COMMISSIONED OFFICERS' EFFECTIVENESS REPORT (COER)

Commissioned Corps Headquarters

COER System

User Guide

COER System User Guide & FAQ's

Updated 9/28/2020

Commissioned Corps Headquarters

Personnel and Career Management, COER Specialist

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Initiating a COER as an Officer:

1. Go to the Officer Secure Area of the Commissioned Corps Management Information System (CCMIS) - https://dcp.psc.gov/osa/osa_security_statement.aspx

2. Login to CCMIS using your PIV, CAC, or ALT card

3. Once logged in, click "Forms" on the left-side menu

4. Click the large, turquoise box labeled "MY FORMS"

5. Click "Add new record"

6. Ensure "Officer COER" is selected then click the button labeled "Save"

7. Click the icon under the "Edit" column

8. Enter the required information throughout the page

9. Submit the COER to your rater by clicking the "Submit" button at the bottom of the page
   After you submit the COER and your Rater completes the evaluation, you must concur or disagree with the COER to complete the officer section of the COER process

OFFICER INSTRUCTIONS: Describe your duties, goals, and accomplishments during the performance period. Use the space provided. COER Information

Section 2: Officer Comments

Description. Describe the main duties and responsibilities in your job during the performance period. *

> Example

393 characters remaining.

Goals. List your work-related goals for the next performance period and long term career goals. *

> Example

393 characters remaining.

Accomplishments. List your accomplishments related to the performance elements you will be rated on. *

> Example

1673 characters remaining.

Rater Information

Email Address *

Full Name

Cancel   Submit

The Rater's email address and name are pulled from RedDOG's systems – update your supervisor information on RedDOG self-service if the COER system is pulling information from your previous Rater

COER Components

Section 1: Administrative Data

Full Name

Phone *
(__) ___-____

SERNO

Email Address *

Agency *
OS

Category
Health Services Officer

Position Title *

Rank
LT

Billet Grade *

In Current Position Since *
MM/dd/yyyy

Input any administrative data that is not auto-populated

☐ **Officer is up for promotion**

Period Covered by Report

From *
MM/dd/yyyy

To *
MM/dd/yyyy

COER Type

Purpose of COER *
End of Evaluation Year

Evaluation Year

Period Covered by Report should cover the entire evaluation year (1 October to 30 September) unless you had a rater change during the evaluation year – transfer, separation, or retirement of the officer or rater

Evaluation Year will auto-populate based on the dates you enter.

Clicking this button will indicate to your rater, RO, and liaison that you are "Up for promotion". It will also require your RO to submit a ROS in order to complete their part of the COER.

Most officers should select "End of Evaluation Year" unless you had a rater change – transfer, separation, or retirement of the officer or rater. See page 60 (FAQ's) for further clarification.

COER type (annual or interim) will auto-populate based on the dates you enter. If the period covered is ≥6 months, it is an annual COER. If the period covered is <6 months, it is an interim COER.

OFFICER INSTRUCTIONS: Describe your duties, goals, and accomplishments during the performance period. Use the space provided. COER Information

Section 2: Officer Comments

Description. Describe the main duties and responsibilities in your job during the performance period. *

Goals. List your work-related goals for the next performance period and long term career goals. *

Accomplishments. List your accomplishments related to the performance elements you will be rated on. *

Officers are encouraged to save text in an external application then copy-and-paste the data into the provided textboxes.

Goals textbox has a 400 character limit and a 9 line limit.

Accomplishments textbox has a 1680 character limit and a 38 line limit.

See page 66 for character and line limits for all textboxes.

Description textbox has a 400 character limit and a 9 line limit.

Concurring or Disagreeing with a COER as an Officer:

1. Go to the Officer Secure Area of the Commissioned Corps Management Information System (CCMIS) - https://dcp.psc.gov/osa/osa_security_statement.aspx

2. Login to CCMIS using your PIV, CAC, or ALT card

3. Once logged in, click "Forms" on the left-side menu

4. Click the large, red box labeled "FORMS TO REVIEW"

5. Click the icon in the column labeled "Edit Form"

6. Select "Concurrence", choose the date, then click "Submit"; after submitting your concurrence/non-concurrence, the officer section of the COER process is complete
If you wish to see your Rater's comments, click the "Next" button **before** clicking "Submit"

Submitting a Rebuttal

1. Officer who wish to submit a rebuttal should go to "MY FORMS" in CCMIS (see page 4 for step-by-step instructions

2. Click the "Supplemental Forms" icon after verifying you are submitting a rebuttal to the correct COER

3. Click "Add new record"

4. Ensure "Officer Rebuttal (COER)" is selected in the Form Name dropdown menu and click "Save"

5. Click the icon in the "Edit" column

6. Enter data in the rebuttal textbox, select the date, enter your liaison's email address, and click "Submit"; after liaison approval, the rebuttal will be indexed in your eOPF with your COER

Rebuttal textbox is limited to 15,000 characters (5 pages)

Enter your liaison's email address

Submitting a Reviewing Official's Statement (ROS)

The ROS is a section of the annual COER and should be completed whenever the annual COER is completed. It is required for officers who are up for promotion and optional for those who are not up for promotion. If an officer needs to submit their ROS because they completed their annual COER without the ROS, please see the steps below:

1. Go to "MY FORMS" in CCMIS (see page 4 for step-by-step instructions)
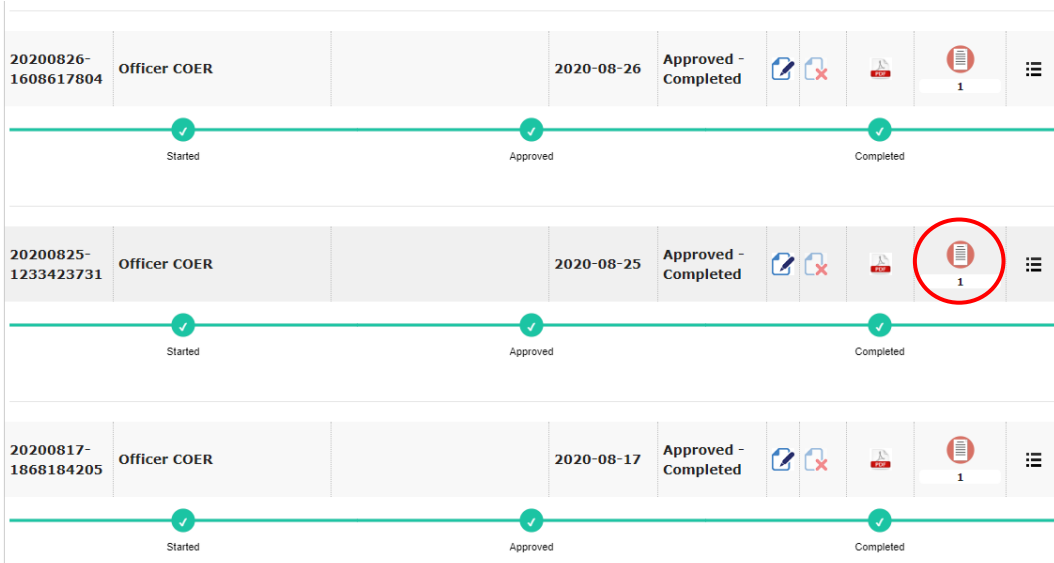
2. Click the "Supplemental Forms" icon after verifying the correct COER is selected

3. Click "Add new record"

4. Click "Save" after confirming "ROS(COER)" is selected

5. Click the icon in the "Edit" column

6. Enter your reviewing official's email address and click "Submit"; your reviewing official will receive an email notification to complete your ROS

7. Your reviewing official will receive form below; once all fields are completed, they will click "Submit" and the form will be sent to your liaison for approval

SECTION I -- Officer Information

Full Name *

Category *

Reviewing Official Email Address

SECTION II -- Reviewing Officials Assessment must address the following three points in the space provided.

1. PROMOTION READINESS: Do you recommend this officer for promotion to the next higher rank?
2. LEADERSHIP: How does the officer take on a leadership role in the Command/Agency?
3. MISSION: How does the officer contribute to the mission of the Command/Agency?

*

SECTION III -- Reviewing Officials Signature

Reviewing Official Name *

Signed Date: *

MM/dd/yyyy

SECTION IV -- Commissioned Corps Liaison Verification

Email Address *

Cancel   Reject   Approve

Rating an Officer as a PHS Officer

1. Go to the Officer Secure Area of the Commissioned Corps Management Information System (CCMIS) - https://dcp.psc.gov/osa/osa_security_statement.aspx

2. Login to CCMIS using your PIV, CAC, or ALT card

3. Once logged in, click "Forms" on the left-side menu

4. Click the large, red box labeled "FORMS TO REVIEW"

5. Click the icon in the column labeled "Edit Form"
   If no forms appear, the officer has not yet submitted the COER; you'll receive an automated email when the officer submits the COER

6. Review information the officer entered, scroll to the bottom of the page, and click "Next"

7. Complete the information about yourself and add comments about the officer's strengths and areas of improvement

Last Name, First Name, MI *

Phone Number *
( ) __-___

Position Title *

Overall Performance
(Auto-calculated from the performance evaluation - unless the COER is narrative)
*

Email Address

Time Supervised

Years *

Months

Strengths: List the areas in which the officer displays strong qualities and superior skills. *

Areas of improvement: List the areas needed for continued growth and development. *

8. Select a score (1 to 7 with 1 being the worst and 7 being the best) for each performance attribute and add a comment to describe the action upon which you based your rating
If you have supervised the officer for <6 months, this section is optional

1. Leadership - Demonstrates and communicates vision and sense of purpose; nurtures an environment conductive to accomplishing the organizations mission.

1
2 - Demonstrates behavior that maintains the status quo, often seeking direction in accomplishing the teams goals.
  - Has minimal influence on others.
3
4 - Demonstrates behavior that facilitates collaboration, fairness, and inclusiveness.
  - Influences others through actions, accomplishments, and team work.
5
6 - Consistently demonstrates behavior that contributes to the organizations success by fostering effective relationships, inspiring the trust of others, and nurturing group effectiveness and cohesion.
  - Influences others by exhibiting vision, innovation, resilience, inclusiveness, and by teaching and coaching others.
7

Comment *

2. Initiative and Growth - Recognizes and acts on programmatic and personal developmental needs, resulting in advancement of programmatic goals and growth in professional skills.

1
2 - Needs assistance in identifying opportunities to improve work performance.
  - Work performance improves with regular supervisory input and detailed instructions about assignments.
  - Needs guidance to understand how personal decisions and actions contribute to mistakes or impedes success of individual and group projects.
3

9. Enter the email address of the Reviewing Official (your supervisor)

10. Type your name into the Signature textbox, choose the date, and click "Approve"
   After clicking "Approve", the Rater section is complete; see page 31 to reset/reject a COER

Rating an officer as a Civilian

1. Once an officer under your supervision submits a COER, you will receive an email with a link to create an account; click the link, enter information requested, and click "Submit"

2. Once your account is created, go to the COER System guest user login (https://dcp.psc.gov/Forms/Account/Login)

3. Verify your identity using the validation token sent to your email address

4. Click the large, red box labeled "FORMS TO REVIEW"

5. Click the icon in the column labeled "Edit Form"
   If no forms appear, the officer has not yet submitted the COER; you'll receive an automated email when the officer submits the COER to you

6. Review information the officer entered, scroll to the bottom of the page, and click "Next"

7. Complete the information about yourself and add comments about the officer's strengths and areas of improvement

Last Name, First Name, MI *

Phone Number *

( ) ___-____

Position Title *

Overall Performance
(Auto-calculated from the performance evaluation - unless the COER is narrative)
*

Email Address

Time Supervised

Years *

Months

Strengths: List the areas in which the officer displays strong qualities and superior skills. *

Areas of improvement: List the areas needed for continued growth and development. *

8. Select a score (1 to 7 with 1 being the worst and 7 being the best) for each performance attribute and add a comment to describe the action upon which you based your rating
    If you have supervised the officer for <6 months, this section is optional

1. Leadership - Demonstrates and communicates vision and sense of purpose; nurtures an environment conductive to accomplishing the organizations mission.

○ **1**
○ **2** - Demonstrates behavior that maintains the status quo, often seeking direction in accomplishing the teams goals. *
       - Has minimal influence on others.
○ **3**
○ **4** - Demonstrates behavior that facilitates collaboration, fairness, and inclusiveness.
       - Influences others through actions, accomplishments, and team work.
○ **5**
○ **6** - Consistently demonstrates behavior that contributes to the organizations success by fostering effective relationships, inspiring the trust of others, and nurturing group effectiveness and cohesion.
       - Influences others by exhibiting vision, innovation, resilience, inclusiveness, and by teaching and coaching others.
○ **7**

Comment *

2. Initiative and Growth - Recognizes and acts on programmatic and personal developmental needs, resulting in advancement of programmatic goals and growth in professional skills.

○ **1**
○ **2** - Needs assistance in identifying opportunities to improve work performance. *
       - Work performance improves with regular supervisory input and detailed instructions about assignments.
       - Needs guidance to understand how personal decisions and actions contribute to mistakes or impedes success of individual and group projects.
○ **3**

9. Enter the email address of the Reviewing Official (your supervisor)

10. Type your name into the Signature textbox, choose the date, and click "Approve"
    After clicking "Approve", the Rater section is complete; see page 31 to reset/reject a COER

Resetting or Closing a COER (Rater)

1. Review information entered by the officer

    ▪ For raters who are PHS officers, see page 19 for step-by-step instructions on arriving at this stage in the COER process

    ▪ For raters who are a civilians, see page 30 for step-by-step instructions on arriving at this stage in the COER process

2. If the officer entered incorrect information, you may send the COER back to the officer for modifications or close the COER completely by clicking the "Reject" button

3. Choose "Assign To – Officer" or "Reject and Close" from the dropdown menu then click save; the "Comments" textbox is used to explain why you rejected the COER

Please note:

"Assign To – Officer" – Selecting this option will send the COER back to the officer. Data entered by the officer will be retained; Data entered by you (the rater) will be lost.

"Reject and Close" – If the COER is rejected and closed, all data entered will be lost and the COER will be closed completely.

Initiating a COER on an Officer as a Rater

1. Click "Search Officer" within CCMIS; please see page 4 and follow steps 1 – 7 to arrive at this stage

2. Search for any officers you supervise using their SERNO or name
   The COER system will only show officers you supervise

3. Click the checkbox that corresponds to the officers you wish to initiate a COER on and click "Add Selected"

4. Enter the required data and click "Submit" to initiate the COER
   Officers are required to complete any COER their rater initiates

Reviewing a COER as a PHS Officer

1. Go to the Officer Secure Area of the Commissioned Corps Management Information System (CCMIS) - https://dcp.psc.gov/osa/osa_security_statement.aspx

2. Login to CCMIS using your PIV, CAC, or ALT card

3. Once logged in, click "Forms" on the left-side menu

4. Click the large, red box labeled "FORMS TO REVIEW"

5. Click the icon in the column labeled "Edit Form"

If no forms appear, the officer has not yet concurred or disagreed with the COER; you'll receive an automated email when the officer submits concurrence

6. Review the information entered in the "Officer" tab then click "Next"

7. Review the information entered in the "Rater" tab then click "Next"

8. Enter administrative data on yourself, choose concurrence, enter comments (optional), and enter the Reviewing Officials Statement (required if the officer is up for promotion, optional if not)

9. Type in your name in the "Signature" textbox, select the date, and enter the email address of the agency liaison

10. Click "Approve" to submit the COER to the liaison and complete your part of the COER process; you may also click "Reject" to reset the COER to a previous stage or close the COER completely

Reviewing a COER as a Civilian

1. Once an officer under your supervision submits a COER, you will receive an email with a link to create an account; click the link, enter information requested, and click "Submit"

2. Once your account is created, go to the COER System guest user login (https://dcp.psc.gov/Forms/Account/Login)

3. Verify your identity using the validation token sent to your email address

4. Click the large, red box labeled "FORMS TO REVIEW"

5. Click the icon in the column labeled "Edit Form"
    If no forms appear, the officer has not yet concurred or disagreed with the COER; you'll receive an automated email when the officer submits concurrence

6. Review the information entered in the "Officer" tab then click "Next"

7. Review the information entered in the "Rater" tab then click "Next"

8. Enter administrative data on yourself, choose concurrence, enter comments (optional), and enter the Reviewing Officials Statement (required if the officer is up for promotion, optional if not)

9. Type your name in the "Signature" textbox, select the date, and enter the email address of the agency liaison

10. Click "Approve" to submit the COER to the liaison and complete your part of the COER process; you may also click "Reject" to reset the COER to a previous stage or close the COER completely

Resetting or closing a COER (Reviewing Official)

Reviewing officials have the ability to close a COER or reset a COER to any stage in the COER process preceding their own stage; they may reset the COER to the officer stage, rater stage, or officer concurrence stage.

1. After you are in the reviewing official tab on a COER (see page 35 for officers and page 40 for civilians on how to get to this tab), click the "Reject" button

2. Click the dropdown menu to view your available options

3. After selecting the stage you would like to reset the COER to (or closing the COER), add a comment explaining your reasons for doing so and click "Save".

Please note:

"Assign To – Officer" – The COER will be sent back to the officer. Data entered by the officer will be retained. Data entered by you (the RO) and the rater will be lost.

"Assign To – Officer's Rater" – The COER will be sent back to the rater. Data entered by the officer and rater will be retained. Data entered by you (the RO) will be lost.

"Assign To – Officer Concurrence" – The COER will be sent back to the officer concurrence page. Data entered by the officer and rater will be retained. Data entered by you (the RO) will be lost.

"Reject and Close" – If the COER is rejected and closed, all data entered will be lost and the COER will be closed completely.

Liaison Review

1. Go to the Officer Secure Area of the Commissioned Corps Management Information System (CCMIS) - https://dcp.psc.gov/osa/osa_security_statement.aspx

2. Login to CCMIS using your PIV, CAC, or ALT card

3. Once logged in, click "Forms" on the left-side menu

4. Click the large, red box labeled "FORMS TO REVIEW"

5. Click the icon in the column labeled "Edit Form" on whichever officer you wish to review

6. Review information entered in the "Officer" tab and click "Next"

7. Review information entered in the "Rater" tab and click "Next"

Summary

1. Leadership	2. Initiate and Growth	3. Communication Skills	4. Interpersonal Skills
7	6	6	6

5. Planning and Organization	6. Professional Competencies	7. Analysis, Judgement, and Decision-Making	8. Overall Effectiveness
6	6	7	7

Overall Performance

Satisfactory

Reviewing Official Information

Email Address *

Signature *

asdf

Signed Date *

09/10/2020

Previous   Cancel   Next

8. Reviewing information entered in the "Reviewing Official" tab and click "Next"

Reviewing Officials Comments
(Optional section used to justify concurrence/non-concurrence or to add general comments about the officer)

Section 4: Reviewing Officials Statement (ROS)
(Required if the officer is up for promotion; optional if the officer is not up for promotion)

1. PROMOTION READINESS: Do you recommend this officer for promotion to the next higher rank?
2. LEADERSHIP: How does the officer take on a leadership role in the Command/Agency?
3. MISSION: How does the officer contribute to the mission of the Command/Agency?

Signature *

test

Signed Date *

09/10/2020
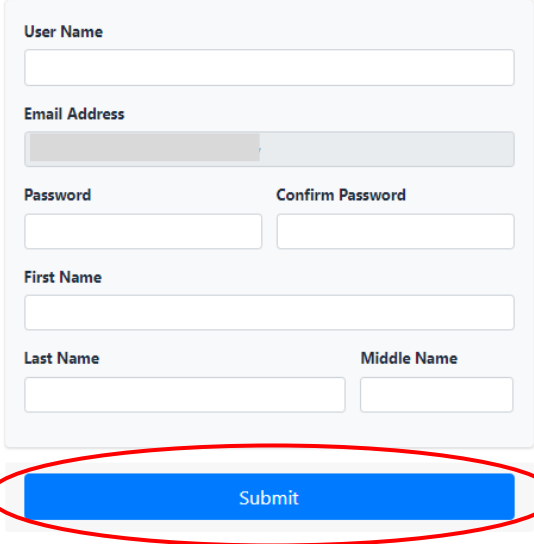
Liaison Information

Email Address *

Previous   Cancel   Next

9. Enter your name and click the six checkboxes indicating you've reviewed the information in the previous tabs

Click "Late COER Entry" if the COER is being submitted past deadlines (do not click "Late COER Entry" if the COER is late due to no fault of the officer)

10. Click "Approve" to complete the COER process; the COER will be sent to the officer's eOPF and their PIR will be updated to reflect the scores. Click "Reject" to reset the COER to any other stage in the COER process or close the COER completely.
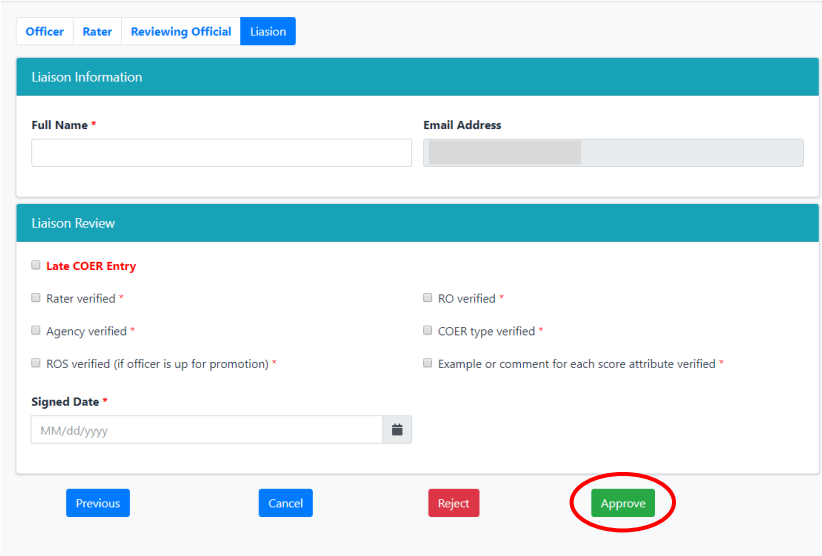
Resetting or Closing a COER (Liaison)

Raters, reviewing officials, and liaisons all have the ability to reset or close a COER up to their own stage in the COER process. Once a COER is past their stage, they cannot reset or close the COER.
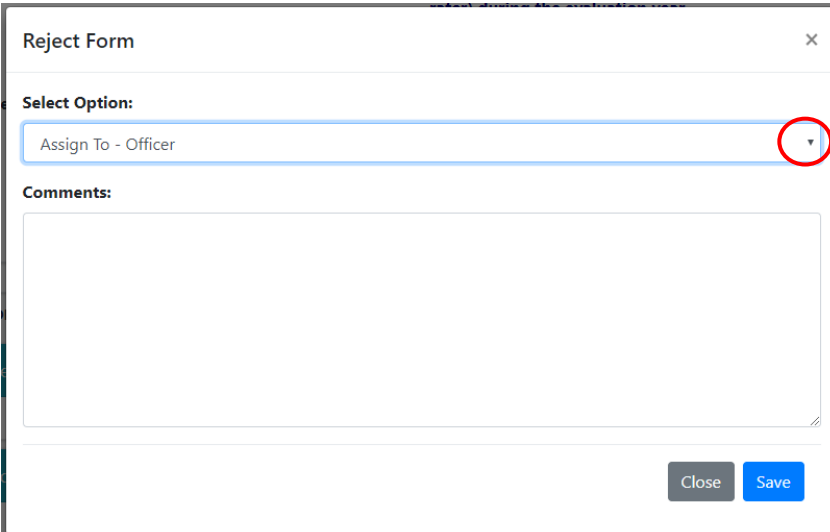
For example, once a rater submits a COER to the reviewing official, the rater can no longer reset or close the COER.

1. After you are in the liaison tab on a COER (see page 47 on how to get to this tab), click the "Reject" button

2. Click the dropdown menu to view your available options

3. After selecting the stage you would like to reset the COER to (or closing the COER), add a comment explaining your reasons for doing so and click "Save"

4. If you reset the COER to a previous stage, the COER will return to that stage with all data entered during that stage intact, but data entered after that particular stage will be lost. If you close the COER, any data entered will be lost.

Please note:

"Assign To – Officer" – The COER will be sent back to the officer. Data entered by the officer will be retained. Data entered by you (the liaison), the RO, and the rater will be lost.

"Assign To – Officer's Rater" – The COER will be sent back to the rater. Data entered by the officer and rater will be retained. Data entered by you (the liaison) and the RO will be lost.

"Assign To – Officer Concurrence" – The COER will be sent back to the officer concurrence page. Data entered by the officer and rater will be retained. Data entered by you (the liaison) and the RO will be lost.

"Assign To – Officer's Reviewer" – The COER will be sent back to the reviewing official. Data entered by the officer, rater, and reviewing official will be retained. Data entered by you (the liaison) will be lost.

"Reject and Close" – If the COER is rejected and closed, all data entered will be lost and the COER will be closed completely.

Reports

1. After entering the secure area of CCMIS (see page 47 for step-by-step instructions on arriving at this area), click "Officer Reports" on the left-side menu

2. Click the dropdown menu then click "COERS INFO REPORT" for data on the current COER year or "MISSING COERS REPORT" for data on missing COERs in the current year as well as previous years

3. Select parameters using the dropdown menu and click "Search" to view the report

"COERS INFO REPORT" Variables:

SERNO
FULL NAME
FIRST NAME
LAST NAME
RANK
AGENCY
BUREAU
CATEGORY
TGRADE
PGRADE
UP FOR PROMOTION
PROMOTION YEAR
TEMP PROMOTION ELIGIBILITY
PERM PROMOTION ELIGIBILITY
COER YEAR
COER TYPE
START DATE
END DATE
REVIEW TYPE
COER STATUS
OVERALL PERFORMANCE
RATER NAME
RATER EMAIL ADDRESS
RATER STATUS
REVIEWER NAME
REVIEWER EMAIL ADDRESS
REVIEWER STATUS
LIAISON NAME
LIAISON EMAIL ADDRESS
LIAISON STATUS

"MISSING COERS REPORT" Variables:

SERNO
RANK
FIRST NAME
LAST NAME
TGRADE
PGRADE
AGENCY
CATEGORY
TGRADE PROMO ELIG
PGRADE PROMO ELIG
COER CURRENT YEAR
COER YEAR MINUS 1
COER YEAR MINUS 2
COER YEAR MINUS 3
COER YEAR MINUS 4

FAQ's

- **I'm completing my annual COER. What dates do I enter for "Period Covered by Report"?**
  1 October to 30 September. For the 2020 annual COER, the period covered will be 1 October 2019 to 30 September 2020. If you had a rater change (transfer, separation, or retirement of the officer or rater), the period covered by the COER should reflect the date the rater change occurred. Please see the "Scenarios" section on page 61 for specific examples.

- **My Rater is incorrect. How do I change my rater?**
  The COER system pulls your rater information from the supervisor information provided in RedDOG. Officers must keep this information up-to-date. If you have not updated your supervisor's information in "RedDOG – Self Service", please do so immediately then initiate a COER with your current supervisor. If you are completing a COER with a rater other than your current rater, please contact your liaison.

- **I accidentally entered the wrong information and submitted my COER. How can I correct this?**
  If the COER has not yet been submitted to CCHQ by your liaison, contact whoever the COER is currently with and ask them to "Reject" the COER. Once they click reject, they have the option to reset the COER to an earlier stage. Raters, reviewing officials, and liaisons all have the options of resetting a COER to a previous stage. However, they cannot reset a COER past their own stage. For example, if a rater submits the COER to the reviewing official, the rater can no longer reset the COER. Only the reviewing official and liaison can reset the COER.

  If the COER has already been submitted to CCHQ, contact your liaison about submitting an amendment to correct accidental errors.

- **What does the "Officer is up for promotion" button do?**
  Only the officer may select this button. If it is selected, the rater, reviewing official, and liaison will know the officer is up for promotion. Additionally, the system will not allow the reviewing official to submit their part of the COER without adding a Reviewing Official's Statement (ROS).

- **What do I select for "Purpose of COER"?**
  If you did not have a rater change (transfer, separation, or retirement of the officer or rater), you should select "End of Evaluation Year" and begin your COER after 30 September. Please select the corresponding option from the dropdown menu if you are completing a COER due to a rater change.

- **I'm a rater or reviewing official, and I don't see any COERs to review. Am I missing something?**
  The COER may not be in the stage for you to review. You will receive an automated email when it is time to review a COER. If you received an automated email message and you still do not see any COERs to review, ensure you are in the correct area of the website. Raters and reviewing officials should click "Forms to Review", rather than "My Forms".

- **I'm having issues logging into the COER system with my PIV card or using a username and password as a guest user.**
  Please contact the Commissioned Corps Helpdesk (cchelpdesk@hhs.gov) for any login issues.

- **The COER system will not let me create another COER because I already have a COER that covers the period I'm entering. How can I correct this?**
  Any period of evaluation can only be covered by one COER. COERs cannot overlap the same time period. The exception is a COER for the purpose of performance issues, TDY, and "other".

- **Considering the COER system is open throughout the year, can I complete my annual COER early (before the evaluation year is over) to get it out of the way?**
  No, you must wait until the evaluation year is over. You may only complete your annual COER early if you have a permanent rater change (transfer, separation, or retirement of the officer or rater) or incur special circumstances.

- **How can I complete a COER if I am temporarily unable to contact my rater or reviewing official, and the COER won't be completed until after the deadline?**
  Make every effort to complete the COER before the deadline. If it is not possible, please contact your liaison for their situation awareness.

- **How can I complete a COER if I am permanently unable to contact my rater or reviewing official because they are incapacitated or refuse to complete it?**
  Your acting supervisor or whoever is next in your chain of command may complete your COER.

- **I am taking leave in conjunction with my PCS, so the last day at my duty station is weeks before my actual transfer date. May I initiate my COER before the period of evaluation is over in order to discuss my COER with my rater while we are at the same duty station?**
  Yes, you may initiate your COER up to one month before the rater change occurs. For example, if your first day at your new agency is 1 June, you may initiate your COER on 1 May or later.

- **Does my Reviewing Official need to complete the Reviewing Official's Statement (ROS) section of the online COER?**

If you are up for promotion, the ROS is required. If you are not up for promotion, the ROS is optional. This section will only appear in annual COERs – not interim COERs.

- **Can I have more than one ROS per evaluation year?**
  Officers should only have one ROS per evaluation year, and it should be completed with the officer's annual COER. The ROS section will not appear on an interim COER.

- **I submitted my annual COER without an ROS, but now I need to submit an ROS. How can I submit my ROS outside of the annual COER process?**
  Please see the step-by-step process on page 17.

- **What do I select for purpose of COER?**
  - End of Evaluation Year – Select this option if you are completing a COER because the evaluation year has ended. This includes officers who completed a COER before the evaluation year ended (due to a transfer, separation, etc.) and they're completing a COER to "fill in the gap" from the time they transferred until the end of the evaluation year. The majority of officers will select "End of Evaluation Year" because they or their rater did not transfer, separate, or retire during the evaluation year. End of evaluation COERs should cover the period from 1 October to 30 September – unless the officer completed a COER during the evaluation year and they're doing a COER to "fill in the gap".
  - Transfer (Officer) – Select this option if you (the officer) are transferring and you're completing a COER to cover the period with your previous rater until your transfer.
  - Transfer (Rater) – Select this option if your rater is transferring and you're completing a COER to cover the period with that rater until their transfer.
  - Separation (Officer) – Select this option if you (the officer) are separating from the Corps and you're completing a COER to cover the period until separation.
  - Separation (Rater) – Select this option if your rater is separating and you're completing a COER to cover the period until their separation.
  - Retirement (Officer) – Select this option if you (the officer) are retiring and you're completing a COER to cover the period with your previous rater until your retirement.
  - Retirement (Rater) – Select this option if your rater is retiring and you're completing a COER to cover the period with that rater until their retirement.
  - TDY – Select this option if you would like to cover the period on a Temporary Duty Assignment (TDY) with a COER. When selecting this option, the period of evaluation will overlap with your annual COER.
  - Performance Issues – Select this option if you (the officer or rater) are completing a COER due to performance issues. Officers may select this option if they're completing a COER to document improved performance after performance issues. When selecting this option, the period of evaluation will overlap with your annual COER.

- o <u>Other</u> – Select this option if you are completing a COER for any other reason than those listed above. When selecting this option, the period of evaluation will overlap with your annual COER.

- **I will take leave and use travel days in conjunction with my transfer/PCS, so my rater will not actually supervise me on those days. Which date do I use as the end date on my COER?**
  For officers who transfer, the end date for the period of evaluation with their previous rater should be the day before "DATE ASSIGNED NEW ORGANIZATION" on their personal orders. For example, if an officer's "DATE ASSIGNED NEW ORGANIZATION" was 15 June, the officer's COER for the period with their previous rater should cover the period from 1 October to 14 June.

- **The system is incorrectly designating my COER as interim instead of annual or vice versa. How can I fix this?**
  Contact PHSCOERs@hhs.gov to correct this issue.

- **How did I make a COER "Narrative"?**
  Click the narrative checkbox to remove the section labeled "Section 3: Performance Evaluation". This option is only available on interim COERs (COERs that cover a period of <6 months).

Scenarios*

*Applicable to the 2021 evaluation year and forward

Scenario 1: An officer or the officer's rater did not transfer, separate, or retire during the 2021 COER evaluation year

Annual COER: October 1st 2020 – September 30th 2021 (mandatory)

Interim COER(s): None

Annual COER

1 October 2020	1 January 2021	1 April 2021	1 July 2021	30 September 2021
Start of COER Evaluation Year				End of COER Evaluation Year
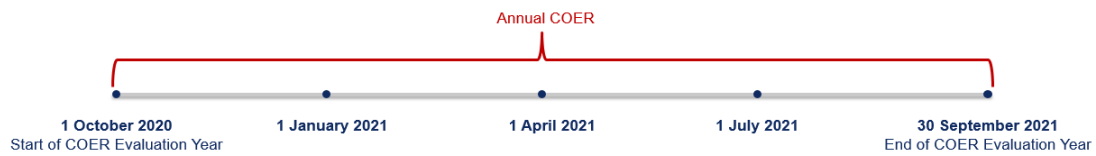
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Scenario 2: An officer transfers on 1 June 2021

Annual COER: 1 October 2020 – 31 May 2021 (mandatory)

Interim COER(s): 1 June 2021 – 30 September 2021 (optional)

Annual COER   Interim COER

1 October 2020	1 January 2021	1 April 2021	1 July 2021	30 September 2021
Start of COER Evaluation Year				End of COER Evaluation Year

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Scenario 3: An officer transfers on 1 February 2021

Annual COER: 1 February 2021 – 30 September 2021 (mandatory)

Interim COER(s): 1 October 2020 – 31 January 2021 (optional)

Scenario 4: An officer transfers on 1 April 2021

Annual COER: 1 April 2021 – 30 September 2021 (mandatory) (183 days)*

Interim COER(s): 1 October 2020 – 31 March 2020 (optional) (182 days)

*The longest period will be the annual COER, even if it is the longest by one day
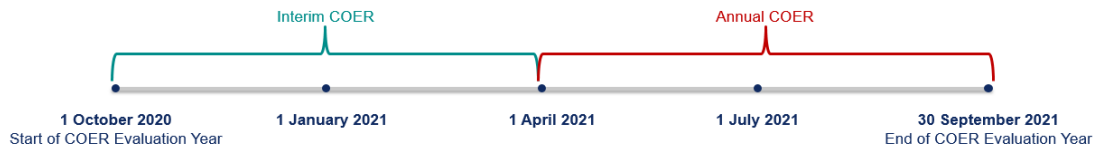
Scenario 5: An officer transfers on 1 January 2021, and the officer's rater transfers on 1 July 2021

Annual COER: 1 January 2021 – 30 June 2021 (mandatory)

Interim COER(s): 1 October 2020 – 31 December 2020 (optional)
1 July 2021 – 30 September 2021 (optional)

Interim COER	Annual COER	Interim COER

1 October 2020	1 January 2021	1 April 2021	1 July 2021	30 September 2021
Start of COER Evaluation Year				End of COER Evaluation Year

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Scenario 6: An officer transfers on 1 December 2020, and the officer's rater transfers on 2 May 2021

Annual COER: 2 May 2021 – 30 September 2021 (mandatory) (152 days)*

Interim COER(s): 1 October 2020 – 31 November 2020 (optional)
1 December 2020 – 1 May 2021 (optional) (152 days)

*If the longest periods are the same length, the most recent will be the annual COER

Interim COER	Interim COER	Annual COER

1 October 2020	1 January 2021	1 April 2021	1 July 2021	30 September 2021
Start of COER Evaluation Year				End of COER Evaluation Year

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Scenario 7: An officer or the officer's rater did not transfer, separate, or retire during the 2021 COER evaluation year but TDYs for all of May 2021

Annual COER: 1 October 2020 – 30 September 2021 (mandatory)

Interim COER(s): 1 May 2021 – 31 May 2021
        (optional – dates **will** overlap with dates covered by the annual COER)

Annual COER   Interim COER

1 October 2020	1 January 2021	1 April 2021	1 July 2021	30 September 2021
Start of COER Evaluation Year				End of COER Evaluation Year
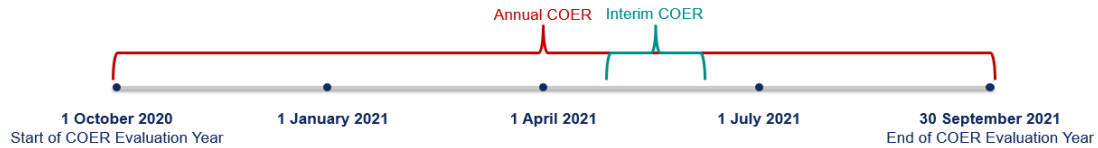
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Scenario 8: An officer or the officer's rater did not transfer, separate, or retire during the 2021 COER evaluation year, but the officer's rater chooses to complete a COER for performance issues for all of May 2021

Annual COER: 1 October 2020 – 30 September 2021 (mandatory)

Interim COER(s): 1 May 2021 – 31 May 2021
        (mandatory – dates **will** overlap with dates covered by the annual COER)

Annual COER   Interim COER

1 October 2020	1 January 2021	1 April 2021	1 July 2021	30 September 2021
Start of COER Evaluation Year				End of COER Evaluation Year

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Character and Line Limits

Officer Tab

- Description – 400 character limit, 9 line limit
- Goals – 400 character limit, 9 line limit
- Accomplishments – 1680 character limit, 38 line limit

Rater Tab

- Strengths – 240 character limit, 5 line limit
- Areas of Improvement – 240 character limit, 5 line limit
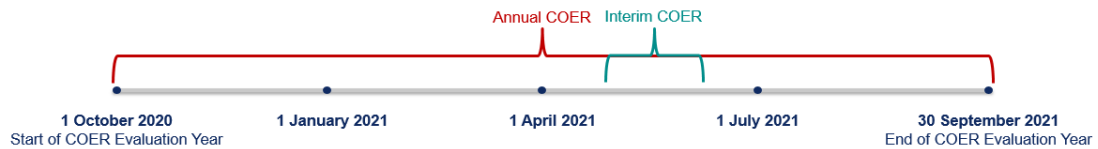- Performance Evaluation Comments – 240 character limit, 7 line limit

Reviewing Official Tab

- Reviewing Official's Comments – 240 character limit, 7 line limit
- Reviewing Official's Statement – 3600 character limit, 38 line limit

Tips and Suggestions

- All users should save text in an external word processer (Microsoft Word, Notepad, etc.) then copy-and-paste the text into the COER system
- After the COER is complete, officers should ensure their COER scores are reflected in their PIR, the COER is uploaded into the eOPF, and each page of the COER is without errors
- Raters and reviewing officials should not close a COER because it was assigned to the incorrect rater or reviewing official – they should contact their liaison or PHSCOERs@hhs.gov; closing a COER will delete all entered data
- Raters and reviewing officials who are PHS officers, may enter their rank in the textbox which prompts them for their name; it is a free textbox, so the text does not have to be in a certain format
- Officers should only include information from time as a PHS officer
- Users should not include any classified information or make false/misleading statement