

2017 COER Instructions

1. Officers exempt from completing the 2017 Annual COER:

(as listed in CCI 351.01, Section 6-2)

- (1) Officers called to extended active duty on or after 1 July 2017;
- (2) Officers who have separated or retired prior to 1 July 2017;
- (3) Medical students enrolled at the Uniformed Services University of the Health Sciences (USU);
- (4) Junior and Senior Commissioned Officer Student Training and Extern Program (COSTEP) participants;
- (5) The Assistant Secretary for Health (ASH);
- (6) The Surgeon General (SG); and
- (7) Non-career and career political appointees.

2. Instructions for the officer:

- a. Confirm officer contact information and supervisor for rating period by reviewing the information in [Direct Access](#) and making necessary changes.
- b. Access the “Officer Secure Area” by selecting “Officer Secure Area” (OSA) under the “Login” tab of the Commissioned Corps Management Information System (CCMIS) website. Next, proceed through the Access Management System (AMS) to the OSA dashboard to initiate the 2017 Annual COER. Select “COERs 2017” on the left side of the screen.
 - (1) Contact the Commissioned Corps Help Desk if you cannot access the COER: CCHelpDesk@hhs.gov.
 - (2) Complete the officer’s portion of the 2017 Annual online COER following the guidance below. If the officer, Rater or Reviewing Official does not have internet access, contact the [Commissioned Corps Agency Liaison](#) for approval to use the paper or electronic PDFCOER form.
- c. Select “Officer (My COER)” in the activity tree on the left side of the screen revealing the following folders:
 - Officer Information;
 - Enter Officer Comments;
 - Preview;
 - Release to Rater; and
 - Check COER Status.

d. Select “Officer Information” in the COERs application activity tree folder to update email and contact information. Update contact information as necessary and select the “Update Information” button. The electronic application provides for an optional alternate phone and email to ensure that you receive the email messages.

e. Creating and Submitting Officer Comments:

(1) Select “Enter Officer Comments.” The program provides three text boxes to enter comments:

- Description of Duties and Responsibilities;
- Goals; and
- Accomplishments.

(2) You can type text directly into each box, or you can cut and paste text from an editor (like Notepad or Text Editor on a Mac) into each box. Avoid word processors like Microsoft Word since they often add unreadable characters and alter formatting.

DO NOT use "bullets" to itemize text. It will prevent the comments from saving properly. Use alternatives such as numbers or the asterisk (*) character.

(3) The “**Description of Duties and Responsibilities**” box.

1) Describe the main duties and responsibilities in the officer’s job during the performance period.

- a. The box is limited to 5 lines or 400 Courier New, 10 pitch characters, including spaces and returns.
- b. Located at the bottom of the box is a text character counter displaying the used and available text space.

2) Click “Save” when finished.

(4) The “**Goals**” box.

1) List work-related goals for the next performance period and long-term career goals.

- a. The box is limited to 5 lines or 400 Courier New, 10 pitch characters, including spaces and returns.
- b. Located at the bottom of the box is a text character counter displaying the used and available text space.

2) Click "Save" when finished.

(5) The "**Accomplishments**" box.

- 1) List accomplishments related to the 8 performance elements on which you will be rated.
 - a. Refer to the [Performance Elements](#) section of the COER website to review the 8 elements.
 - b. This box has a limit of 21 lines or 1,680 Courier New, 10 pitch characters, including spaces and returns.
 - c. Located at the bottom of the box is a text character counter displaying the used and available text space.

Click "Save" when finished.

- f. Select "Preview" to ensure the entered text fits on one page. If the text does not fit, edit the narrative until the text fits in the box.
- g. Rater is generally defined as the officer's immediate supervisor on 1 July 2017, regardless of the time he/she has supervised the officer.
 - If the officer is detailed outside the Department of Health and Human Services (HHS), the Memorandum of Agreement (MOA) or the Memorandum of Understanding (MOU) may designate the officer's Rater.
 - If the Rater is not designated by the MOA/MOU, the Federal Supervisor named in the MOA/MOU shall be the Rater.
 - If the identity of the Rater is unclear, the officer should immediately contact his/her Liaison office for assistance.

(1) Temporary Duty Assignment (TDY).

The immediate agency supervisor (Rater) will complete the COER with input from the TDY supervisor for a TDY that was completed on or after 1 July 2017. This evaluation will stand as the officer's Annual COER for the year.

(2) The TDY supervisor (Rater) may complete an Interim COER on the paper or electronic PDF format when the TDY is completed prior to 1 July 2017.

- h. Transmit the COER to the Rater no later than 18 October 2017, by selecting "Release to Rater."

You will be asked if you wish to "Use Last Year's Rater" or "Assign New Rater."

- (1) If you select "Use Last Year's Rater," you will be asked to verify the Rater's contact information. ***It is crucial that the email listed for the Rater is correct.***
 - 1) If the information is correct, select "Assign." Upon confirmation that the Rater has been assigned, you may logoff by selecting "Exit COER."
 - 2) If the information is not correct, correct the Rater's contact information and select "Assign."
- (2) If you select "Assign New Rater," you will be asked "Has the new Rater ever been a Commissioned Corps officer?"
 - 1) If the officer's Rater is currently on active duty, retired, or separated, select "Yes."
 - 2) If the Rater is a civilian or a member of another uniformed service, select "No."
 - 3) Search for the Rater's name. The search results page will display the names that most closely match the Rater's name.
 - 4) Select the Rater's name from the list if listed.
 - 5) If the Rater's name does not appear, select "New User." Follow the instructions for the creation of a new user account. ***It is crucial that the email listed for the Rater is correct.***
 - 6) Edit or add the information as necessary and select "Assign." Do not use dashes when entering the telephone number.
- (3) Upon confirmation that the Rater has been assigned, the officer may log off by selecting "Exit COER."

- i. COER status and rater resend.

It is the responsibility of the officer to ensure his/her COER is assigned and transmitted to the Rater and Reviewing Official (RO) by the prescribed deadlines in this POM.

Furthermore, the officer is responsible to ensure the COER is completed and submitted to his/her eOPF.

- (1) To determine the status of the COER, the officer will login to the “Officer Secure Area” of the CCMIS website.
 - 1) Select “COERs 2017” on the left side of the screen.
 - 2) Select “Check COER Status” from the left side of the activity tree. This will provide the most current information on the status of the COER.
 - (2) The officer should contact the Rater directly if he/she has not started the COER.
 - (3) The officer may also use the “Notify Rater Again” web-link on the left side of the screen. ***If the officer uses the “Notify Rater Again,” ensure the Rater’s email is correct. “Notify Rater Again” may also be used to correct the Rater’s email address if needed, but only once.***
- j. The officer will receive an email notification indicating the Rater has completed his/her section, and the COER is ready for the officer to concur or disagree with the evaluation.
- k. The officer should review the ratings and comments and discuss them with the Rater if there are any questions or concerns.
- (1) If after discussing the COER ratings and comments with the Rater there are no changes, the officer may concur or disagree with the evaluation. This will release the COER to the RO.
 - (2) If changes are required, the officer and/or the Rater may modify their respective sections of the COER.
- Note: The Rater must review any changes the officer makes to “Officer Comments” before the officer may concur or disagree with the evaluation.
- (3) If the officer disagrees with the evaluation, the officer may provide a Rebuttal (CCI 351.01, see Section 7 “Rebuttals and Other Rights”). The rebuttal must be submitted within 90 days of the date the electronic COER is viewable (Archive date) in the COER Documents section of the officer’s eOPF. (All corrections and subsequent resubmission of the rebuttal must be made within this 90 day period)
- l. COER completion:
- After the RO has completed his/her section, the officer will receive an email indicating the COER is complete. The COER will be archived in the “COER Documents” section of the eOPF with the following attributes:

- Document Type: COER
- COER Type: ANNUAL
- Document Date: 30 Sep 2017

If the COER is not in the eOPF within one week after receipt of the email notification, contact phscoers@hhs.gov. **It is the responsibility of the officer to ensure that the COER has been completed and is visible in the eOPF by opening and reviewing each individual page of the archived COER.** The officer is also responsible for ensuring the COER scores are available on the Promotion Information Report (PIR).

3. Instructions for the Rater

a. Login to COER.

The Rater will receive an email notification from OS PHS, COERS (HHS/OS) indicating that an officer has submitted an online COER for rating. The email will contain information and instructions on how to login to the online COER and how to access the officer's COER.

Raters who are not Commissioned Corps officers are required to register once as a guest user each COER cycle.

The Rater shall ensure all officers under his/her supervision transmit the COER to the Rater no later than 18 October 2017

(1) Once the Rater has access to the online COER, the Rater will see an activity tree (series of folders) on the left side of the screen. To begin work on the officer's COER, select the officer's name. This will expand the folder to reveal the following folders:

- Enter Time Supervised;
- View Officer Comments;
- Score and Comment;
- Preview Scores;
- Summarize Performance;
- Preview Performance;
- Assign Reviewing Official; and
- Release to Officer

(2) Enter the period of time he/she has supervised the officer by selecting "Enter Time Supervised."

- 1) If the time supervised is greater than 6 months, the evaluation type is automatically set to a 2017 [Detailed COER](#).

2) If the time supervised is less than 6 months, the Rater will be prompted to select either a Detailed Evaluation or a 2017 [Narrative COER](#). The Rater should select Narrative Evaluation if the time supervised would not allow sufficient information to complete a numerical rating of each performance element.

3) Click "Save."

(3) Review Officer Comments.

Select "View Officer Comments." After reviewing, the Rater may ask the officer to modify Officer Comments.

Note: The officer will be unable to modify Officer Comments until the rating is completed, the RO is assigned, and the COER is "released to the officer."

(4) Evaluate the officer's performance and provide comments.

If an officer has been on extended periods of sick leave or intermittent periods of sick leave, the officer shall be rated on his/her performance when present. Medical information should not be entered into comments.

(5) Select "Score and Comment" from the activity tree.

Score all 8 performance elements by selecting one circle per element corresponding to the description that reflects the officer's performance during the rating period.

(6) "Rater's Comments" box.

1) Comments are required for a detailed evaluation.

2) The comments should provide an overall description of the action(s)/behavior upon which the Rater based his/her ratings of the officer.

3) Enter text in the Raters Comments box.

4) Explain the impact of the action and why it was important.

5) Text can be typed directly into each box, or text can be added by cutting/pasting from a word processor. You can type directly into each box, or you can cut and paste text from an editor (like Notepad or Text Editor on a Mac) in each box. Avoid word processor like Microsoft Word since they often add unreadable characters and alter formatting

- 6) Text is limited to 16 lines, or 1,280 Courier New, 10 pitch characters, which includes spaces and returns.
- 7) Located at the bottom of the box is a text character counter displaying the used and available text space.
- 8) Select "Save" when finished.
- 9) Select "Summarize Performance" and indicate whether the performance is Satisfactory, Marginal, or Unsatisfactory. **(See Note for performance guidelines)**

Note: Overall performance must align with the average of the rating scores in elements 1 to 8. Add all scores from elements 1 to 8 and divide by 8. Rate the officer's overall performance according to the following score average.

If the officer's average score is:

1 to 1.99..... Unsatisfactory
2.0 to 3.99..... Marginal
4.0 to 7.0..... Satisfactory

- 10) Note strengths and areas for improvement.
- 11) Select "Preview Performance" to ensure the text entered fits on one page.

If the text does not fit, the text should be edited until it fits in the "Preview Performance" view.
- 12) Save your work.
- 13) In lieu of a signature, select the Signature box to electronically sign the COER.

(7) Assign the RO.

- 1) The Rater is prohibited from acting as both the Rater and RO.
- 2) Select "Assign Reviewing Official."
- 3) The Rater will be asked if he/she wishes to "Use Last Year's Reviewing Official" or "Assign New Reviewing Official."

- a. If you select “Use Last Year’s Reviewing Official,” you will be asked to verify the RO’s contact information. *For timely submission of the COER, it is crucial that the Rater ensures the email for the RO is correct.*

- (1) Edit the information if it is not correct.

- (2) If the information is correct, select “Assign”.

Note: Assignment of the RO does not automatically send the COER to the RO. **The Rater must select “Release to Officer” to send the COER to the officer for concurrence or disagreement. The officer must first concur or disagree with the evaluation, which automatically releases the COER to the RO, before the RO can begin the review of the COER.**

- b. If you select “Assign New Reviewing Official,” you will be asked “Has the new Reviewing Official ever been a Commissioned Corps Officer?”

- (1) If the RO is currently on active duty, retired, or separated, select “Yes.”

- (2) If the RO is a civilian or other uniformed services member, select “No.” You will be prompted to search for the RO’s name. The search results page will display the names that most closely match the RO’s name.

- a. Select the RO’s name from the list if listed.

- b. If the RO’s name does not appear, select “New User.” Follow the instructions for the creation of a new user account. *It is crucial for timely submission of the COER that the Rater ensures the email listed for the RO is correct.*

- (3) Edit or add the information as necessary and select “Assign.”

- c. Upon assignment of the RO, you will be asked if you wish to release the COER to the officer to review the evaluation.

- d. Click “Release to Officer” to release the COER to the Officer for review.

- e. Log off by selecting “Exit COER.”

The COER must be released to the officer to allow sufficient time to review the evaluation and for the officer to transmit (i.e., concur or disagree with) the COER to the RO no later than 8 November 2017

b. Review and Discussion.

- (1) The officer and Rater should formally discuss the evaluation before the officer concurs or disagrees with the evaluation. Both the officer and Rater may make changes to their respective portions of the COER, but not at the same time.
- (2) If the officer makes changes to Officer Comments, the officer must release the COER to the Rater again for review.
- (3) If the Rater makes changes to the ratings or comments, they will save their work. Next, select “Summarize Performance” and re-check the e-signature box.
- (4) Save the changes, and select “Release to Officer.”
- (5) **Once the officer concurs or disagrees with the evaluation, no portion of the COER can be changed.** The COER is then automatically forwarded to the RO.

c. Additional Rater Guidance.

- (1) In the event an officer cannot meet the deadline, the officer is required to arrange an alternative deadline with the Rater and RO. The electronic COER must be completed and transmitted to DCCPR **no later than 6 December 2017**
- (2) In the event the officer fails to release the COER to the Rater with sufficient time to allow completion of the COER by 6 December 2017 the Rater shall initiate the 2017 Annual COER on the prescribed paper or electronic PDF version COER form by following these instructions.
 - 1) The Rater will access the paper or electronic PDF version [COER form](#) by clicking “Forms” on the CCMIS website main menu.
 - 2) Complete Section 1, Part II “Rater’s Comments and Signature” and Section 3, “Performance Evaluation” of form [PHS-838 \(8/2015\)](#).

The Rater may not consider the officer’s failure to submit the COER in a timely manner in rating the performance of the officer, because it is outside of the rating period.

- 3) Provide the COER to the officer to complete Section 2 “Officer’s Comments,” review and sign the COER. If the officer refuses to sign the COER, the Rater

will note the failure to sign in Section 1, Part III.b. If the officer fails to enter comments, the Rater will note "Officer refused to enter comments" in Section 2.

- 4) The Rater must sign and forward the COER to the RO to complete Section 1 Part IV. The COER is then submitted through the Liaison to DCCPR for inclusion in the officer's eOPF. **If using an electronic signature, the name and date must be legible both digitally and when printed.** Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF.
- 5) **All signatures for form PHS-838 must be signed and dated in succession of each other to begin with the rater and ending with the liaison before submission to DCCPR.**

4. Instructions for the Reviewing Official

- a. Ensure that all officers and Raters under his/her supervision transmit the COER for review no later than 8 November 2017.
- b. The RO will receive an email notification from OS PHS, COERS (HHS/OS) indicating that the COER is ready for review and completion after the officer has concurred/disagreed with the COER.

The email will contain information and instructions on how to login to the online COER and how to access the officer's COER for the review. **The RO (if not a Commissioned Corps officer) is required to register once as a guest user each COER cycle.**

The Reviewing Official should ensure that all COERs are completed and submitted to DCCPR no later than 6 December 2017

- c. Login to the COER following the instructions contained in the automated email.
 - (1) Once the RO has access to the online COER, the RO will see an activity tree (series of folders) on the left side of the screen. To begin the review of an officer's COER, select the officer's name. This will expand the folder to reveal the following folders:
 - Rater Information;
 - View Officer Comments;
 - View Scores and Comments;
 - Performance Summary; and
 - Final Concur/Disagree.

- (2) Select "View Officer Comments" to review the Officer's Comments.
- (3) Select "View Scores and Comments" to review the Rater's scores and comments.
- (4) Select "Performance Summary" to review the overall Officer Performance. This will include officer's overall performance of job duties and the officer's strengths and areas for improvement.
- (5) Select "Final Concur/Disagree."
- (6) Select one of 4 options which include:
 - I concur with this evaluation;
 - Although this evaluation is reasonable, this rater is somewhat more demanding than average;
 - Although this evaluation is reasonable, this rater is somewhat less demanding than average or;
 - I disagree with this evaluation.
- (7) Provide comments in the text box below the selected response.
 - 1) Comments are required if selecting "I disagree with this evaluation."
 - 2) The text is limited to 3 lines or 240 Courier New, 10 pitch characters including spaces and returns.
 - 3) Located at the bottom of the box is a text character counter displaying the used and available text space.
- (8) Select "Submit" when finished. Click "Submit" only once to avoid error.
- (9) Select "Exit COER" to log off.
- (10) If the process is completed using the paper or electronic PDF format, the COER must be delivered by the Reviewing Official to the Commissioned Corps Agency Liaison. **If using an electronic signature, the name and date must be legible both digitally and when printed.** Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF.

- (11) **All signatures for form PHS-838 must be signed and dated in succession of each other to begin with the rater and ending with the liaison before submission to DCCPR.**

5. **Instructions for Commissioned Corps Agency Liaisons**

- a. General Instructions for Liaisons. Liaisons are responsible for monitoring the status of the 2017 electronic COER for their respective Operating Division (OPDIV), Staff Division (STAFFDIV), or non-HHS organization. Liaisons will have access to a suite of reporting tools through the electronic COER application. Liaisons are responsible for making follow-up inquiries with officers, Raters, and ROs for COERs that are not submitted or transmitted in a timely manner.
- b. Assignment of Rater and RO.
- (1) In the event an officer is unable to identify a Rater, the Liaison is required to identify the most appropriate person to serve as the Rater.
- (2) In the event the Rater is unable to identify the RO, the Liaison is required to identify the most appropriate person to serve as the RO. In the event an RO cannot be identified or due to unique operational circumstances, the Liaison may act as the RO.
- c. Verification of paper or electronic PDF COER documents.

Liaisons are **required** to verify all paper or electronic PDF COERs and rebuttals prior to submission to DCCPR. Liaisons are required to verify:

- (1) The document is completely and appropriately filled-out:
- No blank fields.
 - COER type is correct.
 - Dates are correct for the rating period covered by the COER type.
 - Single sided (COERs and rebuttals).
 - Page limit requirements are not exceeded.
 - Manually signed and dated, or digitally-signed using a PIV card or CAC by the Rater, officer, and RO (in that order). **See note regarding signatures below.**
 - No attachments are included.
 - All required signatures are signed and dated in succession beginning with the rater and ending with the liaison before submission to DCCPR.

- (2) **Note:** A COER or rebuttal may be electronically submitted to the agency liaison for review and signature. **If using an electronic signature, the name and date must be legible both digitally and when printed. Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF.**
- (3) The liaison will submit the finalized document to DCCPR.

6. Rebuttals and Other Rights

- a. If an officer does not agree with a rating or comment on the COER, the officer may submit a rebuttal to the agency Liaison. There is no prescribed form for a rebuttal, but there are rebuttal format guidelines. Officers should type rebuttals on a blank document. Officers are reminded that a rebuttal does not substitute as a remedy for a formal complaint (see CCI 211.04, "Complaints and Redress" or other rights of due process. DCCPR will not act on a rebuttal to adjudicate the statements made or pursue remedy. DCCPR will review the rebuttal to ensure it meets guidelines listed below. If guidelines are met, DCCPR will include the rebuttal in the eOPF adjacent to the associated COER. DCCPR will return the rebuttal to the agency Liaison for modifications by the officer if it does not adhere to the guidelines.

Rebuttal Guidelines. The rebuttal is required to:

- Include the officer's name, rank, and serial number on the top of each page.
 - Be limited to five (5) narrative pages of single-sided, single-spaced 12 pt. Times New Roman font.
 - Be a professionally written explanation that clearly identifies and itemizes with which areas of the COER evaluation the officer does not agree.
 - Only reflect comments or responses to the narrative comments and/or scoring in the current COER evaluation itself. Allegations, anecdotes, and other statements that do not respond directly to the COER ratings will not be accepted.
 - Be signed by the officer and the agency Liaison.
 - Be submitted to DCCPR within 90 days of the Archive Date of the corresponding COER in the eOPF (All corrections and subsequent resubmission must be made within this 90 day period).
 - Attachments such as copies of email correspondence, other performance evaluations, or letters of recommendation, are prohibited.
- (1) The officer is required to submit the rebuttal through his/her Liaison. The Liaison will sign the rebuttal and submit the rebuttal to DCCPR. It is recommended that officers submit a rebuttal within 30 days of the COER to ensure the agency Liaison

has time to sign and submit. **Rebuttals that are not signed by both the officer and Liaison will not be accepted and will be returned to the agency Liaison.**

Note: Electronically submitted (i.e., emailed or faxed) copies are permitted when sent directly to the Liaison. **If using an electronic signature, the name and date must be legible both digitally and when printed.** The liaison will submit the finalized document to DCCPR. Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF. Digital submission via email is suggested for best document tracking.

- (2) If an officer submits a rebuttal, the Liaison is required to review, sign, and submit the original document to DCCPR and send copies to the Rater and RO.
- (3) The Liaison has the right to return the rebuttal to the officer if the rebuttal does not adhere to the Rebuttal Guidelines.
- (4) Either the Rater or RO may respond to the officer's rebuttal. If the Rater and RO prefer, they may submit one combined response to the officer's rebuttal through the Liaison.
- (5) The Rater and RO must limit the response to 5 narrative pages.
- (6) The Rater and RO must submit their signed response to the Liaison.
- (7) The Liaison is required to sign the response and submit it along with the rebuttal to DCCPR.
- (8) Rebuttals submitted to DCCPR after 31 December 2017 may not be available to the 2018 Promotion Boards.
- (9) Rebuttals for all COER types are accepted for inclusion into the officer's eOPF up to 90 days of the "Archive Date" of the corresponding COER in the officer's eOPF. Rebuttals received more than 90 days after the "Archive Date" of the corresponding COER will not be accepted by DCCPR (All correction(s) and resubmission must be made within this 90 day period).

The Rater and RO have up to 60 days from the date the officer's rebuttal is placed into the officer's eOPF (Archive Date) to submit their response. Rebuttals received after the prescribed deadlines will not be accepted by DCCPR (All corrections and subsequent resubmission must be made within this 60 day period).

- b. The officer may seek redress if informal attempts are unsuccessful by filing a formal complaint in accordance with CCI 211.04, "Complaints and Redress."
- c. If the officer believes that he/she has been subjected to discrimination, they may file an Equal Opportunity (EO) complaint in accordance with [CCI 211.03](#) (old CC26.1.6), "Equal Opportunity: Discrimination Complaints Processing."
- d. If the officer is not satisfied with the outcome of a formal complaint filed in compliance with CCI 211.04, "Complaints and Redress," or CCI 211.03 (old CC26.1.6, "Equal Opportunity: Discrimination Complaints Processing," the officer may apply for relief through the Board for Correction of Public Health Service Records in accordance with [CCI 394.01](#) (old CC29.9.5). Failure to initiate a complaint for redress or failure to complete/initiate other available administrative remedies shall be construed as the officer relinquishing their right to proceed with an application to the Board for Correction.

7. Other COER types

- a. Transfer COER.

The officer may complete a Transfer COER at any point in the annual COER cycle to capture a period of time prior to an officer's change in duty station (orders must reflect) or a change of an officer's supervisor. The Paper or electronic PDF version COER is form PHS-838, and can be downloaded from the CCMIS website under the [Forms](#) tab on the menu bar, or from the COER webpage.

- The Transfer COER may be a Detailed or Narrative format based on length of the rating period. (Review COER webpage for details.)
- For a Transfer COER, the Rater and RO must be from the officer's assignment prior to the transfer.
- The COER must be signed and submitted to DCCPR by the Liaison at the previous assignment.
- ***Part I.b. Period Covered by Report is ALWAYS "To" the report date on the officer's PCS orders regardless of when the officer, Rater, RO and Liaison sign the COER form.***

Note: Transfer COERs may be submitted electronically to the agency liaison for review and signature. **If using an electronic signature, the name and date must be legible both digitally and when printed.** Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF. The liaison will submit the finalized document to DCCPR.

- b. Transfer COER as the Annual COER.

If an officer or Rater transfers or retires on or after 1 July 2017, but before 1 October 2017, the officer is required to complete a Transfer COER on the prescribed paper or electronic PDF version COER form that will automatically serve as the officer's 2017 Annual COER.

The Paper or electronic PDF COER document is form PHS-838 and can be downloaded from the CCMIS website under the [Forms](#) link of the menu bar or from the COER webpage.

The Rater and RO must be from the officer's assignment prior to the transfer. The Liaison at the previous assignment must sign and submit the COER to DCCPR.

Note: Transfer COERs as Annual COERs may be submitted electronically via email to the agency liaison for review and signature. **If using an electronic signature, the name and date must be legible both digitally and when printed.** Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF. The liaison will submit the finalized document to DCCPR. The liaison should ensure all signatures are signed and dated in succession beginning with the rater and ending with the liaison before submission.

c. Interim COER.

- (1) The officer or the Rater may initiate an Interim COER, and may do so at any point during the annual COER cycle for specific situations. The period covered by the report must be 30 days or greater. The Rater may require an officer to complete an Interim COER to document performance. Other situations in which an Interim COER would be warranted include temporary duty assignments or for special pay requirements. A narrative COER is recommended for a rating period of 90 days or less.
- (2) The Interim COER must be completed on the paper or electronic PDF COER document, PHS-838. The form is available on the CCMIS website under the [Forms](#) link of the menu. The Rater and RO must sign the COER.
- (3) The paper or electronic PDF COER must be signed and delivered to DCCPR by the officer's Liaison. DCCPR will review the COER and determine if it should be placed in the eOPF.
- (4) If an officer refuses to provide comments for any COER type, the sections an officer completes are left blank. The Agency may enter a statement that the officer refused to complete or sign the COER or both.

- (5) In other situations regarding COER type, the officer must contact his/her agency Liaison or the COER Coordinator at DCCPR for guidance at phscoers@hhs.gov

Note: Interim COERs may be submitted electronically to the agency liaison for review and signature. **If using an electronic signature, the name and date must be legible both digitally and when printed.** Electronic or digital signatures must have been registered by a recognized certificate authority and must also contain a distinguished name (DN). The DN must be legible on both the electronically submitted version and a printed version by the COER Coordinator for submission into the eOPF. The liaison will submit the finalized document to DCCPR. The liaison should ensure all signatures are signed and dated in succession beginning with the rater and ending with the liaison before submission