

Noncommissioned Officer Evaluation Report (NCOER)



Agenda

- Evaluation Reporting System
- Key Points
- Rating Officials
- Writing Style and Bullet Guidelines
- Common Errors
- Interactive Web Response System (IWRS)
- Redress Program
- Information Sources
- Contact Information



Purpose

- ≻Used to mentor and develop subordinates.
- Identify Soldiers for promotion and positions of greater responsibility.
- Combine elements of counseling, assessment, documentation, and integration with other personnel functions to meet the needs of the Army.

Functions

- Provide information to HQDA for use in making personnel management decisions (e.g., promotion, assignments, schools).
- Encourage leader professional development and enhance mission accomplishment.



- Rating chain is established by the organizational leader (e.g., Commander) and maintained by rating officials.
- Rating scheme will be published and made accessible; should correspond as nearly as practicable to the chain of command or supervision within a unit.
- A Soldier's signature validates that the administrative data is correct and any disagreements in the ratings should be addressed through the rating officials, a commander's inquiry, and/or appeal procedures.
- NCOERs must be submitted and received by USAHRC NLT 90 days after THRU date.



- It is essential that rating officials meet and maintain the required eligibility criteria throughout the rating period.
- Timely and effective counseling is critical in establishing standards, discussing expectations, and monitoring performance during the rating period.
- When a rater/ratee relationship is established and then broken, an evaluation report is rendered.



- Be short, concise, and to-the-point; <u>tailor</u> the report to the rated individual.
- Start with action words (verbs) or possessive pronouns ("his" or "her"); personal pronouns ("he" or "she") may be used; <u>use past tense</u> when addressing how the NCO performed and his or her contributions made during the rating period.
- Lead with the strongest bullet first.
- Senior Raters should reserve bullet comments, such as "Promote now", "Promote immediately", or "Promote today" for the best qualified leaders.



Writing Style and Bullet Guidelines (cont.)

- Bullet comments are mandatory regardless of the ratings given. (Minimum of one per value/responsibility.)
- Bullet comments will not be longer than two lines; no more than one bullet to a line; double-spaced between bullets.
- - "EXCELLENCE" or "NEEDS IMPROVEMENT" entries in Parts IVb-f;
 - ≻ "FAIL/PROFILE/ NO APFT" entries in Part IVc;
 - ≻"NO" entry in Part IVc HT/WT block.





Part IV - Army Values/Attributes/Skills/Actions

ARMY VALUES.	Check either "YES" o	r "NO". (Bullet Comments are mandatory. Substantive bullet comments are required for "NO" entries.)	YES	N			
V	Loyalty	1. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and other Soldier					
		2. DUTY: Fulfills their obligations.	X				
	Duty Respect	3. RESPECT/EO/EEO: Treats people as they should be treated.					
Δ	Selfless-Service	4. SELFLESS-SERVICE: Puts the welfare of the nation, the Army, and subordinates before their own.	X				
~		5. HONOR: Lives up to all the Army values.	X				
L		6. INTEGRITY: Does what is right - legally and morally.	X				
_	U	7. PERSONAL COURAGE: Faces fear, danger, or adversity <i>(physical and moral).</i> Bullet comments Substantive bullet comments are required regardless of the ratings given.					
Honor Integrity Personal Courage	E	Mandatory specific bullet comments are required for all "NO" entries.					
	S S	Bullets will not be longer than two lines and double-spaced.					
FORM 2166-	8, OCT 2011	PREVIOUS EDITIONS ARE OBSOLETE.	Page APD PE v				

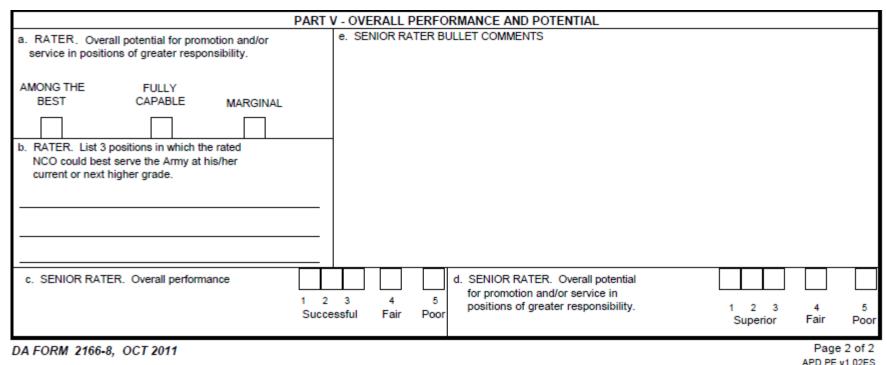


Part IV – Values/NCO Responsibilities

RATED NCO'S NAME (Last, First, Middle Initial) DOE, JOHN		SSN 123-45-6789	THRU DATE 20130930
PART IV (Rater) - VALUES/NCO RESPONSIBILITIES	Bullet comments are mandatory.		
b. COMPETENCE o Duty proficiency; MOS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment o Seeking self-improvement; always learning o Accomplishing tasks to the fullest capacity; committed to excellence EXCELLENCE SUCCESS NEEDS IMPROVEMENT	Substantive bullet comments are required for 'EX Specific bullet comments are mandatory IMPROVEMENT'' entries.		
(Exceeds std) (Meets std) (Some) (Much)			
c. PHYSICAL FITNESS & MILITARY BEARING	APFT FAIL 20130911	HEIGHT/WEIGHT	70/260 NO
 Mental and physical toughness Endurance and stamina to go the distance Displaying confidence and enthusiasm; looks like a Soldier 	Comments for "FAIL/PROFILE/NO APFT" entries are mandatory. Comments are mandatory and will indicate reason for noncompliance with AR 600-9. The progress or lack of progress will be indicated.		
EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)			
d. LEADERSHIP o Mission first o Genuine concern for Soldiers o Instilling the spirit to achieve and win o Setting the example; Be, Know, Do EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)			
e. TRAINING o Individual and team o Mission focused; performance oriented o Teaching Soldiers how; common tasks, duty-related skills o Sharing knowledge and experience to fight, survive and win EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Forecale of eff.)			
(Exceeds std) (Meets std) (Some) (Much)			
o Care and maintenance of equipment/facilities o Soldier and equipment safety o Conservation of supplies and funds o Encouraging Soldiers to learn and grow o Responsible for good, bad, right & wrong EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)			



Part V – Overall Performance and Potential



Rater completes Part Va & Vb

Among the Best – Demonstrated a very good, solid performance and a strong recommendation for promotion.

Fully Capable – Demonstrated a good performance and strong recommendation for promotion should sufficient allocations be available.

Marginal – Demonstrated a poor performance and should not be promoted at this time.



Part V – Overall Performance and Potential

PART	V - OVERALL PERFORMANCE AND POTENTIAL
 RATER. Overall potential for promotion and/or service in positions of greater responsibility. 	e. SENIOR RATER BULLET COMMENTS
AMONG THE FULLY BEST CAPABLE MARGINAL	
b. RATER. List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade.	
c. SENIOR RATER. Overall performance	23452345cessfulFairPoor
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Senior Rater completes Part Vc, Vd, & Ve.

Successful/superior. A "1" rating represents the cream of the crop and is a recommendation for immediate promotion. A "2" rating represents a very good, solid performance and is a strong recommendation for promotion. A "3" rating also represents a good performance and, should sufficient allocations be available, is a recommendation for promotion.

Fair. A "4" rating represents NCOs who may require additional training/observation and should not be promoted at this time.

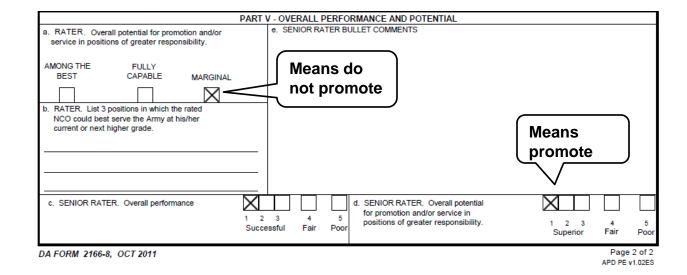
Poor. A "5" rating represents NCOs who are weak or deficient and, in the opinion of the senior rater, need significant improvement or training in one or more areas. Do not promote and consider for DA-imposed bar to reenlistment under the Qualitative Management Program.

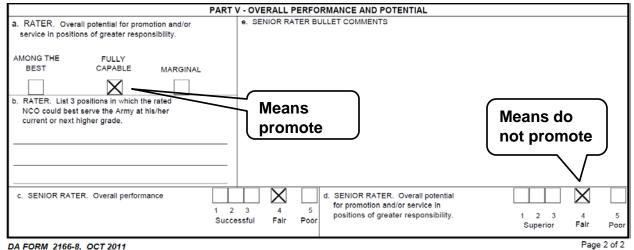
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Part V – Inconsistent Rating Examples





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Sample NCOER (Page 2)

RATED NCO'S NAME (Last, First, Middle Initial)		SSN	THRU DATE	1
DOE, JOHN		123-45-6789	20130930	
PART IV (Rater) - VALUES/NCO RESPONSIBILITIES	Bullet comments are mandatory. Substantive bullet comments are required for "EX	CELLENCE" or "NEEDS IMPROVE	MENT."	4 / \
 b. COMPETENCE o Duty proficiency; MOS competency o Technical & tactical; knowledge, skills, and abilities 	o meticulous monitoring of NCOERs re rate	-	-	
 Sound judgment Seeking self-improvement; always learning Accomplishing tasks to the fullest capacity; committed to excellence 	o expertly handled and ensured prompt p this rating period	Lead with your		
EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)	o provided superb personnel service sup brigade	-		<pre>strongest bullet</pre>
c. PHYSICAL FITNESS & MILITARY BEARING	APFT PASS 20130911		70/165 YES	
 Mental and physical toughness Endurance and stamina to go the distance Displaying confidence and enthusiasm; looks like a Soldier 	o awarded the physical fitness badge for o routinely worked in excess of 60 hours enthusiasm			
EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)				
d. LEADERSHIP o Mission first	o mentored and coached two Soldiers to	win Brigade Soldier of	the Quarter honors	ľ
 Genuine concern for Soldiers Instilling the spirit to achieve and win Setting the example; Be, Know, Do 	o motivated a previously substandard So the height/weight standards	oldier to successfully pa	ss the APFT and meet	
EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)	o ensured Soldiers were regularly couns caring, compassionate leader	eled and earned their tr	ust and confidence as a	
e. TRAINING o Individual and team o Mission focused; performance oriented o Teaching Soldiers how; common tasks, duty-related skills	o personally planned and executed annu- brigade headquarters	al training for all Soldie	ers assigned to the	
duty-related skills o Sharing knowledge and experience to fight, survive and win EXCELLENCE SUCCESS NEEDS IMPROVEMENT	o constantly trained Soldiers on daily ta mediocrity	sks and responsibilities	; refused to settle for	Focus on
(Exceeds std) (Meets std) (Some) (Much)	o maintained accountability of office and	A automation aquinmon	t valued in excess of	promotion,
o Care and maintenance of equipment/facilities	\$800,000 with zero loss or damage	a automation equipment	t valueu ili excess of	schools,
 Soldier and equipment safety Conservation of supplies and funds Encouraging Soldiers to learn and grow Responsible for good, bad, right & wrong 	o completely reorganized office area to to create a more professional office atm		space; removed excess	> assignments
EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)				
	V - OVERALL PERFORMANCE AND POTENTI e. SENIOR RATER BULLET COMMENTS	AL		4 / /
 RATER. Overall potential for promotion and/or service in positions of greater responsibility. 	o select in the secondary zone for promo			L .
AMONG THE FULLY BEST CAPABLE MARGINAL	o out-performs most Master Sergeants a o assign to the most challenging position	-		
b. RATER. List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade.	o unquestionably the best Sergeant First		-	
FIRST SERGEANT				
SR HR SGT BDE S1				
IG NCO				
	d. SENIOR RATER. Overa for promotion and/or sei positions of greater res	rvice in	1 2 3 4 5 Superior Fair Poor	J. -
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- Inconsistent ratings in Parts Va and Vd; non-concurrence memo not attached to report
- Incorrect SSN (*must* check before signing)
- Signing more than 14 days prior to the THRU date
- Sending to HQDA before the THRU date
- No bullet comments
- Missing statement when Soldier is unavailable for signature or refuses to sign
- Missing comment for profile status
- FROM date overlaps with THRU date of previous report
- APFT date not in correct format (YYYYMMDD) or older than 12 months from the THRU date of the evaluation
- Missing counseling dates or statement in Part Ve



Interactive Web Response System (IWRS)

- An interactive tool that provides information to a variety of users (individuals, BN/BDE S1s, Human Resources Managers, and Commanders).
- Reflects administrative information on OERs (all officers, regardless of component) and NCOERs (Army active component and Army Reserve NCOs only).
- Creates a number of helpful prepared reports that draw information from the most current databases at HQDA to retrieve evaluation report information on your Soldiers.
- It's the <u>responsibility of the rated Soldier and unit</u> to monitor IWRS for any evaluation status updates (e.g., On Hold, Pending, Rejected, Completed).
- Once an evaluation is completed and placed in the Soldier's AMHRR, any requested changes to it become a matter for the Appeals Section (see AR 623-3, Ch 4).

Direct Internet Access: https://knoxhrc16.hrc.army.mil/iwrs.



- Redress Program (AR 623-3, Ch 4) includes:
 Commander's Inquiry
 Appeals System
 Army Board of Correction of Military Records
- Preventive and corrective in nature
- Protects the Army's interests and ensures fairness to the rated Soldier
- First element communication process
- Second element various regulatory requirements



- Provide command involvement in preventing obvious injustices and in correcting errors before they become a matter of permanent record to include:
 > Improperly designated or unqualified rating officials
 > Inaccurate or untrue statements
 > Lack of objectivity or fairness by rating officials
- Not a prerequisite for submission of an appeal
- Not used to document differences of opinion amongst rating officials
- Commander will not pressure/force raters to change their evaluation.



- Must be in writing to a Commander above the designated rating chain.
- The Commander/Commandant takes the following actions:
 - If no error, violation of the regulation, or wrongdoing is found, advise the requester and take no further action.
 - If an error, violation of the regulation, or wrongdoing has occurred and the evaluation has not been forwarded to HQDA, the evaluation is returned with the inquiry results to be corrected.
 - Report is sent to HQDA with no reference to the inquiry.
 - \succ The results of the inquiry remain with the commander.
 - If rating chain members cannot agree on the need for change in the report, the commander will forward the evaluation report and the results of the inquiry to the appropriate agency listed in Appendix F of AR 623-3.
 - Sufficient documentation, such as report and statements, will be attached to justify the conclusion.



- The rated Soldier or another party can file an appeal of a report that he or she feels is unjust.
- The results of a commander's inquiry do not constitute an appeal they may be used to support it.
- Substantiating evidence must support an appeal.
- Appeals based solely on the lack of counseling will not normally serve as a basis to invalidate a report.
- Three types: Administrative (no time limit), Substantive (3 year limit), Combination (Administrative/Substantive).



- Evaluation Systems Homepage http://www.hrc.army.mil/evaluations
- AR 623-3 and DA PAM 623-3, http://www.apd.army.mil/
- AKO Forms Wizard and Portal: <u>https://myforms.ecms.army.mil/wps/myportal</u>
- AKO Forms Portal Assistance
 Email: <u>APDFCMP@conus.army.mil</u>
 Phone: 703-692-1306



Mailing Address

US Army Human Resources Command Attn: AHRC-PDV-E (for Policy); AHRC-PDV-ER (for Hard Copy Evals); or AHRC-PDV-EA (for Appeals) 1600 Spearhead Division Avenue, Dept #470 Fort Knox, KY 40122-5407

Note: Only deployed units and Soldiers are authorized to email reports to USAHRC.

Email accounts

Policy – <u>usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil</u> Appeals – <u>usarmy.knox.hrc.mbx.tagd-eval-appeals@mail.mil</u> Deployed Units – <u>usarmy.knox.hrc.mbx.tagd-eval-from-deployed@mail.mil</u>

Phone Numbers:

Policy – COM 502-613-9019/DSN 983-9019 Appeals – COM 502-613-9022/DSN 983-9022