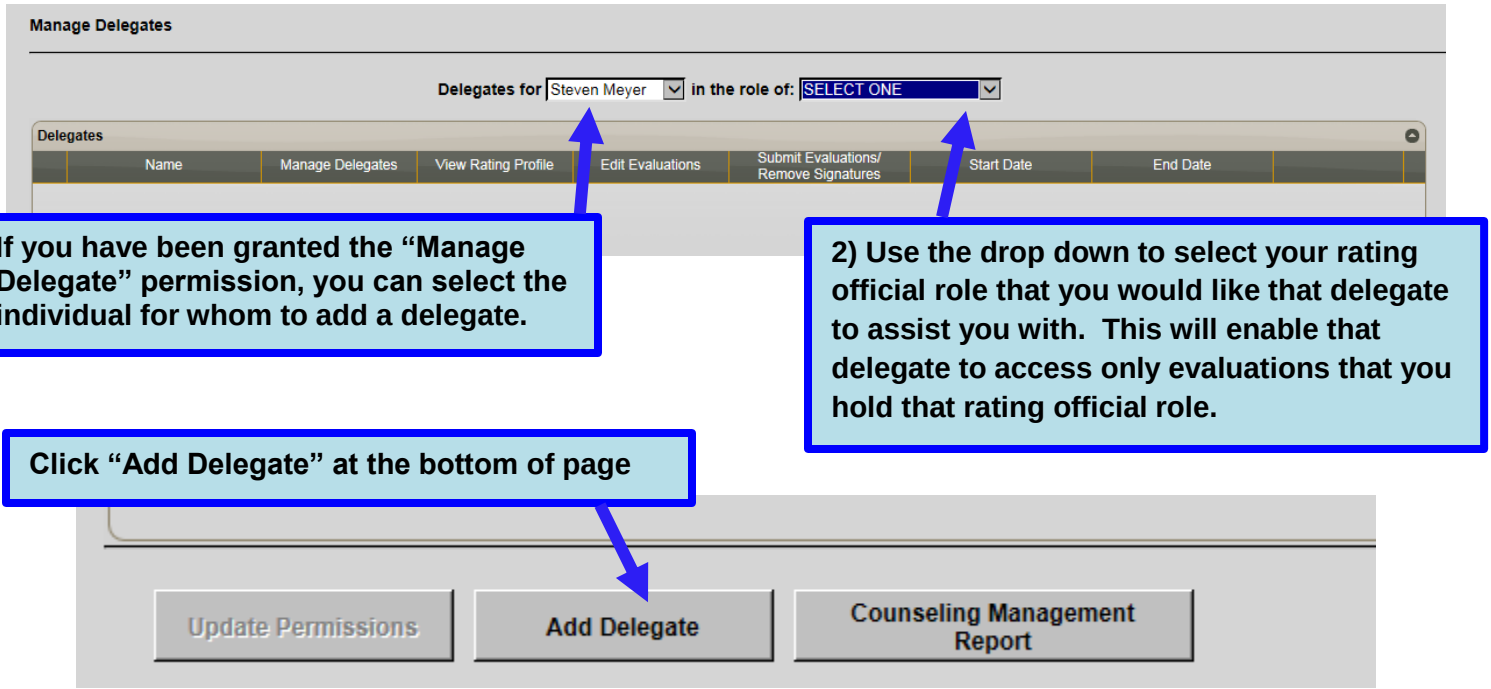
**Reminders:**
-Effective 1 April 2014, the evaluation process will be completed using the Evaluation Entry System (EES). EES is the revised web-based tool at HRC which will be used to submit evaluations. EES will consolidate AKO MyForms wizard, IWRS, Excel profile calculators, etc.
-When evaluations are processed, the Senior Rater and Rater profiles are incremented at the time of submittal.
-Except for the first rating in a particular grade by a (Senior) Rater, the percentage of total ratings by grade in the top block (aka box) must remain below 50%.
-Evaluations on promotable Soldiers serving in positions at the authorized promotable grade will be processed and profiled at the promotable grade. Processing at the promotable grade will only occur when the evaluation displays a (P) with the rated Soldier's rank.
-Rating officials can discuss profile or policy issues with the Evaluation Systems Office. Telephone: (502) 613-9019 DNS: 983-9019 Email: usarmy.knox.hrc.mbx.taad-eval-policy@mail.mil

## Accessing Manage Delegates Function

- Access the Evaluation Entry System by clicking the link https://evaluations.hrc.army.mil/

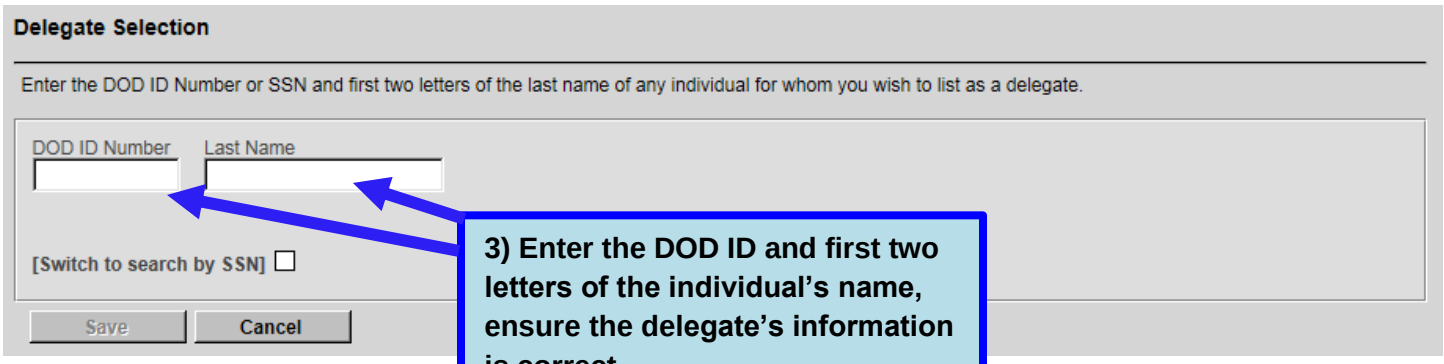


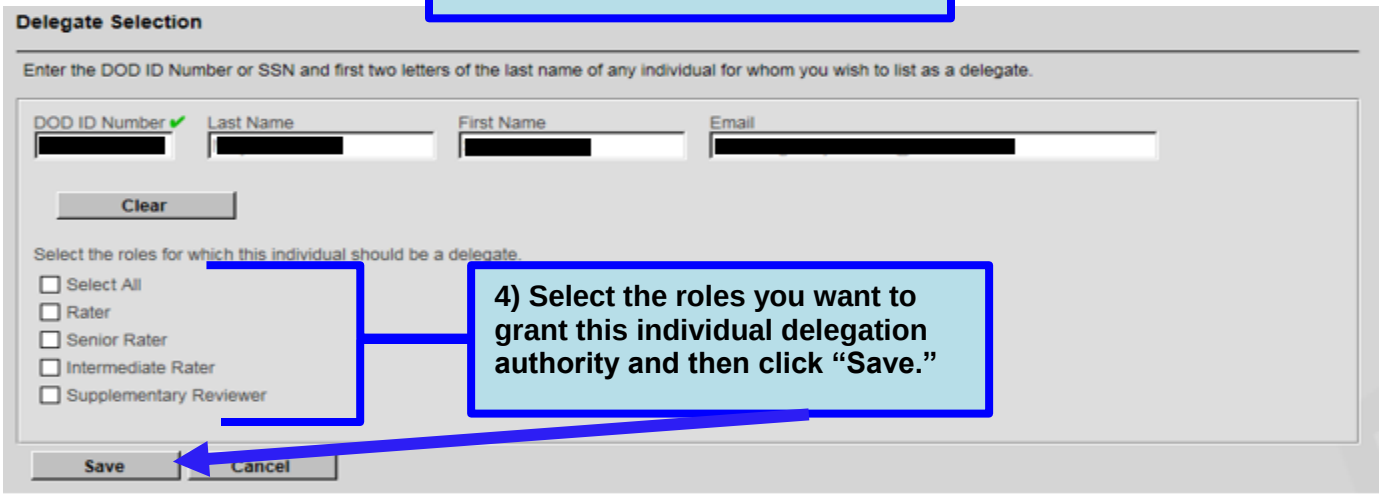
## Adding a Delegate





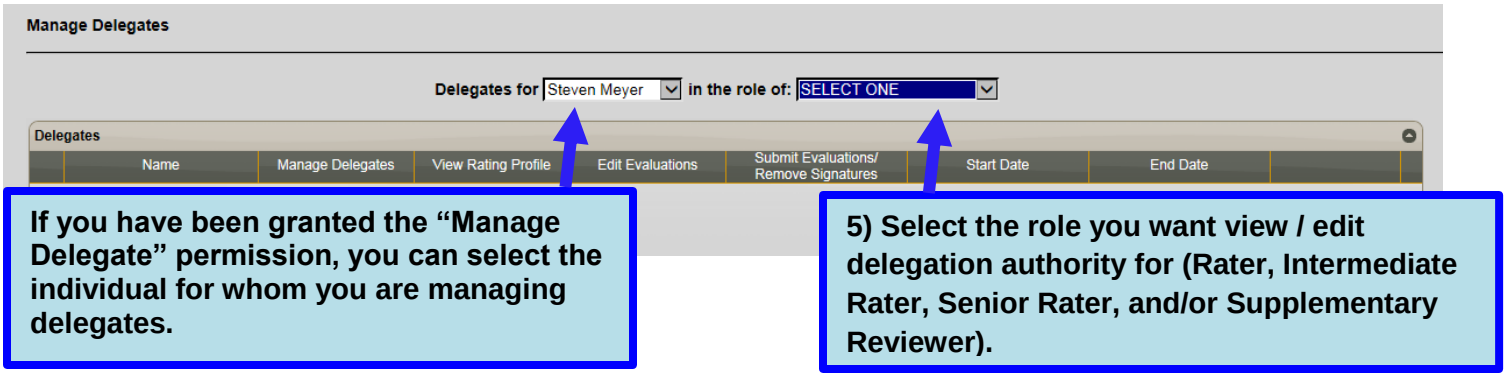




## Manage Delegates

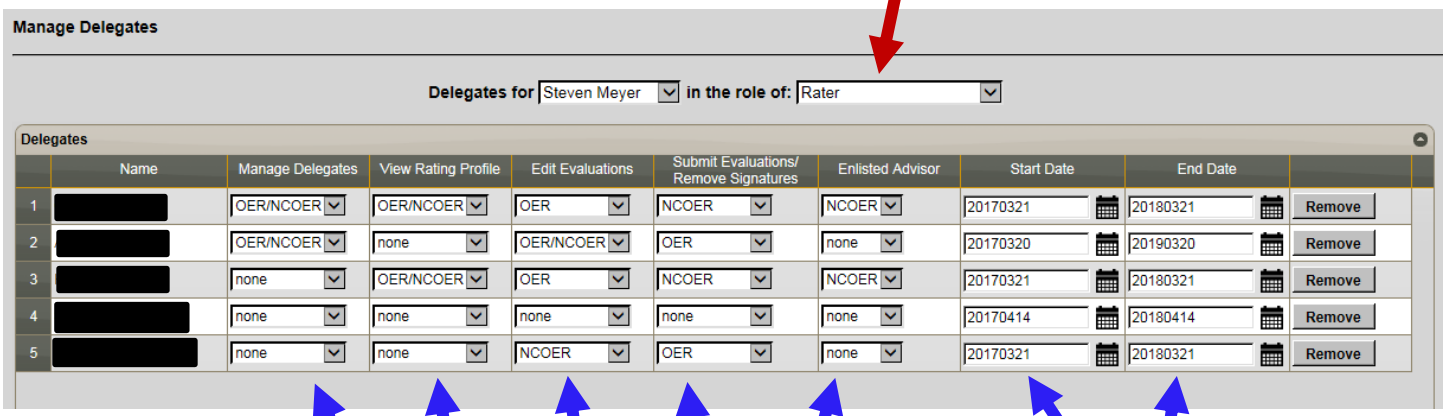
- Once you have delegates, you can update their authorizations as needed.




**If you have been granted the "Manage Delegate" permission, you can select the individual for whom you are managing delegates.**

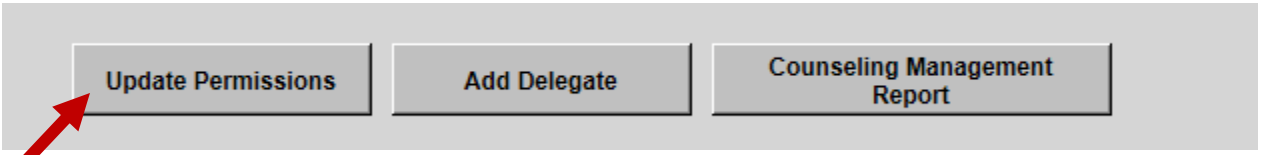
**5) Select the role you want view / edit delegation authority for (Rater, Intermediate Rater, Senior Rater, and/or Supplementary Reviewer).**

**Permissions must be granted in each role that you wish to provide delegation authority.**




**6) You can grant as many or as few permissions as you desire. This must be done for each role (e.g. rater and senior rater) and can be tailored for each delegate. Permissions can be granted for OER, NCOER, OER/NCOER, or none.**

**7) The delegate will only have delegation authority for evaluations within this period. The default "End Date" will be 1 year from the date the delegate was added. The "End Date" can be a maximum of 2 years from the current date.**




**Must click "Update Permissions" at the bottom of the page in order to save any changes to the delegate permissions.**

- Manage Delegates - only two delegates may be authorized to add delegates to the user's delegate list. This enables these two delegates to add or remove delegates as needed.

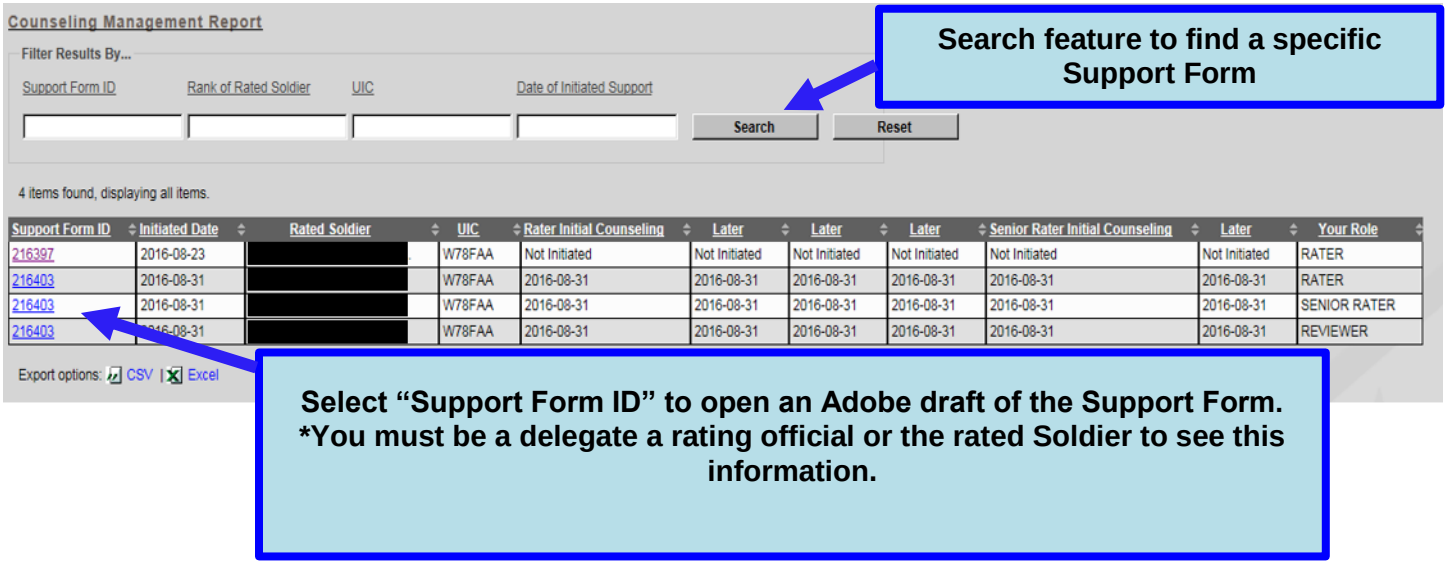
- View Rating Profile - only two delegates may be authorized to view the user's senior rater and rater profile (the delegates must be authorized access to each profile individually). This enables these two delegates to assist users in the management of their profile.

- Edit Evaluations – up to 15 delegates may be authorized to review and make changes to evaluations on behalf of the user.

- Submit Evaluations / Remove Signatures – up to 15 delegates may be authorized to submit evaluations to HQDA on behalf of the senior rater and to remove signatures of personnel they are a delegate for.

- Enlisted Advisor – up to 15 delegates may be authorized to be an enlisted advisor. This enables these delegates to review NCOERs and provide notes / suggested comments that only the user can see.

## Counseling Management Report Tool



**Tips & FAQs**

- Incorrect Profile Numbers – Some Senior Rater Profiles have incomplete / incorrect data transferred into their EES Senior Rater Profile. To correct, the Senior Rater (due to sensitive nature of the information only the Senior Rater may request) submit a request via email to:
  1. usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil
  2. Subject: Senior Rater Profile Verification
  3. Include Senior Rater's full SSN, Ranks that need to be verified, why you think the data is incorrect

- Use the link below to download profile management tools. These tools will assist leaders in properly projecting future OER/NCOERs and subsequent block checks.

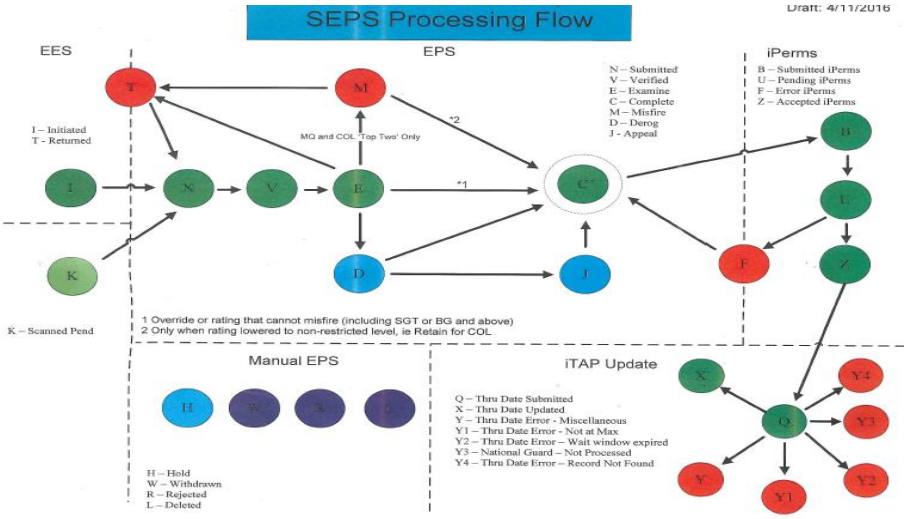
https://www.hrc.army.mil/TAGD/Evaluation%20Systems%20Homepage.

- Sequencing – IAW AR 623-3 para 3-11, HQDA processes OER/NCOERs in order of receipt. This is extremely important to remember when OER/NCOERs are submitted by the three means available – EES, Mail and Email (deployed units only).

- Misfire –
  1. OER
     - Rater - The assessment will apply to raters of Company and Field Grade officers. It will NOT apply to raters of Strategic Leaders (O6). The rating is sequenced based on when the rating is "Locked" within EES. A report with an "Excels" rating that causes a rater's profile to exceed the 49.9% limitation for "Excels" ratings in the rated officer's grade will be automatically processed with a "Proficient" HQDA electronically generated label. The rater and the senior rater listed on the report will be notified of the misfire in EES, and the report will process accordingly.
     - Senior Rater - The senior rater profile continues with the limitation of less than 50%. Senior Rater profiles in effect prior to 1 April 14 migrated to the new OER for LTC and below. COL grade profiles restarted because the math changed for the top two boxes. Senior raters of O6s were given a credit of 5 in the "Retain as Colonel" block. Senior raters of O6s are limited to less than 24% in the "Multi- star Potential" block and no more than 25-49% in the "Promote to BG" block. Senior raters may choose not to give any "Multi-star Potential" and could give up to 49.9% in "Promote to BG" box but, Senior Raters cannot exceed a cumulative of 49.9% for both. The MISFIRE warning is provided twice in EES and if the Senior Rater or his delegate submits anyway, the report is automatically downgraded and it still counts against the Senior Raters higher box check indication. Senior Raters are able to see their profile in real time by selecting the BLUE profile indication when working on the Senior Rater BOX check portion of EES. The profile is calculated at the time the evaluation is "received" by HRC.
  2. NCOER
     - Rater – The rating is not constrained. The Rater's tendency is imprinted on the evaluation when it is processed by HQDA.
     - Senior Rater - A report with a "Most Qualified" rating that causes a Senior Rater's profile to exceed the 24% limitation for "Most Qualified" ratings in the rated Soldier's grade will be automatically processed with a "Highly Qualified" HQDA electronically generated label.

The rater and the senior rater listed on the report will be notified of the misfire in EES, and the report will process accordingly.

- EES Workflow




*Additional FAQs can be found on the EES Home Page (https://evaluations.hrc.army.mil/index.html)

**OER -** https://evaluations.hrc.army.mil/viewDocument.html?msgTypTx=POLICY_FAQ

**NCOER -**

https://www.hrc.army.mil/Site/Protect/Assets/Directorate/TAGD/Consolidated%20NCOER%20FAQs_7%20Oct%2015.pdf

## Troubleshooting

- Unable to access an evaluation/support form
  1. Ensure all DOD ID/SSNs were correctly entered- 99.9% of all unable to view errors are because of this.
  2. If you are a delegate, ensure the following:
     i. The applicable delegation authority has been granted
     ii. Permission were granted for all delegated roles
     iii. The delegation authority is still active (end date)
  3. If you are the rated soldier, ensure that the rater, intermediate rater (if applicable), and senior rater have signed the evaluation
  4. Ensure that the evaluation/support form was created on, and all user are using, the active EES webpage (https://evaluations.hrc.army.mil/index.html)

- Locked out of the evaluation
  1. Signatures must be removed in reverse order (Supplementary Reviewer, Rated Soldier, Senior Rater, Intermediate Rater and then Rater). Failure to remove signatures in reverse order will result in locking individuals out of the report. Have all individuals re-sign the evaluation and then remove signatures in the proper sequence.

2. Ensure all users click the "Exit" button when exiting the evaluation/support form. Have the last individual who was in the report open the evaluation and exit using the "Exit" button. Or wait ten minutes, at which time the lock should be automatically removed.

- Unable to lock rating (Can't see lock button)
  1. No lock button on SGT NCOERs
  2. Can only be locked by the Rater (Delegates cannot lock rating)
  3. Rating cannot be locked more than 14 day before the THRU date.
  4. Ensure DOD ID/SSN are correct for the Rater
  5. Cannot use dual CAC Card reader
  6. Must use Microsoft Internet Explorer 9 or greater

- Adding/Removing a Supplementary Reviewer
  1. Added/Removed by the Senior Rater
  2. "Senior Rater" button, Step 2
  3. For OERs, both the "Is a supplementary review required" question and the "Is a uniformed Army advisor available to perform the supplementary review" question must be answered 'Yes' in order to access the Supplementary Reviewer tab from the signature page.
  4. For NCOERs, the "Is a supplementary review required" question must be answered 'Yes' in order to access the Supplementary Reviewer tab from the signature page.

- Deleting an evaluation from EES
  1. Remove all signatures from the evaluation
  2. Remove the rater lock (see "How to unlock rating")
  3. Senior Rater can then delete the evaluation by clicking the "Delete" button on the Signature Page.

- Cannot change the rated soldier's rank or date of rank
  1. Remove all signatures from the evaluation
  2. Remove the rater lock (see "How to unlock rating")
  3. Ensure that the rank and answers to the related questions are valid for the current form
     i. For NCOER, rank + promotable + serving in next higher position
     ii. For OER, rank + promotable + serving in next higher position
     iii. For both, frocked rank date = Date of Rank

- How to unlock rating
  1. NCOERs can be unlocked by the Rater if the evaluation has not been submitted to HQDA
     i. Ensure a dual CAC Card reader is not being used
     ii. Ensure all signatures have been removed
  2. OERs must be unlocked at HQDA
     i. The Rater must submit a request for an Exception to Policy in Memorandum format thru the chain of command (his/her Rater and Senior Rater) to the Evaluations Branch Chief, AHRC-PDV-E
     ii. Email to: usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil
     iii. Sample memo and additional details below.

## Unlock Rater Profile Process

In order to unlock a Rater profile within EES, a request for an Exception to Policy (ETP) in Memorandum format will be submitted by the Rater thru the chain of command (his/her Rater and Senior Rater) to the Evaluations Branch Chief:

*OFFICIAL LETTERHEAD*

*OFFICE SYMBOL* *DATE*

MEMORANDUM THRU (***Rater's Rater***)

FOR U.S. Army Human Resources Command, Attention: AHRC-PDV-E, 1600 Spearhead Division Avenue, Dept. #470, Fort Knox, KY 40122-5407

SUBJECT: Request for an Exception to Policy to Unlock Rater Profile (***Eval ID XXXXX***)

1. Request (***Rater's rank, full name***) rater profile for (***Eval ID XXXXX***) be unlocked due to (***provide justification***).

2. Point of contact for this request is (***POC's rank/title, full name, telephone number, and email address***).

Signature Block
(***Rater's Senior Rater***)

- Once the ETP request is signed by the Rater's Senior Rater, the request will be forwarded to the following email address for review and processing: usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil. Please ensure the subject of the email is: **Unlock Evaluation**.

## Ways to Submit OER/NCOERs

1. EES – click "Submit to HQDA" button at top of OER/NCOER once all appropriate signatures are obtained.

2. Mail – mail hard copies to the following addresses (AR 623-3, Table F-1):

   - AERs:
     U.S. Army Human Resources Command
     (AHRC–PDV–ER) (Evaluation Processing)

1600 Spearhead Division Avenue, Department 470
Fort Knox, KY 40122–5407

- OER/NCOERs:
U.S. Army Human Resources Command
(AHRC–PDV–ER) (Evaluation Processing)
1600 Spearhead Division Avenue, Department 470
Fort Knox, KY 40122–5407

- Appeals:
U.S. Army Human Resources Command
(AHRC–PDV–EA) (Evaluation Appeals)
1600 Spearhead Division Avenue, Department 470
Fort Knox, KY 40122–5407

**3.** Email – this option is for deployed units only (subject line: Deployed OER/NCOER), **must select 600 DPI or greater resolution for scanned OER/NCOERs. It is best to use EES whenever possible.**

- usarmy.knox.hrc.mbx.tagd-eval-from-deployed@mail.mil

*Reference AR 623-3, Table F-1 for additional contact information