

# **Public Health Service**

## ***Office of Commissioned Corps Operations***

### ***Commissioned Officer Effectiveness Report (COER) Reference Guide***

#### **Introduction to the 2004 COER**

This section provides an overview of the 2004 Commissioned Officer Effectiveness Report (COER) process and online application. It introduces the following concepts:

- Introduction to the COER
- Overview of the 2004 COER process
- Best Practices for using the 2004 COER online application

## Introduction to the COER

The 2004 Annual COER will be a web based electronic workflow process which can be accessed from the Commissioned Corps Management Information System website.

The COER is very important to the career of every officer. It is the major source of information concerning each officer's performance and work record. The report also provides a vehicle to discuss an officer's performance with him/her. Such discussions provide the officer with an opportunity to assess his/her strong and weak points, and overcome perceived performance and/or attitudinal deficiencies in order to increase his/her value to the Service. Moreover, the COER is utilized by the Office of Commissioned Corps Operations as an adjunct in processing both positive and adverse actions that are initiated by program officials. Therefore, it is imperative both to the officer and to the Service that the report be candid and objective. Under-rating the officer may affect his/her career. Over-rating is of dubious benefit as it may lead to assignments and promotions for which the officer is not qualified and could compromise requests for disciplinary action.

In preparation for completing an annual COER, it is recommended that the Rater have a beginning of the rating year conference with the officer regarding the Rater's performance expectations. It is also strongly recommended that performance accomplishments and any performance issues be reviewed with the officer at a mid-year performance review conference. The purpose of these conferences is to enhance officer-Rater communication about performance expectations, to avoid any surprises to the officer at the end of the rating period, and to allow the officer an opportunity to improve or correct identified deficiencies.

The annual COER should reflect the officer's performance between June 1, 2003 and May 31, 2004.

Annual COERs are required irrespective of the fact that a COER was recently submitted for some other purpose (officers who transfer after May 1, 2004 should complete an Annual COER instead of the normal transfer COER).

Please refer to the Manual Circular for more details. The Manual Circular will be posted to the CCMIS website.

# Overview of the 2004 COER Process

## Step 1: Officer Initiates COER

- Officer logs in to COER application. If necessary, officer updates contact (email address and work phone) information.
- Officer enters and saves Attachment I.
- Please note that you must save all information before leaving a page. If you do not, then the information you entered will be lost and you will have to re-enter it.
- Changes may be to Attachment I anytime prior to assigning it to the rater. Once the COER has been sent to the rater for review the officer will be prohibited from making changes until the rater has finished the evaluation.
- Officer assigns a rater to the COER. The officer may choose to use last year's rater or assign a new rater.

## Step 2: Rater Opens Officer COER and Evaluates

- Rater logs in to COER application. If necessary, rate updates contact (email address and work phone) information.
- Rater enters time supervised. If time supervised is less than six months, the rater has the option of completing either a Narrative or Detailed COER. If time supervised is greater than six months, the rater must complete a Detailed COER.
- Please note that you must save all information before leaving a page. If you do not, then the information you entered will be lost and you will have to re-enter it.

### For Narrative COER

- Rater enters rating (**Question 18.**)
- Rater enters and saves Attachment II.

### For Detailed COER

- Rater enters scores (A to F). 'A' scores require additional comments.
- Rater enters and saves Attachment II.
- Rater assigns a reviewing official to the COER. The rater may choose to use last year's reviewing official or assign a new reviewing official.
- Rater releases COER to Officer.

### **Step 3: Officer Reviews Rater's Scores and Attachment II**

- Officer logs in to COER application.
- Officer reviews rater's scores and Attachment II.
- Officer meets with rater to discuss. If necessary, revisions may be made to the COER by the officer or the rater.
- Officer responds to the rater's evaluation by either concurring or disagreeing.
- When Officer responds, an email is sent to the Reviewing Official stating the COER is ready for the final response.

### **Step 4: Reviewing Official Responds to Scores and Attachments**

- Reviewing Official logs in to COER application.
- Reviewing Official reviews officer's Attachment I and rater's scores and Attachment II.
- Reviewing Official responds to the rater's evaluation by either concurring or disagreeing.
- When Reviewing Official responds the COER is archived into the eOPF.

## Best Practices for Using the 2004 COER Application

Here are a few tips and suggestions that will aid in successfully using the online 2004 COER application.

### System Requirements

- Internet Explorer 5.5 or greater.
- It will not work on Netscape versions earlier than 7.1
- We believe it will work using Safari on a MAC, but do not have a way yet to verify this.
- If you have a POP-UP blocker on your computer, you must either turn it off or set it up so that the COER application web link is allowed.

### Helpful Hints

- When creating attachments, you MUST click SAVE before moving to another link.
- If you do not, your text will be lost.
- Remember you are limited to one page or 3600 characters total for each attachment. To ensure that you have not exceeded your limit Click "Preview OPF Att 1". If the full text is visible, you should be fine. If it is cut off, you know you have exceeded your limit.
- Make sure your email address is correct.
- If it is not, you will not receive the necessary communications
- If you are an officer needing to make sure your email is correct before the COER is released:
  - Go to <http://dcp.psc.gov>. Click Secure Area, click Officer and Liaison Activities, log in, click Update Contact Information, make the changes, and click Update.
  - If you are an officer needing to make sure your email is correct after the COER is released:
    - Log into the COER application, click "Update phone/email", make the changes and save.
    - If you are an Officer or Rater assigning someone to work on the COER, MAKE SURE you get that person's email address correct.
    - Please be aware that passwords are only valid for about 6 months. It is imperative that you complete the task as soon as possible.
- If you are an Officer and have forgotten your username and password, call **301-594-0961** or email the cchelpdesk at: **cchelpdesk@psc.gov**.
- If you are a Rater/Reviewing official and have forgotten your username and password, go back to the original email you received, go to the guest registration link, click "forgot password" and follow the instructions on resetting your password.

- If you are a Rater/Reviewer and you no longer have the original email, ask the officer to log in and resend it to you.
- If you are an officer wondering what the status of your COER is, go to the COERs application, log in, click “MORE OPTIONS”, “COER STATUS”.
- Communication between you, your Rater, and your Reviewing Official is very important. If you have questions about your COER (status, ratings, etc) speak with them first. If you still have questions your second contact should be your Agency Liaison.

## Officer Tasks

This section will concentrate on the tasks an officer performs to initiate a COER, and manage the COER process. It will cover:

- Logging into the COER application
- Updating contact information
- Initiating a COER
- Assigning a rater
- Checking COER status
- Resending rater notification
- Reviewing rater response
- Concurring with COER

# COER Login

1. From **Commissioned Corps Management Information Services (CCMIS)** webpage, click link to access **Commissioned Officers' Effectiveness Reports (COER's) Activities** webpage.

Registered Users  
please log in for:  
**Commissioned Officers' Effectiveness Reports (COERs) Activities**

Optimized for Internet Explorer 5.5 or greater. Firefox and  
Netscape 7.0 are also functional (some limitations).

Login ID:

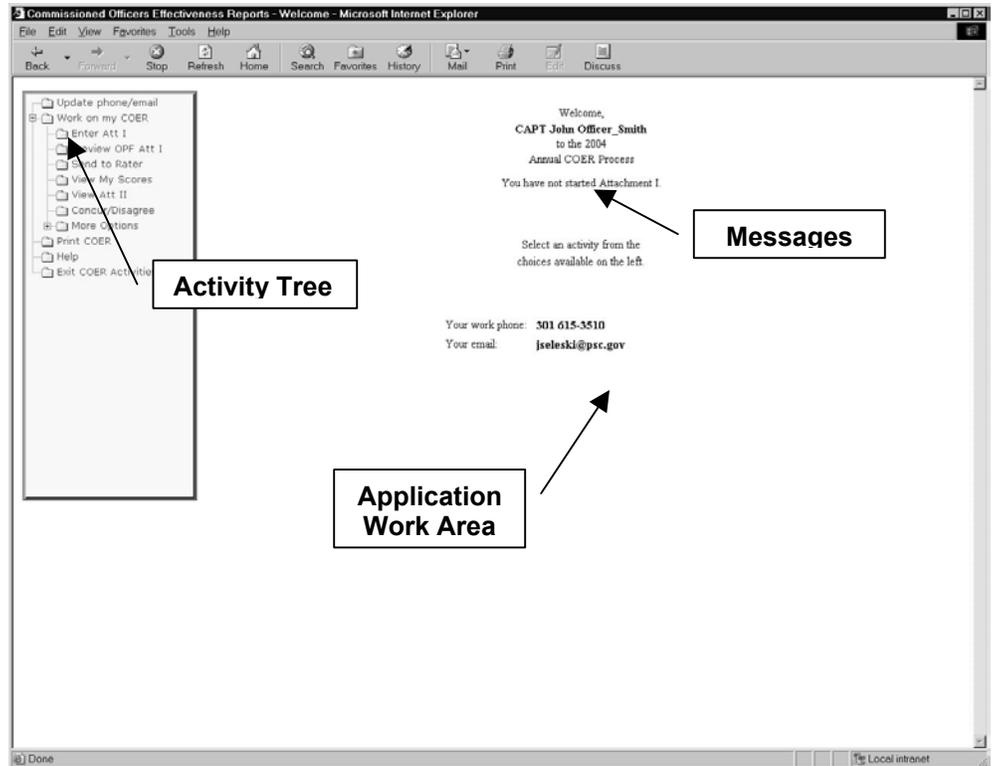
Password:

[Return to CCMIS Home Page](#)

2. Place cursor in **Login ID**, type Login ID. Press **Tab**.
3. Type **Password**.
4. Click **Login**.

# COER 2004 Geography

Here are the basic sections of the application that are referred to in this reference guide:



## Activity Tree

The Activity Tree contains links to all the tasks that you may perform when using the COER Application. Additionally, if you are a Rater and/or Reviewer, you will see a listing for each officer you are to rater and/or review.

## Messages

As you progress through the COER process messages will inform you of the status of your COER. Additionally, if you are a Rater and/or Reviewer, you will see a process status message for each officer to who you are rater and/or reviewer.

It is important to check this area for changes in status.

## Application Work Area

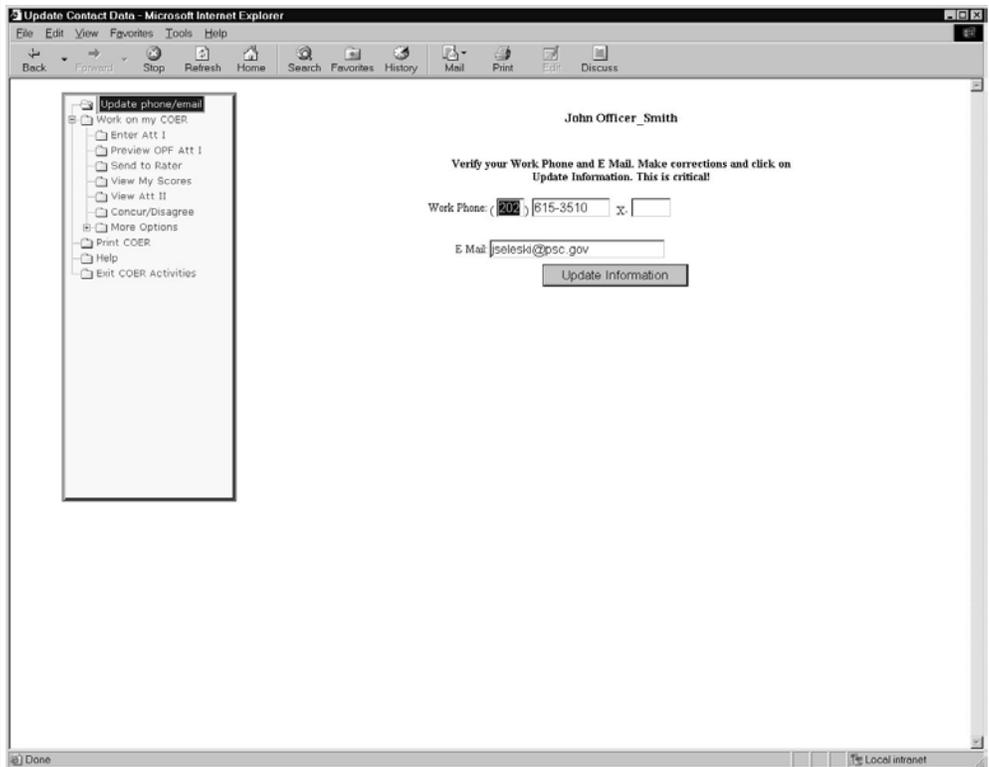
When you choose a task from the Activity Tree, this area becomes the active part of the application. Here you will enter information according to the task instructions.

# Updating Contact Information

1. From Activity Tree, click **Update phone/email**.

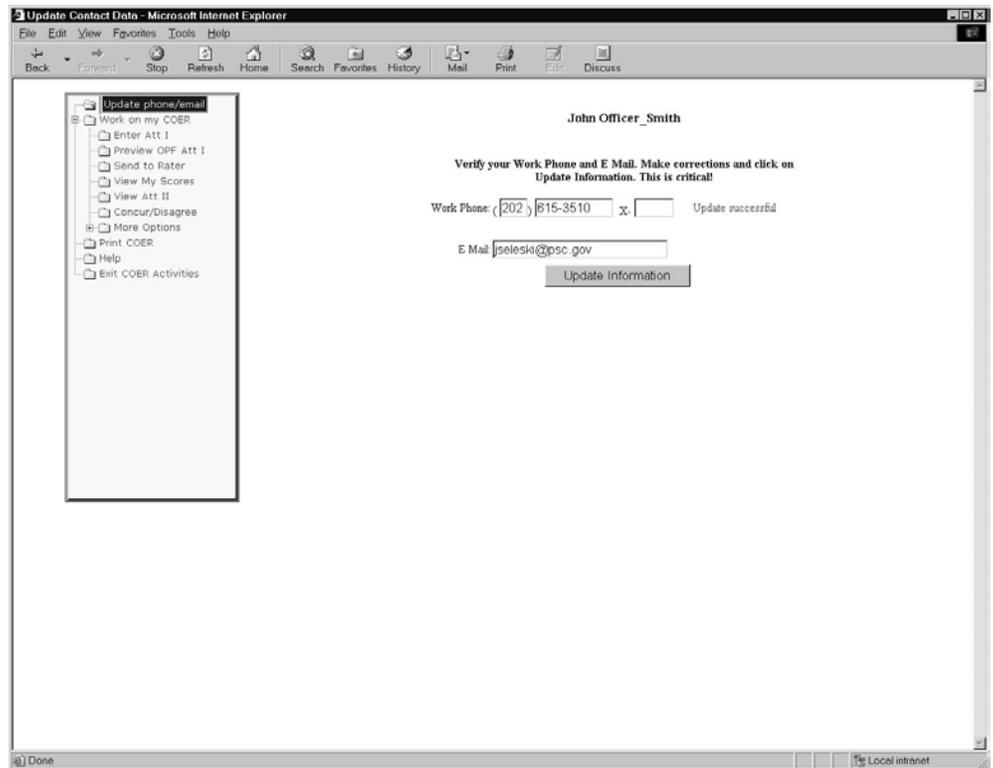


2. If necessary, enter **Work Phone** information.



3. If necessary, enter **E-Mail** information.

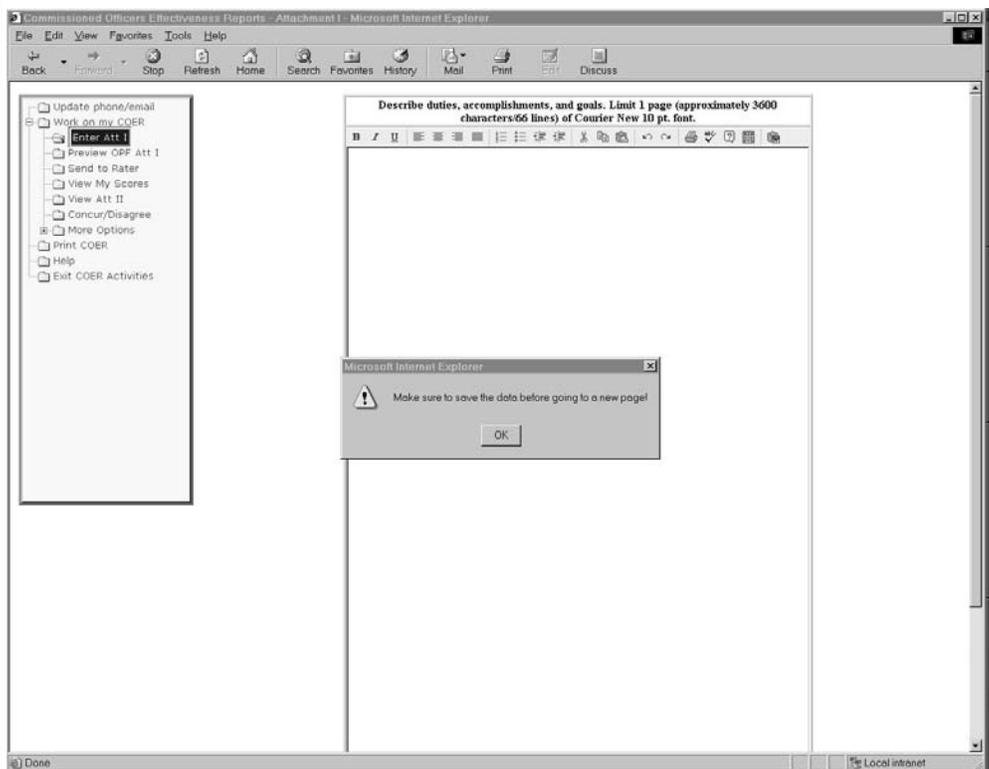
#### 4. Click **Update Information**.



*The confirmation message 'Update successful' will appear to the right of the updated fields.*

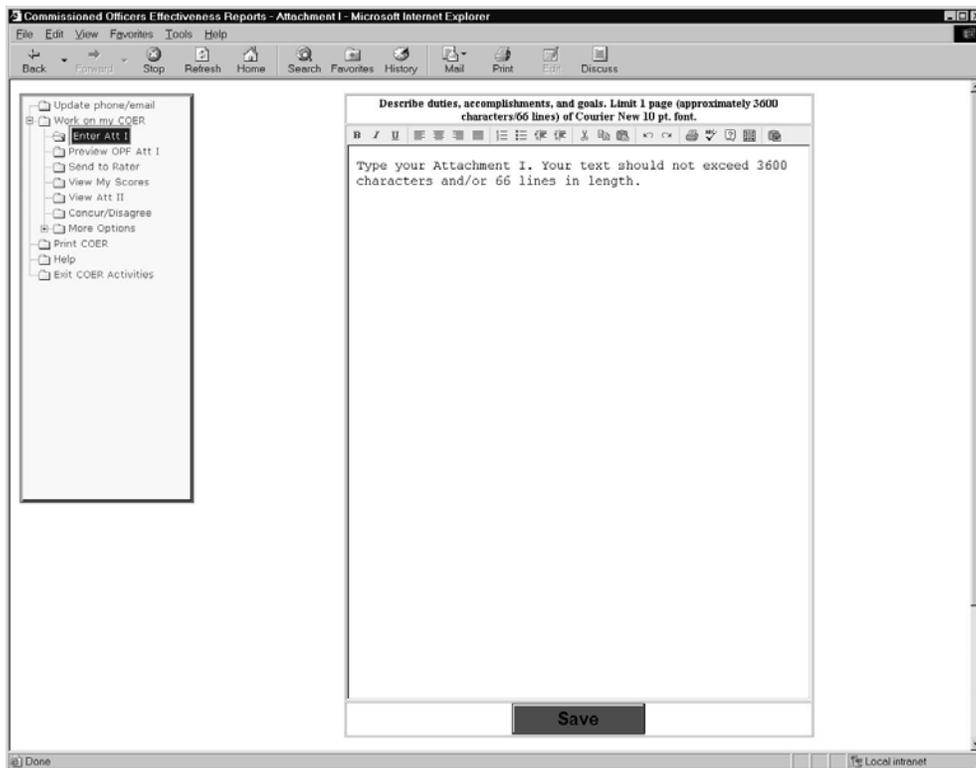
## Initiating a COER

1. From **Activity Tree**, select **Enter Att I**.
2. Click **OK** to message about saving before going to a new page.



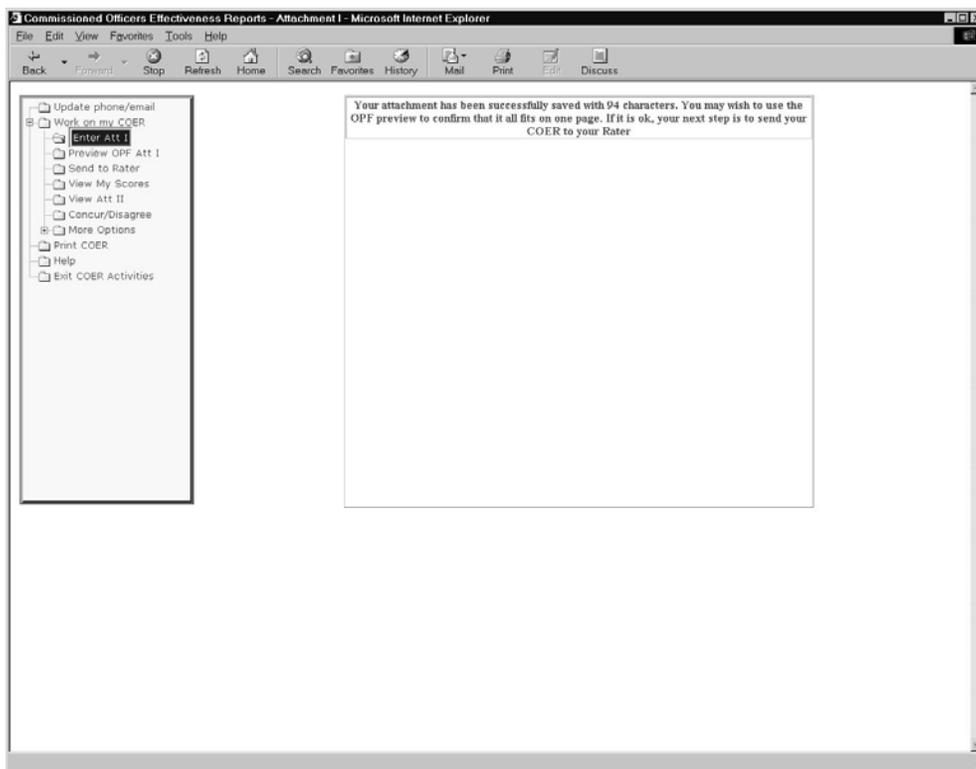
*Make sure you save any work before going to another page. If you fail save your work will be lost and you will need to re-enter it.*

### 3. Enter Attachment I.



*You are limited to 3600 characters (including spaces) and/or 66 lines of text.*

### 4. Click **Save**.



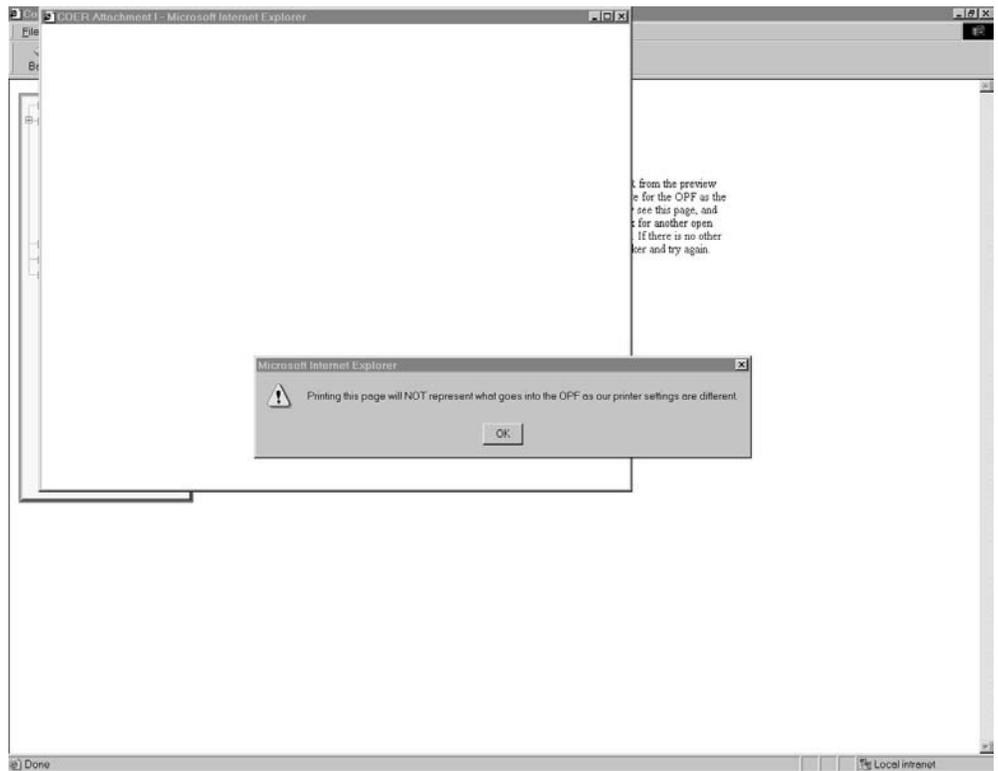
*When you save Attachment I the application checks to verify that there are no more than 3600 characters and/or 66 lines of text, and displays the totals in the save confirmation.*

*Use the **Preview OPF Att I** to view your Attachment I to see how it fits on the page.*

*If you are over the character/line limit the text will truncate in the Preview Window. If this happens, it means that the text **WILL NOT** be seen in the eOPF. You will need to edit the Attachment I to fit within the character/line limits so that it fits on the single page.*

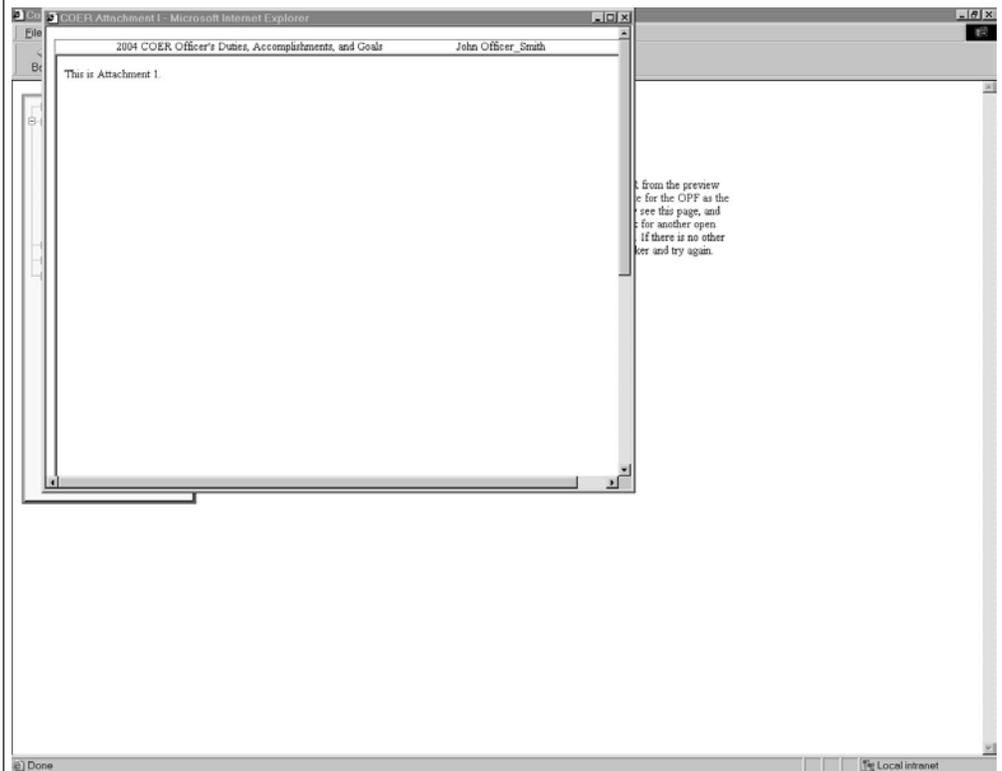
## Previewing OPF Att I

1. From the **Activity Tree**, click **Preview OPF Att I**.



2. Click **OK** to the message about printer setting.

3. View your Attachment 1.  
*Note the bottom of the text box to insure that the text has not been truncated*

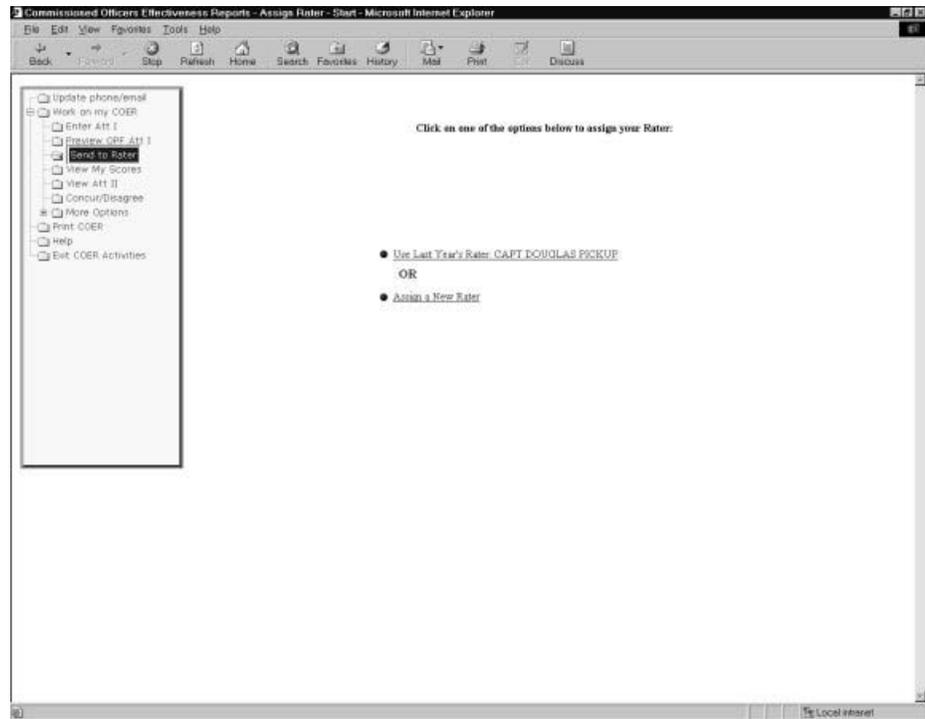


4. Click **Close Box** to exit the preview and close the window.

## Assigning a Rater

To assign the same rater as last year:

1. From **Activity Tree**, select **Send to Rater**.



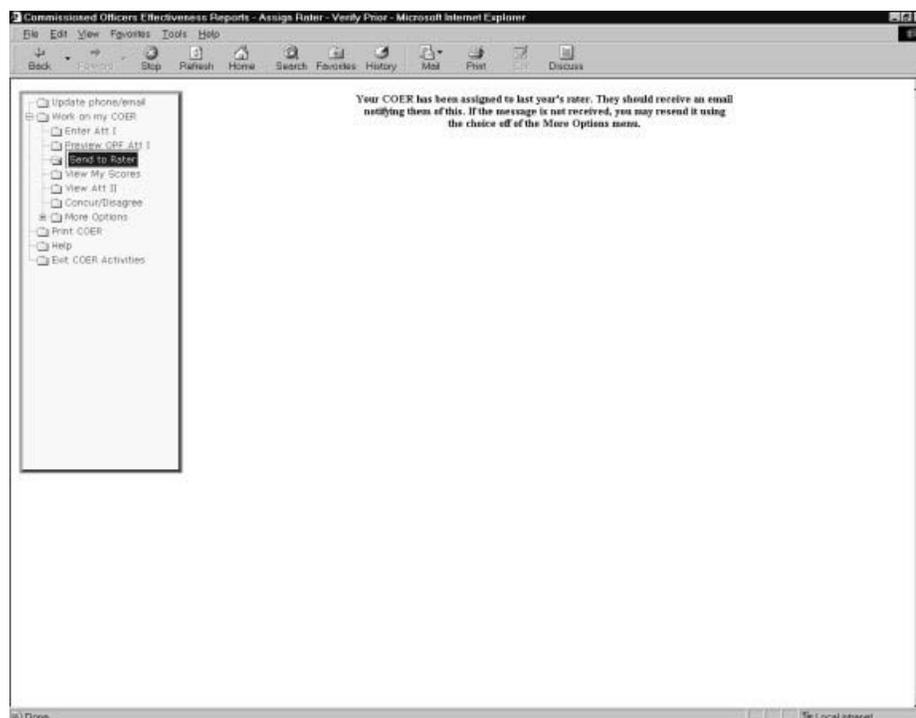
2. Select **Use Last Year's Rater:**           (Last Years Rater's Name)          .

3. If necessary, update the rater's e-mail address.

**Notifications to the rater will be sent via email. IT IS IMPORTANT THAT THE RATER'S EMAIL BE CORRECT!**

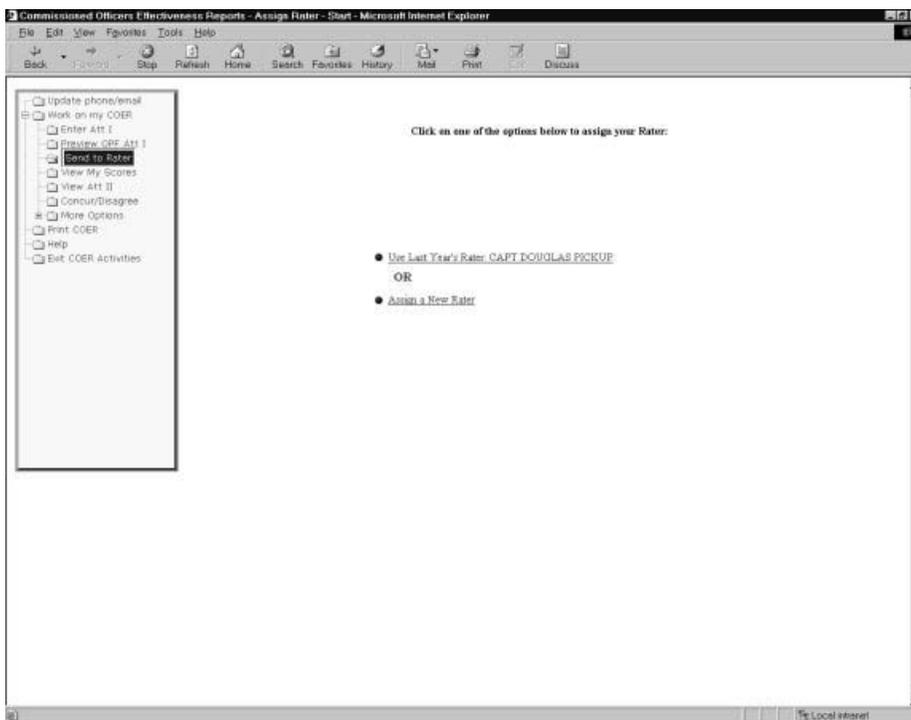


4. Click **Assign**.

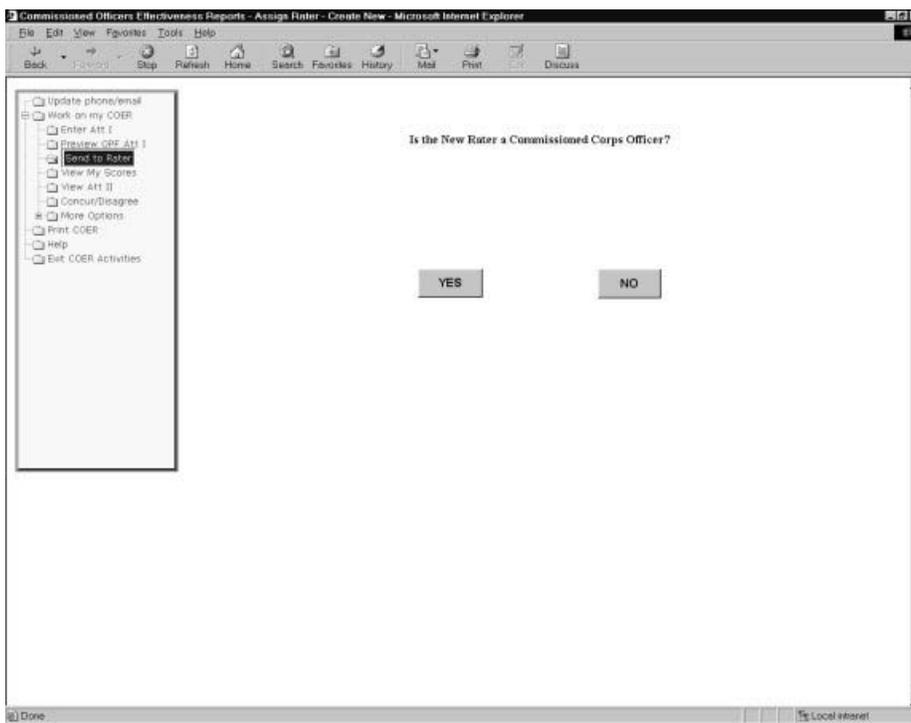


**To assign a new rater who IS a Commissioned Corps Officer:**

1. From **Activity Tree**, select **Send to Rater**.
2. Select **Assign a New Rater**.



3. Click **Yes** to the question "Is the New Rater a Commissioned Corps Officer?"



4. Enter rater's **Last Name** (*First Name is optional*) or **PHS Number**.

Commissioned Officers Effectiveness Reports - Assign Rater - Input - Microsoft Internet Explorer

Enter either Rater's Name or PHS#

All or part of either name will work. First name is optional. If in doubt of the spelling, use partial last name (at least 5 characters).

Rater's *First* Name Rater's *Last* Name

OR

Rater's PHS#

5. Click **Find**.

6. From **Results**, select **Rater**.

Commissioned Officers Effectiveness Reports - Assign Rater - Search Results - Microsoft Internet Explorer

To select your rater from the list below if available, click on the name. If you don't find the name after verifying a search against partial last name only, click on New User name at the bottom of the list to add a guest.

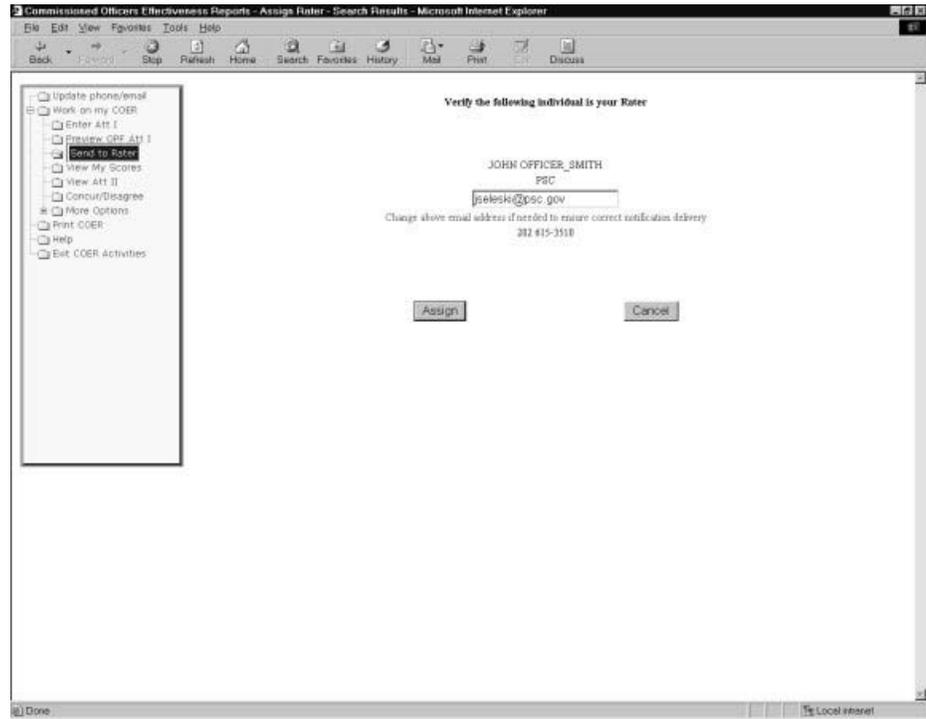
LAST NAME	FIRST NAME	OPDIV	ORGANIZATION
OFFICER,	KENT	BOP	OK
OFFICER,	SMITHGHN	PSC	DIVISION OF ENVIRONMENTAL

[New User Create Guest](#)

If no matching results are displayed, go to the section below entitled 'New User Create Guest.'

7. If necessary, update the rater's e-mail address.

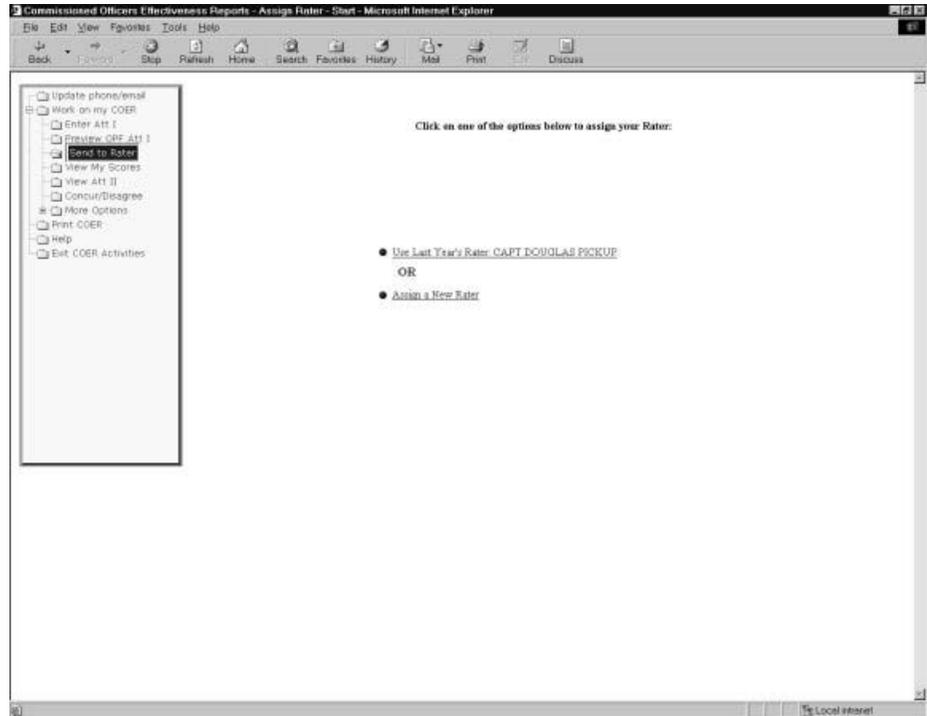
**Notifications to the rater will be sent via email. IT IS IMPORTANT THAT THE RATER'S EMAIL BE CORRECT!**



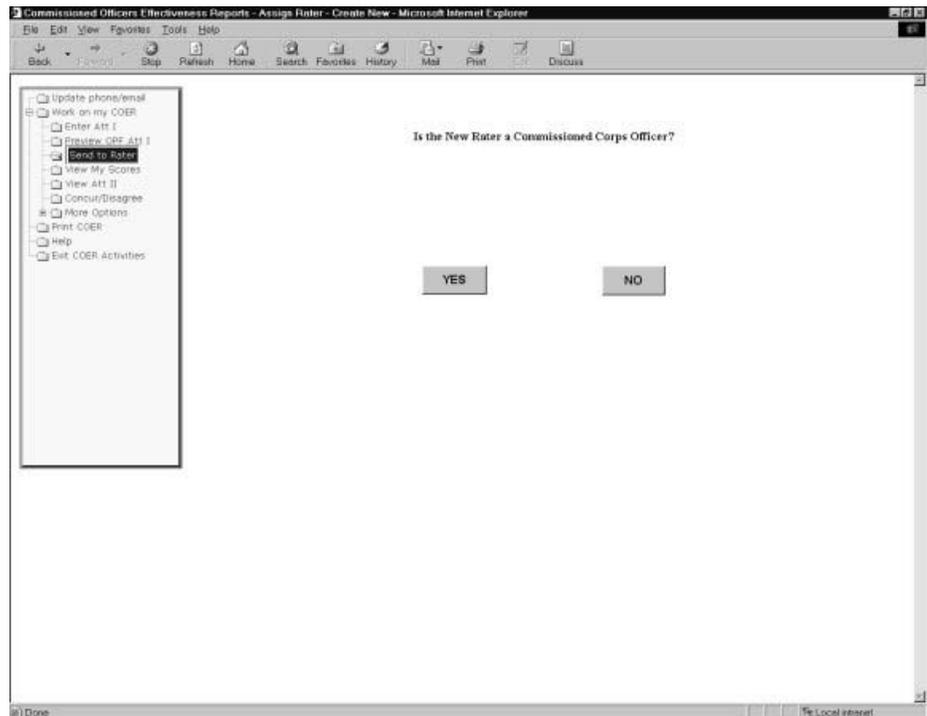
8. Click **Assign**.

**To assign a new rater who IS NOT a Commissioned Corps Officer:**

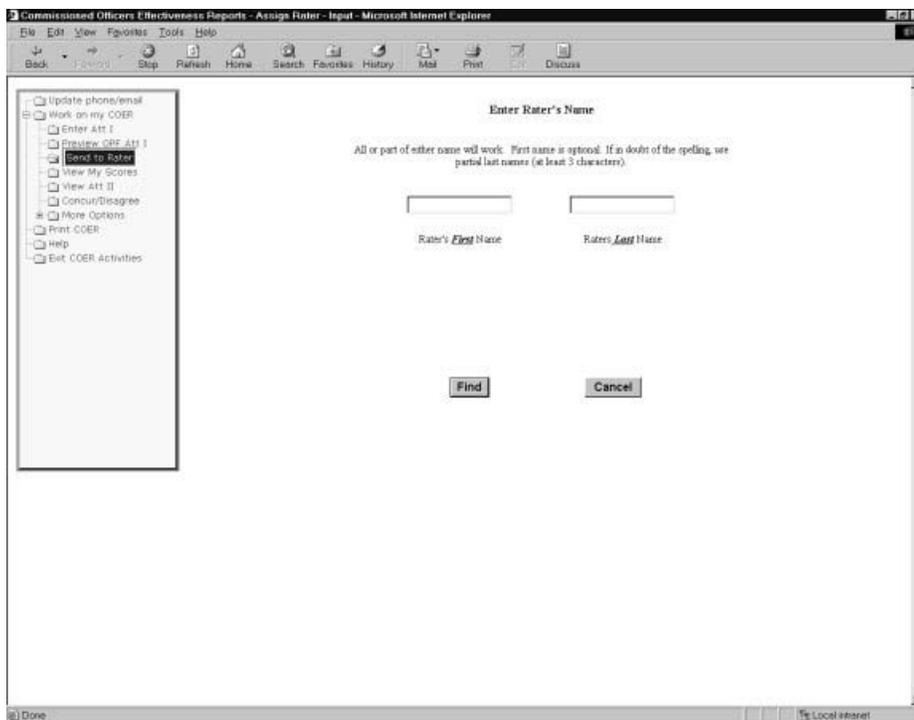
1. From **Activity Tree**, select **Send to Rater**.
2. Select **Assign a New Rater**.



3. Click **No** to the question “**Is the New Rater a Commissioned Corps Officer?**”



4. Enter rater's **Last Name**. (*First Name is optional*)



Commissioned Officers Effectiveness Reports - Assign Rater - Input - Microsoft Internet Explorer

Enter Rater's Name

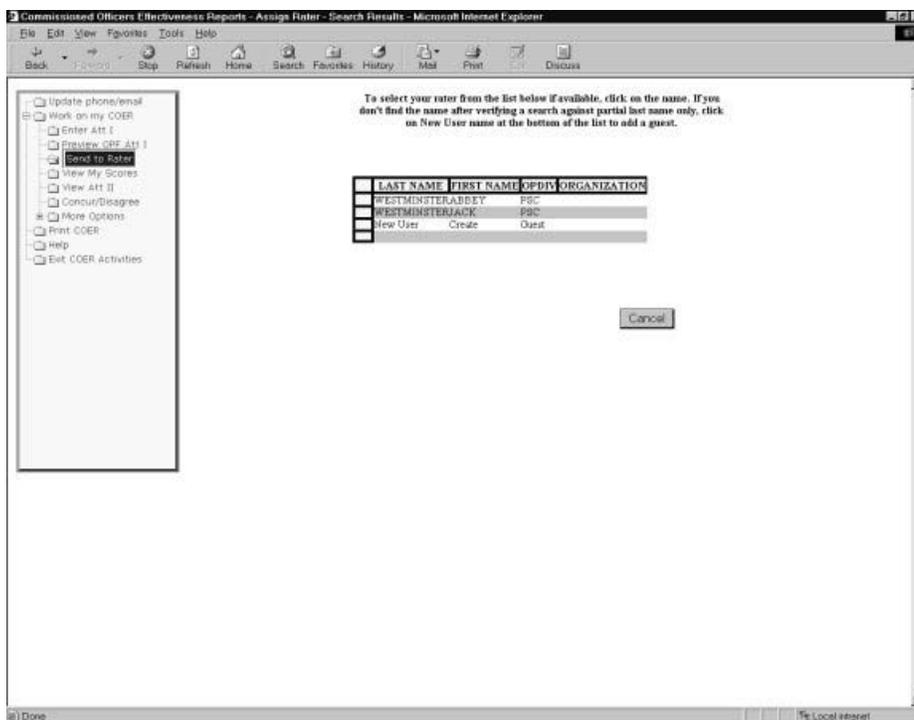
All or part of either name will work. First name is optional. If in doubt of the spelling, use partial last names (at least 3 characters).

Rater's **First** Name      Rater's **Last** Name

Find      Cancel

5. Click **Find**.

6. From **Results**, select **Rater**.



Commissioned Officers Effectiveness Reports - Assign Rater - Search Results - Microsoft Internet Explorer

To select your rater from the list below if available, click on the name. If you don't find the name after verifying a search against partial last name only, click on New User name at the bottom of the list to add a guest.

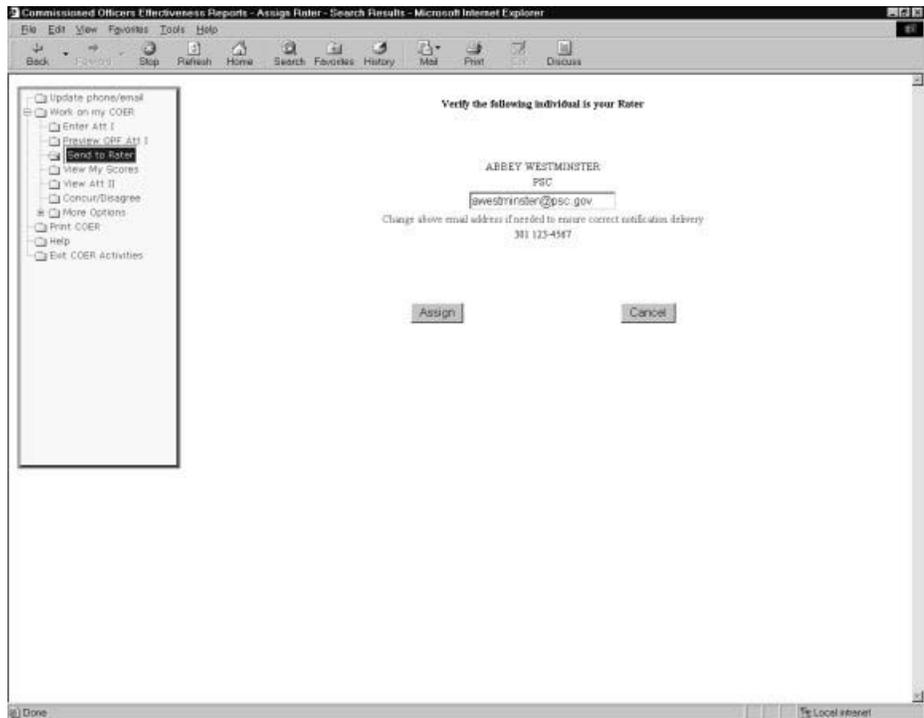
LAST NAME	FIRST NAME	OPD#	ORGANIZATION
WESTMINSTERLABBEY			PSC
WESTMINSTERJACK			PSC
New User	Create		Guest

Cancel

*If no matching results are displayed, go to the section below entitled 'New User Create Guest.'*

7. If necessary, update the rater's e-mail address.

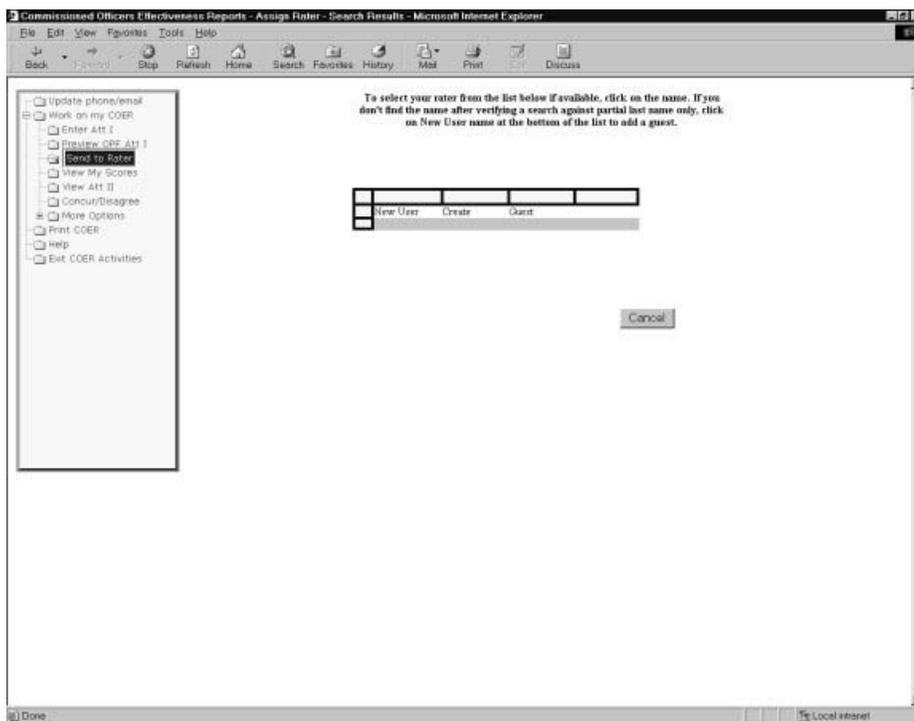
**Notifications to the reviewing official will be sent via email. IT IS IMPORTANT THAT THE REVIEWING OFFICIAL'S EMAIL BE CORRECT!**



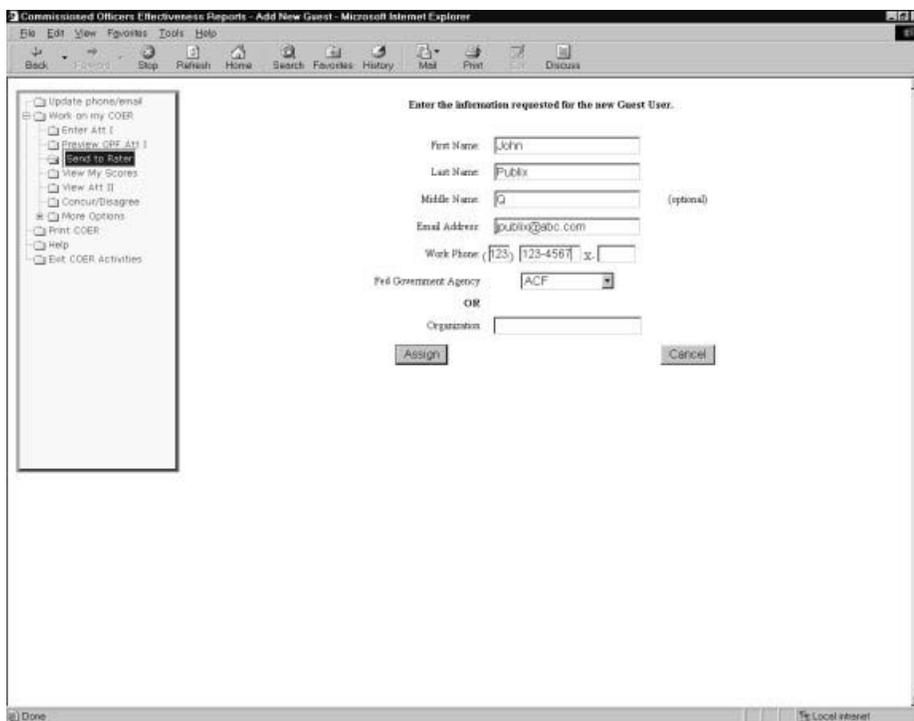
8. Click **Assign**.

## To Initiate a Guest Account:

1. From search results, select **New User Create Guest**.

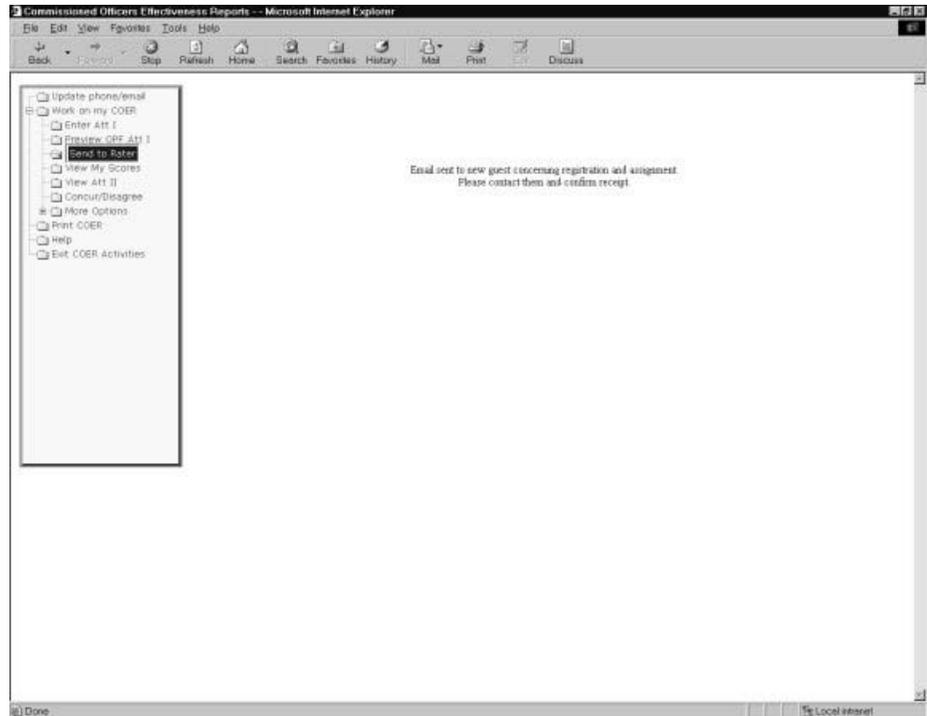


2. Enter **First Name**. Press **Tab**.



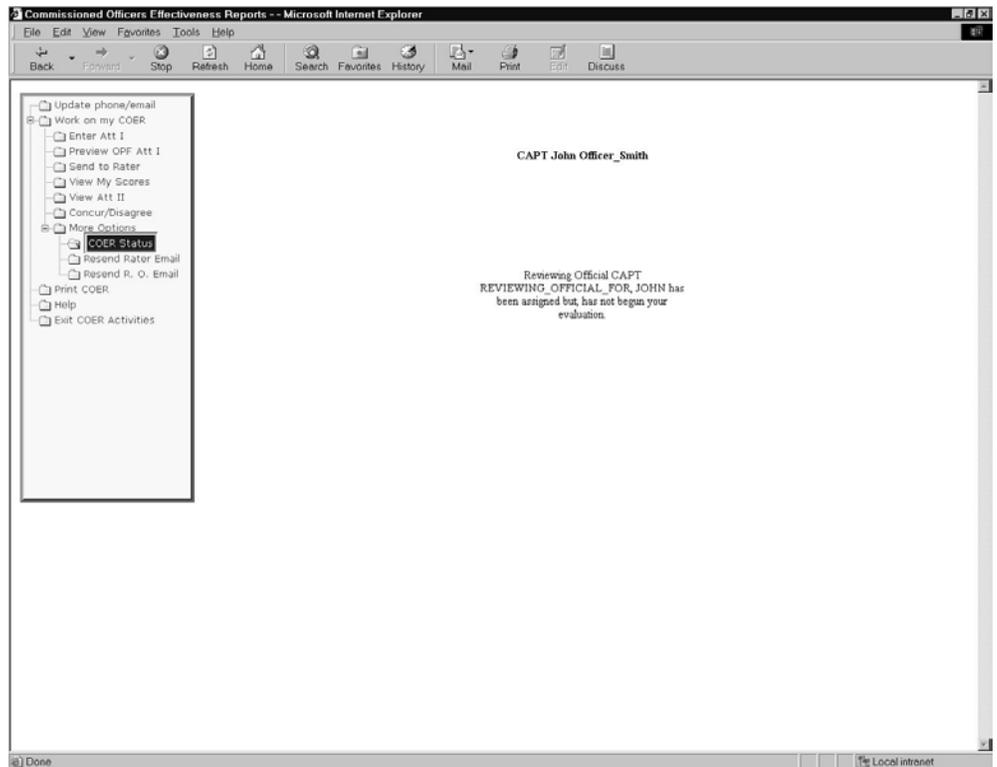
3. Enter **Last Name**. Press **Tab**.

4. Enter Middle Name. Press **Tab**.
5. Enter e-mail address. Press **Tab**.  
*Notifications to the rater will be sent via email. **IT IS IMPORTANT THAT THE RATER'S EMAIL BE CORRECT!***
6. Enter **Work Phone**. Press **Tab**.
7. From pull down list, select **Fed Government Agency** or enter **Organization**.
8. Click **Assign**.



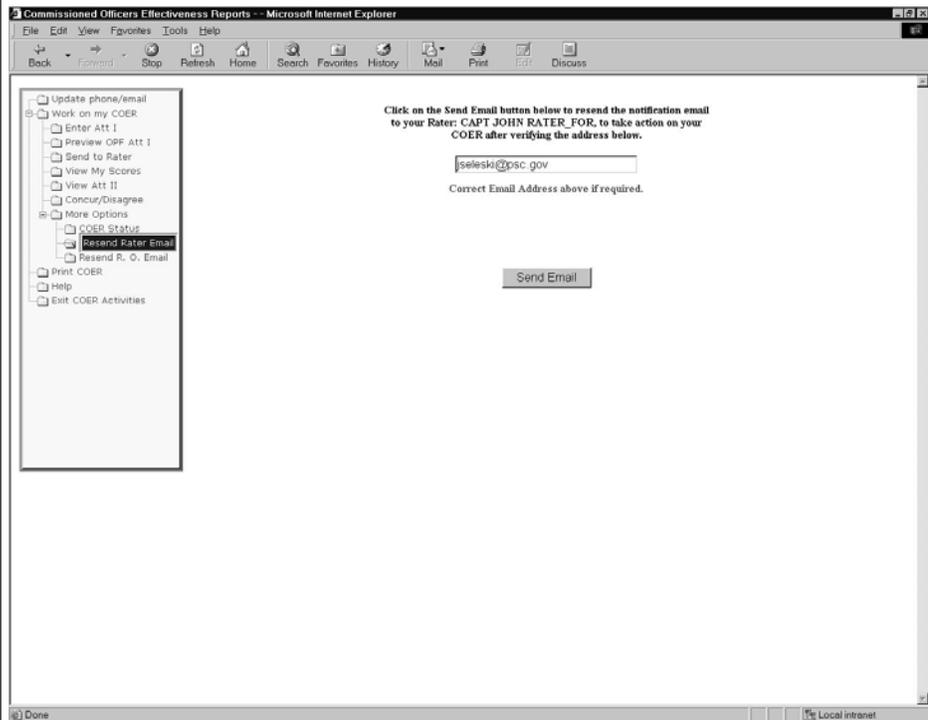
# Checking COER Status

1. From **Activity Tree**, select **More Options**.
2. From **More Options** list, select **Check My COER Status**.



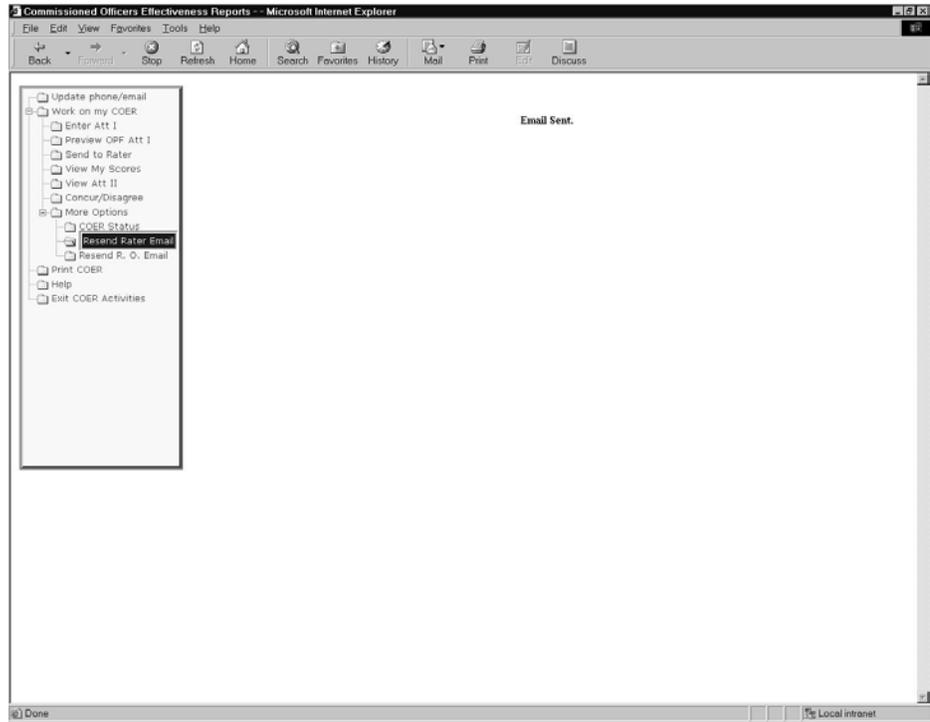
## Resending Rater Notification

1. From **Activity Tree**, select **More Options**
2. From **More Options** list, select **Resend Rater Notification**.



3. If necessary, update rater's e-mail address.

#### 4. Click Send E mail.



## Reviewing Rater Response

To view rater's scores:

1. From **Activity Tree**, select **View My Scores**.

To view Attachment II:

1. From **Activity Tree**, select **View Att II**.

To edit Attachment I:

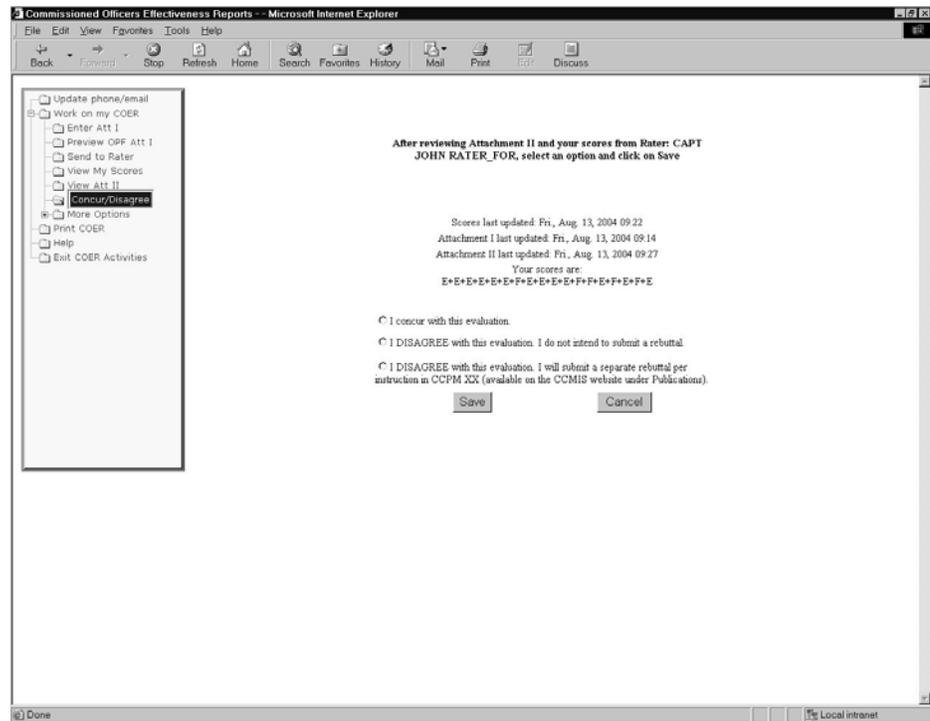
1. From **Activity Tree**, select **Work on Att I**.
2. Enter Attachment I changes.
3. Click **Save**.

*You may make changes to your Attachment I after submitting it to your rater. Please keep the following in mind:*

- *You will not be able to make changes to your Attachment I while your rater is in the process of evaluating your COER. You may, however, make changes before your rater starts the evaluation or after the rater has finished.*
- *Once you have submitted your concurrence or disagreement with the evaluation you will be blocked from making any changes.*
- *If you make a change to your Attachment I, the COER system will automatically generate an email notification informing your rater that a change was made.*

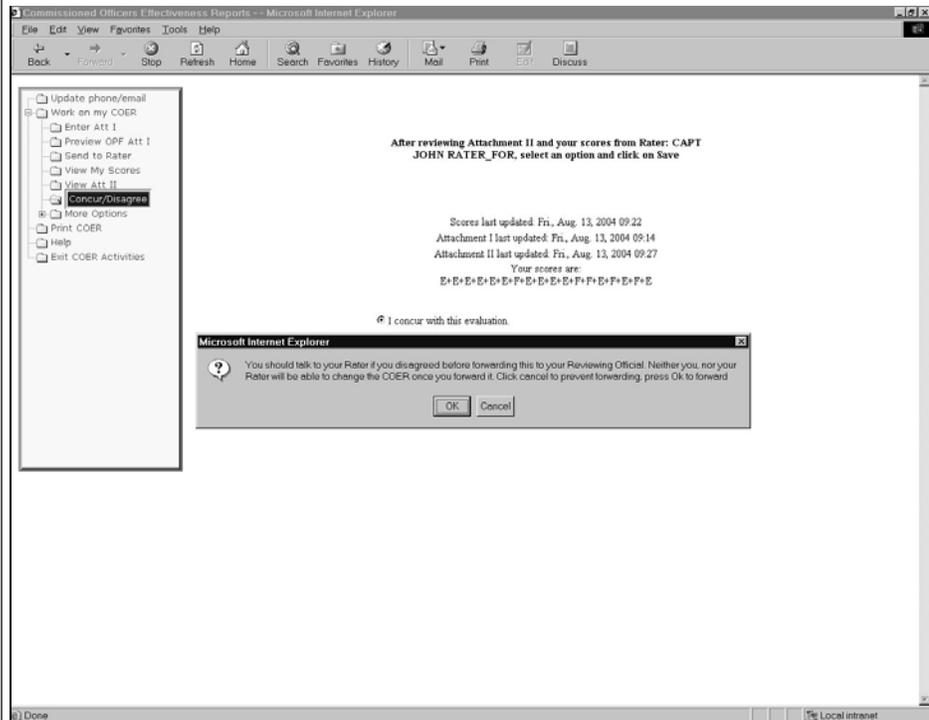
# Concurring with COER

1. Review rater scores, Attachment I and Attachment II.
2. From **Activity Tree**, select **Concur/Disagree**.

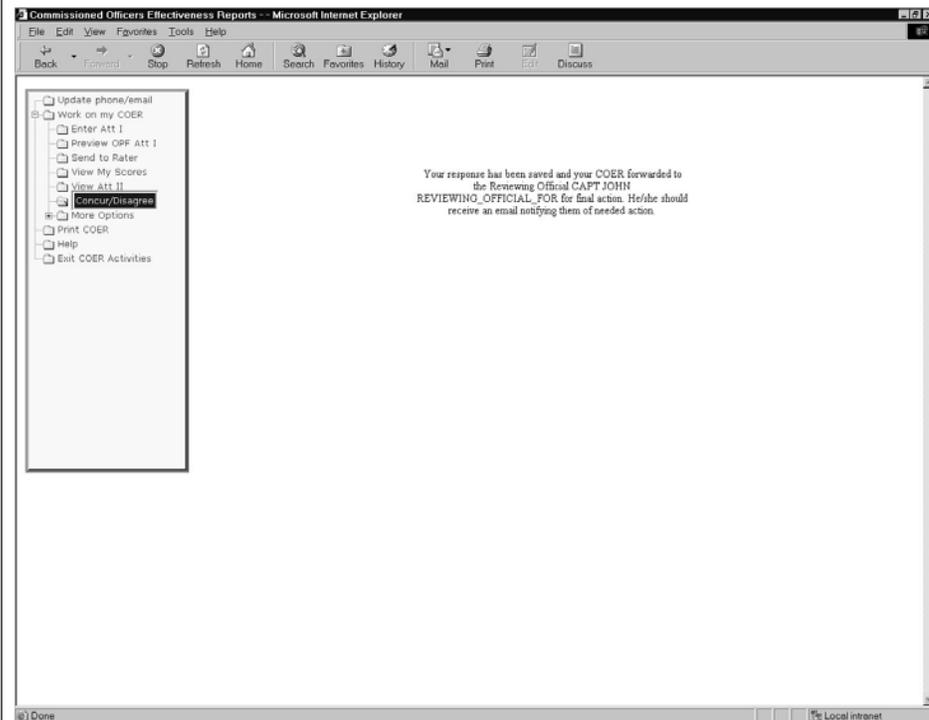


3. Select option:
  - I concur with this evaluation.
  - I DISAGREE with this evaluation. I do not intend to submit a rebuttal.
  - I DISAGREE with this evaluation. I will submit a separate rebuttal per instruction in 2004 Promotion Cycle Manual Circular available on the CCMIS website under Publications).
4. Click **Save**.

5. Click OK.



Notification is sent to the Reviewing Official that the COER is ready for review.



## Rater Tasks

This section will concentrate on the tasks a Rater performs to review and complete a COER. It will cover:

- Creating and working with Guest Accounts
- Logging into the COER application
- Updating contact information
- Reviewing Attachment I
- Creating and completing a Narrative COER
- Creating and completing a Detailed COER
- Assigning a reviewing official
- Releasing COER to Officer

## Create a Guest Account

1. Open the e-mail from PHSCOERS informing you that you had been selected as an officer's rater.
2. Note **Guest ID** and **Last Name**.
3. Click **Guest Registration** link.

The screenshot shows a web browser window titled "Commissioned Officer Systems - Microsoft Internet Explorer". The address bar shows the URL "http://www.dcp.gov/guestregistration". The page header includes the "Division of Commissioned Personnel" logo and the text "Login ID: | August 16, 2004".

Below the header, there are two informational boxes:

- The first box states: "The guest registration website will NOT work with the older Netscape version 4.7x browser. We have confirmed it will work with versions 6 or later. Click [here](#) to download the latest version."
- The second box states: "Guest Registration is available only to those individuals who have been authorized to create an account through an email notification. Email notification will provide all necessary information like Guest ID etc. for account registration process."

The main content area is a registration form with three steps:

- Step 1:** Enter your Guest ID and Last Name. This step is currently active. It contains two input fields: "Guest ID" with the value "2545" and "Last Name" with the value "PUBLIC". Both fields are marked with an asterisk (\*) indicating they are required. To the right of the "Guest ID" field is a dropdown menu with the text "Enter the Guest ID". To the right of the "Last Name" field is a dropdown menu with the text "Enter your Last Name". Below the "Last Name" field are two links: "Forgot your Guest ID?" and "Forgot your Password?".
- Step 2:** Your Personal Information.
- Step 3:** Create Your Login ID and Password.

At the bottom of the form are three buttons: "Continue", "Clear", and "Exit".

At the bottom of the page, there is a footer with the following text: "HH&H Home | PSC | DCP-WebSite | Accessibility | Privacy Notice | Freedom of Information Act | Disclaimers | The White House | FirstGov | Contact Us | Division of Commissioned Personnel | 5600 Fishers Lane, # 4-04 | Rockville, MD 20857".

4. Enter **Guest ID**. Press Tab.
5. Enter **Last Name**.
6. Click **Continue**.

7. Verify personal information. Make any updates and/or additions.

Commissioned Officer Systems - Microsoft Internet Explorer

Division of Commissioned Personnel

Guest Account Registration

Step 1: Enter your Guest ID and Last Name

Step 2: Your Personal Information

Step 3: Create Your Login ID and Password

\* Indicates a required field

\* Last Name: PUBLIC

\* First Name: JOHN

Middle Name: J

\* E-Mail Address: jpeteski@psc.gov

Federal Govt. Agency: PROGRAM SUPPORT CENTER

Organization Name:

\* Work Phone Number: Area Code: 123 Phone No.: 1234567 Extension:

If any of the above information is incorrect, make appropriate changes and click continue

Continue Clear Exit

HHS Home | PSC | DCP WebSite | Accessibility | Privacy Notice | Freedom of Information Act | Disclaimers | The White House | FireGov | Contact Us

Division of Commissioned Personnel | 5600 Fraters Lane # 4-04 | Rockville, MD 20857

8. Click **Continue**.

Commissioned Officer Systems - Microsoft Internet Explorer

Division of Commissioned Personnel

Guest Account Registration

Step 1: Enter your Guest ID and Last Name

Step 2: Your Personal Information

Step 3: Create Your Login ID and Password

\* Indicates a required field

\* Login ID: JCPUBLIC

\* Password: \*\*\*\*\*

\* Confirm Password: \*\*\*\*\* Login ID and Password Tips

\* Secret Question: In what city were you born?

\* Secret Answer: WASHINGTON, DC

\* Enter one of the following

\* S.S.N.: 123456789 Enter SSN Please do not include any dashes "--"

- OR -

\* Date of Birth: In mm/dd/yyyy format

\* Digital PIN: PIN is valid only for this account you are creating.

\* The above information we collect will be used to reset a forgotten Login ID or password.

Submit Clear Exit

HHS Home | PSC | DCP WebSite | Accessibility | Privacy Notice | Freedom of Information Act | Disclaimers | The White House | FireGov | Contact Us

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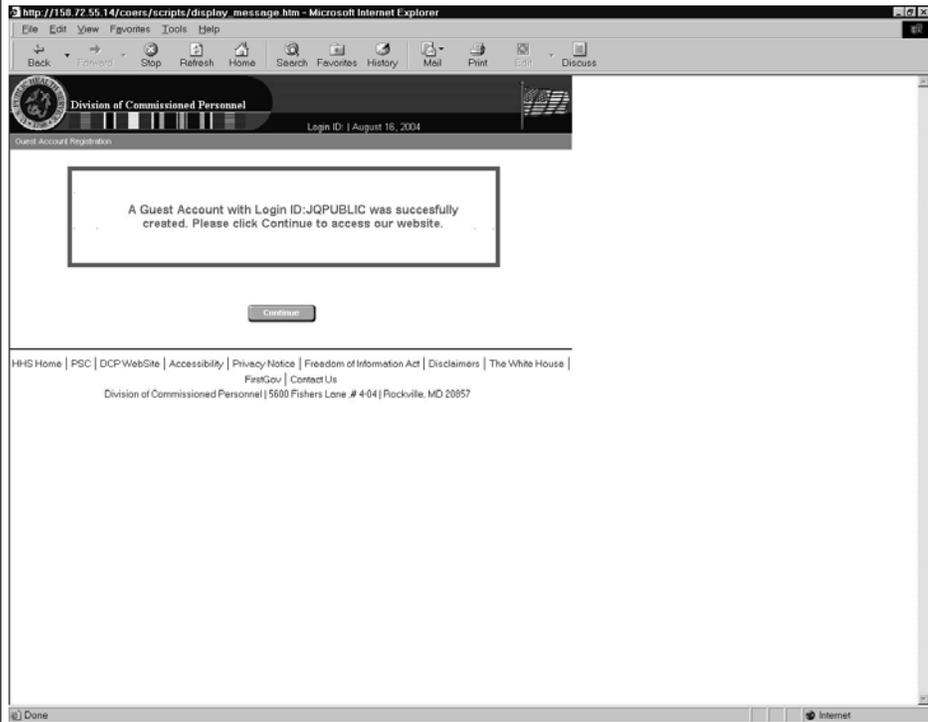
9. Enter a **User Name**. Press **Tab**.

10. Enter a **Password**. Press **Tab**.

11. Re-enter **Password** for confirmation.

12. From pull-down menu, select a **Secret Question**.

13. Enter a **Secret Answer** in response to the Secret Question.
14. Enter either your **Social Security Number (SSN)** or **Date of Birth (DOB)**.
15. Enter a **Digital Pin**.  
*The purpose for requesting this information is to validate a guest user should it be necessary to change a password.*
16. Click **Continue**.



17. Click **Continue** to be directed to the 2004 COER application.

### **User Name and Password Tips**

- **User Name must be 6 to 20 Characters.**
- **User Name must begin with an Alphabet.**
- **Password must be a combination of 8 to 20 alpha and numeric characters for example, XX9999S3.**
- **Avoid easy-to-guess names, addresses, or birth dates.**
- **Avoid using your Social Security Number.**
- **Avoid obvious passwords. Do not use names of persons, pets, favorite sports teams, or things significant to you in any way. Do not use numbers significant to you or someone close to you (i.e., phone numbers, birth dates, etc.).**
- **Do not use anything that can be found in a dictionary.**
- **Make your password alphanumeric. Intentionally misspell a word such as "guvrmnt" or "2gether."**
- **First and foremost, NEVER tell your password to anyone. This includes coworkers.**
- **Do not write your password or share it. A written password is more easily discovered than one committed to memory.**
- **Do not allow others to watch you type the password.**
- **Do not write your password or share it. You alone are responsible for what is done with your user ID and password.**
- **If you feel your password has been compromised, change it immediately.**

# Working with Guest Registration

## Forgotten Password

1. Open the e-mail from PHSCOERS informing you that you had been selected as an officer's rater. Click Guest Registration link.

Commissioned Officer Systems - Microsoft Internet Explorer

Division of Commissioned Personnel  
Login ID: | August 15, 2004

Guest Account Registration

The guest registration website will NOT work with the older Netscape version 4.7x browser. We have confirmed it will work with versions 6 or later. Click here to download the latest version.

Guest Registration is available only to those individuals who have been authorized to create an account through an email notification. Email notification will provide all necessary information like Guest ID etc. for account registration process.

Step 1: Enter your Guest ID and Last Name  
Step 2: Your Personal Information  
Step 3: Create Your Login ID and Password

\* Guest ID: [2545] Enter the Guest ID  
\* Last Name: [PUBLIC] Enter your Last Name

Forgot your Guest ID? **Forgot your Password?**

Continue Clear Exit

HHS Home | PSC | DCP WebSite | Accessibility | Privacy Notice | Freedom of Information Act | Disclaimers | The White House | FirstGov | Contact Us  
Division of Commissioned Personnel | 5600 Fishers Lane, # 4-04 | Rockville, MD 20857

2. From Registration Page, click 'Forgot your password?' link.

Commissioned Officer Systems - Microsoft Internet Explorer

Division of Commissioned Personnel  
Login ID: | August 16, 2004

Forgot your password?

Login ID  
Login ID: [JQPUBLIC]

Please enter the answer to your secret question you registered

\* Secret Question: [In what city were you born?] \* Secret Answer: [ ]

Enter the following information you have provided during initial registration

\* S.S.N.: [ ] Enter SSN Please do not include any dashes ""  
- OR -  
\* Date of Birth: [ ] in mm/dd/yyyy format  
\* Digital PIN: [ ] Enter the PIN that his valid for this account.

Choose a new password and confirm it.

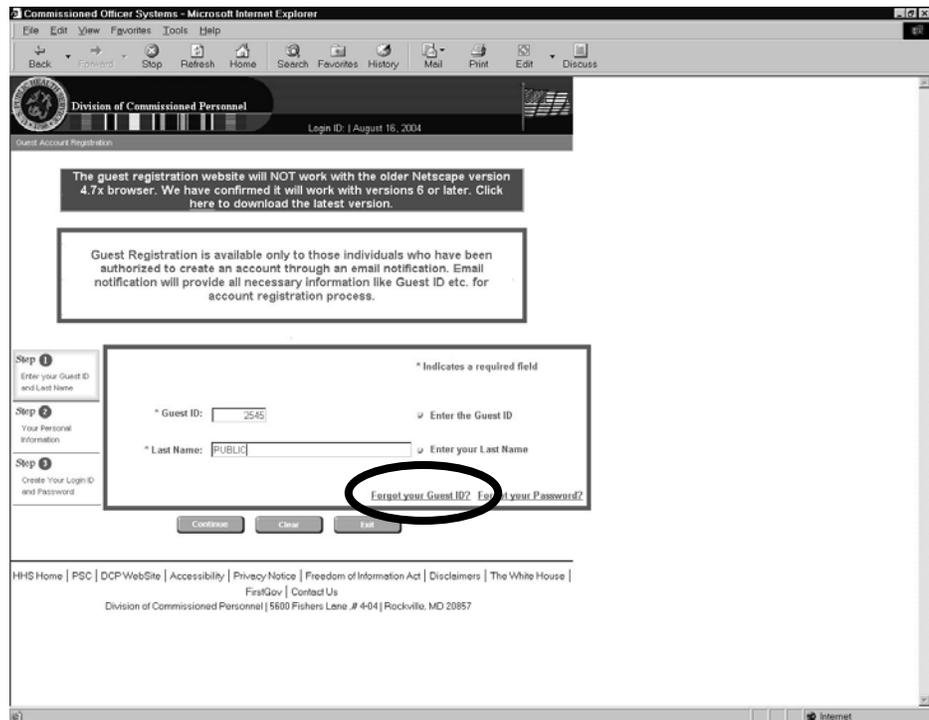
\* Password: [ ] \* Confirm Password: [ ] Login ID and Password Tips

Submit Exit

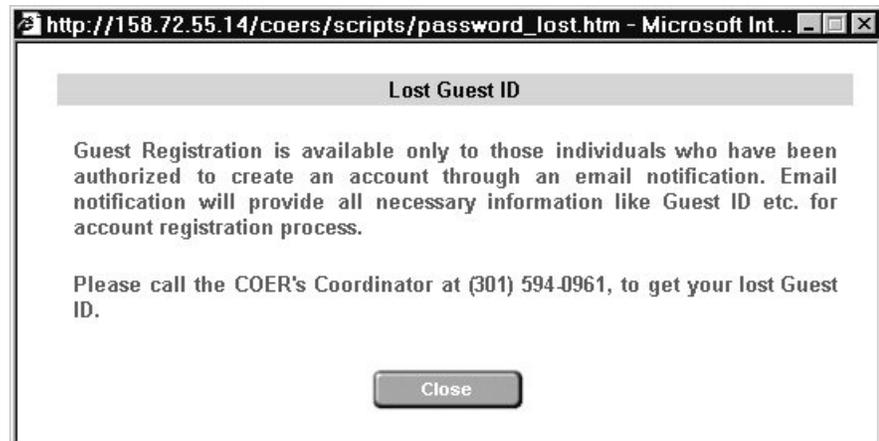
3. Enter **Secret Answer**. Press **Tab**.
4. Enter **SSN** or **Date of Birth** and **Digital PIN**. Press **Tab**
5. Enter **New Password**. Press **Tab**.
6. Re-enter **New Password** to confirm.
7. Click **Submit**.

### Forgotten Guest ID

1. Open link to Guest Registration application.



2. From Registration Page, click '**Forgot your Guest ID?**' link.



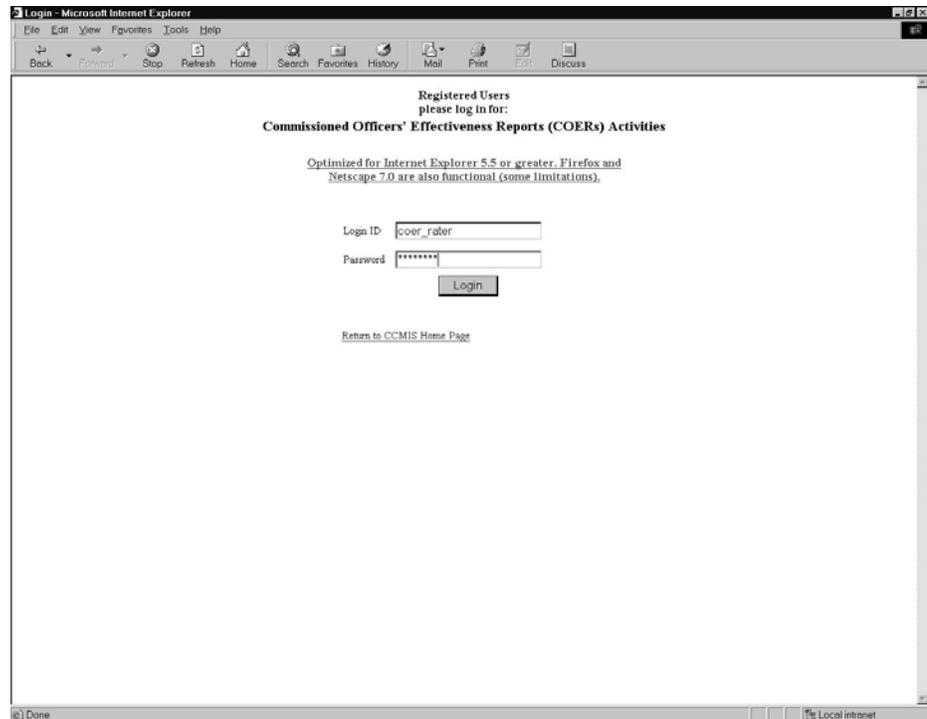
3. Following instructions from Lost Guest ID message box.

## COER Login

1. From **Commissioned Corps Management Information Services (CCMIS)** webpage, click link to access **Commissioned Officers' Effectiveness Reports (COER's) Activities** webpage.

-OR-

From the e-mail notification, click the link provided to access **Commissioned Officers' Effectiveness Reports (COER's) Activities** webpage.



The screenshot shows a Microsoft Internet Explorer browser window titled "Login - Microsoft Internet Explorer". The address bar is empty. The main content area displays the following text:

Registered Users  
please log in for:  
**Commissioned Officers' Effectiveness Reports (COERs) Activities**

Optimized for Internet Explorer 5.5 or greater. Firefox and Netscape 7.0 are also functional (some limitations).

Login ID:

Password:

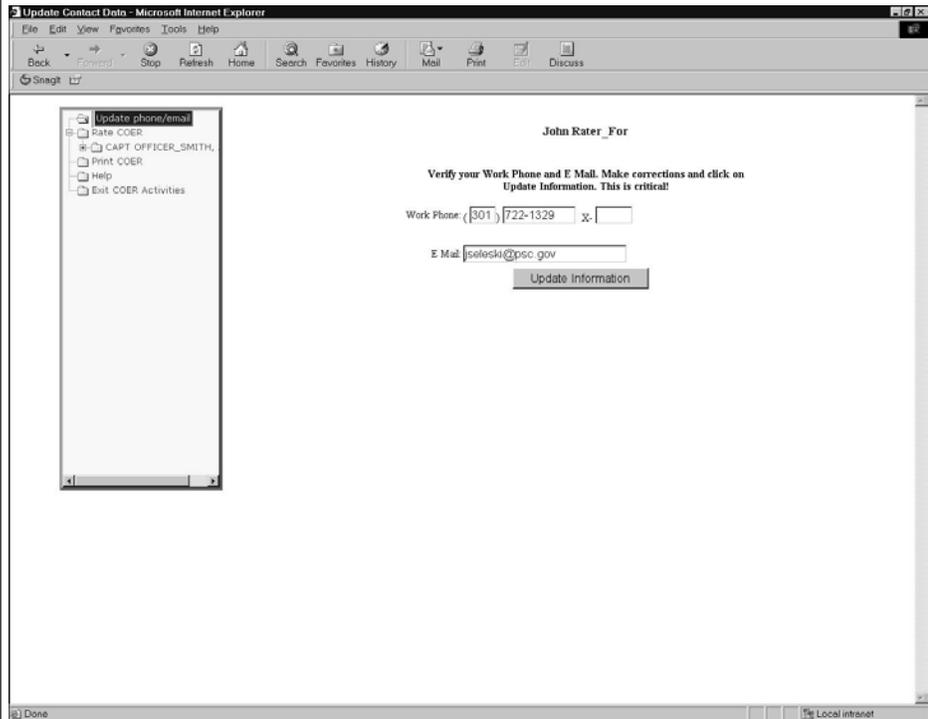
[Return to CCMIS Home Page](#)

The status bar at the bottom shows "Done" and "Local intranet".

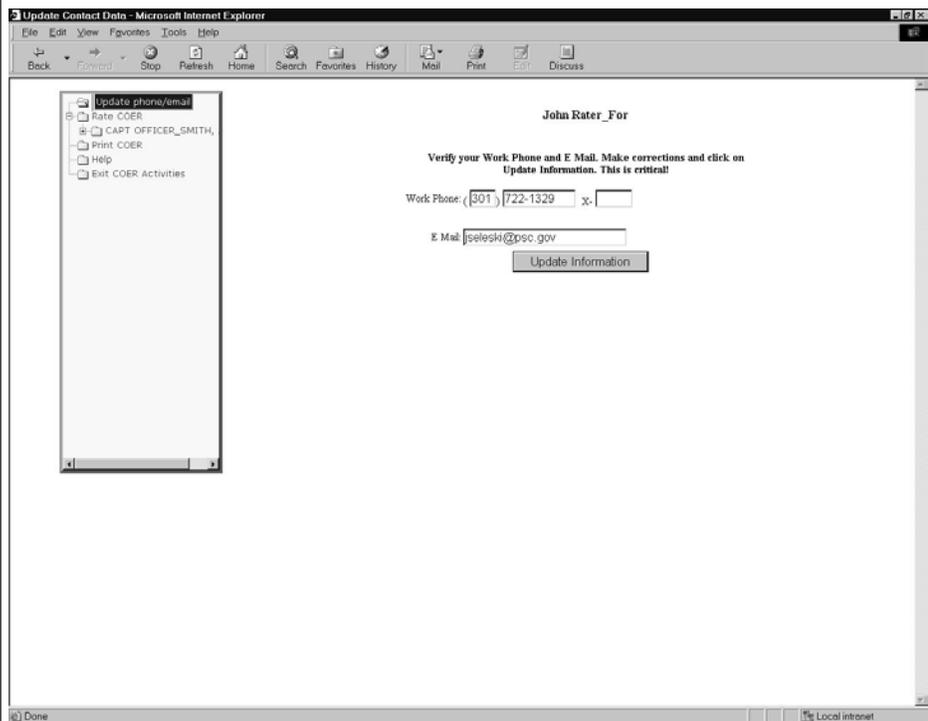
2. At **Login**, enter **User Name**.
3. Press **Tab**.
4. Enter **Password**
5. Click **Login**.

# Updating Contact Information

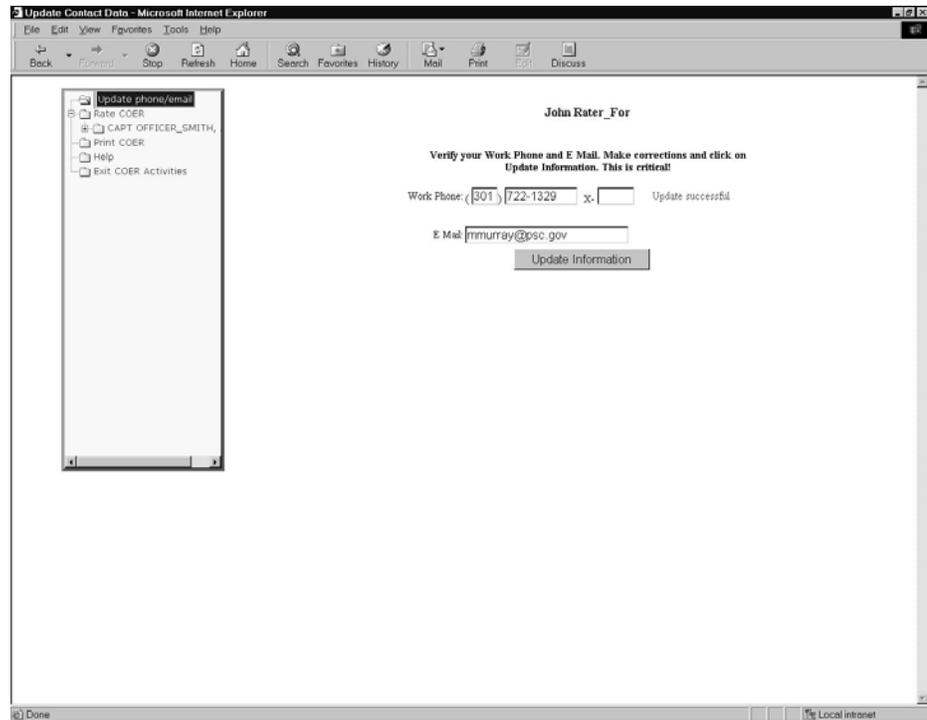
1. From **Activity Tree**, click **Update phone/email**.



2. If necessary, enter **Work Phone** information.
3. If necessary, enter **E Mail** information.



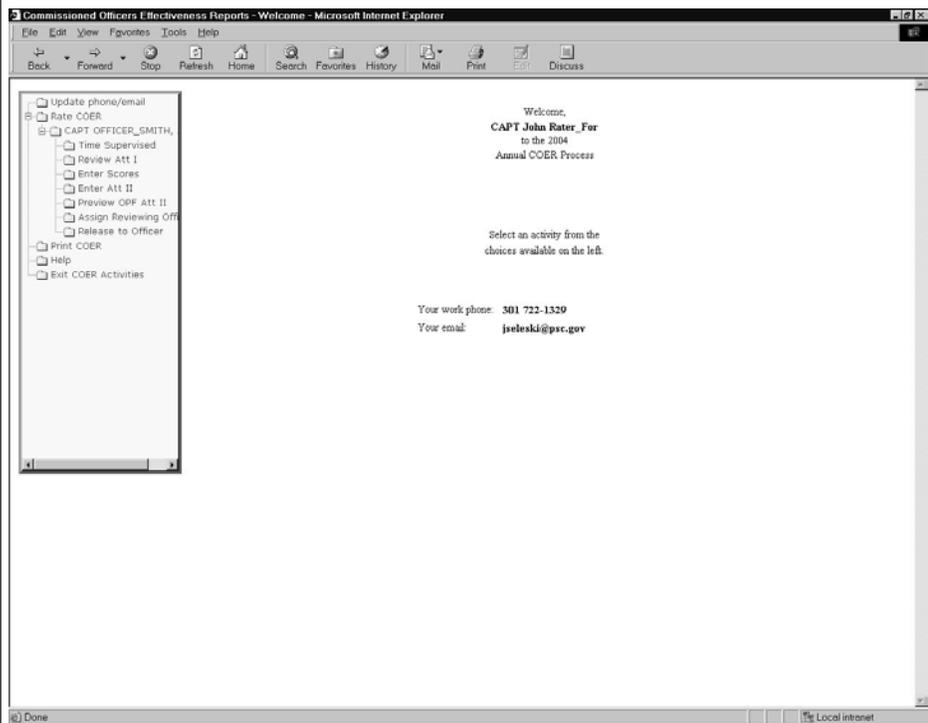
#### 4. Click Update Information.



*The confirmation message 'Update successful' will appear to the right of the updated fields.*

# Reviewing Attachment I

1. From **Activity Tree**, click '+' to expand a listing for an officer.



2. Select **Review Att I**.

# Creating and Completing a Narrative COER

**NOTE: If you are a rater for an officer you have supervised for six months or less, you have the option of completing either a Narrative or Detailed COER (*'Creating and Completing a Narrative COER' - Step 6'*.)**

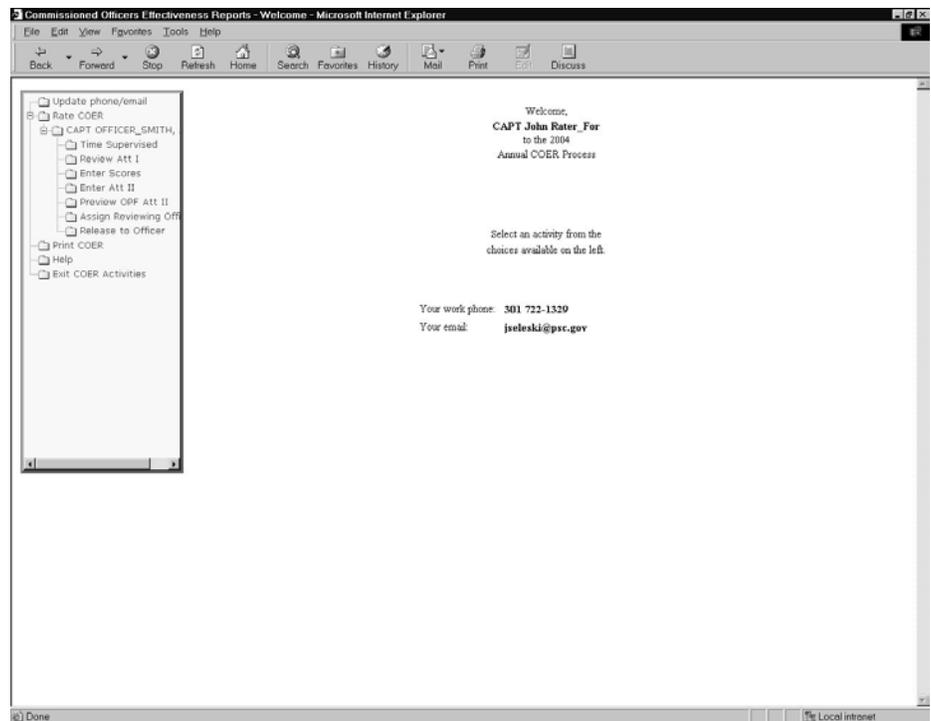
**A Narrative COER permits you to score Question 18 and enter Attachment II. The Detailed COER requires you to score each Question (1-18) and enter Attachment II.**

**If you have the option and choose to complete a Detailed COER, after Step 6 below, skip to the topic *'Creating and Completing a Detailed COER: To complete a Detailed COER – Step1'***

**If you have supervised an officer for more than six months, you must complete the Detailed COER (see topic *'Creating and Completing a Detailed COER'*.)**

## To initiate a Narrative COER:

1. From **Activity Tree**, click '+' to expand listing for an officer.

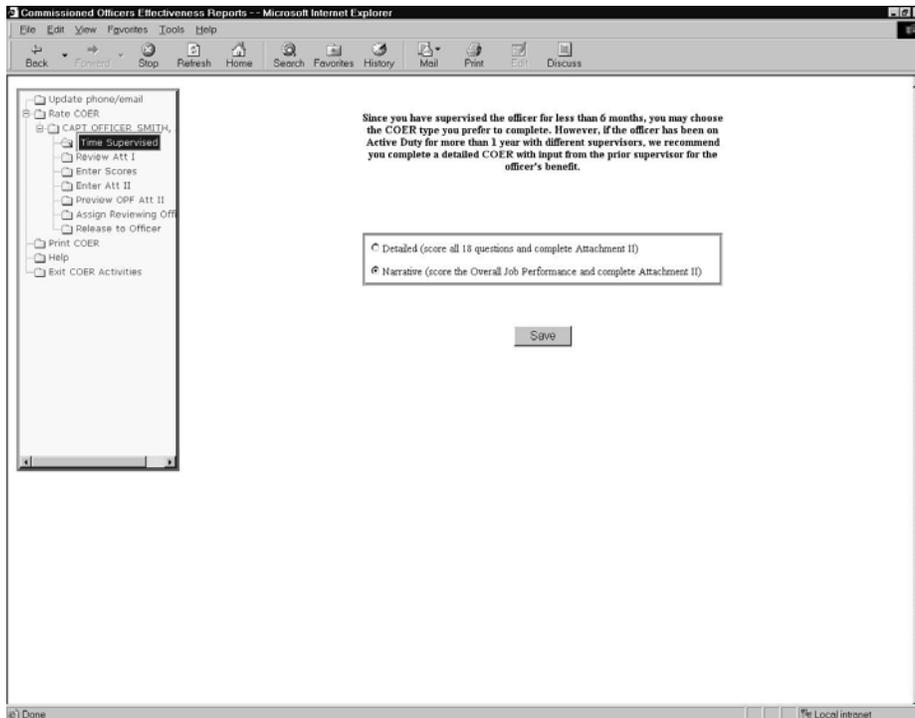


## 2. Select Enter Time Supervised.

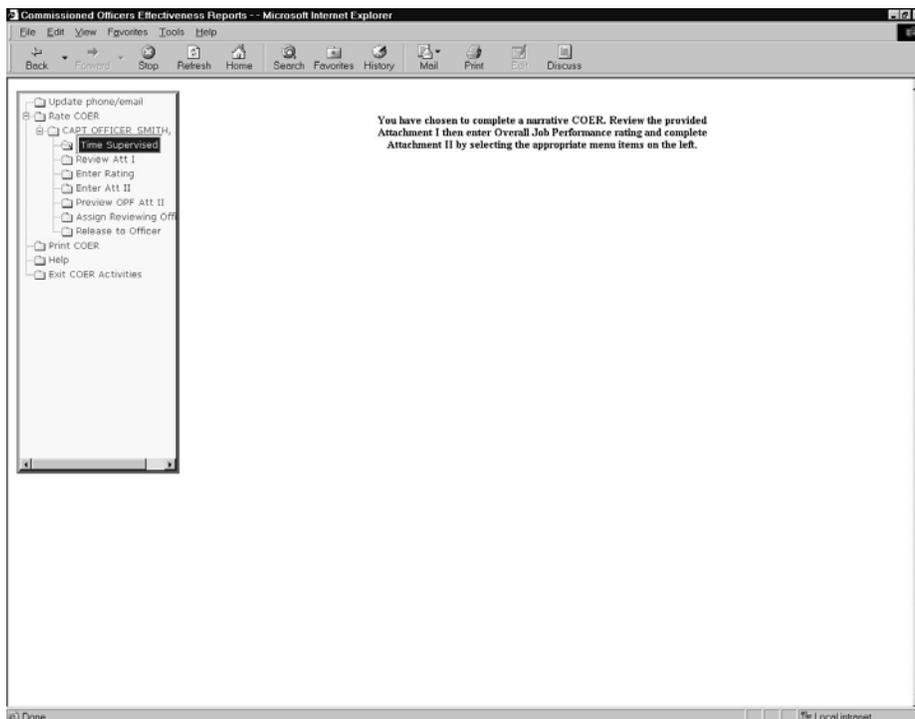
The screenshot shows a Microsoft Internet Explorer browser window titled "Commissioned Officers Effectiveness Reports -- Microsoft Internet Explorer". The address bar is empty. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains icons for Back, Forward, Stop, Refresh, Home, Search, Favorites, History, Mail, Print, Edit, and Discuss. On the left side, there is a vertical menu with the following items: Update phone/email, Rate COER, CAPT OFFICER SMITH, Enter Time Supervised (highlighted), Review Att I, Enter Scores, Enter Att II, Preview ODF Att II, Assign Reviewing Off, Release to Officer, Print COER, Help, and Exit COER Activities. The main content area displays the text "How long have you supervised CAPT OFFICER SMITH, JOHN" and "Zero should be selected for years if less than 12 months." Below this text are two pull-down menus: "Years: 0" and "Months: 4". A "Save" button is located at the bottom of the form. The status bar at the bottom of the browser window shows "Done" and "Local intranet".

3. From pull-down menu, select number of years supervised. Press **Tab**.
4. From pull-down menu, select number of months supervised.
5. Click **Save**.

6. From results box, select **Narrative**.

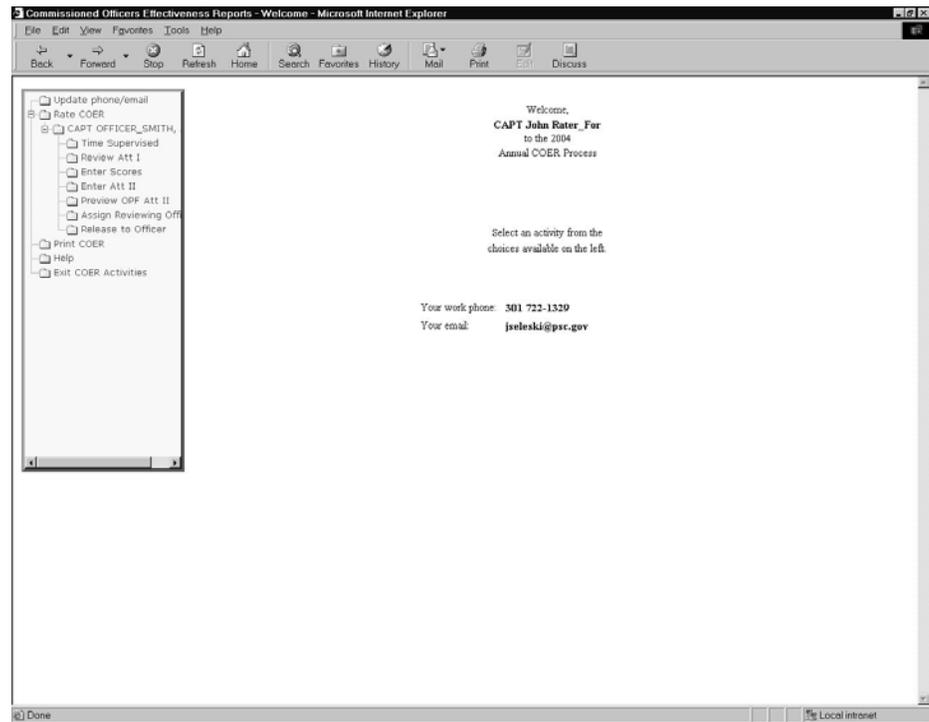


7. Click **Save**.



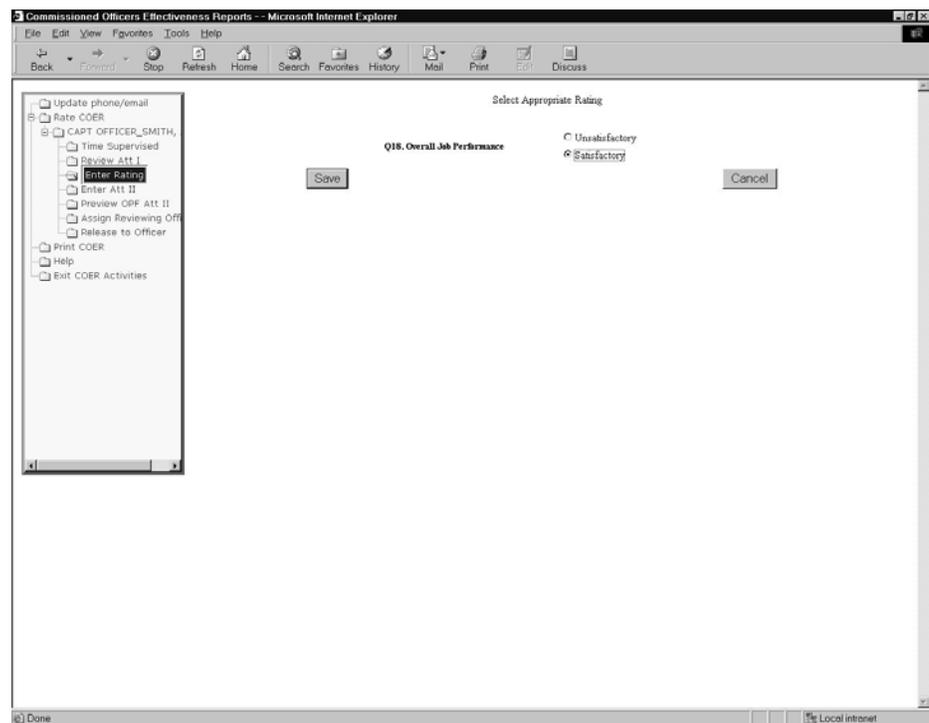
## To Complete a Narrative COER:

1. From **Activity Tree**, click **+** to expand listing for an officer.

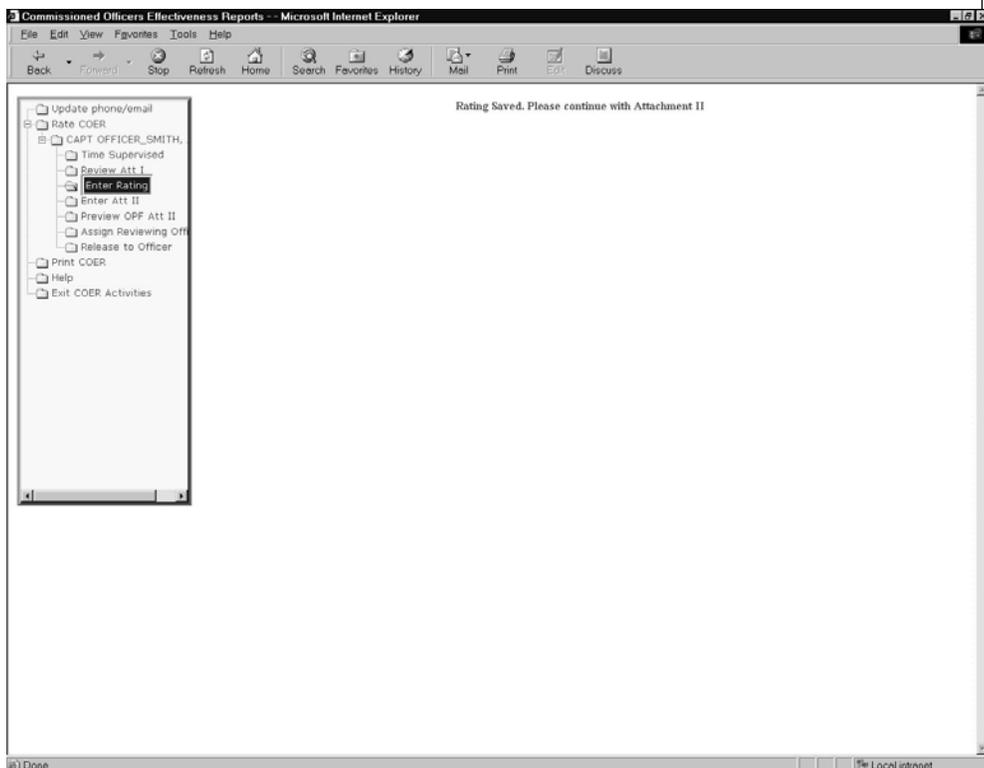


2. From officer listing, click **Review Att I**.

3. From officer listing, click **Enter Rating**.

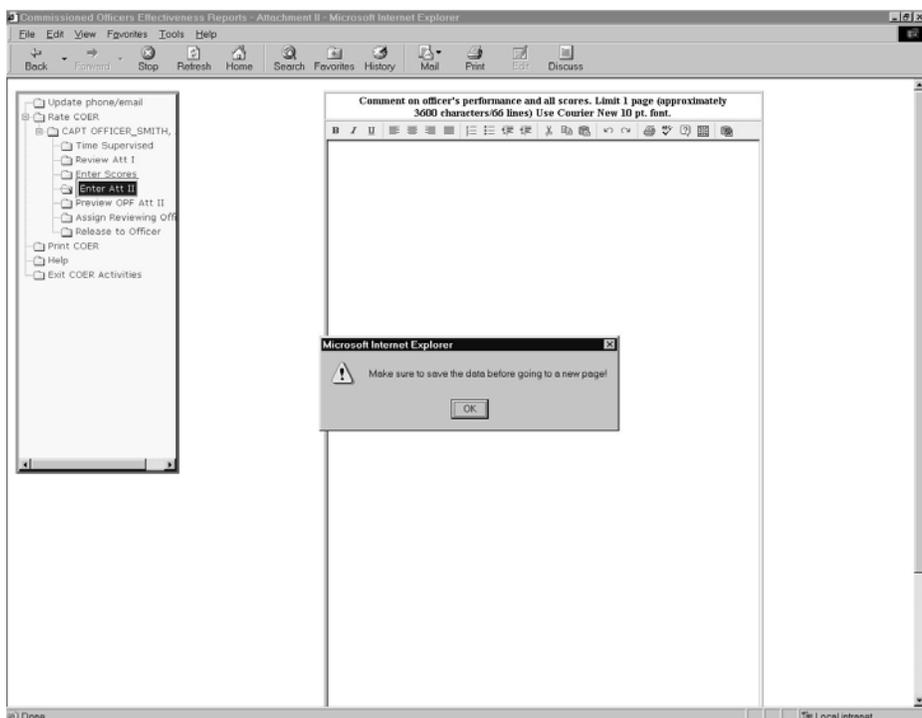


4. Enter **Overall Job Performance Score** (Question 18.) Click **Save**.



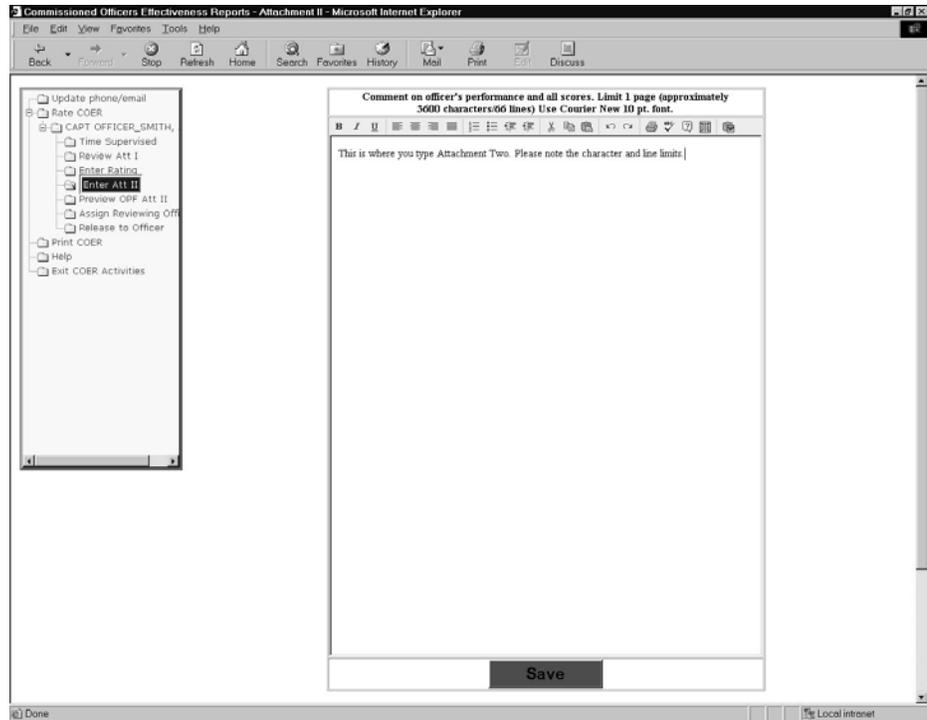
5. From officer listing, click **Enter Att II**.

6. Click **OK** to message about saving before going to a new page.



*Make sure you save any work before going to another page. If you fail save your work will be lost and you will need to re-enter it.*

## 7. Enter Attachment II.

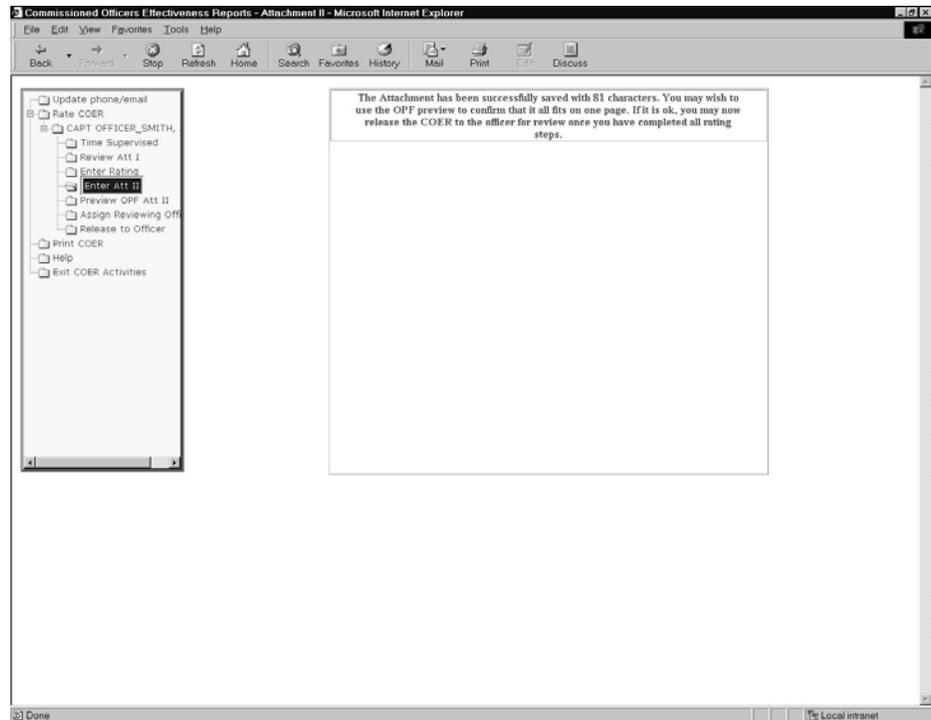


*When you save Attachment II the application checks to verify that there are no more than 3600 characters and/or 66 lines of text, and displays the totals in the save confirmation.*

*Use the **Preview OPF Att II** to view your Attachment I to see how it fits on the page.*

*If you are over the character/line limit the text will truncate in the Preview Window. If this happens, it means that the text **WILL NOT** be seen in the eOPF. You will need to edit the Attachment II to fit within the character/line limits so that it fits on the single page.*

## 8. Click **Save**.



If you decide that you want to change the COER type from Narrative to Detail after initiating the COER follow these steps:

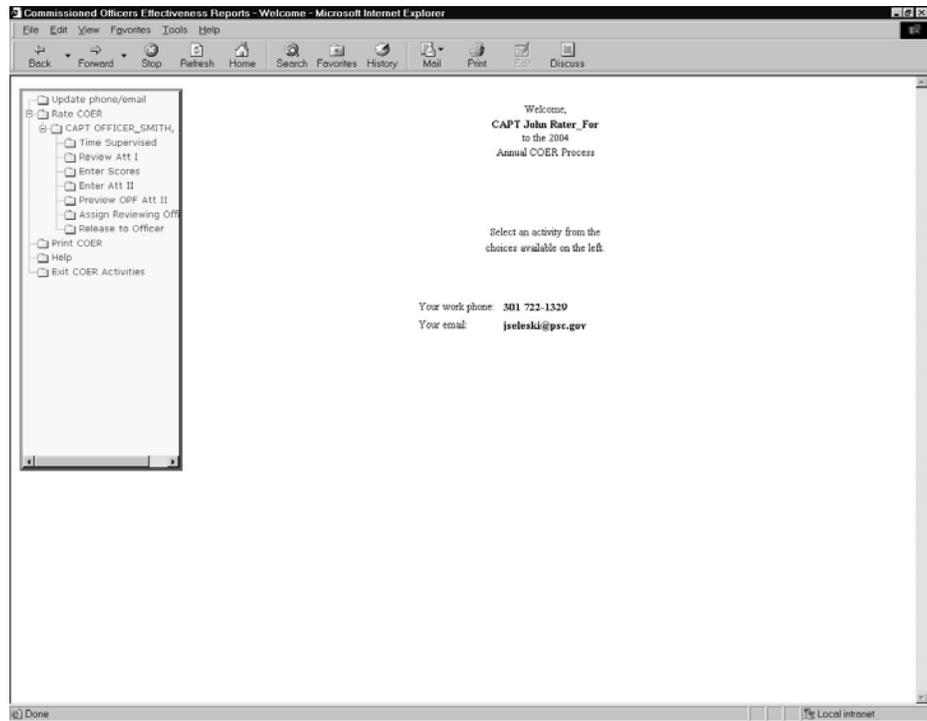
1. From **Activity Tree**, select **Time Supervised** in officer listing.
2. Click **Save**.
3. Select **Detailed** from COER Type Box.
4. Click **Save**.

*This may be done at anytime prior to the officer's final response to the rater's evaluation.*

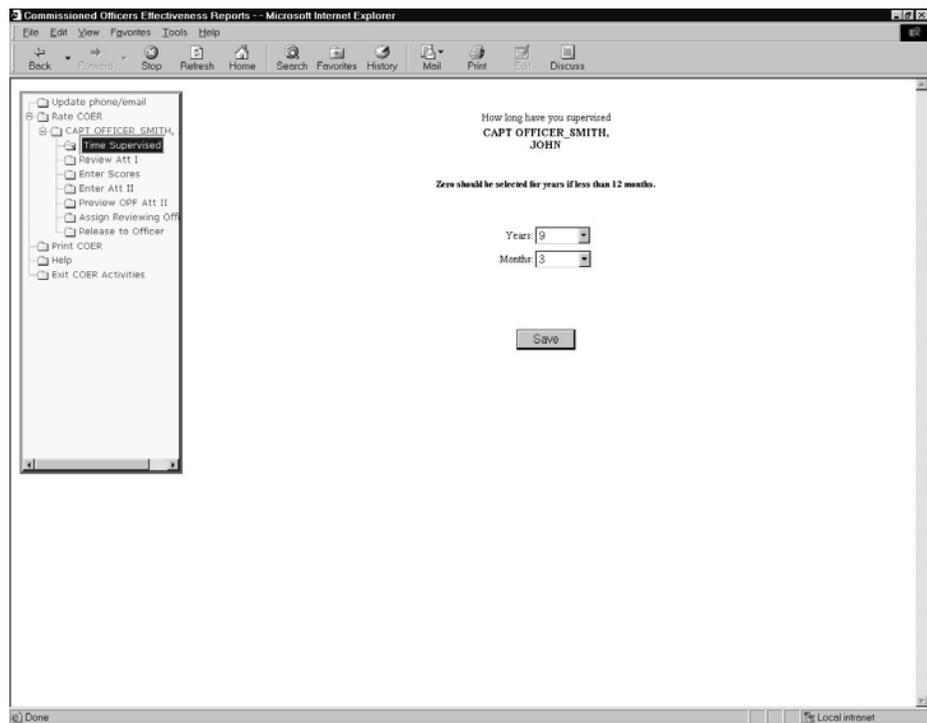
# Creating and Completing a Detailed COER

To initiate a Detailed COER:

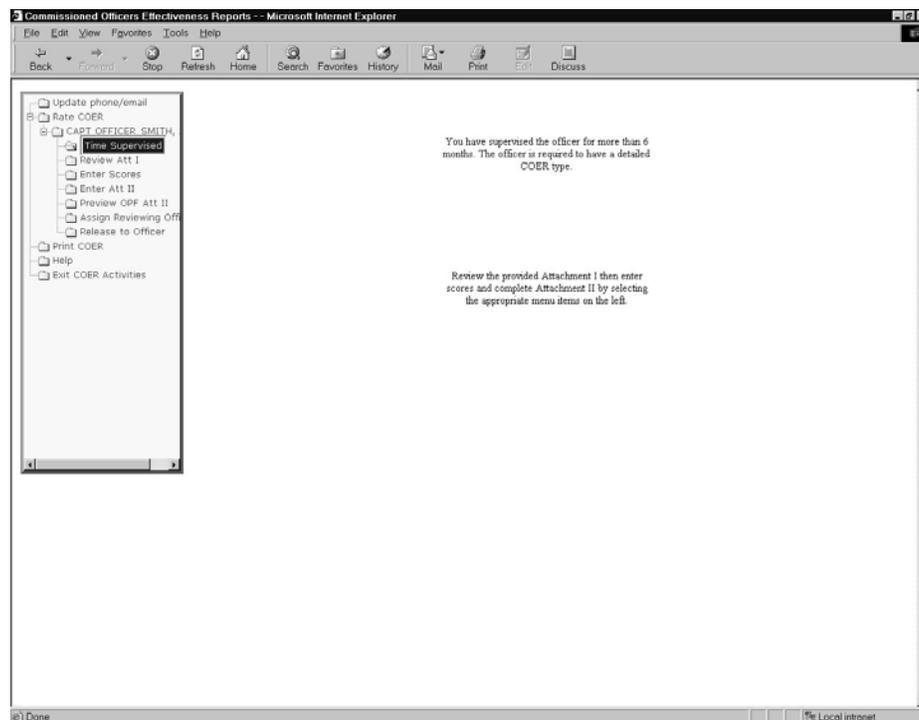
1. From **Activity Tree**, click '+' to expand listing for officer.



2. From listing, select **Enter Time Supervised**.

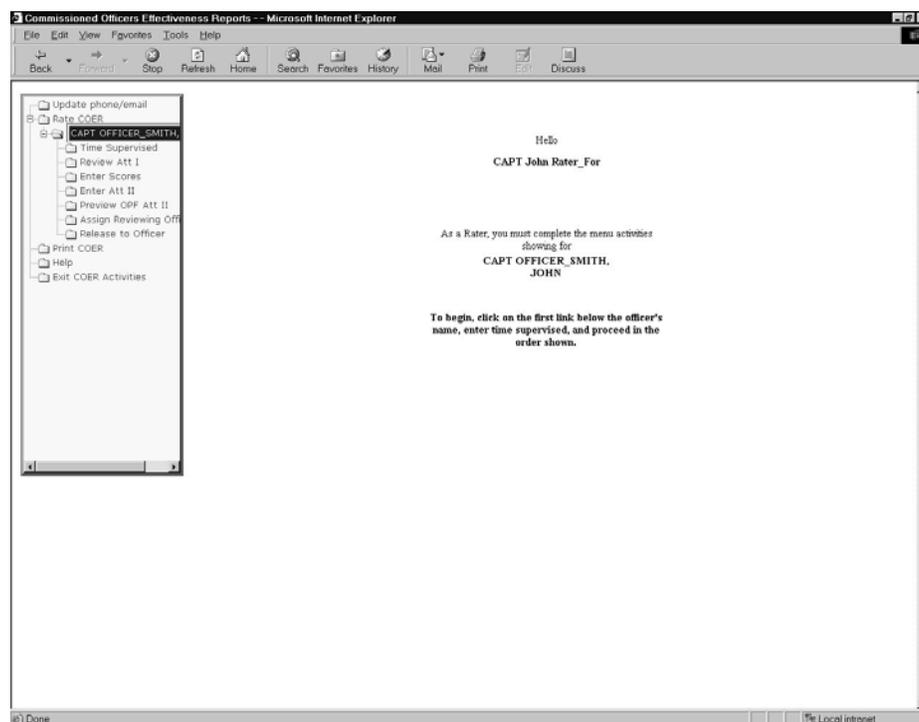


3. From pull-down menu, select number of years supervised. Press Tab.
4. From pull-down menu, select number of months supervised.
5. Click **Save**.



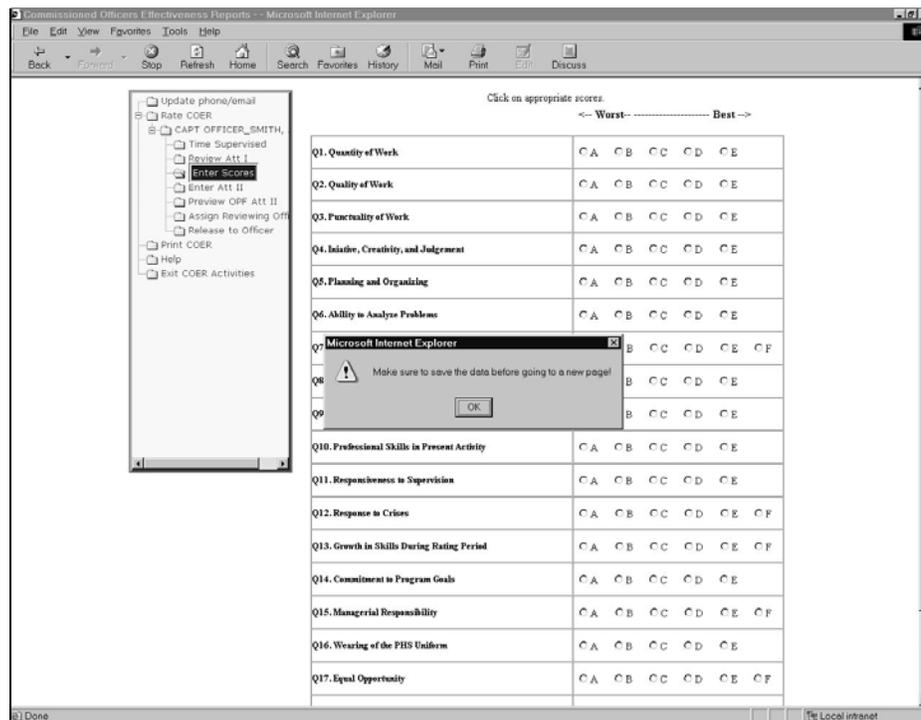
**To complete a Detailed COER:**

1. From **Activity Tree**, click '+' to expand listing for officer.

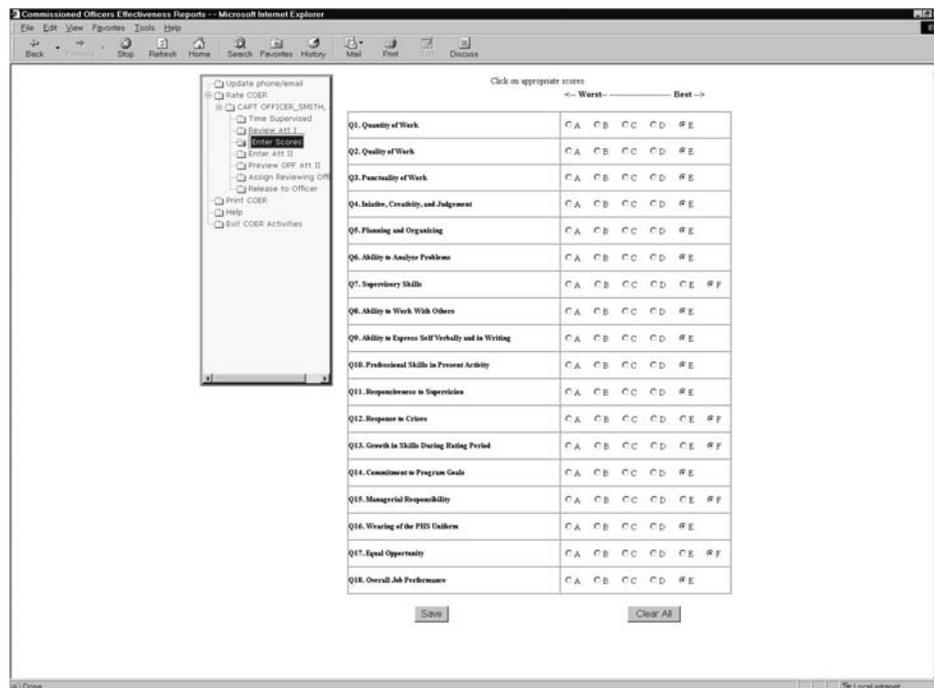


2. From listing, click **Review Att I**.

3. From listing, click **Enter Scores**.

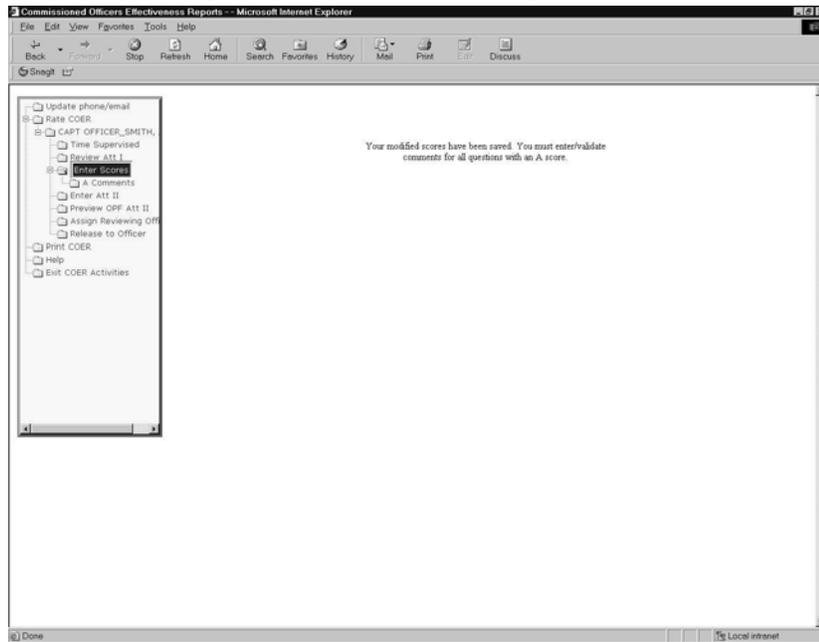


4. Enter Scores (**A\***, **B**, **C**, **D**, **E**, **F**).

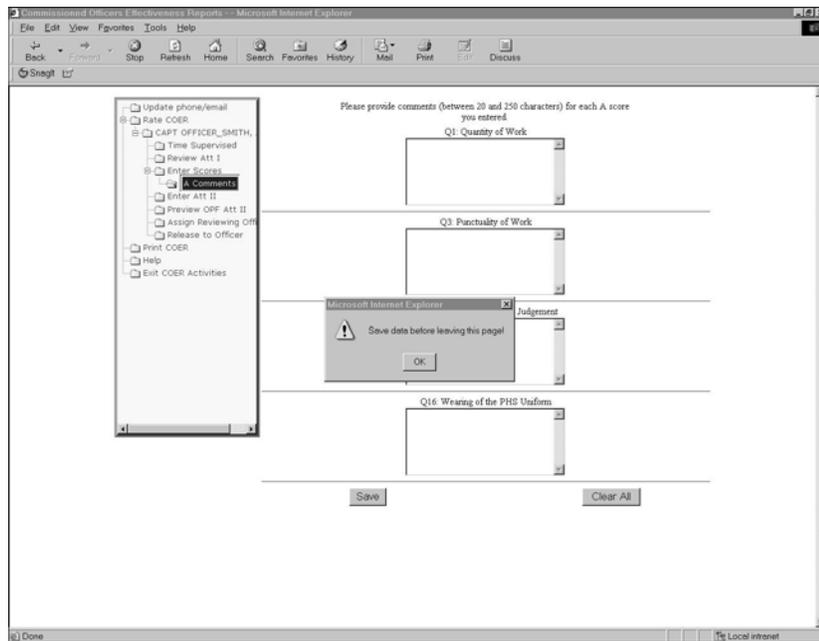


*\*If you assign an 'A' score you must enter comments. To do so:*

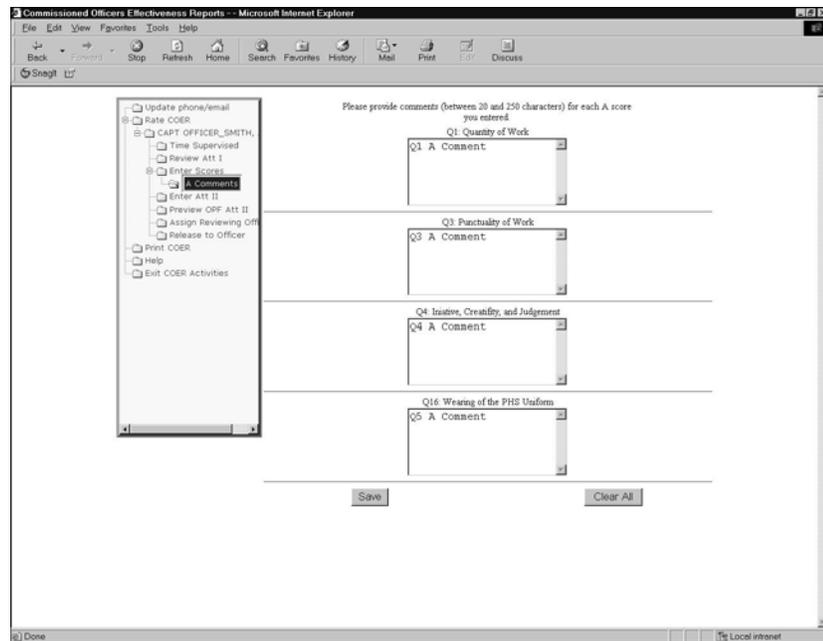
a. From **Activity Tree**, expand officer listing. Select **Enter A Comments**.



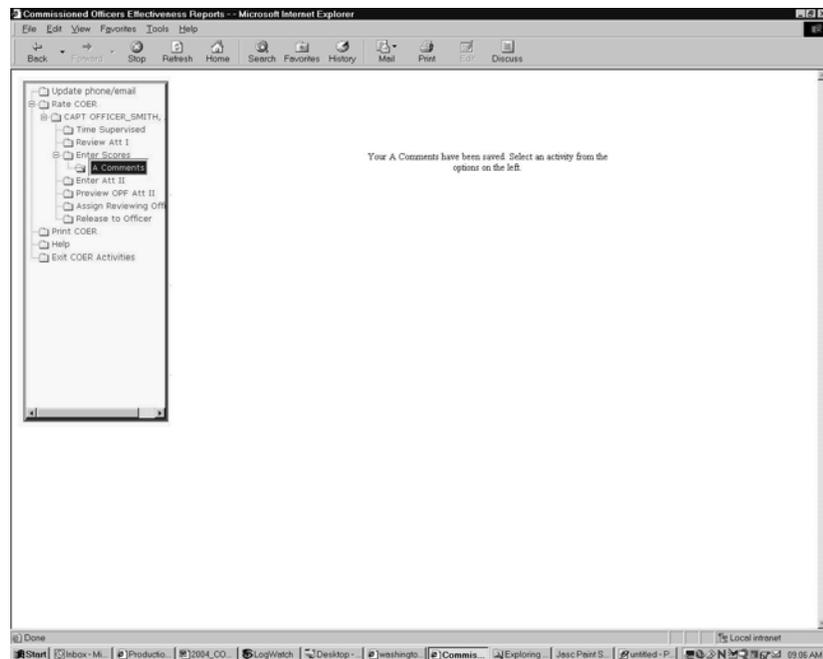
b. Click **OK**.



c. Enter A Comments.

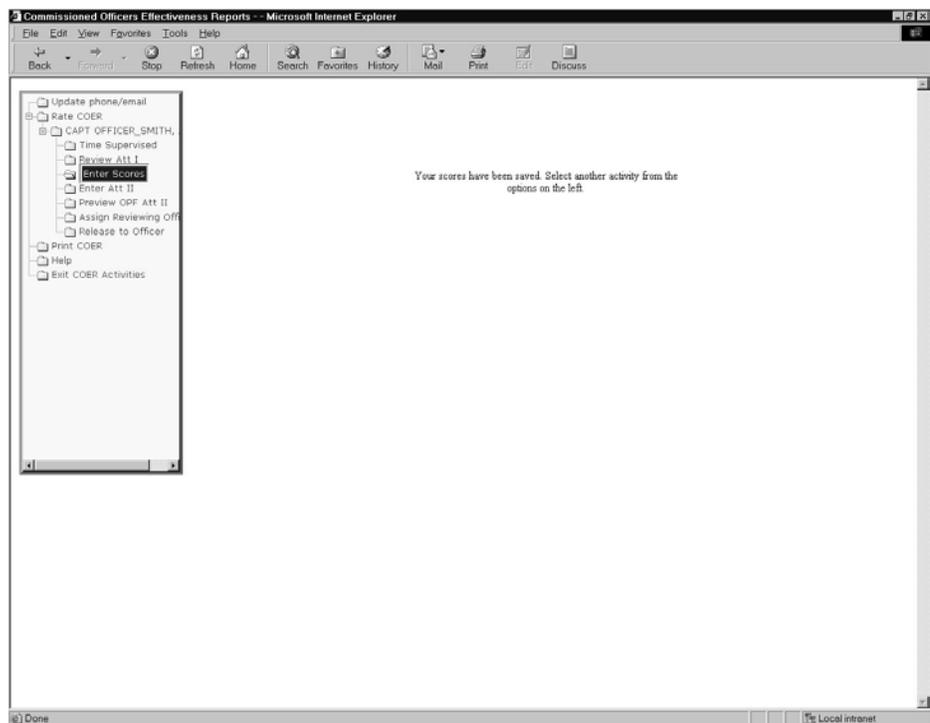


d. Click **Save**.

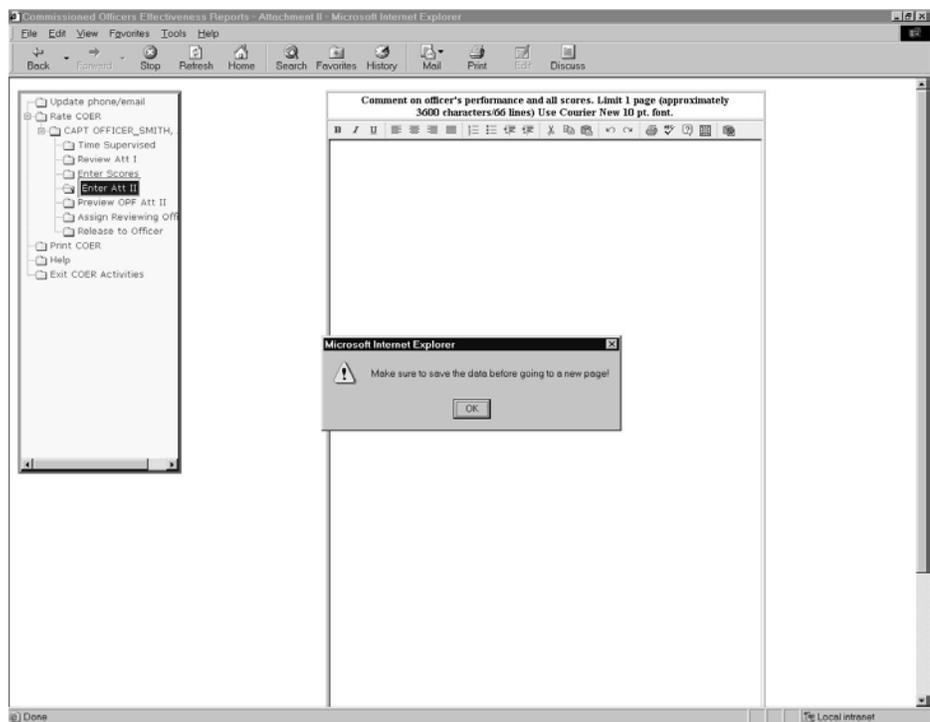


- To eliminate A Comments:
  - From listing, click **Enter Scores**.
  - Change 'A' scores to another rating.
  - Click **Save**.

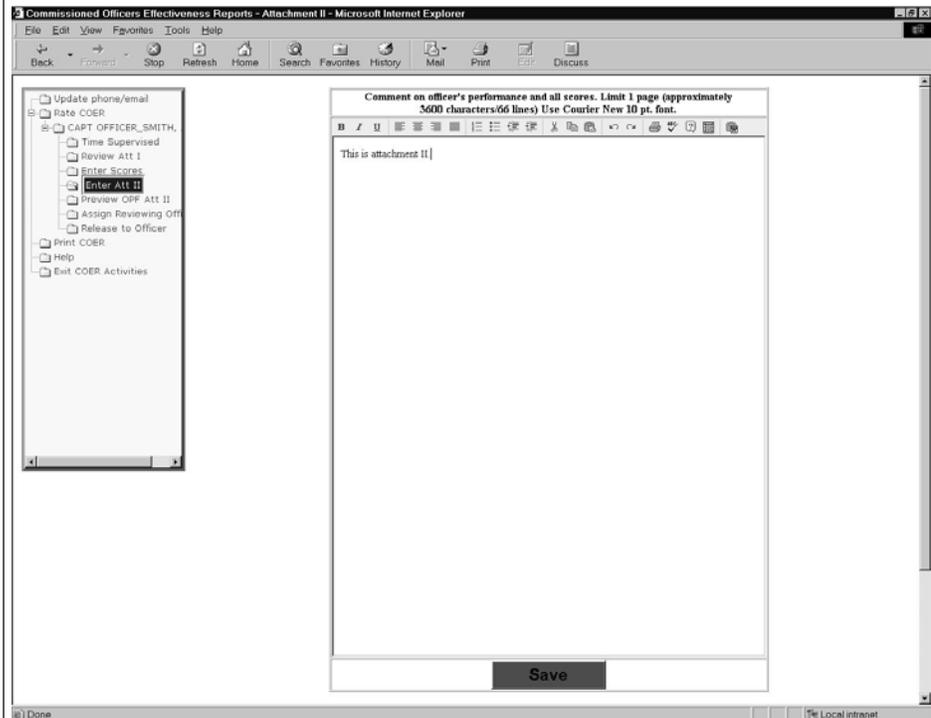
5. Click **Save**.



6. From listing, click **Enter Att II**. Click **OK** to message about saving before going to a new page.



## 7. Enter Attachment II.

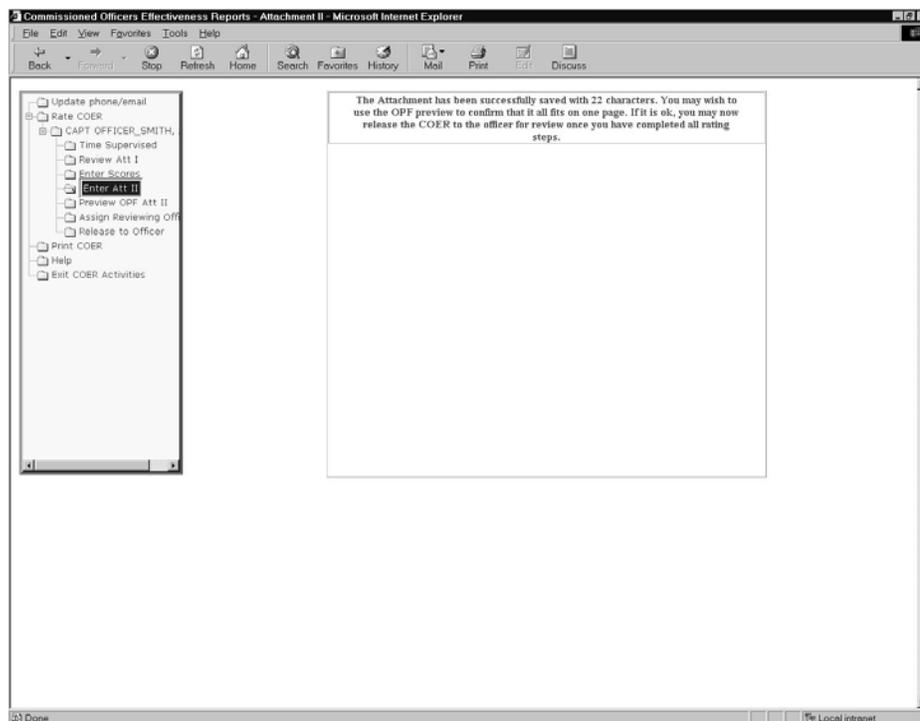


*When you save Attachment II the application checks to verify that there are no more than 3600 characters and/or 66 lines of text, and displays the totals in the save confirmation.*

*Use the **Preview OPF Att II** to view your Attachment I to see how it fits on the page.*

*If you are over the character/line limit the text will truncate in the Preview Window. If this happens, it means that the text **WILL NOT** be seen in the eOPF. You will need to edit the Attachment II to fit within the character/line limits so that it fits on the single page.*

## 8. Click **Save**.



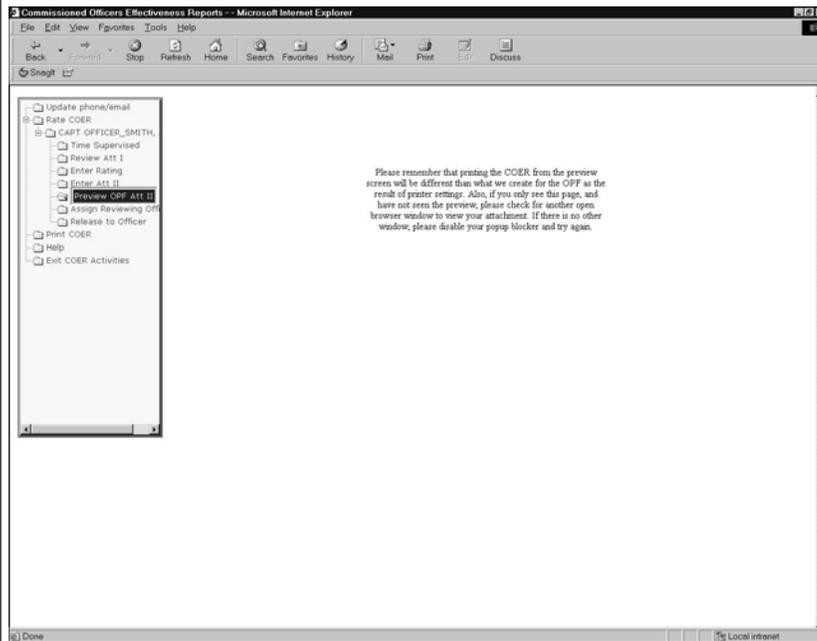
If you decide that you want to change the COER type from Detailed to Narrative after initiating the COER follow these steps:

- a. Make sure that the situation meets the requirements for a Narrative COER (i.e., having supervised the officer six months or less.)
- b. From **Activity Tree**, select **Time Supervised** in officer listing.
- c. Make sure **Years** is set to zero.
- d. Make sure **Months** is set to six or less.
- e. Click **Save**.
- f. Select **Narrative** from results box.
- g. Click **Save**.

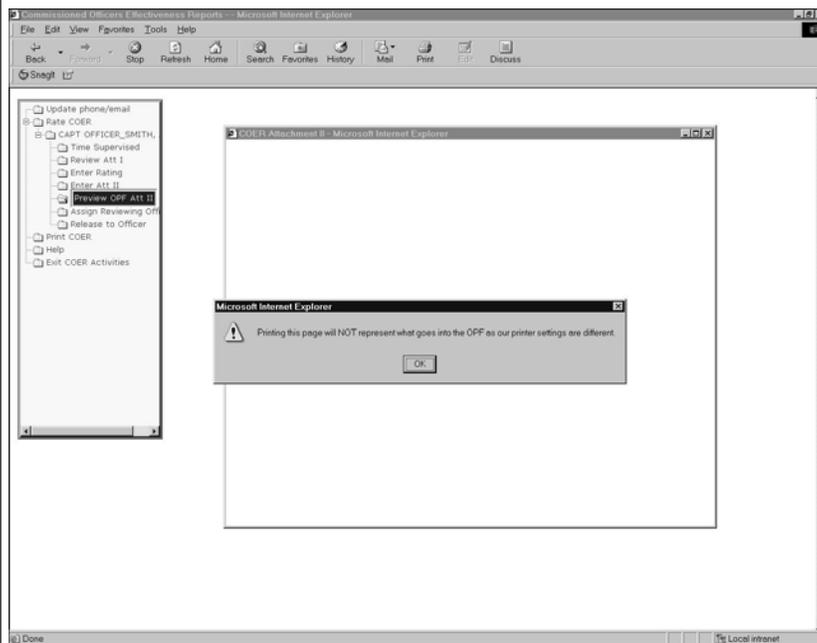
*This may be done at anytime prior to the officer's final response to the rater's evaluation.*

# Previewing OPF Att II

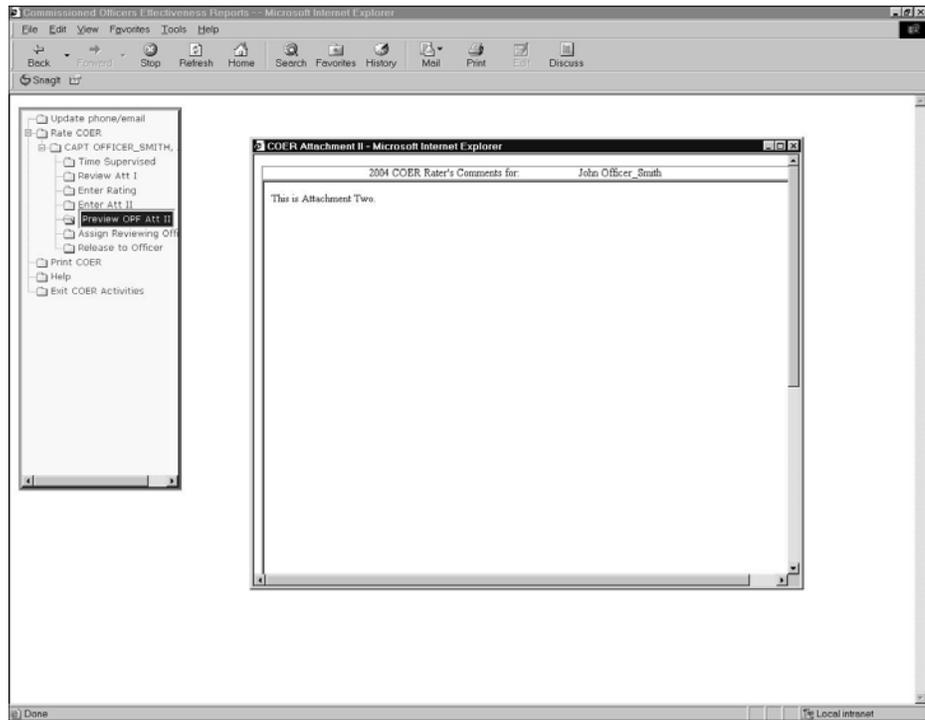
1. From the **Activity Tree**, click **Preview OPF Att II**.



2. Click **OK** to the message about printer setting.



3. View your Attachment II.  
*Note the bottom of the text box to insure that your text has not been truncated.*

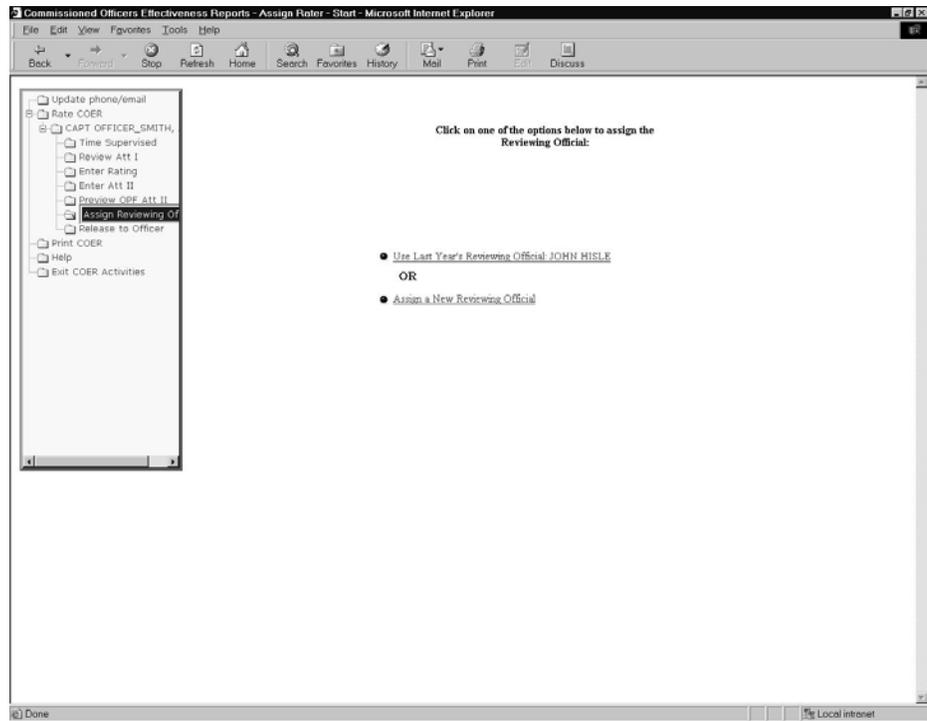


4. Click **Close Box** to exit the preview and close the window.

# Assigning a Reviewing Official

To assign the same Reviewing Official as last year:

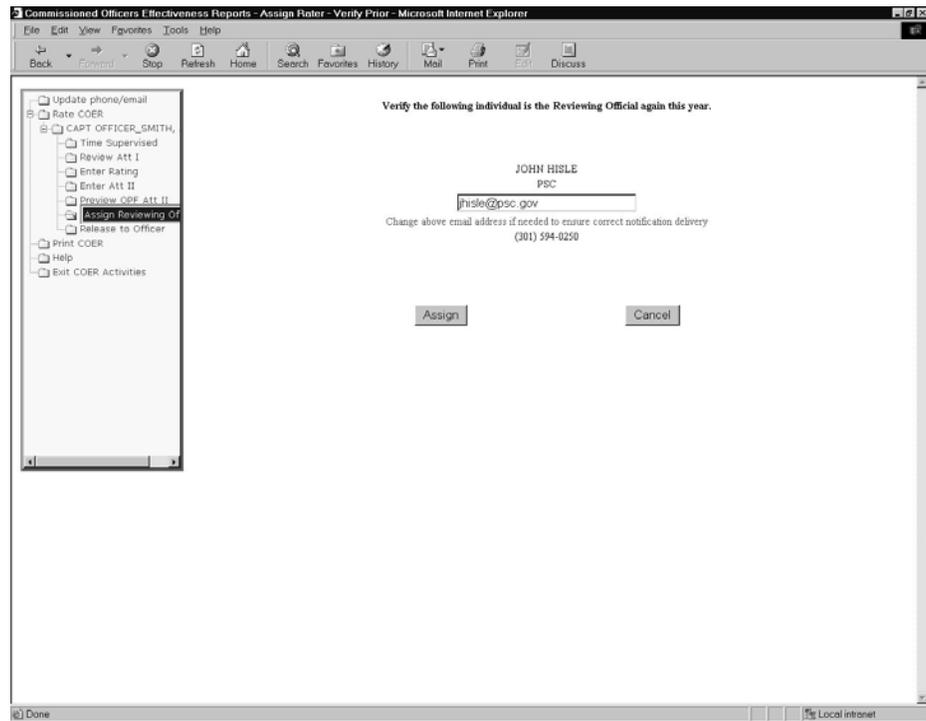
1. From **Activity Tree**, select **Assign Reviewing Official**.



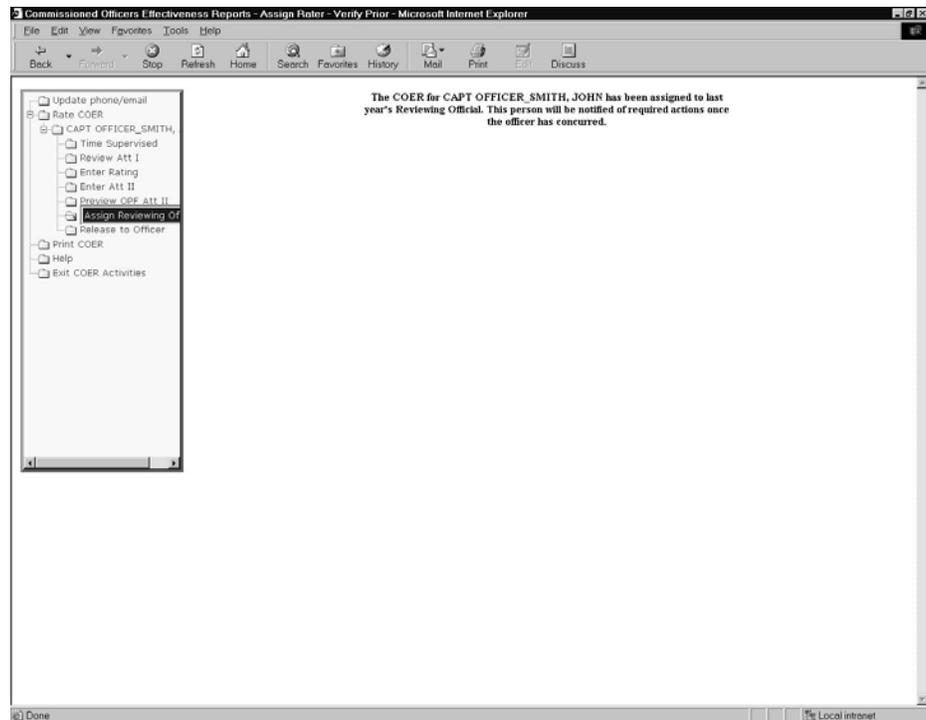
2. Select **Use Last Year's Reviewing Official**.

3. If necessary, update the rater's e-mail address.

**Notifications to the reviewing official will be sent via email. IT IS IMPORTANT THAT THE REVIEWING OFFICIAL'S EMAIL BE CORRECT!**

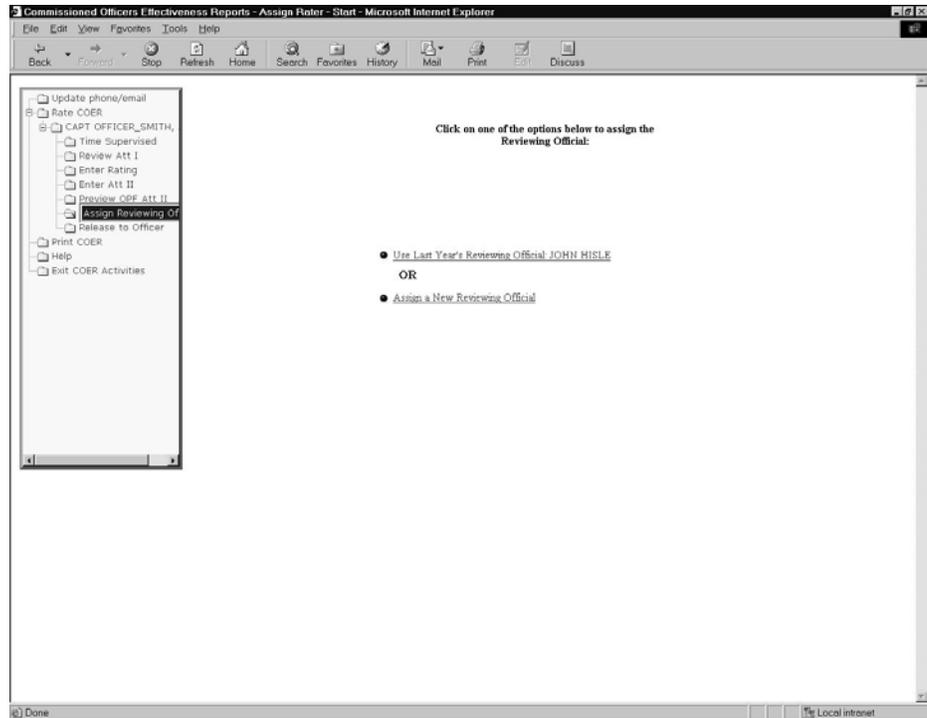


4. Click **Assign**.

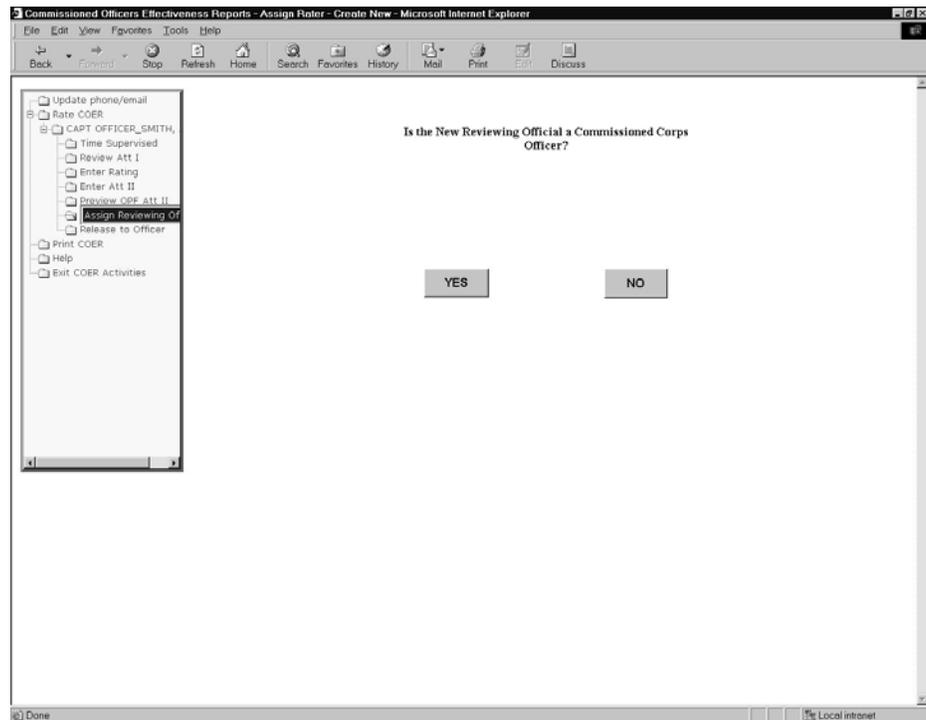


**To assign a new Reviewing Official who is a Commissioned Corps Officer:**

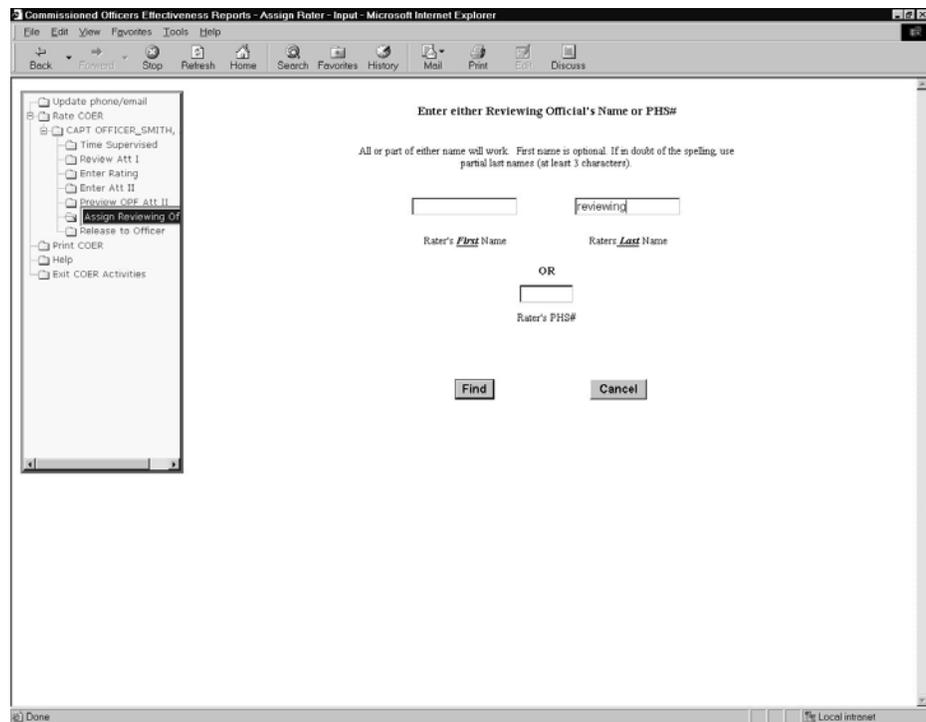
1. From **Activity Tree**, select **Assign a Reviewing Official**.
2. Select **Assign a New Reviewing Official**.



3. Click Yes to the question “Is the New Reviewing Official a Commissioned Corps Officer?”

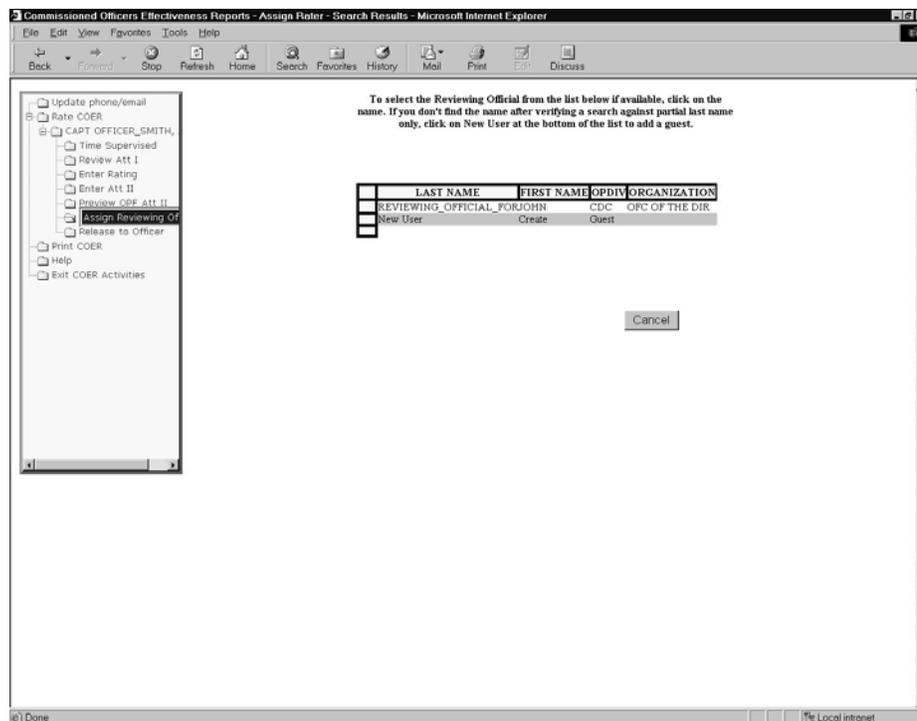


4. Enter rater's Last Name (*First Name is optional*) or PHS Number.



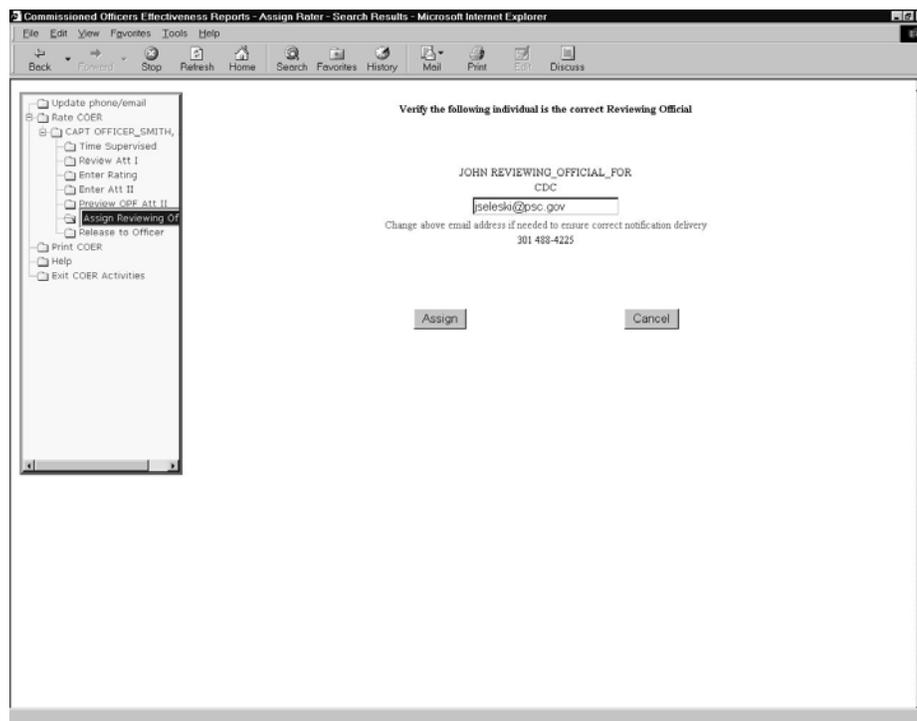
5. Click Find.

6. From Search Results, select Reviewing Official.

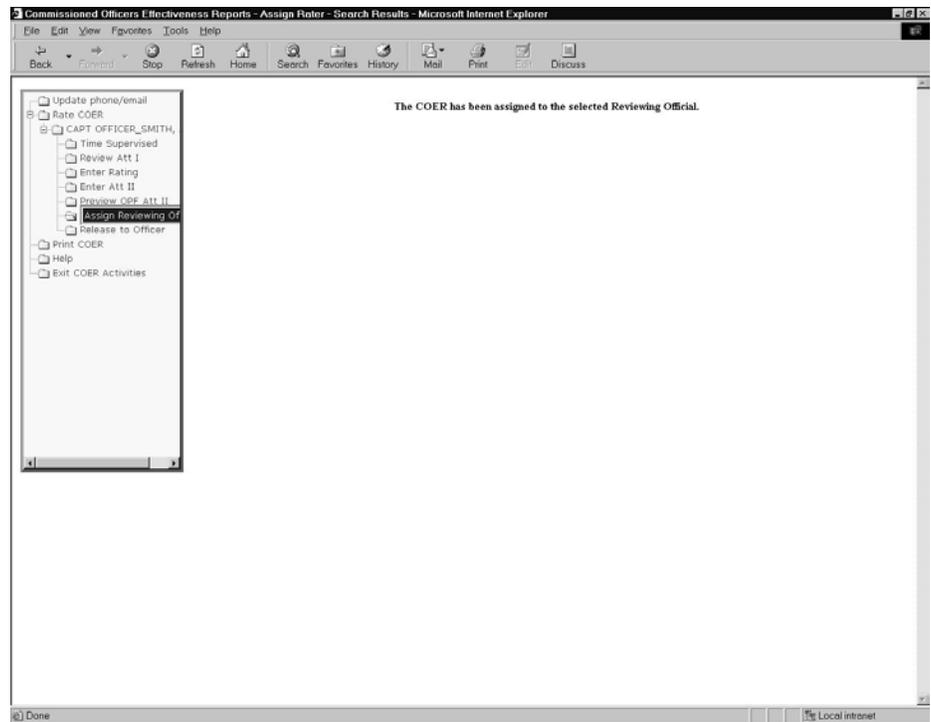


7. If necessary, update the rater's email address.

*Notifications to the reviewing official will be sent via email. IT IS IMPORTANT THAT THE REVIEWING OFFICIAL'S EMAIL BE CORRECT!*

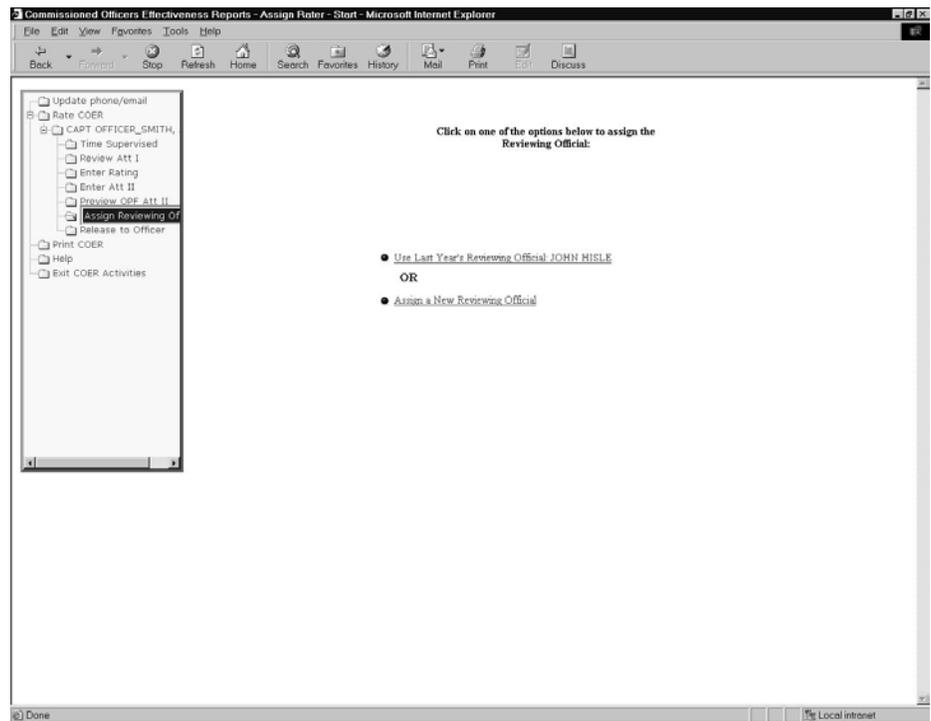


## 8. Click Assign.

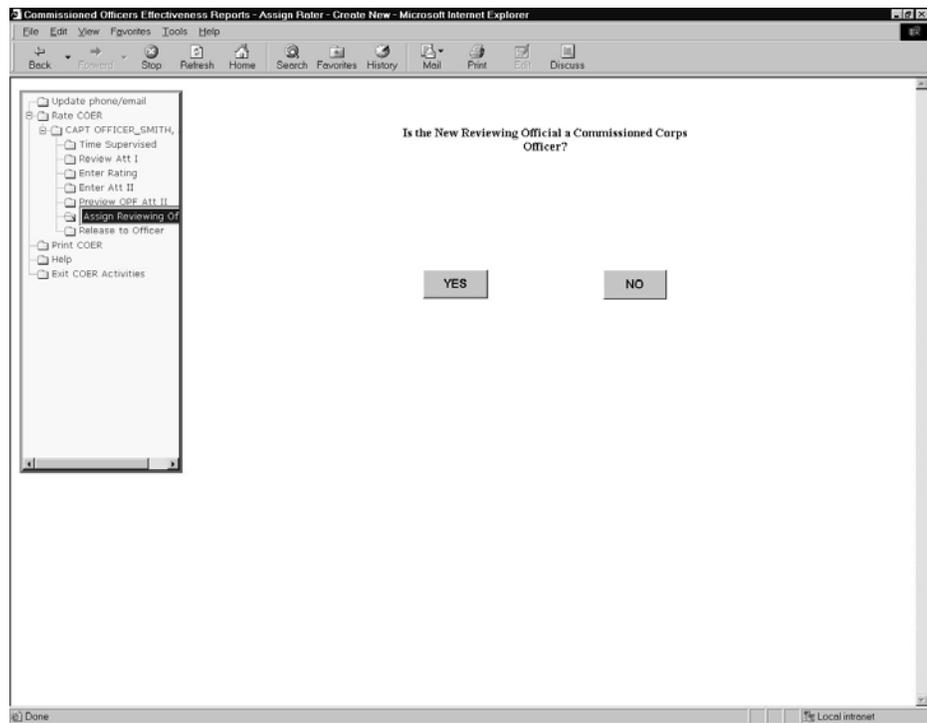


To assign a new Reviewing Official who is not a Commissioned Corps Officer:

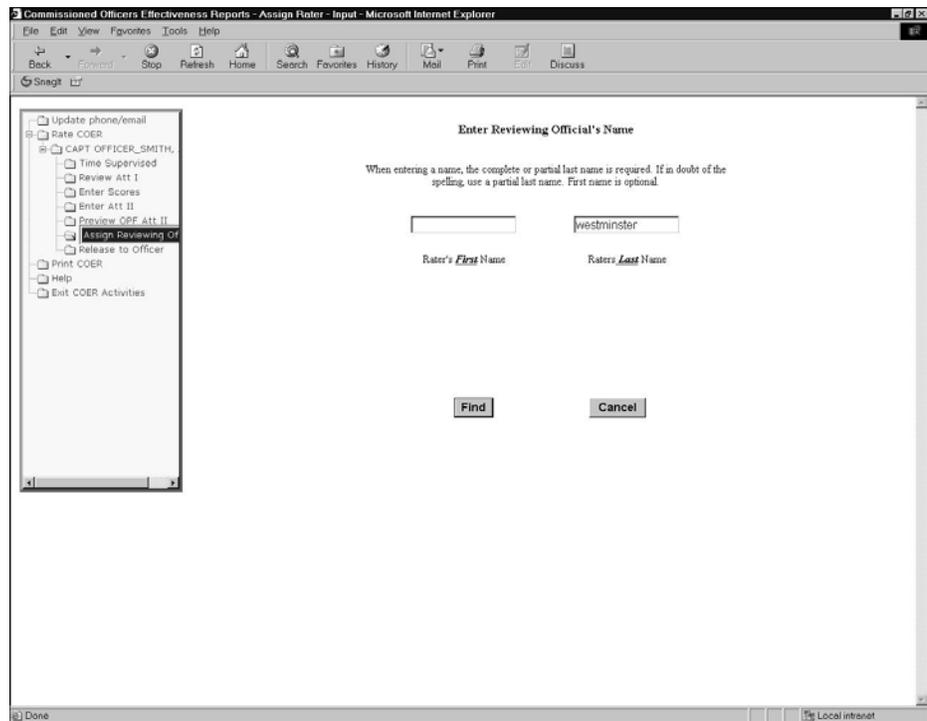
1. From **Activity Tree**, select **Assign A Reviewing Official**.
2. Select **Assign a New Reviewing Official**.



3. Click **No** to the question “Is the New Reviewing Official a Commissioned Corps Officer?”



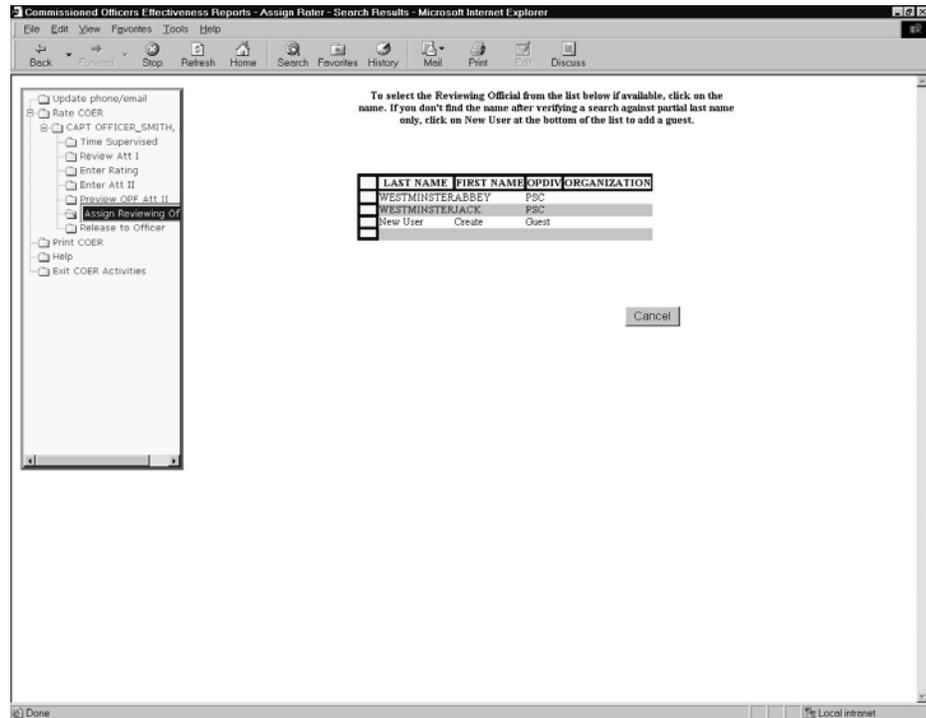
4. Enter reviewing official's Last Name. (*First Name is optional.*)



5. Click **Find**.

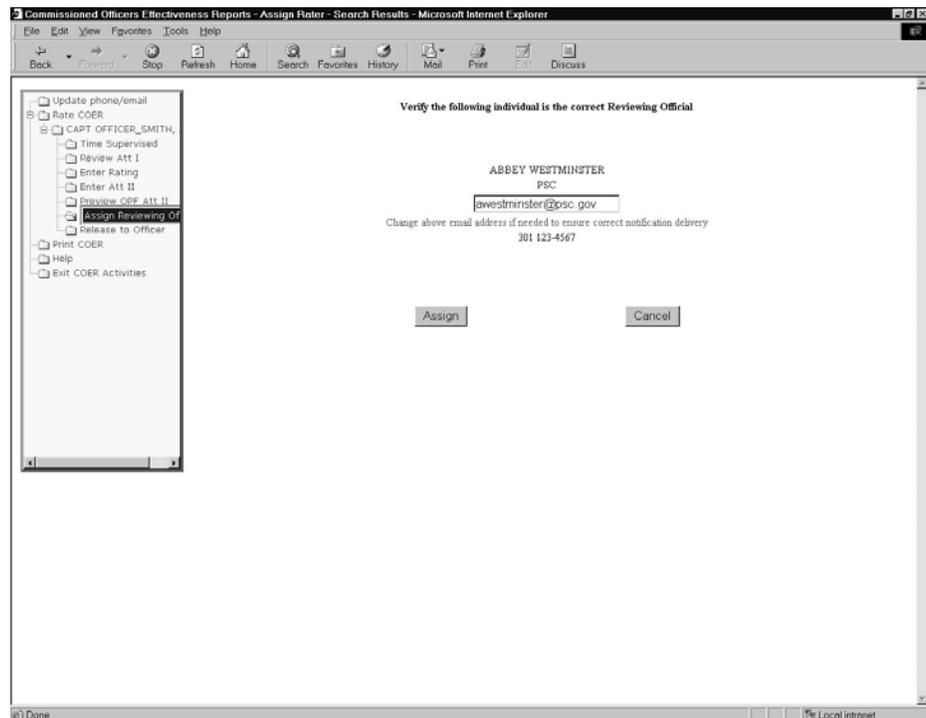
6. From **Search Results**, select **Reviewing Official**.

*If no matching results are displayed, go to the section below entitled 'New User Create Guest.'*

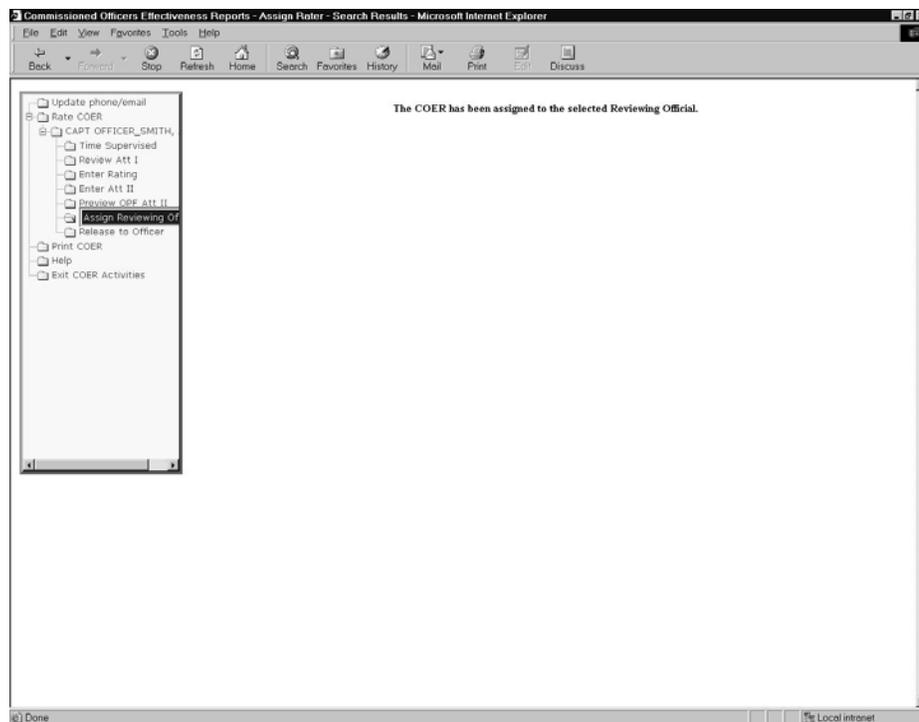


7. If necessary, update the rater's email address.

**Notifications to the reviewing official will be sent via email. IT IS IMPORTANT THAT THE REVIEWING OFFICIAL'S EMAIL BE CORRECT!**

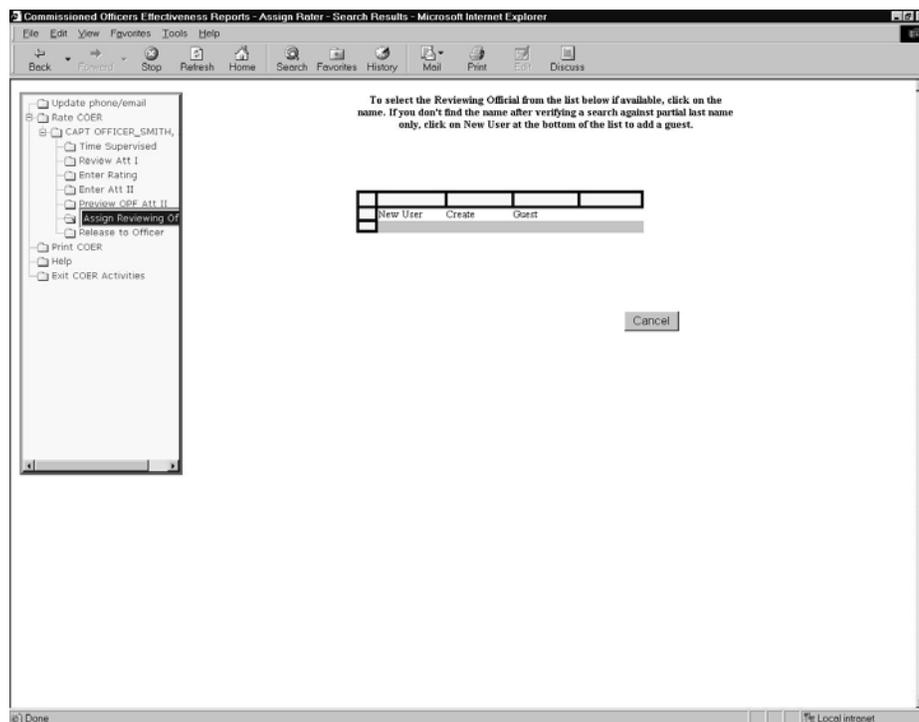


## 8. Click Assign.



## To Create a New Rater Account:

### 1. From search results, select **New User Create Guest**.



2. Enter **First Name**. Press **Tab**.

The screenshot shows a Microsoft Internet Explorer browser window titled "Commissioned Officers Effectiveness Reports - Add New Guest - Microsoft Internet Explorer". The browser's address bar is empty. The main content area displays a form titled "Enter the information requested for the new Guest User." The form contains the following fields and options:

- First Name:
- Last Name:
- Middle Name:  (optional)
- Email Address:
- Work Phone:  x-
- Fed Government Agency:  (dropdown menu)
- OR
- Organization:

At the bottom of the form are two buttons: "Assign" and "Cancel". On the left side of the browser window, a sidebar menu is visible with the following items:

- Update phone/email
- Rate COER
- CAPT OFFICER\_SMITH,
  - Time Supervised
  - Review ATT I
  - Enter Rating
  - Enter ATT II
  - Preview COE ATT II
  - Assign Reviewing Of
  - Release to Officer
- Print COER
- Help
- Exit COER Activities

3. Enter **Last Name**. Press **Tab**.

4. Enter **Middle Name**. Press **Tab**.

5. Enter **First Name**. Press **Tab**.

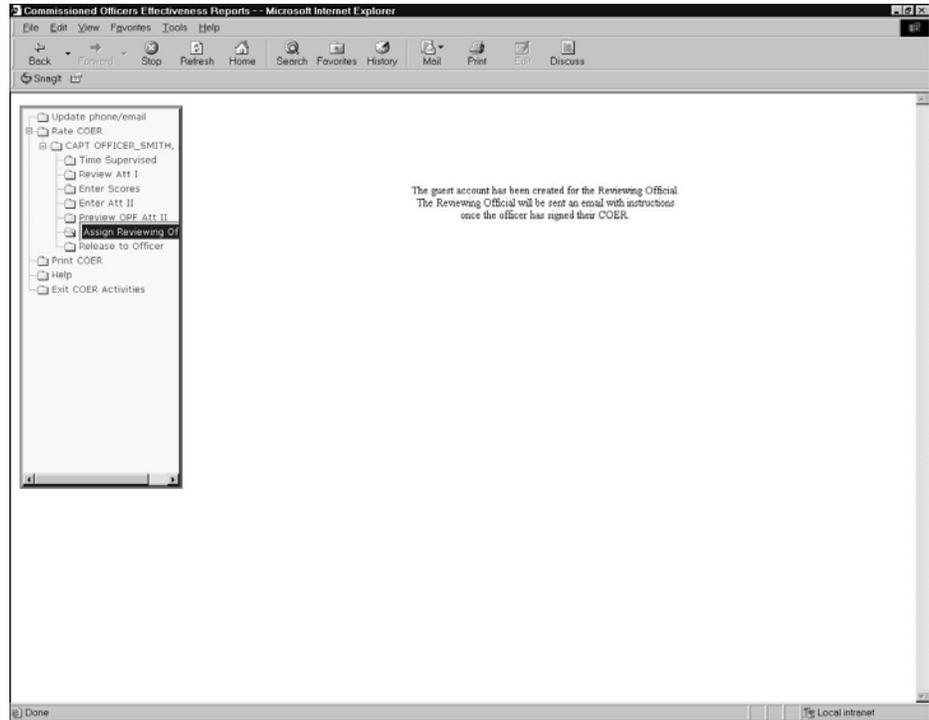
6. Enter the reviewing official's **Email address**. Press **Tab**.

*Notifications to the reviewing official will be sent via email. **IT IS IMPORTANT THAT THE REVIEWING OFFICIAL'S EMAIL BE CORRECT!***

7. Enter **Work Phone**. Press **Tab**.

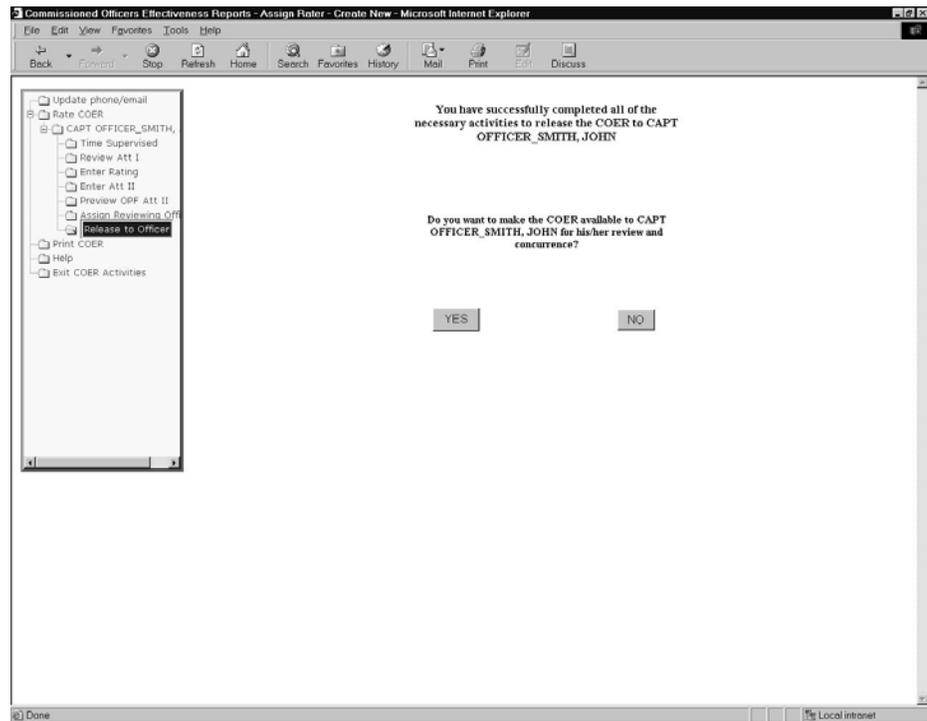
8. From pull down list, select **Fed Government Agency** or enter **Organization**.

## 9. Click Assign.

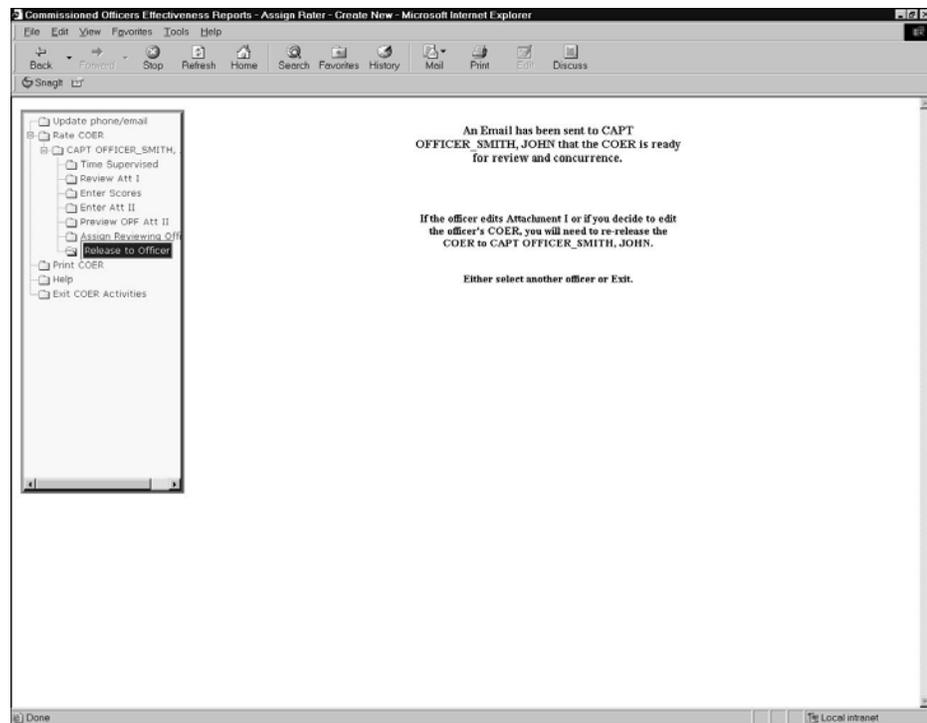


# Releasing COER to Officer

1. From **Activity Tree**, select **Release to Officer**.



2. Click **Yes**.



*If changes are made, the COER must be re-released.*



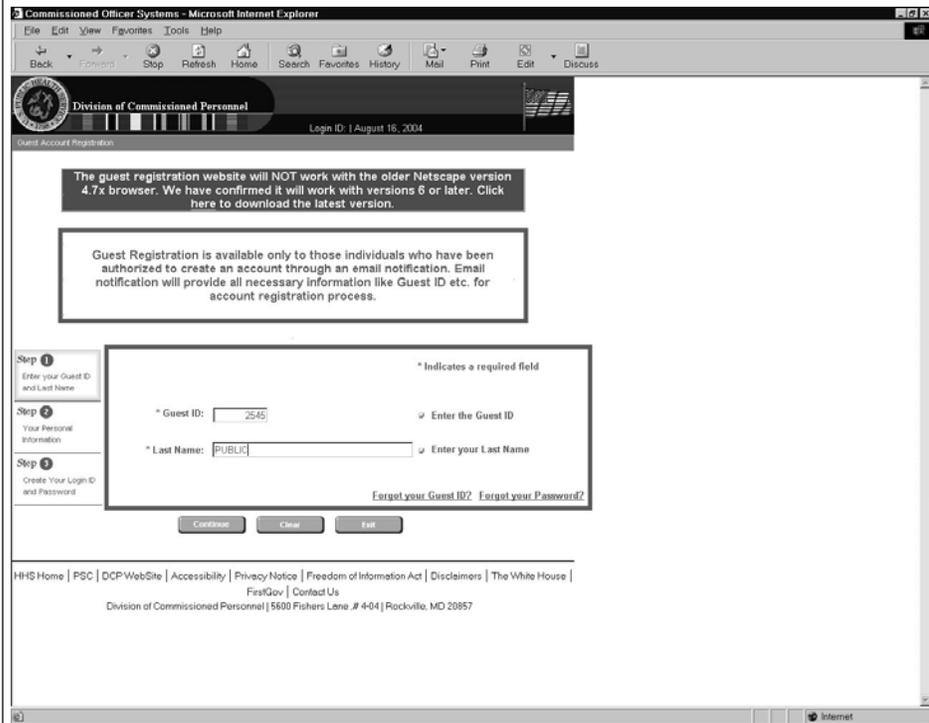
## Reviewing Official Tasks

This section will concentrate on the tasks a Reviewing Official performs to review and complete a COER. It will cover:

- Logging into the COER application
- Creating a Guest Account
- Updating contact information
- Reviewing officer and rater comments
- Responding to the COER

# Create a Guest Account

1. Open the e-mail from PHSCOERS informing you that you had been selected as an officer's rater.
2. Note **Guest ID** and **Last Name**.
3. Click **Guest Registration** link.



4. Enter **Guest ID**. Press **Tab**.
5. Enter **Last Name**.
6. Click **Continue**.

7. Verify personal information. Make any updates and/or additions.

Commissioned Officer Systems - Microsoft Internet Explorer

Division of Commissioned Personnel

Login ID: August 16, 2004

Guest Account Registration

Step 1: Enter your Guest ID and Last Name

Step 2: Your Personal Information

Step 3: Create Your Login ID and Password

\* Indicates a required field

\* Last Name: PUBLIC

\* First Name: JOHN

Middle Name: D

\* E-Mail Address: johnd@psc.gov

Federal Govt. Agency: PROGRAM SUPPORT CENTER

Organization Name:

\* Work Phone Number: Area Code: 123 Phone No.: 1234567 Extension:

If any of the above information is incorrect, make appropriate changes and click continue

Continue Clear Exit

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8. Click **Continue**.

Commissioned Officer Systems - Microsoft Internet Explorer

Division of Commissioned Personnel

Login ID: August 16, 2004

Guest Account Registration

Step 1: Enter your Guest ID and Last Name

Step 2: Your Personal Information

Step 3: Create Your Login ID and Password

\* Indicates a required field

\* Login ID: JOPUBLIC

\* Password: \*\*\*\*\*

\* Confirm Password: \*\*\*\*\* Login ID and Password Tips

\* Secret Question: In what city were you born?

\* Secret Answer: WASHINGTON, DC

\* Enter one of the following

\* S.S.N.: 123456789 Enter SSN Please do not include any dashes ""

- OR -

\* Date of Birth: mm/dd/yyyy format

\* Digital PIN: PIN is valid only for this account you are creating.

\* The above information we collect will be used to reset a forgotten Login ID or password.

Submit Clear Exit

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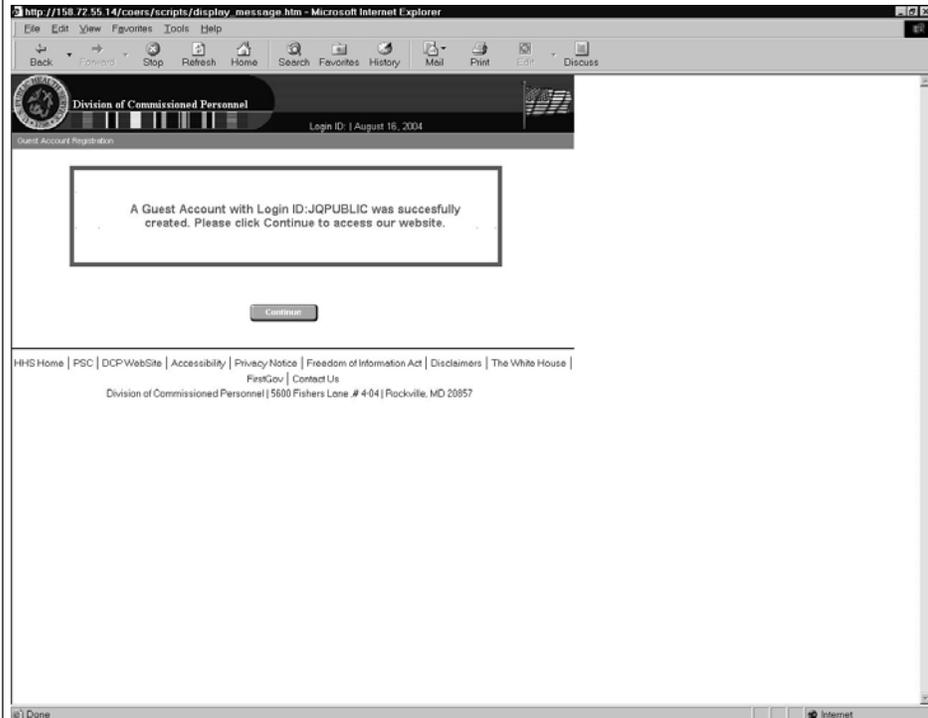
9. Enter a **User Name**. Press **Tab**.

10. Enter a **Password**. Press **Tab**.

11. Re-enter **Password** for confirmation.

12. From pull-down menu, select a **Secret Question**.

13. Enter a **Secret Answer** in response to the Secret Question.
14. Enter either your **Social Security Number (SSN)** or **Date of Birth (DOB)**.
15. Enter a **Digital Pin**.
16. Click **Continue**.



17. Click **Continue** to be directed to the 2004 COER application.

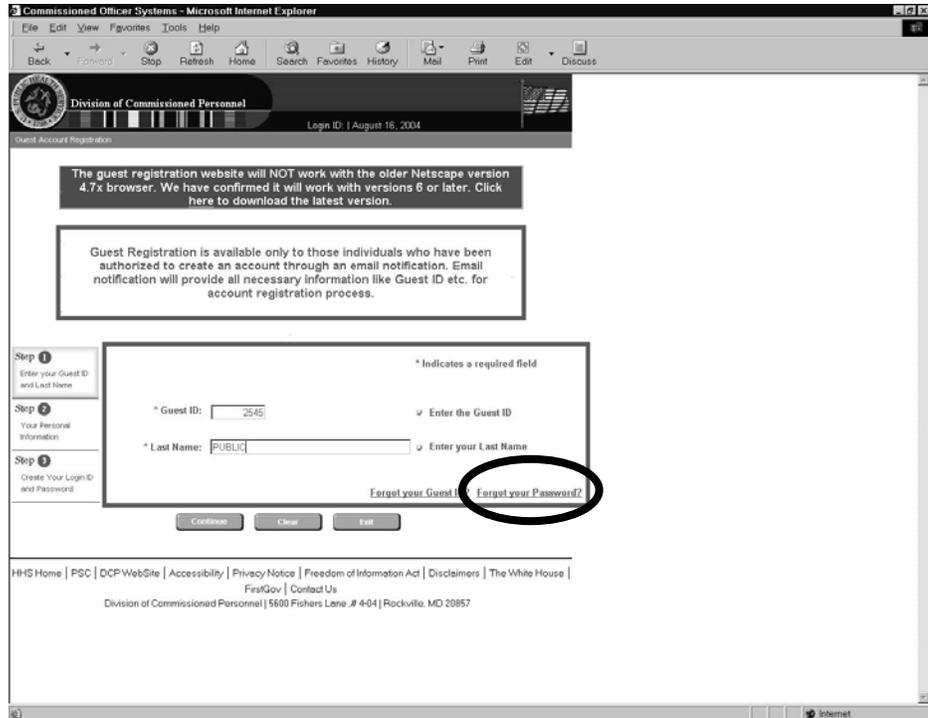
### User Name and Password Tips

- **User Name must be 6 to 20 Characters.**
- **User Name must begin with an Alphabet.**
- **Password must be a combination of 8 to 20 alpha and numeric characters for example, XX9999S3.**
- **Avoid easy-to-guess names, addresses, or birth dates.**
- **Avoid using your Social Security Number.**
- **Avoid obvious passwords. Do not use names of persons, pets, favorite sports teams, or things significant to you in any way. Do not use numbers significant to you or someone close to you (i.e., phone numbers, birth dates, etc.).**
- **Do not use anything that can be found in a dictionary.**
- **Make your password alphanumeric. Intentionally misspell a word such as "guvrmt" or "2gether."**
- **First and foremost, NEVER tell your password to anyone. This includes coworkers.**
- **Do not write your password or share it. A written password is more easily discovered than one committed to memory.**
- **Do not allow others to watch you type the password.**
- **Do not write your password or share it. You alone are responsible for what is done with your user ID and password.**
- **If you feel your password has been compromised, change it immediately.**

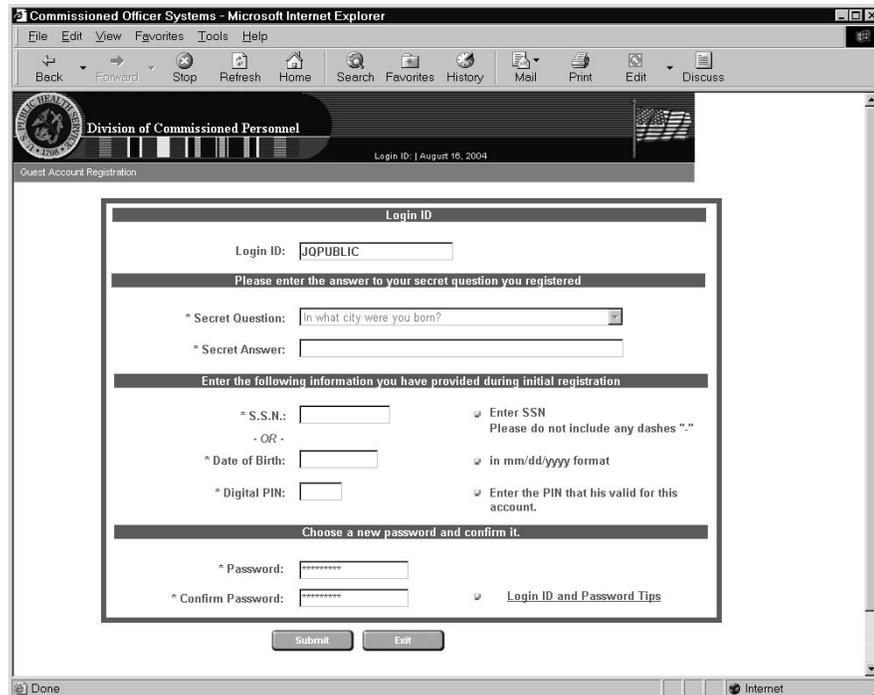
# Working with Guest Registration

## Forgotten Password

1. Open the e-mail from PHSCOERS informing you that you had been selected as an officer's rater. Click Guest Registration link.



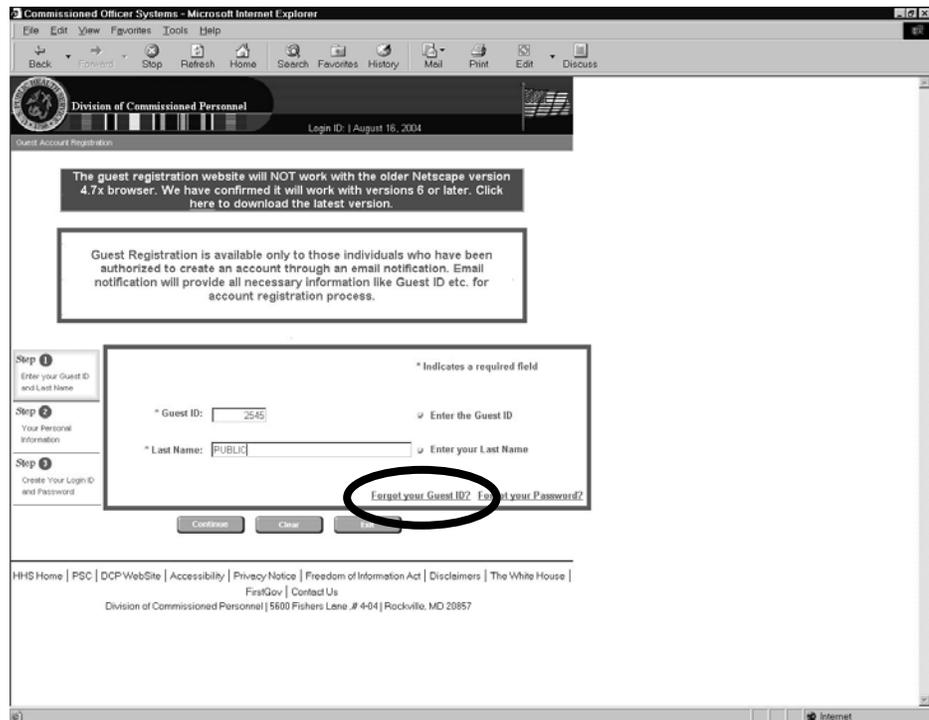
2. From Registration Page, click 'Forgot your password?' link.



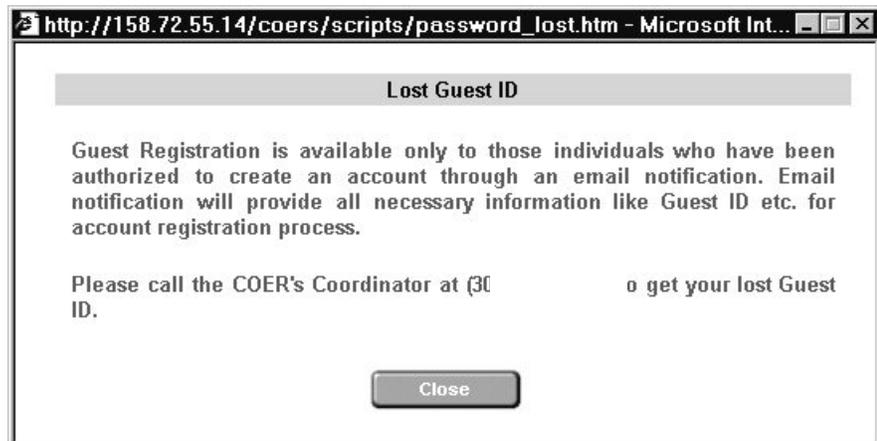
3. Enter **Secret Answer**. Press **Tab**.
4. Enter **SSN** or **Date of Birth** and **Digital PIN**. Press **Tab**
5. Enter **New Password**. Press **Tab**.
6. Re-enter **New Password** to confirm.
7. Click **Submit**.

### Forgotten Guest ID

1. Open link to Guest Registration application.



2. From **Registration Page**, click '**Forgot your Guest ID?**' link.



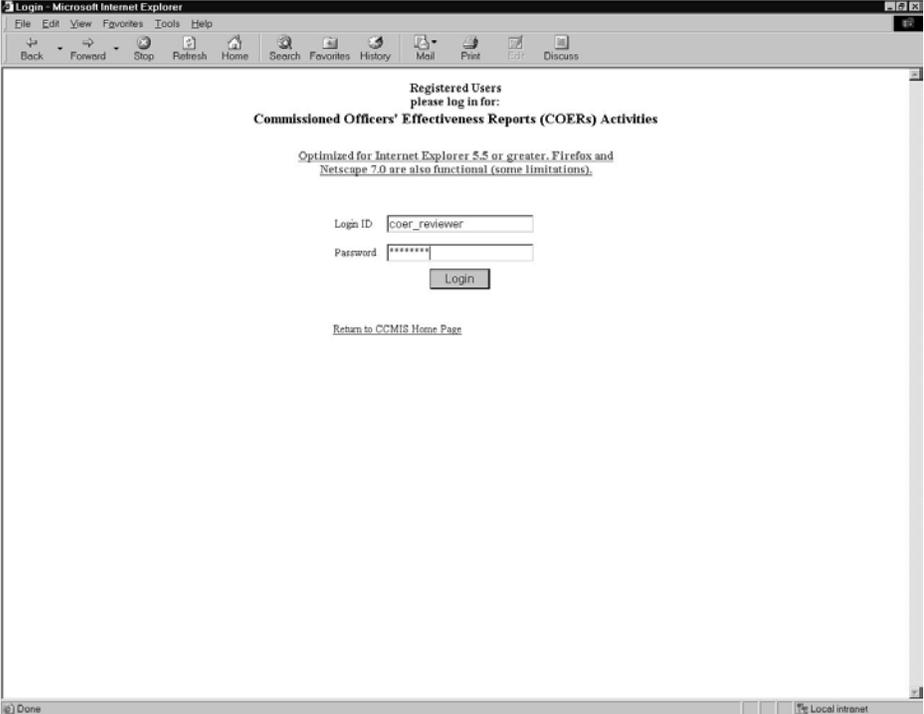
3. Following instructions from Lost Guest ID message box.

## COER Login

1. From **Commissioned Corps Management Information Services (CCMIS)** webpage, click link to access **Commissioned Officers' Effectiveness Reports (COER's) Activities** webpage.

-OR-

From the e-mail notification, click the link provided to access **Commissioned Officers' Effectiveness Reports (COER's) Activities** webpage.



The screenshot shows a Microsoft Internet Explorer browser window displaying the login page for the Commissioned Officers' Effectiveness Reports (COERs) Activities. The page title is "Login - Microsoft Internet Explorer". The browser's address bar is empty. The page content includes the following text:

Registered Users  
please log in for:  
**Commissioned Officers' Effectiveness Reports (COERs) Activities**

Optimized for Internet Explorer 5.5 or greater. Firefox and Netscape 7.0 are also functional (some limitations).

Login ID:

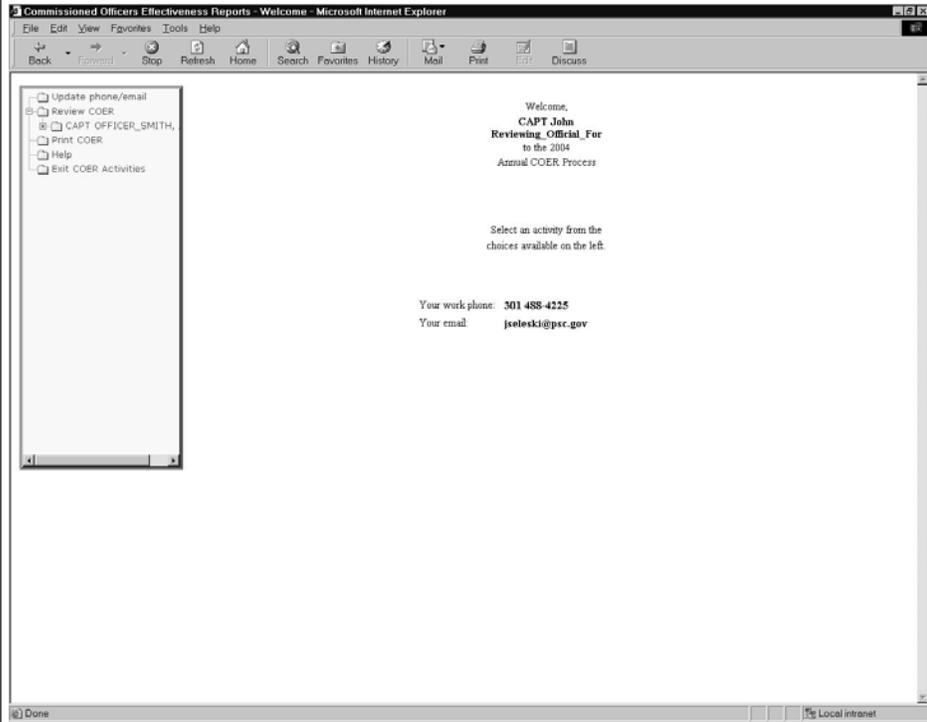
Password:

[Return to CCMIS Home Page](#)

The browser's status bar at the bottom shows "Done" and "Local intranet".

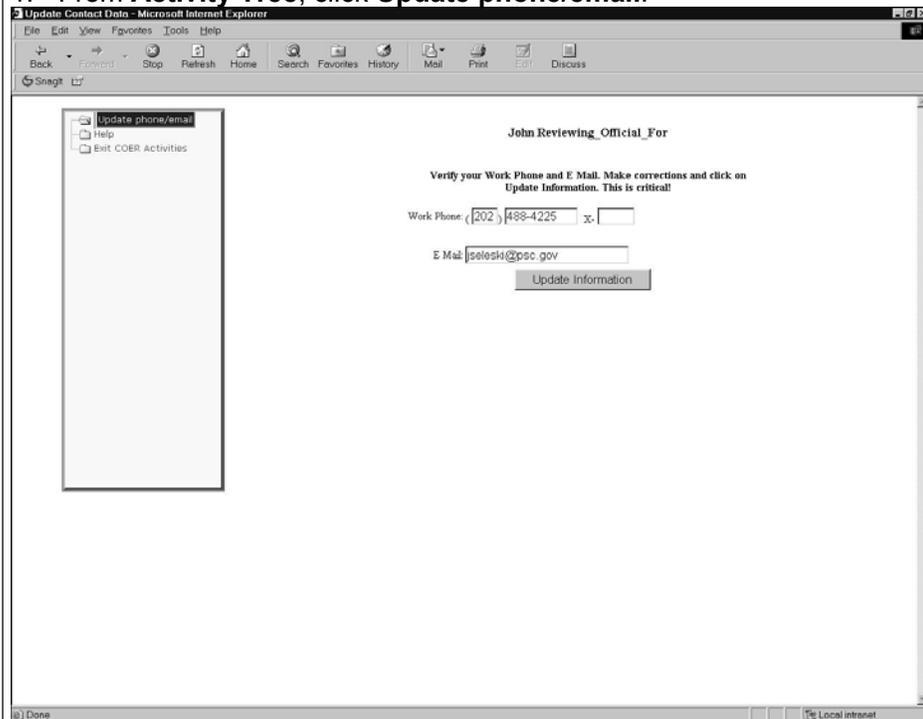
3. At **Login**, enter **User Name**.
4. Press **Tab**.
5. Enter **Password**

## 6. Click Login.



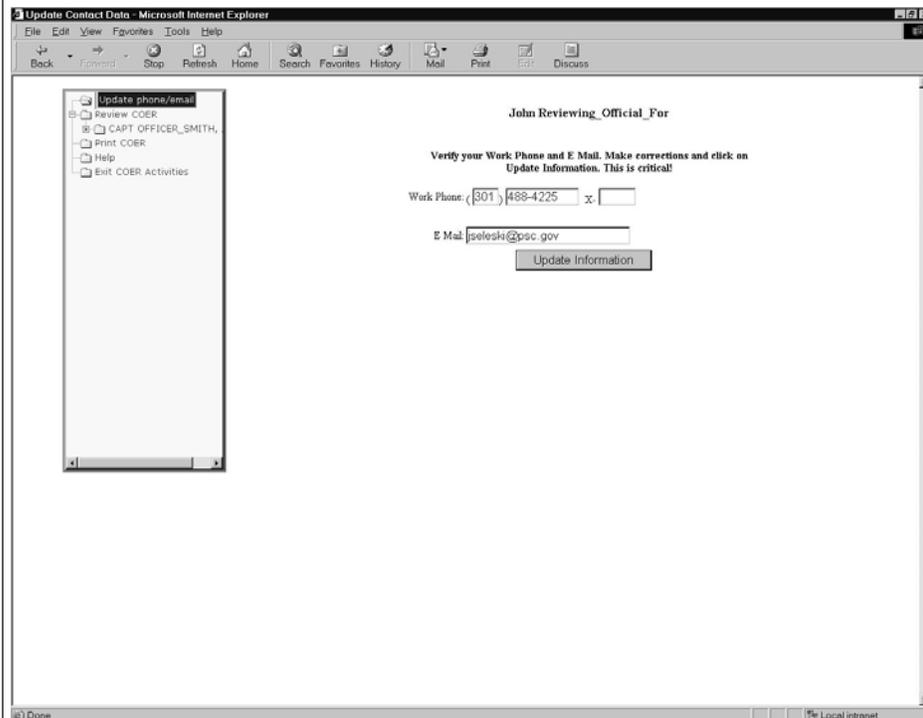
# Update Contact Information

1. From Activity Tree, click **Update phone/email**.

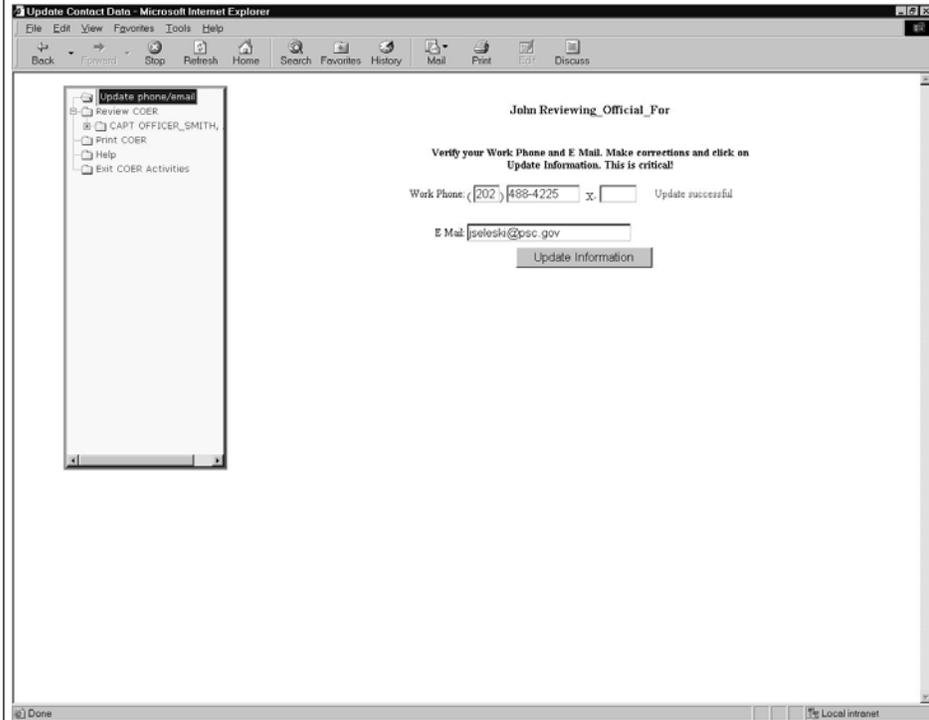


2. If necessary, enter **Work Phone** information.

3. If necessary, enter **E-Mail** information.



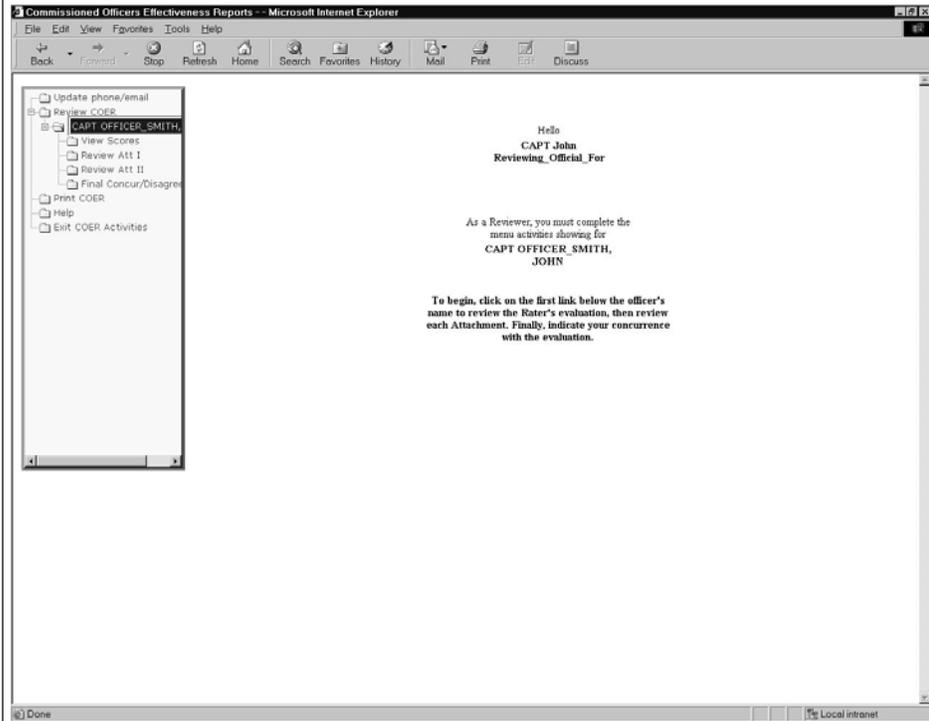
#### 4. Click Update Information.



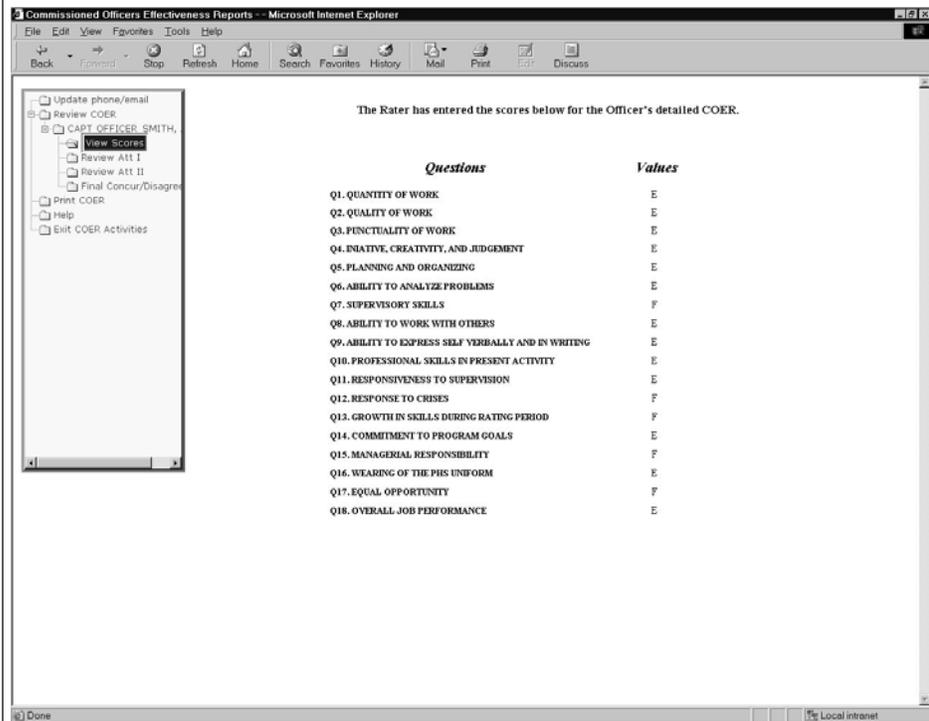
*The confirmation message 'Update successful' will appear to the right of the updated fields.*

# Review Officer and Rater Documents

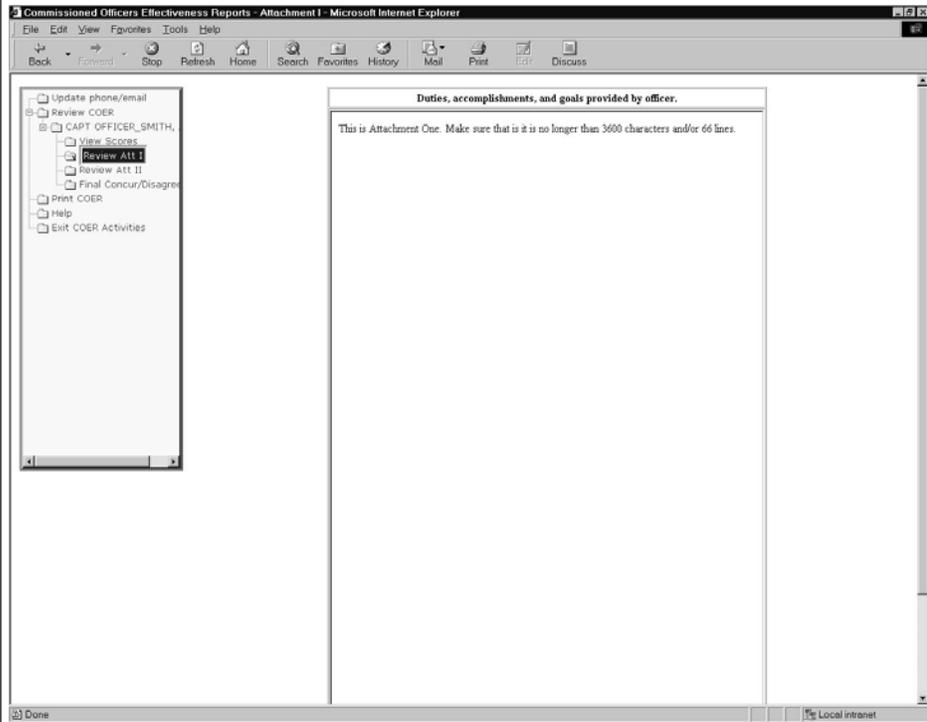
1. From **Activity Tree**, click '+' to expand listing for officer.



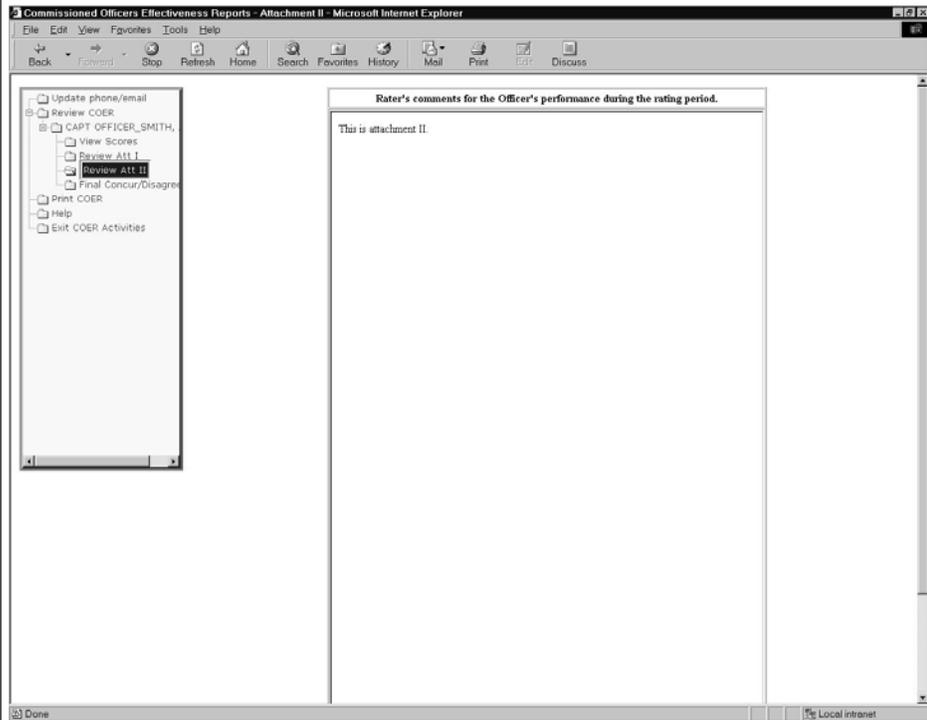
2. From listing, click **View Scores**.



3. From listing, click **Review Att I**.

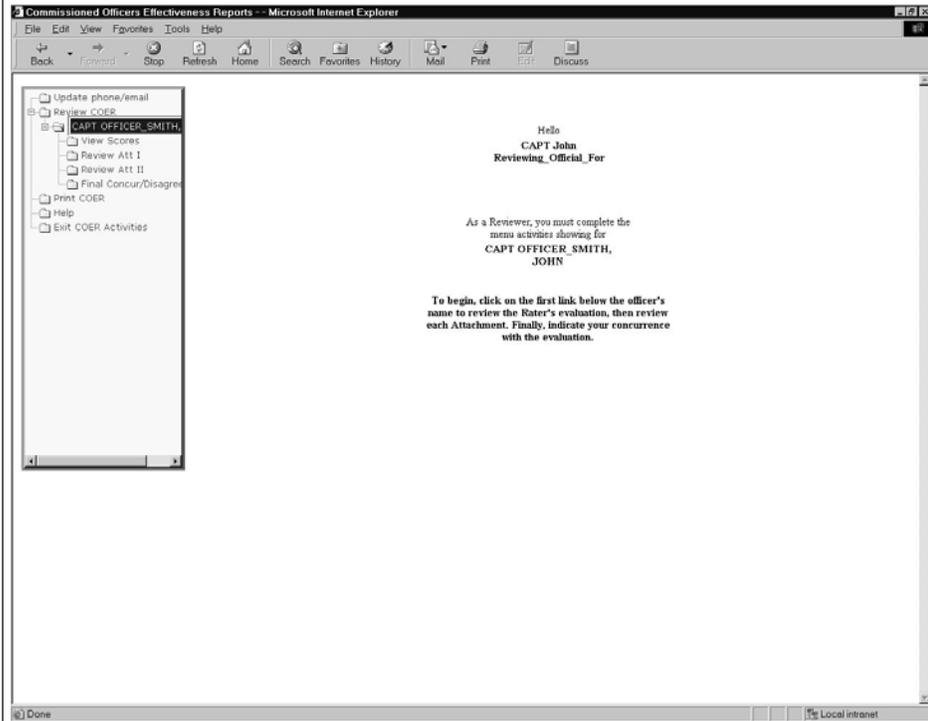


4. From listing, click **Review Att II**.

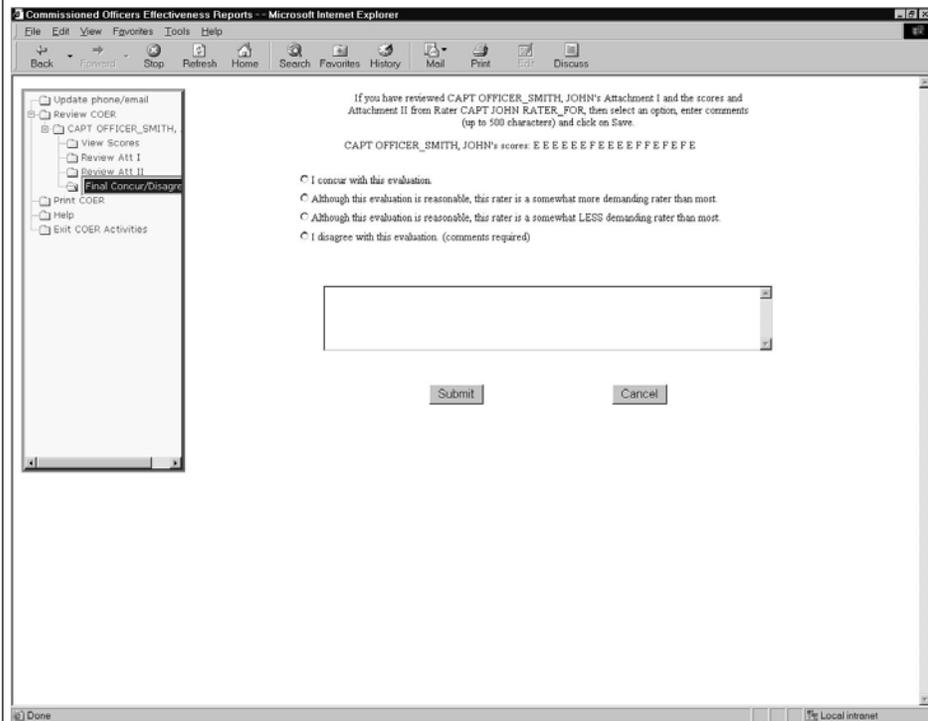


# Submitting Response to Officer COER

1. From **Activity Tree**, click '+' to expand listing for officer.

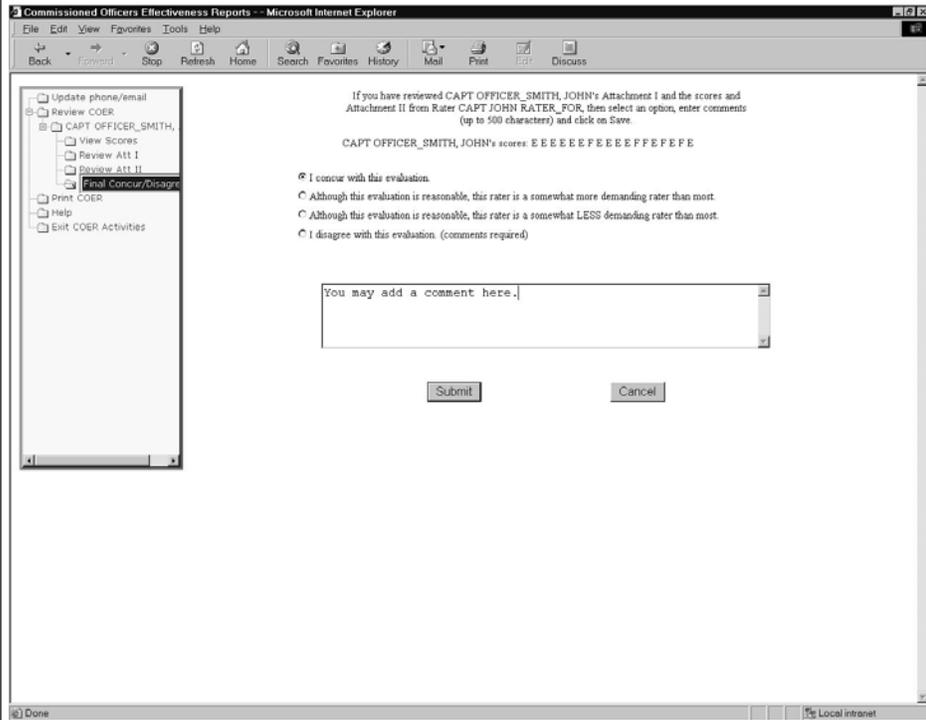


2. From listing, click **Final Concur/Disagree**.

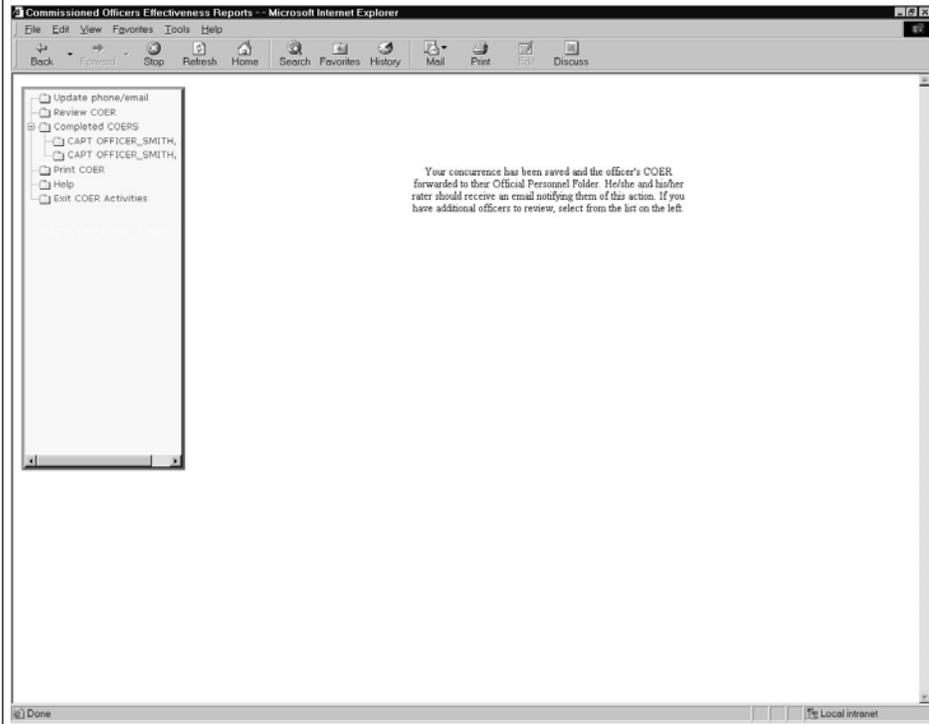


3. Select Option:

- I concur with this evaluation.
- Although this evaluation is reasonable, this rater is a somewhat more demanding rater than most.
- Although this evaluation is reasonable, this rater is a somewhat LESS demanding rater than most.
- I disagree with this evaluation. Comments required. (Reviewing officer must enter comments in the textbox.)



#### 4. Click **Submit**.





## Appendix

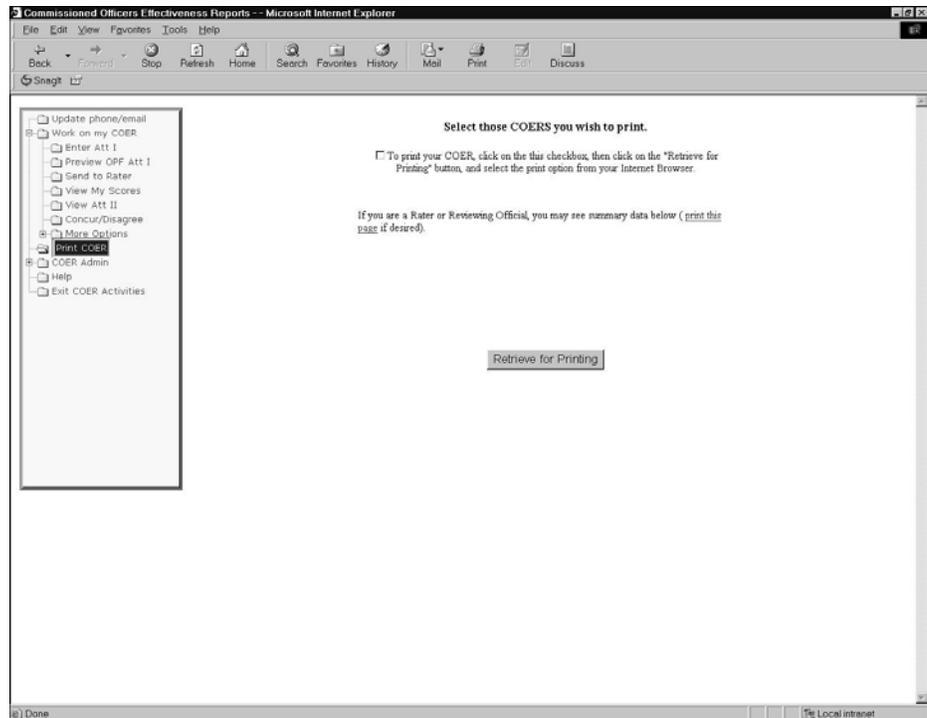
This section will concentrate on the tasks that can be performed by some or all of the roles in the COER process. These tasks include:

- Printing
- Viewing Completed COER as a Rater and/or Reviewing Official.

# Printing

## Officer Printing COER

1. From **Activity Tree**, click **Print COER**.



2. Check box before statement: **'To print your COER, click on the this checkbox, then click on the "Retrieve for Printing" button, and select the print option from your Internet Browser.'**

### 3. Click Retrieve for Printing.

2004 COER for Officer: CAPT John Officer\_Smith

Questions	Values
Q1. QUANTITY OF WORK	C
Q2. QUALITY OF WORK	C
Q3. PUNCTUALITY OF WORK	C
Q4. INITIATIVE, CREATIVITY, AND JUDGEMENT	C
Q5. PLANNING AND ORGANIZING	C
Q6. ABILITY TO ANALYZE PROBLEMS	C
Q7. SUPERVISORY SKILLS	C
OR ABILITY TO WORK WITH OTHERS	C

### 4. From Browser File menu, choose Print.

2004 COER for Officer: CAPT John Officer\_Smith

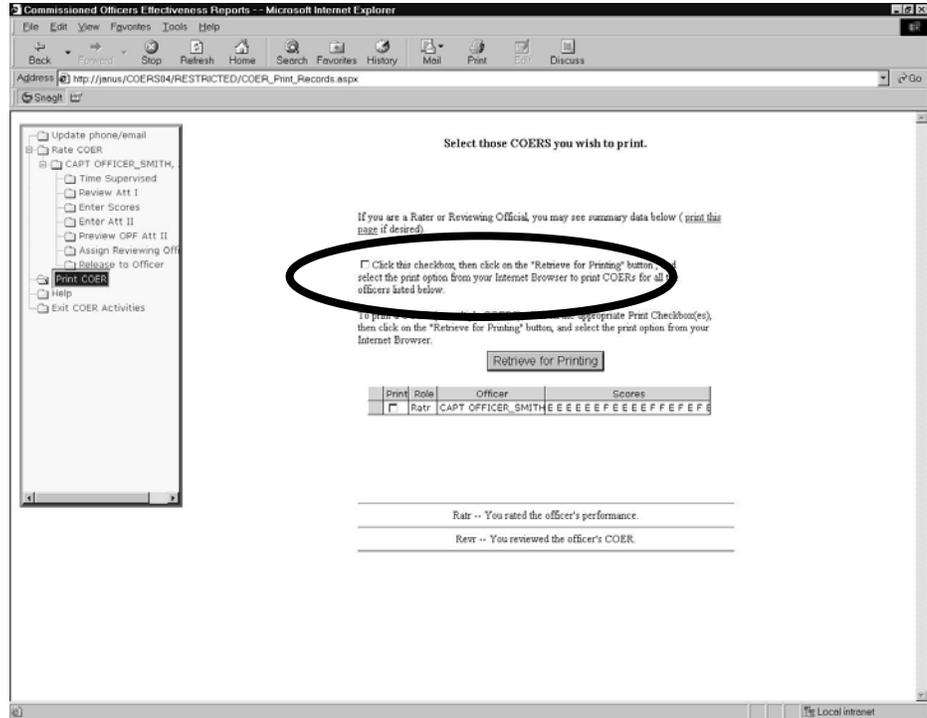
Questions	Values
Q1. QUANTITY OF WORK	C
Q2. QUALITY OF WORK	C
Q3. PUNCTUALITY OF WORK	C
Q4. INITIATIVE, CREATIVITY, AND JUDGEMENT	C
Q5. PLANNING AND ORGANIZING	C
Q6. ABILITY TO ANALYZE PROBLEMS	C
Q7. SUPERVISORY SKILLS	C
OR ABILITY TO WORK WITH OTHERS	C

### 5. Click OK.

## Rater/Reviewing Officer Print COER

### Print All COERs from Assigned Officers

#### 1. From Activity Tree, click Print COER

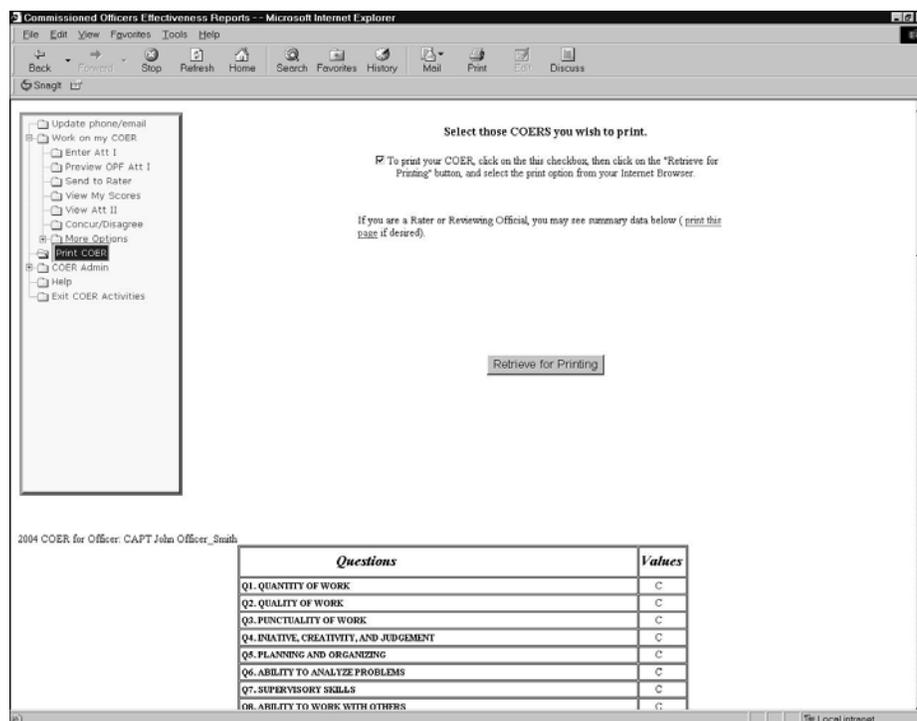


2. Check box before statement: **'Click this checkbox, then click on the "Retrieve for Printing" button , and select the print option from your Internet Browser to print COERs for all the officers listed below.'**

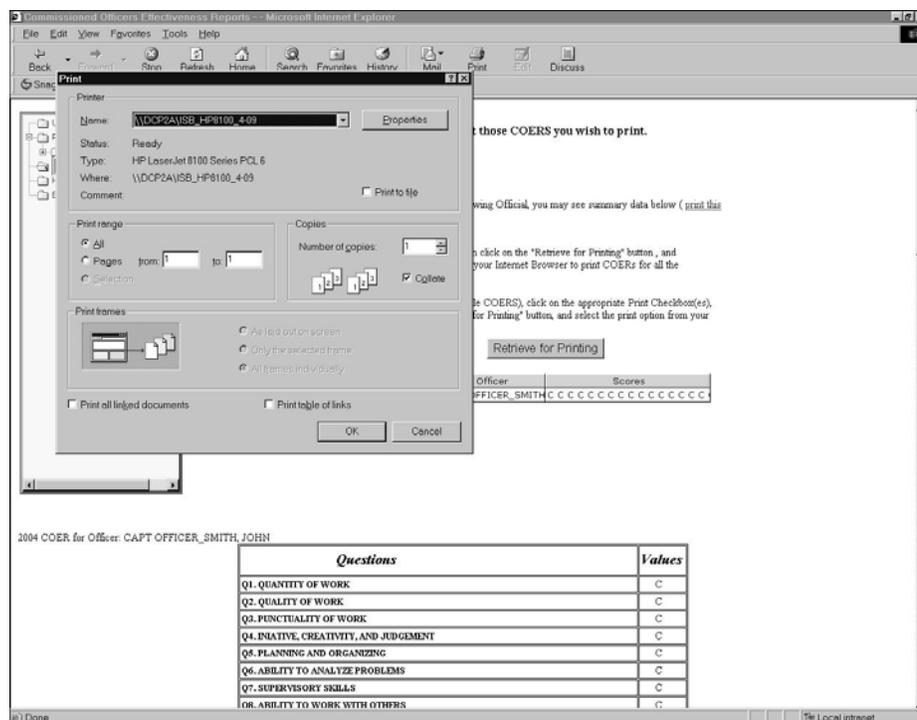




### 3. Click Retrieve for Printing.



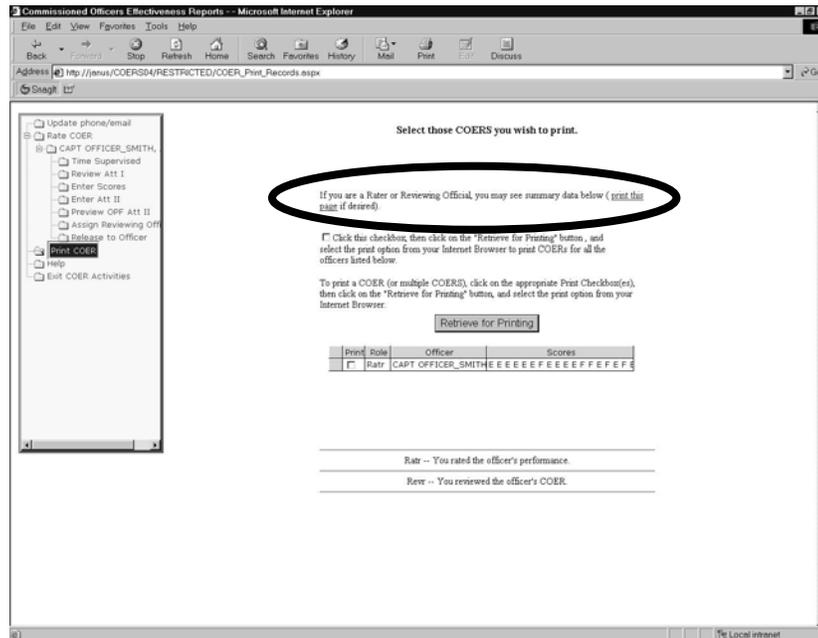
### 4. From Browser File menu, choose Print.



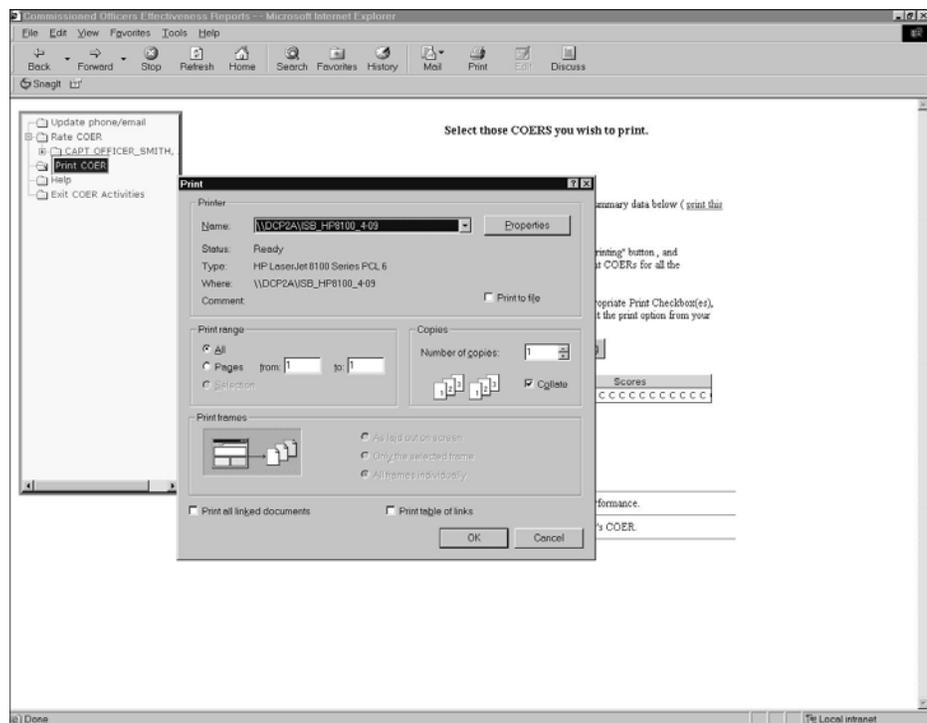
### 5. Click OK.

## Print Summary Data Page

### 1. From Activity Tree, click **Print COER**



### 2. Click **Print This Page** link in the first paragraph.

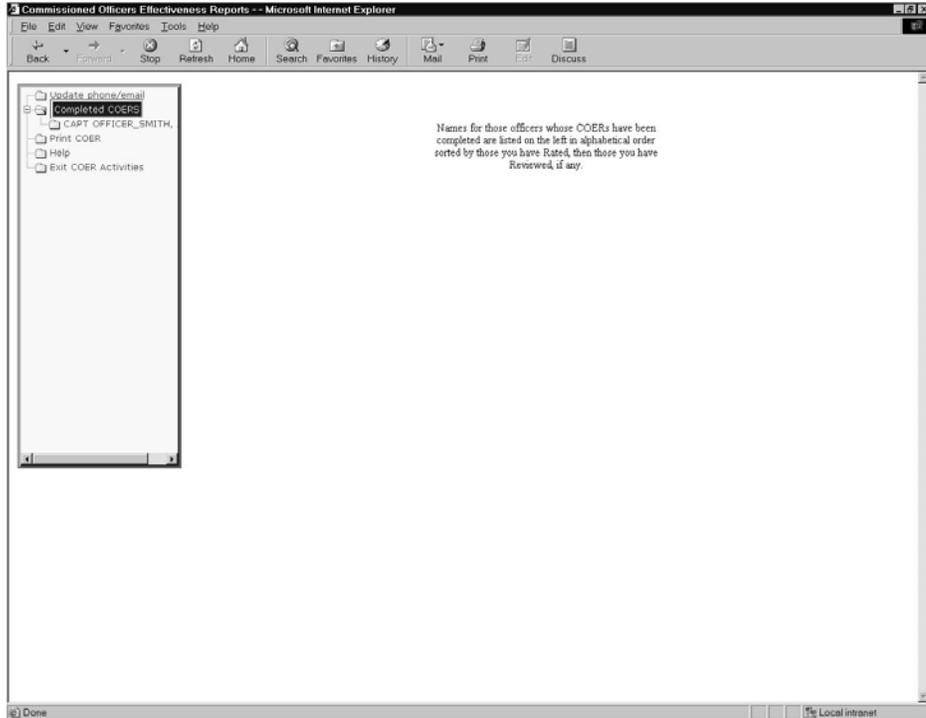


### 3. Click **OK**

# Completed COERs

This task allows Raters and Reviewing Officials to view officers' COERs that have been completed.

1. From **Activity Tree**, click **Completed COERS**.



2. From **Completed COERS** folder select an officer listing.

