

Summary Report for Individual Task
805C-420-7006
Manage Evaluations Process
Status: Approved

Distribution Restriction: Approved for public release; distribution is unlimited.

Destruction Notice: None

Foreign Disclosure: FD1 - This training product has been reviewed by the training developers in coordination with the Fort Jackson / USASSI foreign disclosure officer. This training product can be used to instruct international military students from all approved countries without restrictions.

Condition: You are assigned as the Human Resources (HR) Technician at echelons above brigade. The Commanding General tasks you to review the rating chain, manage the senior rater profile, and review/process command level evaluations. You have access to all HR enabling systems and the references listed on the enclosed table. This task should not be trained in MOPP 4.

Standard: Manage the evaluations process by reviewing rating chain and senior rater profiles and implementing quality control measures that ensure 100% accuracy and timeliness for all evaluations.

Special Condition: None

Safety Risk: Low

MOPP 4: Never

Task Statements

Cue: You are required to manage command level evaluations for your unit.

DANGER

None

WARNING

None

CAUTION

None

Remarks: None

Notes: None

Performance Steps

1. Identify the principles of the Evaluation Reporting System (ERS).
 - a. Encompasses the means and methods needed for developing people and leaders.
 - b. Identifies Soldiers best qualified for promotion and assignment to positions of greater responsibility.
 - (1) Performance evaluations.
 - (2) School evaluations.
2. Determine rating chain qualifications and responsibilities.
 - a. Noncommissioned officer (NCO) rating chain.
 - (1) Rater.
 - (2) Senior Rater.
 - (3) Reviewer.
 - b. Officer rating chain.
 - (1) Rater.
 - (2) Intermediate Rater.
 - (3) Senior Rater.
 - c. Minimum grade requirements.
 - d. Identify any joint / foreign leaders within the chain of command.
 - e. Identify any special branch officers.
3. Define counseling requirements that support ERS.
 - a. Initial counseling.
 - b. Follow-up face-to-face counseling.
 - c. NCO / Officer Support Forms.
4. Identify types of Evaluation Reports.
 - a. Mandatory reports.
 - (1) Change of rater.
 - (2) Annual.

- (3) Extended annual.
- (4) Change of duty.
- (5) Depart temporary duty, special duty, or temporary change of station.
- (6) Officer failing selection promotion.
- (7) Initial tour of extended active duty.
- (8) Human Resources Command (HRC) directed.
- (9) Relief-for-cause.

b. Optional reports.

- (1) Complete-the-record.
- (2) Senior rater option.
- (3) Sixty day option.
- (4) Rater option.

5. Identify forms used for evaluations.

- a. Company Grade Plate (O1-O3; WO1-CW2) Officer Evaluation Report (DA Form 67-10-1).
- b. Officer Evaluation Report Support Form (DA Form 67-10-1A).
- c. Field Grade Plate (O4-O5; CW3-CW5) Officer Evaluation Report (DA Form 67-10-2).
- d. Strategic Grade Plate (O6) Officer Evaluation Report (DA Form 67-10-3).
- e. Strategic Grade Plate (O7) Officer Evaluation Report (DA Form 67-10-4).
- f. Noncommissioned Officer Evaluation Report (DA Form 2166-8).
- g. Noncommissioned Officer Evaluation Report Counseling and Support Form (DA Form 2166-8-1).
- h. Academic Evaluation Report (DA Form 1059).

6. Identify websites that support the processing of evaluation reports.

- a. Evaluation Entry System (EES).
- b. Interactive Web Response Systems (IWRS).

7. Manage Rater Profiles.

- a. Obtain current senior rater profile from the Senior Rater.

b. Review senior rater profile with senior rater to ensure the profile is current and that all previously submitted reports are captured on the profile.

c. Identify current evaluations submitted for projected senior rater profile percentage.

d. Project the senior rater profile percentage; ensure it is less than 50% for Most Qualified (MQ) ratings.

e. Implement an accurate senior leader tracking system on evaluations.

(1) Track status and location of evaluations.

(2) Monitor suspense dates in order to meet the submission requirement to Human Resources Command (HRC).

(3) Establish or facilitate/anticipate all mandatory and optional reports.

(4) Update the commander on the status of evaluations, as required.

f. Update Senior Rater profile after evaluations are processed and completed at HRC.

(Asterisks indicates a leader performance step.)

Evaluation Guidance: Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

Evaluation Preparation: This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Identified the principles of the Evaluation Reporting System (ERS).			
2. Determined rating chain qualifications and responsibilities.			
3. Defined counseling requirements that support ERS.			
4. Identified types of Evaluation Reports.			
5. Identified forms used for evaluations.			
6. Identified websites that support the processing of evaluation reports.			
7. Managed Rater Profiles.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	ADP 6-22	Army Leadership	Yes	No
	ADRP 6-22 (Change 1, 10 Sep 2012)	Army Leadership	Yes	No
	AR 623-3 Revision, March 31, 2014	Evaluation Reporting System http://www.apd.army.mil/pdffiles/r623_3.pdf	Yes	Yes
	DA FORM 2166-8	Noncommissioned Officer Evaluation Report	Yes	No
	DA FORM 2166-8-1	NONCOMMISSIONED OFFICER COUNSELING CHECKLIST/RECORD	Yes	No
	DA FORM 67-10-1	Company Grade Plate (O1 - O3; WO1 - CW2) Officer Evaluation Report	Yes	No
	DA FORM 67-10-1A	Officer Evaluation Report Support Form	Yes	No
	DA Form 67-10-2	Field Grade Plate (O4 - O5; CW3 - CW5) Officer Evaluation Report	Yes	No
	DA Form 67-10-3	Strategic Grade Plate (O6) Officer Evaluation Report	Yes	No
	DA Form 67-10-4	Strategic Grade Plate (O7) Officer Evaluation Report	Yes	No
	PAM 600-3	COMMISSIONED OFFICER PROFESSIONAL DEVELOPMENT AND CAREER MANAGEMENT	No	No
	PAM 600-4	AMEDD OFFICER DEVELOPMENT AND CAREER MANAGEMENT	No	No
	PAM 623-3 (Revision, March 31, 2014)	Evaluation Reporting System http://www.apd.army.mil/pdffiles/p623_3.pdf	Yes	Yes

Environment: Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

Safety: In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

Prerequisite Individual Tasks : None

Supporting Individual Tasks : None

Supported Individual Tasks : None

Supported Collective Tasks : None