



Joint Task Force National Capital Region Medical INSTRUCTION

NUMBER 1200.01
MAR 12 2010

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SUBJECT: EVALUATIONS/FITNESS REPORTS (FITREPS)

References: (a) AR 623-3, Evaluation Reporting System
(b) DA Pam 623-3, Evaluation Reporting System
(c) AFI 36-2406, Officer and Enlisted Evaluation Systems
(d) BUPERSINST 1610.10B, Navy Performance Evaluation System, 9 Jul 2008
(e) Federal Register, Vol. 70, No. 210, 5 CFR Chapter XCIX and Part 9901

1. PURPOSE. Provides guidance to the Joint Task Force, National Capital Region Medical (JTF CAPMED) and establishes processing procedures for Officer Performance Reports and Enlisted Performance Reports and National Security Personnel System (NSPS) assessments.

2. APPLICABILITY. This Instruction applies to all JTF CAPMED personnel, Directorates, Special Staff, and Subordinate Activities.

a. Army. To establish procedures and provide guidance to process Army Evaluations IAW AR 623-3, Evaluation Reporting System.

b. Air Force. To inform, provide guidance, and establish processing procedures for Air Force Officer Performance Reports and Air Force Enlisted Performance Reports. IAW Air Force Instruction (AFI) 36-2406, Military Performance Evaluations.

c. Navy. To establish procedures and provide guidance to process Navy Evaluations IAW BUPERSINST 1610.10A, Navy Performance Evaluation System.

d. National Security Personnel System (NSPS). To process NSPS Employee evaluations, in accordance with Office of Personnel Management Guidance.

3. DEFINITIONS

a. Army

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- (1) Officer Evaluation Report (OER) – Type of report filed for members O-1 and above.
- (2) Non-Commissioned Officer Evaluation Report (NCOER) – Type of report filed for members E5 through E9.
- (3) Officer Developmental Form – Developmental form for Officers O-1 through O-3.
- (4) Officer Support Form – Form required from Ratee and Rater at the end of a rating period.

b. Air Force

- (1) Enlisted Performance Report (EPR)
 - (a) Ratee – Individual whose performance is the basis for the report.
 - (b) Rater – Immediate supervisor. The person who will write the report.
 - (c) Additional Rater – Second evaluator in the rating chain after the rater.
 - (d) Senior Rater/Endorser – PAS Code Owner of Rater.
- (2) Officer Performance Report (OPR)
 - (a) Ratee – Individual whose performance is the basis for the report.
 - (b) Rater – Immediate Supervisor. Normally, the person who will write the report.
 - (c) Additional Rater – Rater's Supervisor.
 - (d) Senior Rater/Reviewer – PAS Code Owner of Rater.
- (3) Air Force Personnel Data System (AFPDS)

c. Navy

- (1) Reporting Senior (RS) – A person designated by a Commanding Officer to submit fitness or evaluation reports for which that commanding officer would otherwise be responsible.
- (2) Fitness Report (FITREP) – Type of report filed for members in the grade of O-1 through O-6.
- (3) Chief Evaluation (CHIEFEVAL) – Type of report filed for members in the grade of E-7 through E-9.

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(4) Evaluation (EVAL) – Type of report filed for members in the grade of E-1 through E-6.

4. POLICY

a. Army

(1) A rating chain is established by Commanders and maintained by rating officials to provide the best evaluation of an individual Soldier's performance and potential. A rating chain also ties rated individual performance to a specific senior and/or subordinate relationship. This allows for proper counseling to develop the rated Soldier to accomplish the mission. These functions are best achieved in an organization's chain of command.

(2) Generally, the evaluation of Soldiers by persons not involved in the chain of command or supervision is inappropriate.

(3) Special rules for designating rating officials have been made to cover the death, relief, or incapacitation of a rating official (AR623-1).

(4) General rules for establishing rating chains:

(a) The rater will normally be the immediate supervisor of the rated Soldier and senior by grade or date of rank (DOR) to the rated individual. Commanders will normally rate Commanders. Civilian raters for OERs and NCOERs will be designated as official supervisor on the established rating scheme approved by the Commander. Civilian raters for NCOERs will be designated and qualified by grade. The minimum grade to be a civilian rater is general schedule GS-07.

(b) The intermediate rater (OER only) will be senior in grade or date of rank to the rated officer. The intermediate rater will be included when there is a level of supervision between the rater and senior rater unless an exemption applies. If an intermediate rater is included, they will be senior to the rated officer by grade or date of rank. For Chaplains, see AR 623-3, appendix C, for JAGC officers, see appendix D; and for AMEDD officers, see appendix E.

(c) Senior rater minimum grade requirements for OERs are in table 2-1. Senior Executive Service (SES) members may be senior raters for all grades of rated officers provided they are in the rated officer's chain of supervision and is at least one level above the intermediate supervision of the rated officer.

(d) Senior raters for NCOERs will be U.S. Armed Forces members, senior by grade or date of rank to all rating officials and rated NCOs in the direct line of supervision of the rated NCO. DOD civilian employee minimum qualified grade is GS-09 or equivalent.

(e) Specific requirements for rating officials is addressed in the below table.

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Minimum Grade requirements for senior raters of officer OERs			
	If a military senior rater, The minimum grade of the senior rater is—	If civilian performing senior rater function, the minimum grade of the senior rater is—	
When grade of the rated individual is—		Merit/general schedule (GS)	Non-appropriated fund
WO/2LT/1LT	04 Major (MAJ)/CPT(P)	General manager (GM)/ general Government (GG)/GS-13	Universally administrative (UA) 13
1LT(P)/CPT	05 Lieutenant colonel (LTC)/ MAJ(P)	GM/GG/GS-13	UA-13
CPT(P)/MAJ	06 Colonel (COL)/LTC(P)	GM/GG/GS-15	UA-15
MAJ(P)/LTC	06 Colonel (COL)/LTC(P)	GM/GG/GS-15	UA-15
LTC(P)/COL	07 Brigadier general (BG)/ COL(P)	SES (see 2-4c)	UA-16
COL(P)/BG/MG	Senior to the rater and intermediate rater	Senior to the rater and intermediate rater	Senior to the rater and intermediate rater
<p>Notes:</p> <p>1 Supplementary review required in some cases.</p> <p>2 A promotable officer (signified on report by placing a P next to the rank) is one who is on a promotion list and is currently serving in a position authorized the next higher grade.</p> <p>3 Civilian ranks are under transition because of National Security Personnel System; as we evolve, these minimum requirements may be changed.</p>			

(5) Senior Rater Profile Report (DA Form 67-9-2)

(a) Senior rater profiles track the rating history of each senior rater for officers by grade, MAJ through BG, and warrant officers by grade, CW3 and CW4. Senior raters do not maintain a profile on officers in the ranks of MG, CPT, LT, and warrant officers in the ranks of CW5, CW2, and WO1. HQDA makes this information available to the senior rater or senior rater's designated representative for officers and warrant officers, regardless of component (appendix F). In addition, this report provides information on the timeliness of a senior rater's OER and NCOER submissions to HQDA. For officers in applicable ranks, a senior rater profile will:

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1. Emphasize the importance of the senior rater's role to provide credible information to DA. This is one of the senior rater's most important actions, affects the Army's future leadership, and has great impact on how the Army accomplishes its missions.

2. Emphasize the importance of a senior rater's sequencing reports. Within a senior rater's profile HQDA will always process reports in the order received.

3. Provide information to DA selection boards and the Army leadership on the senior rater's profile history as a means of disciplining the rating system. For example, senior raters must maintain an Above Center of Mass (ACOM) percentage by grade of 49 percent or less (see DA Pam 623-3, table 2-7). Only one ACOM is allowed in any of the first four evaluations by applicable grade.

4. Continue without interruption as the senior rater moves from job to job.

5. Follows the senior rater upon retirement should the senior rater become a Department of the Army civilian and provide senior rater evaluations to Army officers and warrant officers in applicable ranks.

(6) Rating Schemes

(a) JTF CapMed Rating Schemes for active duty, attached reservists with duty at JTF CapMed, and civilians are managed and maintained by the J1. The Rating Scheme for the command is published at the beginning of each FY (following the summer turnover/transition period) and updated as needed. The Commander, JTF CapMed is the approving authority for the Rating Scheme.

(b) It's essential that directorates notify J1 in instances where any member is assigned to a different rater. J1 will then determine whether a report is due based on the number of days of supervision.

b. Air Force

(1) Rater

(a) The official in the rating chain designated by management to provide periodic performance feedback and initiate performance reports (usually the ratee's immediate supervisor).

(b) For officers, the rater must be an officer or civilian serving in a grade equal to or higher than the ratee.

(c) For enlisted, the rater must be an officer, an NCO, or a civilian serving in a grade equal to or higher than the ratee. Note: Management may appoint a rater serving in the same grade as the ratee without regard to date of rank.

MAR 12 2010**(2) Additional Rater**

(a) The second evaluator in the rating chain, after the rater, to endorse a performance report.

(b) For officers, the additional rater must be serving in a grade equal to or higher than the rater and in a grade higher than the ratee.

(c) A colonel may be the additional rater for a colonel.

(d) For health profession officers (AFSC 4XXX), the additional rater must be serving in a grade equal to or higher than the rater and ratee.

(e) For MSgt through CMSgt, the additional rater must be serving in a grade equal to or higher than the rater.

(3) Additional Reviewer/Senior Rater/Final Evaluator

(a) All senior raters must be the person holding the senior rater position designated by the Management Level (ML) for the ratee's organization. Personnel Accounting Symbol (PAS) Reports will not contain more than one general officer as an evaluator.

(b) When the final evaluator on the report is not a USAF officer or Department of the Air Force (DAF) civilian, an Air Force Advisor must review the report.

(c) For officers, the reviewer must be the ratee's senior rater and will be the final evaluator on the OPR. EXCEPTIONS: When the rater or additional rater is also the senior rater, the OPR will close at this level. Also, when a senior rater refers the report, the officer named in the referral memorandum becomes the final evaluator, unless he/she refers the report again.

(d) For lieutenant colonels and colonels, the reviewer must be the first general officer (includes a brigadier general select), or equivalent, in the rating chain who has been designated as a senior rater by the ML. NOTE: Upon the selection to brigadier general of an officer who is already the designated senior rater for the lieutenants through majors in an organization, the ML must realign their Senior Rater Identification Code (SRID) and re-designate the selectee as the senior rater for the lieutenant colonels of the organization.

(e) For lieutenants through majors, the reviewer must be the first colonel (or equivalent) in a wing commander (or equivalent) position who has been designated as a senior rater, as determined by the ML. Equivalent civilian grades are determined by MLs based on the responsibilities of that civilian position.

(f) Air Force evaluations fall into two primary categories for both Air Force Officer and Enlisted personnel.

(g) Annual – These reports are projected a year from the last report on file. A minimum of 120 days of supervision on the rater's part is required. It is possible for an annual

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report, which covers an entire year, to be generated with only 120 days of supervision by the rater. After an annual report has been generated and finalized, personnel will be projected for the next annual report one year from the closeout (end date) of the current annual report on file.

(h) Change of Rater (CRO) – These reports are generated any time prior to an annual report. Once again, a minimum of 120 days of supervision on the rater's part is required. After the CRO report has been generated and finalized, personnel will be projected for an annual report one year from the closeout of the CRO report on file.

(i) Retirement and Separations – For both Air Force Officer and Enlisted personnel, in cases where the ratee retires or separates, reports are “optional” and are at the rater's discretion.

(4) AF enlisted SNCO (E7 – E9) EPRs:

(a) Mandatory Eligibility requirements for SRID:

1. Meet time in grade requirement IAW AFI 36-2406.
2. Completion of Community College of the Air Force degree (any specialty).
3. Completion of Air Force SNCO Correspondence or In-residence Course.

c. Navy

(1) Reporting Senior Authority of Commanding Officers. A Commanding Officer may submit properly authorized FITREPs and EVALs on any individual, regardless of rank, who has reported to that Commanding Officer for permanent, temporary, or additional duty under competent written orders. For purposes of this instruction, a commanding officer is any person, military or civilian, who exercises command or direction of a commissioned or established Navy unit or activity; an administrative or task organization of such units or activities, which has been established by competent authority; or an equivalent unit, activity, or organization in another department or agency of the U.S. Federal government.

(2) Raters. EVALs on enlisted personnel E6 and below require the signatures of a rater, senior rater, and reporting senior. This ensures Navy's senior enlisted and junior officer supervisors are properly included in the enlisted evaluation process. Raters and senior raters are designated by the command. The rater should be a Navy Chief Petty Officer for E5 and E6 personnel whenever possible. If none is available within the command, the rater will be a military or civilian supervisor who is an E7 equivalent or higher. The senior rater may be omitted where the reporting senior is the rater's immediate supervisor. Typically, the senior rater is the division officer or department head. Raters do not sign FITREPs on officers and chief petty officers, but a similar system may be used for drafting FITREPs. For E4 and below personnel, the rater can be an E6.

(3) Evaluation Timelines

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(3) Evaluation Timelines

(a) The reporting period for Navy FITREPS/EVALS is indicated below:

COMMISSIONED OFFICERS		ENLISTED	
O-8, O-7, O-6	JUL	E-9	APR
O-5	AUG	E-8, E-7	SEP
O-4	OCT	E-6	NOV
O-3	JAN	E-5	MAR
O-1	MAY	E-3, E-2, E-1	JAN, JUL
W-4, W-3, W-2, W-1	MAR		
W-2, W-1	SEP		

(b) The reporting senior will ensure that the EVAL standards have been respected, and will determine the final distribution of promotion recommendations with the member's summary group. The completed report will then be prepared and signed by all members of the team.

(c) A summary letter must accompany each completed FITREP/EVAL. The summary letter will be generated if the report is done using the BUPERS application. NOTE: If the reports are produced manually, the summary letter will have to be produced on a pre-printed form manually.

(d) Copies of Fitness Reports. Distribution of final FITREPS/EVALS is as follows:

	GRADE	BUPERS	FSR	MEMBER	RS	COMMAND
O1-O6, W1-W4	X		X	X		
E7-E9	X	X	X	X		
E5-E6	X	X	X	X		
E1-E4		X	X	X		

(e) All completed reports must be mailed to BUPERS within 30 days of the ending date of the report. Mailing address for BUPERS is:

COMMANDER
 NAVY PERSONNEL COMMAND PERS 311
 5720 INTEGRITY DRIVE
 MILLINGTON TN 38055-3110

5. PROCEDURES

a. Army

(1) Army annual evaluation reports are due 12 months after the last report.

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(2) The J1 will generate and forward OER/NCOER administrative data to each directorate/command group approximately 60 days prior to the closing date of all normally scheduled evaluations. Each directorate/command group is responsible for ensuring these reports are completed in a timely and professional manner. Evaluations will be monitored weekly through J1 reporting procedures. NOTE: In order to generate up-to-date evaluations and rating schemes, J1 must be notified when personnel have changed positions within the different directorates/command group, when the rater has changed and/or when the senior rater has changed. Once a draft report has been generated, directorates will forward the draft to J1 for an initial administrative/procedural review. J1 will return the report to the directorate with corrections, suggestions, or further guidance if necessary for signature.

(3) All active and attached reserve (Officer/NCO) Army reports should be completed and returned to J1 NLT 7 days prior to the through date of the report.

b. Air Force

(1) The AFPDS will automatically generate EPR and OPR notices approximately 60 days prior to the closeout (end date) of an annual report. These notices contain all the information necessary to complete section one, rate identification data, for all OPRs and EPRs. If an Air Force member has been selected for reassignment, retirement, or separation, the AFPDS will also automatically generate EPR and OPR notices if a report is required based on the number of days supervision and the closeout of the last report on file. These notices will be forwarded to the directorate NLT 30 days prior to the through date.

(2) J1 will forward each EPR/OPR to each directorate/command group. Each directorate/command group is responsible for ensuring these reports are completed in a timely and professional manner. These reports will be monitored weekly through J1 reporting procedures. NOTE: In order to generate up-to-date shells and rating schemes, J1 must be notified when personnel have changed positions within the different directorates/command group, when the rater has changed and/or when the senior rater has changed.

(3) All active and attached reserve (Officer/NCO) Air Force reports should be completed and returned to J1 NLT 7 days prior to the through date of the report.

c. Navy

(1) The J1 will generate and forward FITREP administrative data to each directorate/command group approximately 60 days prior to the through date of the evaluations. Each directorate/command group is responsible for ensuring these reports are completed in a timely and professional manner. Evaluations will be monitored weekly through J1 reporting procedures. NOTE: In order to generate up-to-date evaluations and rating schemes, J1 must be notified when personnel have changed positions within the different directorates/command group, when the rater has changed and/or when the senior rater has changed. Once a draft report has been generated, directorates will forward the draft to J1 for an initial administrative/procedural review. J1 will return the report to the directorate with corrections, suggestions, or further guidance if necessary for signature.

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(2) All active and attached reserve (Officer/NCO) Navy FITREPS should be completed and returned to J1 NLT 7 days prior to the through date of the report.

d. Government Civilians. Every civilian employee has at least one key role in the performance management cycle and pay pool process. Below are definitions of the key roles and the responsibilities and tasks for each.

(1) Employees dialogue with rating officials to develop job objectives and identify associated Contributing Factors; identify and record their accomplishments and results; participate in required conversations; and understand the link between their performance expectations, conduct, and organization mission and goals (SC1940.4.6).

(2) Rating Officials are management officials, who are approved by the pay pool manager to link employees' job objectives to the organization's mission and goals; make meaningful distinctions in performance levels; appraise employees based on actual performance; conduct all required conversations; and recommend a rating of record (SC1940.4.5).

(3) Pay Pool Panel Members are a board of management officials who are usually in positions of line authority or in senior staff positions with resource oversight for the organizations, groups, or categories of employees comprising the pay pool. The primary function of the pay pool panel is to reconcile recommended ratings of record, share distribution, and payout distribution (SC1940.4.3, SC1940.11.1, and SC1940.11.2).

(4) Pay Pool Data Administrators review data in the Performance Appraisal Application (PAA) for completeness and currency, extract data from PAA as requested by the pay pool manager, generate compensation workbench (CWB) spreadsheets for use in the pay pools, update the CWB during the pay pool panel meetings, run reports in the Pay Pool Analysis Tool if needed, and provide data files for uploading back to the Defense Civilian Personnel Data System (DCPDS). In some pay pools, the pay pool advisor or pay pool manager assumes these responsibilities.

(5) Pay Pool Advisors provide guidance and support to the pay pool manager on all aspects of the process from establishing business rules to conducting effective pay pool deliberations. The pay pool advisor provides operational assistance to facilitate an effective pay pool process and make sure that the pay pool panel fairly and consistently distributes all the pay pool funds by the end of the Pay phase. In some pay pools, the pay pool manager assumes these responsibilities.

(6) Pay Pool Managers manage the pay pool, resolve discrepancies, ensure consistency and equity within the pay pool, and approve recommendations concerning employee ratings of record, share assignment, and payout distribution between base salary increases and bonuses in a manner consistent with DoD, DoD Component, and organization policies (SC1940.4.2 and SC1940.11.5).

(7) Performance Review Authority (PRA) provides oversight of several pay pools and addresses the consistency of performance management policies within a DoD Component, major

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command, field activity or other organization as determined by the DoD Component. PRA oversight responsibilities include application of DoD and DoD Component NSPS policies pertaining to the operation of pay pools, as well as post-decision analysis of rating and payout results (SC1940.4.1 and SC1940.11.6).

(8) Critical Dates

(a) 30 October – Employee’s objectives initiated and approved by Rating Official.

(b) 30 Jun – Employee’s Self Interim Assessment and Rating Official Interim Assessment completed and submitted.

(c) 30 Jun (if required) – Employee’s Self Mock Assessment and Rating Official Mock Assessment completed and submitted.

(d) Mid October (End of Cycle) – Employee’s End of Cycle Assessment and Rating Official End of Cycle Assessment completed and submitted.

(e) Mid November (End of Cycle) – Conduct pay pool panel reconciliation meetings; approve final ratings of record, share assignments, and payout distributions; provide PRA with final decisions; and communicate final decisions to rating officials.

(f) Mid December (End of Cycle) – Import and review information in Compensation Work Bench (CWB); review CWB data to ensure each employee’s information is complete and accurate; and export CWB rating and payout data and upload it into DCPDS.

6. RELEASABILITY. This Instruction is approved for public release and is available on the Internet from JTF CAPMED Web Site at <http://www.jtfcapmed.mil>.

7. EFFECTIVE DATE. All provisions of this Instruction are effective immediately.


J.M. MATECZUN
Vice Admiral, MC, U.S. Navy
Commander

Enclosures

1. DA Form 67-9-1a – Developmental Support Form
2. DA Form 67-9-1 – Officer Evaluation Report Support Form
3. DA Form 67-9 – Officer Evaluation Report
4. DA Form 2166-8 – NCO Evaluation Report
5. AF Form 910 – Enlisted Performance Report (AB thru TSgt)
6. AF Form 911 – Enlisted Performance Report (MSgt thru CMSgt)

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7. AF Form 707 – Officer Performance Report (Lt thru Col)
8. NAVPERS 1616/26 – Evaluation Report & Counseling Record (E1-E6)
9. NAVPERS 1616/27 – Evaluation & Counseling Record (E7-E9)
10. NAVPERS 1610/2 – Fitness Report & Counseling Record (E7-06)

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DEVELOPMENTAL SUPPORT FORM				FOR OFFICIAL USE ONLY (FOUO) Protected by Privacy Act of 1974.
For use of this form, see AR 623-105; the proponent agency is DCS, G-1.				
NAME OF RATED OFFICER (Last, First, MI)	SSN	GRADE	ORGANIZATION	
PART I - INSTRUCTIONS. Use of this form is mandatory for Captains, Lieutenants, CW2s and WO1s; optional for all other ranks.				
<u>Initial face-to-face (Part II and III)</u>		<u>Quarterly Follow-up Counselings (Part V- Reverse)</u>		
- Discuss duty description/major performance objectives from DA Form 67-9-1. - Discuss Army leader values, attributes and skills as related to future duty performance and professional development (Part II: Leader Character) - Complete Developmental Action Plan (Part III)- Record at least one developmental task for each leadership action that targets major performance objectives listed on DA Form 67-9-1. - Upon completion of the initial face-to-face counseling, date and initial Part IV (verification). Obtain senior rater's initials. Rated officer and rater retain file copy for use during later follow-up counselings.		- Discuss major performance objectives and progress made. Adjust as needed. - Discuss progress made on developmental tasks; update/modify tasks as needed to continue developmental process. - Rater summarize key points in appropriate block of Part V. - Rater and rated officer initial, date, and keep a file copy for use during later counselings. NOTE: Reference for Army Leadership Doctrine is FM 22-100.		
PART II CHARACTER. Disposition of the leader: combination of values, attributes, and skills affecting leader actions. (See FM 22-100)				
ARMY VALUES				
1. HONOR: Adherence to the Army's publicly declared code of values		5. RESPECT: Promotes dignity, consideration, fairness, & EO		
2. INTEGRITY: Possesses high personal moral standards; honest in word and deed		6. SELFLESS-SERVICE: Places Army priorities before self		
3. COURAGE: Manifests physical and moral bravery		7. DUTY: Fulfills professional, legal, and moral obligations		
4. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and the soldier				
ATTRIBUTES Fundamental qualities and characteristics	MENTAL Possesses desire, will, initiative, and discipline	PHYSICAL Maintains appropriate level of physical fitness and military bearing	EMOTIONAL Displays self-control; calm under pressure	
SKILLS (Competence) Skill development is part of self-development; prerequisite to action	CONCEPTUAL Demonstrates sound judgment, critical / creative thinking, moral reasoning	INTERPERSONAL Shows skill with people: coaching, teaching, counseling, motivating and empowering	TECHNICAL Possesses the necessary expertise to accomplish all tasks and functions	
TACTICAL Demonstrates proficiency in required professional knowledge, judgment, and warfighting				
PART III - DEVELOPMENTAL ACTION PLAN. Development tasks that target major performance objectives on the DA Form 67-9-1. (See FM 22-100)				
INFLUENCING: Communicating, Decision Making, Motivating				
COMMUNICATING. Articulates written and oral ideas/concepts clearly and concisely. Message received equals message sent. Displays effective listening skills.				
DECISION MAKING. Reaches sound, logical decisions based on analysis/synthesis of information, and uses sound judgment to allocate resources and select appropriate course(s) of action.				
MOTIVATING. Inspires, motivates, and guides others towards mission accomplishment. Sets the example by being in excellent physical / mental condition and consistently displaying proper military bearing.				
OPERATING: Planning, Executing, Assessing				
PLANNING. Uses critical and creative thinking to develop executable plans that are suitable, acceptable, and feasible.				
EXECUTING. Shows tactical and technical proficiency; meets mission standards; takes care of people/resources. Maximizes the use of available systems and technology. Performs well under physical and mental stress.				

ASSESSING. Uses after-action and evaluation tools to facilitate consistent improvement.

IMPROVING: Developing, Building, Learning

DEVELOPING. Teaches, trains, coaches and counsels subordinates increasing their knowledge, skills and confidence.

BUILDING. Develops effective, disciplined, cohesive, team built on bonds of mutual trust, respect, and confidence. Fosters ethical climate.

LEARNING. Actively seeks self-improvement (individual study, professional reading, etc.), and fosters a learning environment in the unit (IPRs, AARs, NCOPD, etc.)

PART IV - VERIFICATION: Rater initials _____ Rated officer initials _____ Date _____ Senior rater initials _____

PART V - DEVELOPMENTAL ASSESSMENT RECORD. Summary of key points made during follow-up counselings. Highlight progress and strengths observed as well as developmental needs across values, attributes, skills and actions.

1st Assessment Key Points

Rated officer initials _____ Rater initials _____ Date _____

2nd Assessment Key Points

Rated officer initials _____ Rater initials _____ Date _____

3rd Assessment Key Points

Rated officer initials _____ Rater initials _____ Date _____

OFFICER EVALUATION REPORT SUPPORT FORM

For use of this form, see AR 623-105; the proponent agency is ODCSPER

Read Privacy Act Statement on Reverse before Completing this form

PART I - RATED OFFICER IDENTIFICATION

NAME OF RATED OFFICER (Last, First, MI)	RANK	ORGANIZATION
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PART II - RATING CHAIN - YOUR RATING CHAIN FOR THE EVALUATION PERIOD IS:

RATER	NAME	RANK	POSITION
INTERMEDIATE RATER	NAME	RANK	POSITION
SENIOR RATER	NAME	RANK	POSITION

PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION

MANDATORY RATER / RATED OFFICER INITIAL FACE-TO-FACE COUNSELING ON DUTIES, RESPONSIBILITIES AND PERFORMANCE OBJECTIVES FOR THE CURRENT RATING PERIOD TOOK PLACE ON _____ (Date) Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____ (Review)

PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:

Dates _____ Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____ (Review) _____

PART IV - RATED OFFICER *(Complete a, b, and c below for this rating period)*

PRINCIPAL DUTY TITLE _____ POSITION AOC / BR _____

a. STATE YOUR SIGNIFICANT DUTIES AND RESPONSIBILITIES

b. INDICATE YOUR MAJOR PERFORMANCE OBJECTIVES

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c. LIST YOUR SIGNIFICANT CONTRIBUTIONS

SIGNATURE AND DATE

PART V - RATER AND/OR INTERMEDIATE RATER *(Review and comment on Part IVa, b, and c above).*
Insure remarks are consistent with your performance and potential evaluation on DA Form 67-9

d. RATER COMMENTS (Optional)

SIGNATURE AND DATE (Mandatory)

b. INTERMEDIATE RATER COMMENTS (Optional)

SIGNATURE AND DATE (Mandatory)

DATA REQUIRED BY THE PRIVACY ACT (U.S.C. 552a)

1. AUTHORITY: Sec 301 Title 5 USC; Sec 3012 Title 10

2. PURPOSE: DA Form 67-9, Officer Evaluation Report, serves as the primary source of information for officer personnel management decisions. DA Form 67-9-1, Officer Evaluation Support Form, serves as a guide for the rated officer's performance and development, enhances the accomplishment of the organization mission, and provides additional performance information to the rating chain. DA Form 67-9-1a, Junior Officer Developmental Support Form, serves as a common framework for Junior Officer Development and standardizes Junior Officer counseling.

3. ROUTINE USE: DA Form 67-9 will be maintained in the rated officer's Official Military Personnel File (OMPF) and Career Management Individual File (CMIF). A copy will be provided to the rated officer either directly or forwarded to the rated officer. DA Form 67-9-1 and DA Form 67-9-1a are for organizational use only and will be returned to the rated officer after review by the rating chain.

4. DISCLOSURE: Disclosure of the rated officer's SSN (Part I, DA Form 67-9) is voluntary. However, failure to verify the SSN may result in a delayed or erroneous processing of the officer's OER. Disclosure of the information in Part IV, DA Form 67-9-1 is voluntary. However, failure to provide the information requested will result in an evaluation of the rated officer without the benefits of that officer's comments. Should the rated officer use the Privacy Act as a basis not to provide the information requested in Part IV, the Support Form will contain the rated officer's statement to that effect and be forwarded through the rating chain in accordance with AR 623-105.

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+ OFFICER EVALUATION REPORT						FOR OFFICIAL USE ONLY (FOUO) SEE PRIVACY ACT STATEMENT IN AR 623-3 +			
PART I - ADMINISTRATIVE DATA									
a. NAME (Last, First, Middle Initial)			b. SSN		c. RANK	d. DATE OF RANK	e. BRANCH	DESIGNATED / PMOS (W/O) SPECIALTIES	
g. 1. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND					g.2. STATUS CODE		h. REASON FOR SUBMISSION		
i. PERIOD COVERED		j. RATED MONTHS	k. NONRATED CODES	l. NO. OF ENCL	m. RATED OFFICER'S APO EMAIL ADDRESS (.gov or .mil)		n. UIC	o. CMD CODE	p. PSB CODE
FROM (YYYYMMDD)		THRU (YYYYMMDD)							
PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VII and the admin data is correct)									
a. NAME OF RATER (Last, First MI)		SSN	RANK	POSITION		SIGNATURE	DATE (YYYYMMDD)		
b. NAME OF INTERMEDIATE RATER (Last, First, MI)		SSN	RANK	POSITION		SIGNATURE	DATE (YYYYMMDD)		
c. NAME OF SENIOR RATER (Last, First, MI)		SSN	RANK	POSITION		SIGNATURE	DATE (YYYYMMDD)		
SENIOR RATER'S ORGANIZATION			BRANCH	SENIOR RATER TELEPHONE NUMBER		E-MAIL ADDRESS (.gov or .mil)			
d. This is a referred report, do you wish to make comments?				e. SIGNATURE OF RATED OFFICER		DATE (YYYYMMDD)			
<input type="checkbox"/> No <input type="checkbox"/> Yes, comments are attached									
PART III - DUTY DESCRIPTION									
a. PRINCIPAL DUTY TITLE					b. POSITION AOC/BR				
c. SIGNIFICANT DUTIES AND RESPONSIBILITIES. REFER TO PART IVa, DA FORM 67-9-1.									
PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM (Rater)									
CHARACTER Disposition of the leader: combination of values, attributes, and skills affecting leader actions									
a. ARMY VALUES (Comments mandatory for all "NO" entries. Use PART Vb.)				Yes No		Yes No			
1. HONOR: Adherence to the Army's publicly declared code of values				<input type="checkbox"/>	<input type="checkbox"/>	5. RESPECT: Promotes dignity, consideration, fairness, & EO			
2. INTEGRITY: Possesses high personal moral standards; honest in word and deed				<input type="checkbox"/>	<input type="checkbox"/>	6. SELFLESS-SERVICE: Places Army priorities before self			
3. COURAGE: Manifests physical and moral bravery				<input type="checkbox"/>	<input type="checkbox"/>	7. DUTY: Fulfills professional, legal, and moral obligations			
4. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and the soldier				<input type="checkbox"/>	<input type="checkbox"/>				
b. LEADER ATTRIBUTES / SKILLS / ACTIONS: First, mark "YES" or "NO" for each block. Second, choose a total of six that best describe the rated officer. Select one from ATTRIBUTES, two from SKILLS (Competence), and three from ACTIONS (LEADERSHIP). Place an "X" in the appropriate numbered box with optional comments in PART Vb. Comments are mandatory in Part Vb for all "No" entries.									
b.1. ATTRIBUTES (Select 1)		1. MENTAL <input type="checkbox"/> YES <input type="checkbox"/> NO		2. PHYSICAL <input type="checkbox"/> YES <input type="checkbox"/> NO		3. EMOTIONAL <input type="checkbox"/> YES <input type="checkbox"/> NO			
Fundamental qualities and characteristics		Possesses desire, will, initiative, and discipline		Maintains appropriate level of physical fitness and military bearing		Displays self-control; calm under pressure			
b.2. SKILLS (Competence) (Select 2)		1. CONCEPTUAL <input type="checkbox"/> YES <input type="checkbox"/> NO		2. INTERPERSONAL <input type="checkbox"/> YES <input type="checkbox"/> NO		3. TECHNICAL <input type="checkbox"/> YES <input type="checkbox"/> NO			
Skill development is part of self-development; prerequisite to action		Demonstrates sound judgment, critical/creative thinking, moral reasoning		Shows skill with people: coaching, teaching, counseling, motivating and empowering		Possesses the necessary expertise to accomplish all tasks and functions			
b.3. ACTIONS (LEADERSHIP) (Select 3) Major activities leaders perform: influencing, operating, and improving		4. TACTICAL <input type="checkbox"/> YES <input type="checkbox"/> NO							
INFLUENCING		1. COMMUNICATING <input type="checkbox"/> YES <input type="checkbox"/> NO		2. DECISION-MAKING <input type="checkbox"/> YES <input type="checkbox"/> NO		3. MOTIVATING <input type="checkbox"/> YES <input type="checkbox"/> NO			
Method of reaching goals while operating / improving		Displays good oral, written, and listening skills for individuals / groups		Employs sound judgment, logical reasoning and uses resources wisely		Inspires, motivates, and guides others toward mission accomplishment			
OPERATING		4. PLANNING <input type="checkbox"/> YES <input type="checkbox"/> NO		5. EXECUTING <input type="checkbox"/> YES <input type="checkbox"/> NO		6. ASSESSING <input type="checkbox"/> YES <input type="checkbox"/> NO			
Short-term mission accomplishment		Develops detailed, executable plans that are feasible, acceptable, and suitable		Shows tactical proficiency, meets mission standards, and takes care of people/resources		Uses after-action and evaluation tools to facilitate consistent improvement			
IMPROVING		7. DEVELOPING <input type="checkbox"/> YES <input type="checkbox"/> NO		8. BUILDING <input type="checkbox"/> YES <input type="checkbox"/> NO		9. LEARNING <input type="checkbox"/> YES <input type="checkbox"/> NO			
Long-term improvement in the Army, its people and organizations		Invests adequate time and effort to develop individual subordinates as leaders		Spends time and resources improving teams, groups and units; fosters ethical climate		Seeks self-improvement and organizational growth; envisioning, adapting and leading change			
c. APFT:		DATE:		HEIGHT:		WEIGHT:			
d. OFFICER DEVELOPMENT - MANDATORY YES OR NO ENTRY FOR RATERS OF CPTs, LTs, CW2s, AND WO1s.									
WERE DEVELOPMENTAL TASKS RECORDED ON DA FORM 67-9-1a AND QUARTERLY FOLLOW-UP COUNSELINGS CONDUCTED?									
<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> NA									

NAME _____ SSN _____ PERIOD COVERED _____

PART V - PERFORMANCE AND POTENTIAL EVALUATION (Rater)

a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING THE RATING PERIOD AND HIS/HER POTENTIAL FOR PROMOTION

- OUTSTANDING PERFORMANCE, MUST PROMOTE**
 SATISFACTORY PERFORMANCE, PROMOTE
 UNSATISFACTORY PERFORMANCE, DO NOT PROMOTE
 OTHER (Explain)

b. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE, REFER TO PART III, DA FORM 67-9 AND PART IVa, b, AND PART Vb, DA FORM 67-9-1.

c. COMMENT ON POTENTIAL FOR PROMOTION.

d. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

PART VI - INTERMEDIATE RATER

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

- BEST QUALIFIED**
 FULLY QUALIFIED
 DO NOT PROMOTE
 OTHER (Explain below)

I currently senior rate _____ officer(s) in this grade
 A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review
 YES NO (Explain in c)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

- ABOVE CENTER OF MASS**
 (Less than 50% in top box; Center of Mass if 50% or more in top box)

 CENTER OF MASS

 BELOW CENTER OF MASS
RETAIN

 BELOW CENTER OF MASS
DO NOT RETAIN

c. COMMENT ON PERFORMANCE/POTENTIAL

d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

NCO EVALUATION REPORT

For Use of this form, see AR 623-205; the proponent agency is ODCSPER

SEE PRIVACY ACT STATEMENT
IN AR 623-205, APPENDIX C

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial)		b. SSN	c. RANK	d. DATE OF RANK	e. PMOSC
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND				g. REASON FOR SUBMISSION	
h. PERIOD COVERED		i. RATED MONTHS	j. NON-RATED CODES	k. NO OF ENCL	
FROM	THRU			l. RATED NCO COPY <i>Check one and Date</i>	
YYYY MM	YYYY MM			1. Given to NCO	Date
				m. PSC Initials	n. CMD CODE
					OT
					o. PSB CODE

PART II - AUTHENTICATION

a. NAME OF RATER (Last, First, Middle Initial)	SSN	SIGNATURE
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE
b. NAME OF SENIOR RATER (Last, First, Middle Initial)	SSN	SIGNATURE
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE
c. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating officials in Part II, the duty description to include the counseling dates in Part III, and the APFT and height/weight entries in Part IVc are correct. I have seen the report completed through Part V, except Parts II d and IIa. I am aware of the appeals process of AR 623-205.		SIGNATURE
		DATE
d. NAME OF REVIEWER (Last, First, Middle Initial)	SSN	SIGNATURE
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT		DATE
e. <input type="checkbox"/> CONCUR WITH RATER AND SENIOR RATER EVALUATIONS <input type="checkbox"/> NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL (See attached comments)		

PART III - DUTY DESCRIPTION (Rater)

a. PRINCIPAL DUTY TITLE	b. DUTY MOSC
c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, equipment, facilities and dollars)	
d. AREAS OF SPECIAL EMPHASIS	
e. APPOINTED DUTIES	
f. COUNSELING DATES	INITIAL
	LATER
	LATER
	LATER

PART IV - ARMY VALUES/ATTRIBUTES/SKILLS/ACTIONS (Rater)

a. ARMY VALUES. Check either "YES" or "NO". (Comments are mandatory for "No" entries; optional for "Yes" entries.)		YES	NO
V A L U Honor Integrity Personal Courage S	1. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and other soldiers.		
	2. DUTY: Fulfills their obligations		
	3. RESPECT/EO/EEO: Treats people as they should be treated.		
	4. SELFLESS-SERVICE: Puts the welfare of the nation, the Army, and subordinates before their own.		
	5. HONOR: Lives up to all the Army values.		
	6. INTEGRITY: Does what is right -- legally and morally.		
	7. PERSONAL COURAGE: Faces fear, danger, or adversity (physical and moral).		
Bullet comments			

RATED NCO'S NAME (Last, First, Middle Initial)	SSN	THRU DATE
--	-----	-----------

PART IV (Rater) - VALUES/NCO RESPONSIBILITIES Specific Bullet examples of "EXCELLENCE" or "NEEDS IMPROVEMENT" are mandatory. Specific Bullet examples of "SUCCESS" are optional.

<p>b. COMPETENCE</p> <ul style="list-style-type: none"> o Duty proficiency; MOS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment o Seeking self-improvement; always learning o Accomplishing tasks to the fullest capacity; committed to excellence <p> EXCELLENCE SUCCESS NEEDS IMPROVEMENT <i>(Exceeds Std)</i> <i>(Meets std)</i> <i>(Some)</i> <i>(Much)</i> </p> <p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>					
<p>c. PHYSICAL FITNESS & MILITARY BEARING</p> <ul style="list-style-type: none"> o Mental and physical toughness o Endurance and stamina to go the distance o Displaying confidence and enthusiasm; looks like a soldier <p> EXCELLENCE SUCCESS NEEDS IMPROVEMENT <i>(Exceeds Std)</i> <i>(Meets std)</i> <i>(Some)</i> <i>(Much)</i> </p> <p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:60%;">APFT</td> <td style="width:40%;">HEIGHT/WEIGHT</td> </tr> <tr> <td style="height: 40px;"></td> <td></td> </tr> </table>	APFT	HEIGHT/WEIGHT		
APFT	HEIGHT/WEIGHT				
<p>d. LEADERSHIP</p> <ul style="list-style-type: none"> o Mission first o Genuine concern for the soldiers o Instilling the spirit to achieve and win o Setting the example; Be, Know, Do <p> EXCELLENCE SUCCESS NEEDS IMPROVEMENT <i>(Exceeds Std)</i> <i>(Meets std)</i> <i>(Some)</i> <i>(Much)</i> </p> <p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>					
<p>e. TRAINING</p> <ul style="list-style-type: none"> o Individual and team o Mission focused; performance oriented o Teaching soldiers how; common tasks, duty-related skills o Sharing knowledge and experience to fight, survive and win <p> EXCELLENCE SUCCESS NEEDS IMPROVEMENT <i>(Exceeds Std)</i> <i>(Meets std)</i> <i>(Some)</i> <i>(Much)</i> </p> <p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>					
<p>f. RESPONSIBILITY & ACCOUNTABILITY</p> <ul style="list-style-type: none"> o Care and Maintenance of equipment/facilities o Soldier and equipment safety o Conservation of supplies and funds o Encouraging soldiers to learn and grow o Responsible for good, bad, right & wrong <p> EXCELLENCE SUCCESS NEEDS IMPROVEMENT <i>(Exceeds Std)</i> <i>(Meets std)</i> <i>(Some)</i> <i>(Much)</i> </p> <p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>					

PART V - OVERALL PERFORMANCE AND POTENTIAL

<p>a. RATER. Overall potential for promotion and/or service in positions of greater responsibility.</p> <p> AMONG THE BEST FULLY CAPABLE MARGINAL </p> <p> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>	<p>e. SENIOR RATER BULLET COMMENTS</p>
<p>b. RATER. List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade.</p> <p>_____</p> <p>_____</p> <p>_____</p>	

<p>c. SENIOR RATER. Overall performance</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="width: 15px; height: 15px; background-color: black;"></td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">Successful</td> <td></td> <td></td> <td style="text-align: center;">Fair</td> <td style="text-align: center;">Poor</td> </tr> </table>						1	2	3	4	5	Successful			Fair	Poor	<p>d. SENIOR RATER. Overall potential for promotion and/or service in positions of greater responsibility.</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="width: 15px; height: 15px; background-color: black;"></td> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;">Superior</td> <td></td> <td></td> <td style="text-align: center;">Fair</td> <td style="text-align: center;">Poor</td> </tr> </table>						1	2	3	4	5	Superior			Fair	Poor
1	2	3	4	5																											
Successful			Fair	Poor																											
1	2	3	4	5																											
Superior			Fair	Poor																											

ENLISTED PERFORMANCE REPORT (AB thru TSgt)

I. RATEE IDENTIFICATION DATA (Refer to AFI 36-2406 for instructions on completing this form)

1. NAME (Last, First, Middle Initial)	2. SSN	3. GRADE	4. DAFSC
5. ORGANIZATION, COMMAND, LOCATION, AND COMPONENT		6. PAS CODE	7. SRID
8. PERIOD OF REPORT From: _____ Thru: _____		9. NO. DAYS SUPERVISION	10. REASON FOR REPORT

II. JOB DESCRIPTION

1. DUTY TITLE	2. SIGNIFICANT ADDITIONAL DUTY(S)
3. KEY DUTIES, TASKS, AND RESPONSIBILITIES (Limit text to 4 lines)	

III. PERFORMANCE ASSESSMENT

1. PRIMARY/ADDITIONAL DUTIES (For SSgt/TSgt also consider Supervisory, Leadership and Technical Abilities)

Consider Adapting, Learning, Quality, Timeliness, Professional Growth and Communication Skills (Limit text to 4 lines)

Does Not Meet
 Meets
 Above Average
 Clearly Exceeds

2. STANDARDS, CONDUCT, CHARACTER & MILITARY BEARING (For SSgt/TSgt also consider Enforcement of Standards and Customs & Courtesies)

Consider Dress & Appearance, Personal/Professional Conduct On/Off Duty (Limit text to 2 lines)

Does Not Meet
 Meets
 Above Average
 Clearly Exceeds

3. FITNESS (Maintains Air Force Physical Fitness Standards) (For referrals, limit text to 1 line)

Does Not Meet
 Meets
 Exempt

4. TRAINING REQUIREMENTS (For SSgt/TSgt also consider PME, Off-duty Education, Technical Growth, Upgrade Training)

Consider Upgrade, Ancillary, OJT and Readiness (Limit text to 2 lines)

Does Not Meet
 Meets
 Above Average
 Clearly Exceeds

5. TEAMWORK/FOLLOWERSHIP (For SSgt/TSgt also consider Leadership, Team Accomplishments, Recognition/Reward Others)

Consider Team Building, Support of Team, Followership (Limit text to 2 lines)

Does Not Meet
 Meets
 Above Average
 Clearly Exceeds

6. OTHER COMMENTS

Consider Promotion, Future Duty/Assignment/Education Recommendations and Safety, Security & Human Relations (Limit text to 2 lines)

7. RATER INFORMATION

NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION	DUTY TITLE		DATE
	SSN	SIGNATURE	

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V. OVERALL PERFORMANCE ASSESSMENT Overall Performance During Reporting Period			RATEE NAME:		
ASSESSMENT	POOR (1)	NEEDS IMPROVEMENT (2)	AVERAGE (3)	ABOVE AVERAGE (4)	TRULY AMONG THE BEST (5)
RATER'S ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADDITIONAL RATER'S ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last feedback was performed on: _____ If feedback was not accomplished in accordance with AFI 36-2406, state the reason.					
VI. ADDITIONAL RATER'S COMMENTS (Limit text to 3 lines)			<input type="checkbox"/> CONCUR	<input type="checkbox"/> NON-CONCUR	
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
VII. FUNCTIONAL EXAMINER/AIR FORCE ADVISOR (Indicate applicable review by marking the appropriate box.)			<input type="checkbox"/> FUNCTIONAL EXAMINER		<input type="checkbox"/> AIR FORCE ADVISOR
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
VIII. UNIT COMMANDER/CIVILIAN DIRECTOR/OTHER AUTHORIZED REVIEWER			<input type="checkbox"/> CONCUR		<input type="checkbox"/> NON-CONCUR
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
IX. RATEE'S ACKNOWLEDGEMENT					
I understand my signature does not constitute agreement or disagreement. I acknowledge all required feedback was accomplished during the reporting period and upon receipt of this report.					
<input type="checkbox"/> Yes <input type="checkbox"/> No					
SIGNATURE				DATE	
INSTRUCTIONS					
Complete this report IAW AFI 36-2406. Reports written by Colonels or civilians (GS-15 or higher, or Supervisory Pay Band 3), do not require an additional rater; however, endorsement by the rater's rater is permitted unless the report is written by a senior rater or the Chief Master Sergeant of the Air Force. When the rater's rater is not at least a MSgt or civilian (GS-07 or higher, or Supervisory Pay Band 1), the additional rater is the next official in the rating chain meeting grade requirements. An overall rating of 2 or negative comments require the EPR to be referred IAW AFI 36-2406. Rationale for any additional evaluator nonconcurring with an overall rating must be included. Section VIII Reviewer nonconurrence must be included on an AF Form 77, Letter of Evaluation. If ratee is deployed, provide copy and feedback via e-mail/telecon.					
PRIVACY ACT STATEMENT					
AUTHORITY: Title 10 United States Code, Section 8013 and Executive Order 9397, 22 November 1943.					
PURPOSE: Information is needed for verification of the individual's name and Social Security Number (SSN) as captured on the form at the time of rating.					
ROUTINE USES: May specifically be disclosed outside the DoD as a routine use pursuant to 5 U.S.C. 552a(b)(3).					
DISCLOSURE: Disclosure is mandatory; SSN is used for positive identification.					

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ENLISTED PERFORMANCE REPORT (MSgt thru CMSgt)			
I. RATEE IDENTIFICATION DATA (Refer to AFI 36-2406 for instructions on completing this form)			
1. NAME (Last, First, Middle Initial)	2. SSN	3. GRADE	4. DAFSC
5. ORGANIZATION, COMMAND, LOCATION, AND COMPONENT		6. PAS CODE	7. SRID
8. PERIOD OF REPORT From: _____ Thru: _____		9. NO. DAYS SUPERVISION	10. REASON FOR REPORT
II. JOB DESCRIPTION			
1. DUTY TITLE		2. SIGNIFICANT ADDITIONAL DUTY(S)	
3. KEY DUTIES, TASKS, AND RESPONSIBILITIES (Limit text to 4 lines)			
III. PERFORMANCE ASSESSMENT			
1. PRIMARY DUTIES			
Consider Quality, Quantity, Timeliness, Technical Knowledge, Leading, Managing and Supervising (Limit text to 4 lines)			
<input type="checkbox"/> Does Not Meet <input type="checkbox"/> Meets <input type="checkbox"/> Above Average <input type="checkbox"/> Clearly Exceeds			
2. STANDARDS: ENFORCEMENT AND PERSONAL ADHERENCE, CONDUCT, CHARACTER, MILITARY BEARING & CUSTOMS AND COURTESIES			
Consider Dress & Appearance, Personal/Professional Conduct On/Off Duty (Limit text to 2 lines)			
<input type="checkbox"/> Does Not Meet <input type="checkbox"/> Meets <input type="checkbox"/> Above Average <input type="checkbox"/> Clearly Exceeds			
3. FITNESS (Maintains Air Force Physical Fitness Standards) (For referrals, limit text to 1 line)			
<input type="checkbox"/> Does Not Meet <input type="checkbox"/> Meets <input type="checkbox"/> Exempt			
4. RESOURCE MANAGEMENT AND DECISION MAKING			
Consider Efficiency, Judgment, Setting and Meeting Goals (Limit text to 2 lines)			
<input type="checkbox"/> Does Not Meet <input type="checkbox"/> Meets <input type="checkbox"/> Above Average <input type="checkbox"/> Clearly Exceeds			
5. TRAINING, EDUCATION, OFF-DUTY EDUCATION, PME, PROFESSIONAL ENHANCEMENT AND COMMUNICATION			
Consider Providing, Supporting and Personal Growth (Limit text to 2 lines)			
<input type="checkbox"/> Does Not Meet <input type="checkbox"/> Meets <input type="checkbox"/> Above Average <input type="checkbox"/> Clearly Exceeds			
6. LEADERSHIP/TEAM BUILDING/FOLLOWERSHIP/MENTORSHIP			
Consider Team Accomplishments, Leveraging Personal Experiences and Community Support, Recognition/Reward for Others (Limit text to 2 lines)			
<input type="checkbox"/> Does Not Meet <input type="checkbox"/> Meets <input type="checkbox"/> Above Average <input type="checkbox"/> Clearly Exceeds			
7. OTHER COMMENTS			
Consider Promotion, Future Duty/Assignment/Education Recommendations, Safety, Security & Human Relations (Limit text to 2 lines)			
IV. RATER INFORMATION			
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION		DUTY TITLE	DATE
		SSN	SIGNATURE

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V. OVERALL PERFORMANCE ASSESSMENT Overall Performance During Reporting Period			RATEE NAME:		
ASSESSMENT	POOR (1)	NEEDS IMPROVEMENT (2)	AVERAGE (3)	ABOVE AVERAGE (4)	TRULY AMONG THE BEST (5)
RATER'S ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADDITIONAL RATER'S ASSESSMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last feedback was performed on: _____ If feedback was not accomplished in accordance with AFI 36-2406, state the reason.					
VI. ADDITIONAL RATER'S COMMENTS (Limit text to 3 lines)			<input type="checkbox"/> CONCUR		<input type="checkbox"/> NON-CONCUR
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
VII. REVIEWER'S COMMENTS (Limit text to 3 lines)			<input type="checkbox"/> CONCUR		<input type="checkbox"/> NON-CONCUR
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
VIII. FINAL EVALUATORS POSITION			IX. TIME-IN-GRADE ELIGIBLE		
<input type="checkbox"/> SENIOR RATER <input type="checkbox"/> SENIOR RATER'S DEPUTY <input type="checkbox"/> INTERMEDIATE LEVEL <input type="checkbox"/> LOWER LEVEL			N/A for CMSgt or CMSgt Selectee <input type="checkbox"/> N/A <input type="checkbox"/> YES <input type="checkbox"/> NO		
X. FUNCTIONAL EXAMINER/AIR FORCE ADVISOR (Indicate applicable review by marking the appropriate box)			<input type="checkbox"/> FUNCTIONAL EXAMINER <input type="checkbox"/> AIR FORCE ADVISOR		
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
XI. UNIT COMMANDER/CIVILIAN DIRECTOR/OTHER AUTHORIZED REVIEWER			<input type="checkbox"/> CONCUR		<input type="checkbox"/> NON-CONCUR
NAME, GRADE, BR OF SVC, ORGN, COMMAND AND LOCATION			DUTY TITLE		DATE
			SSN	SIGNATURE	
XII. RATEE'S ACKNOWLEDGEMENT					
I understand my signature does not constitute agreement or disagreement. I acknowledge all required feedback was accomplished during the reporting period and upon receipt of this report. <input type="checkbox"/> Yes <input type="checkbox"/> No					
SIGNATURE				DATE	
PRIVACY ACT STATEMENT					
AUTHORITY: Title 10, United States Code, Section 8013 and Executive Order 9397, 22 November 1943. PURPOSE: Information is needed for verification of the individual's name and Social Security Number (SSN) as captured on the form at the time of the rating. ROUTINE USES: May specifically be disclosed outside the DoD as a routine use pursuant to 5 U.S.C. 552a(b)(3). DISCLOSURE: Disclosure is mandatory; SSN is used for positive identification.					

MAR 12 2010

OFFICER PERFORMANCE REPORT (Lt thru Col)

I. RATEE IDENTIFICATION DATA (Read AFI 36-2406 carefully before filling in any item)					
1. NAME (Last, First, Middle Initial)	2. SSN	3. GRADE	4. DAFSC	5. REASON FOR REPORT	6. PAS CODE
7. ORGANIZATION, COMMAND, LOCATION, AND COMPONENT			8. PERIOD OF REPORT THRU		9. NO. DAYS SUPV.
II. JOB DESCRIPTION (Limit text to 4 lines) DUTY TITLE					10. SRID
III. PERFORMANCE FACTORS					
Job Knowledge, Leadership Skills, Professional Qualities, Organizational Skills, Judgment and Decisions, Communication Skills, and Physical Fitness (see reverse if marked Does Not Meet Standards)			DOES NOT MEET STANDARDS <input type="checkbox"/>	MEETS STANDARDS <input type="checkbox"/>	FITNESS EXEMPTION <input type="checkbox"/>
IV. RATER OVERALL ASSESSMENT (Limit text to 6 lines)					
Last performance feedback was accomplished on: _____ (IAW AFI 36-2406) (If not accomplished, state the reason)					
NAME, GRADE, BR OF SVC, ORGN, COMMAND & LOCATION		DUTY TITLE			DATE
		SSN	SIGNATURE		
V. ADDITIONAL RATER OVERALL ASSESSMENT (Limit text to 4 lines)				<input type="checkbox"/> CONCUR	<input type="checkbox"/> NON-CONCUR
NAME, GRADE, BR OF SVC, ORGN, COMMAND & LOCATION		DUTY TITLE			DATE
		SSN	SIGNATURE		
VI. REVIEWER (If required, limit text to 4 lines)				<input type="checkbox"/> CONCUR	<input type="checkbox"/> NON-CONCUR
NAME, GRADE, BR OF SVC, ORGN, COMMAND & LOCATION		DUTY TITLE			DATE
		SSN	SIGNATURE		
VII. FUNCTIONAL EXAMINER/AIR FORCE ADVISOR (Indicate applicable review by marking the appropriate box)				<input type="checkbox"/> FUNCTIONAL EXAMINER	<input type="checkbox"/> AIR FORCE ADVISOR
NAME, GRADE, BR OF SVC, ORGN, COMMAND & LOCATION		DUTY TITLE			DATE
		SSN	SIGNATURE		
VIII. RATEE'S ACKNOWLEDGMENT					
I understand my signature does not constitute agreement or disagreement. I acknowledge all required feedback was accomplished during the reporting period and upon receipt of this report.			Yes <input type="checkbox"/> No <input type="checkbox"/>	SIGNATURE	DATE

RATEE NAME:		
IX. PERFORMANCE FACTORS (If Section III is marked Does Not Meet Standards, fill in applicable block[s])		DOES NOT MEET STANDARDS
1. Job Knowledge. Has knowledge required to perform duties effectively. Strives to improve knowledge. Applies knowledge to handle non-routine situations.		<input type="checkbox"/>
2. Leadership Skills. Sets and enforces standards. Works well with others. Fosters teamwork. Displays initiative. Self-confident. Motivates subordinates. Has respect and confidence of subordinates. Fair and consistent in evaluation of subordinates.		<input type="checkbox"/>
3. Professional Qualities. Exhibits loyalty, discipline, dedication, integrity, honesty, and officership. Adheres to Air Force standards. Accepts personal responsibility. Is fair and objective.		<input type="checkbox"/>
4. Organizational Skills. Plans, coordinates, schedules and uses resources effectively. Meets suspenses. Schedules work for self and others equitably and effectively. Anticipates and solves problems.		<input type="checkbox"/>
5. Judgment and Decisions. Makes timely and accurate decisions. Emphasizes logic in decision making. Retains composure in stressful situations. Recognizes opportunities. Adheres to safety and occupational health requirements. Acts to take advantage of opportunities.		<input type="checkbox"/>
6. Communication Skills. Listens, speaks, and writes effectively.		<input type="checkbox"/>
7. Physical Fitness. Maintains Air Force physical fitness standards.		<input type="checkbox"/>
X. REMARKS (use this section to spell out acronyms from the front)		
XI. REFERRAL REPORT (Complete only if report contains referral comments or the overall standards block is marked as does not meet standards)		
I am referring this OPR to you according to AFI 36-2406, para 3.9. It contains comment(s)/rating(s) that make(s) the report a referral as defined in AFI 36-2406, para. 3.9. Specifically,		
Acknowledge receipt by signing and dating below. Your signature merely acknowledges that a referral report has been rendered; it does not imply acceptance of or agreement with the ratings or comments on the report. Once signed, you are entitled to a copy of this memo. You may submit rebuttal comments. Send your written comments to:		
not later than 10 calendar days (30 for non-EAD members) from your date below. If you need additional time, you may request an extension from the individual named above. You may submit attachments (limit to 10 pages), but they must directly relate to the reason this report was referred. Pertinent attachments not maintained elsewhere will remain attached to the report for file in your personnel record. Copies of previous reports, etc. submitted as attachments will be removed from your rebuttal package prior to filing since these documents are already filed in your records. Your rebuttal comments/attachments may not contain any reflection on the character, conduct, integrity, or motives of the evaluator unless you can fully substantiate and document them. Contact the MPF career enhancement section, or the AF Contact Center if you require any assistance in preparing your reply to the referral report. It is important for you to be aware that receiving a referral report may affect your eligibility for other personnel related actions (e.g. assignments, promotions, etc.). You may consult your commander and/or MPF or Air Force Contact Center if you desire more information on this subject. If you believe this report is inaccurate, unjust, or unfairly prejudicial to your career, you may apply for a review of the report under AFI 36-2401, Correction of Officer and Enlisted Evaluation Reports, once the report becomes a matter of record as defined in AFI 36-2406, Attachment 1.		
NAME, GRADE, BR OF SVC OF REFERRING EVALUATOR	DUTY TITLE	DATE
	SIGNATURE	
SIGNATURE OF RATEE		DATE
INSTRUCTIONS		
<p>ALL: Recommendations must be based on performance and the potential based on that performance. Promotion recommendations are prohibited. Do not comment on completion of or enrollment in Developmental Education, advanced education, previous or anticipated promotion recommendations on AF Form 709, OPR endorsement levels, family activities, marital status, race, sex, ethnic origin, age, or religion. Evaluators enter only the last four numbers of SSN.</p> <p>RATER: Focus your evaluation in Section IV on what the officer did, how well he or she did it, and how the officer contributed to mission accomplishment. Write in concise "bullet" format. Your comments in Section IV may include recommendations for assignment. Provide a copy of the report to the ratee prior to the report becoming a matter of record and provide follow-up feedback to let the ratee know how their performance resulted in this final product.</p> <p>ADDITIONAL RATER: Carefully review the rater's evaluation to ensure it is accurate, unbiased and uninflated. If you disagree, you may ask the rater to review his or her evaluation. You may not direct a change in the evaluation. If you still disagree with the rater, mark "NON-CONCUR" and explain. You may include recommendations for assignment.</p> <p>REVIEWER: Carefully review the rater's and additional rater's ratings and comments. If their evaluations are accurate, unbiased and uninflated, mark "CONCUR" and sign the form. If you disagree with previous evaluators, you may ask them to review their evaluations. You may not direct them to change their appraisals. If you still disagree with the additional rater, mark "NON-CONCUR" and explain in Section VI. Do not use "NON-CONCUR" simply to provide comments on the report.</p> <p>RATEE: Your signature is merely an acknowledgement of receipt of this report. It does not constitute concurrence. If you disagree with the content, you may file an evaluation appeal through the Evaluation Reports Appeals Board IAW AFI 26-2401 (Correcting Officer and Enlisted Evaluation Reports), or through the Air Force Board for Correction of Military Records IAW AFI 36-2603 (Air Force Board for Correction of Military Records) and AFPAM 36-2607 (Applicants' Guide to the Air Force Board for Correction of Military Records (AFBCMR)).</p>		
PRIVACY ACT STATEMENT		
<p>AUTHORITY: Title 10 United States Code, Section 8013 and Secretary of the Air Force and Executive Order 9397, 22 November 1943.</p> <p>PURPOSE: Information is needed for verification of the individual's name and Social Security Number (SSN) as captured on the form at the time of rating.</p> <p>ROUTINE USES: None. RATIONALE: This information will not be disclosed outside DoD channels.</p> <p>DISCLOSURE: Disclosure is mandatory; SSN is used for positive identification.</p>		

MAR 1 2 2010

EVALUATION REPORT & COUNSELING RECORD (E1 - E6)

RCS BUPERS1610.-1

1. Name (Last, First MI Suffix)				2. Rate		3. Desig		4. SSN	
5. ACT <input type="checkbox"/>		TAR <input type="checkbox"/>		INACT <input type="checkbox"/>		AT/ADSW/265 <input type="checkbox"/>		6. UIC	
7. Ship/Station				8. Promotion Status		9. Date Reported			
Occasion for Report				Period of Report					
10. Periodic <input type="checkbox"/>		11. Detachment of Individual <input type="checkbox"/>		12. Promotion/Frocking <input type="checkbox"/>		13. Special <input type="checkbox"/>		14. From: 15. To:	
16. Not Observed Report <input type="checkbox"/>		17. Regular <input type="checkbox"/>		18. Concurrent <input type="checkbox"/>		20. Physical Readiness		21. Billet Subcategory (if any)	
22. Reporting Senior (Last, FI MI)			23. Grade		24. Desig		25. Title		26. UIC
27. SSN									
28. Command employment and command achievements.									
29. Primary/Collateral/Watchstanding duties. (Enter primary duty abbreviation in box.)									
For Mid-term Counseling Use. (When completing EVAL, enter 30 and 31 from counseling worksheet, and sign 32.)				30. Date Counseled		31. Counselor		32. Signature of Individual Counseled	
PERFORMANCE TRAITS: 1.0 - Below standards/not progressing or UNSAT in any one standard; 2.0 - Does not yet meet all 3.0 standards; 3.0 - Meets all 3.0 standards; 4.0 - Exceeds most 3.0 standards; 5.0 - Meets overall criteria and most of the specific standards for 5.0. Standards are not all inclusive.									
PERFORMANCE TRAITS	1.0* Below Standards		2.0 Pro- gressing	3.0 Meets Standards		4.0 Above Standards	5.0 Greatly Exceeds Standards		
33. PROFESSIONAL KNOWLEDGE: Technical knowledge and practical application.	- Marginal knowledge of rating, specialty or job. - Unable to apply knowledge to solve routine problems. - Fails to meet advancement/PQS requirements.			- Strong working knowledge of rating, specialty and job. - Reliably applies knowledge to accomplish tasks. - Meets advancement/PQS requirements on time.			- Recognized expert, sought out by all for technical knowledge. - Uses knowledge to solve complex technical problems. - Meets advancement/PQS requirements early/with distinction.		
NOB <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		
34. QUALITY OF WORK: Standard of work; value of end product.	- Needs excessive supervision. - Product frequently needs rework. - Wasteful of resources.			- Needs little supervision. - Produces quality work. Few errors and resulting rework. - Uses resources efficiently.			- Needs no supervision. - Always produces exceptional work. No rework required. - Maximizes resources.		
NOB <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		
35. COMMAND OR ORGANIZATIONAL CLIMATE/EQUAL OPPORTUNITY: Contributing to growth and development, human worth, community.	- Actions counter to Navy's retention/reenlistment goals. - Uninvolved with mentoring or professional development of subordinates. - Actions counter to good order and discipline and negatively affect Command/Organizational climate. - Demonstrates exclusionary behavior. Fails to value differences from cultural diversity.			- Positive leadership supports Navy's increased retention goals. Active in decreasing attrition. - Actions adequately encourage/support subordinates' personal/professional growth. - Demonstrates appreciation for contributions of Navy personnel. Positive influence on Command climate. - Values differences as strengths. Fosters atmosphere of acceptance/inclusion per EO/EEO policy.			- Measurably contributes to Navy's increased retention and reduced attrition objectives. - Proactive leader/exemplary mentor. Involved in subordinates' personal development leading to professional growth/sustained commitment. - Initiates support programs for military, civilian, and families to achieve exceptional Command and Organizational climate. - The model of achievement. Develops unit cohesion by valuing differences as strengths.		
NOB <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		
36. MILITARY BEARING/ CHARACTER: Appearance, conduct, physical fitness, adherence to Navy Core Values.	- Consistently unsatisfactory appearance. - Poor self-control; conduct resulting in disciplinary action. - Unable to meet one or more physical readiness standards. - Fails to live up to one or more Navy Core Values: HONOR, COURAGE, COMMITMENT.			- Excellent personal appearance. - Excellent conduct, conscientiously complies with regulations. - Complies with physical readiness program. - Always lives up to Navy Core Values: HONOR, COURAGE, COMMITMENT.			- Exemplary personal appearance. - Model of conduct, on and off duty. - A leader in physical readiness. - Exemplifies Navy Core Values: HONOR, COURAGE, COMMITMENT.		
NOB <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		
37. PERSONAL JOB ACCOMPLISHMENT/ INITIATIVE: Responsibility, quantity of work.	- Needs prodding to attain qualification or finish job. - Prioritizes poorly. - Avoids responsibility.			- Productive and motivated. Completes tasks and qualifications fully and on time. - Plans/prioritizes effectively. - Reliable, dependable, willingly accepts responsibility.			- Energetic self-starter. Completes tasks or qualifications early, far better than expected. - Plans/prioritizes wisely and with exceptional foresight. - Seeks extra responsibility and takes on the hardest jobs.		
NOB <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		

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RCS BUPERS1610.-1

EVALUATION REPORT & COUNSELING RECORD (E1 - E6)

1. Name (Last, First MI Suffix)				2. Rate		3. Desig		4. SSN		
5. ACT <input type="checkbox"/>		TAR <input type="checkbox"/>		INACT <input type="checkbox"/>		AT/ADSW/265 <input type="checkbox"/>		6. UIC		
7. Ship/Station				8. Promotion Status		9. Date Reported				
Occasion for Report						Period of Report				
10. Periodic <input type="checkbox"/>		11. Detachment of Individual <input type="checkbox"/>		12. Promotion/Frocking <input type="checkbox"/>		13. Special <input type="checkbox"/>		14. From: To:		
16. Not Observed Report <input type="checkbox"/>		17. Type of Report Regular <input type="checkbox"/>		18. Concurrent <input type="checkbox"/>		20. Physical Readiness		21. Billet Subcategory (if any)		
22. Reporting Senior (Last, FI MI)			23. Grade		24. Desig		25. Title		26. UIC	
27. SSN										
28. Command employment and command achievements.										
29. Primary/Collateral/Wachstanding duties. (Enter primary duty abbreviation in box.) <div style="border: 1px solid black; height: 20px; width: 100%;"></div>										
For Mid-term Counseling Use. (When completing EVAL, enter 30 and 31 from counseling worksheet, and sign 32.)				30. Date Counseled		31. Counselor		32. Signature of Individual Counseled		

PERFORMANCE TRAITS: 1.0 - Below standards/not progressing or UNSAT in any one standard; 2.0 - Does not yet meet all 3.0 standards; 3.0 - Meets all 3.0 standards; 4.0 - Exceeds most 3.0 standards; 5.0 - Meets overall criteria and most of the specific standards for 5.0. Standards are not all inclusive.

PERFORMANCE TRAITS	1.0* Below Standards	2.0 Pro- gressing	3.0 Meets Standards	4.0 Above Standards	5.0 Greatly Exceeds Standards
33. PROFESSIONAL KNOWLEDGE: Technical knowledge and practical application. NOB <input type="checkbox"/>	- Marginal knowledge of rating, specialty or job. - Unable to apply knowledge to solve routine problems. - Fails to meet advancement/PQS requirements.	-	- Strong working knowledge of rating, specialty and job. - Reliably applies knowledge to accomplish tasks. - Meets advancement/PQS requirements on time.	-	- Recognized expert, sought out by all for technical knowledge. - Uses knowledge to solve complex technical problems. - Meets advancement/PQS requirements early/with distinction.
34. QUALITY OF WORK: Standard of work; value of end product. NOB <input type="checkbox"/>	- Needs excessive supervision. - Product frequently needs rework. - Wasteful of resources.	-	- Needs little supervision. - Produces quality work. Few errors and resulting rework. - Uses resources efficiently.	-	- Needs no supervision. - Always produces exceptional work. No rework required. - Maximizes resources.
35. COMMAND OR ORGANIZATIONAL CLIMATE/EQUAL OPPORTUNITY: Contributing to growth and development, human worth, community. NOB <input type="checkbox"/>	- Actions counter to Navy's retention/recruitment goals. - Uninvolved with mentoring or professional development of subordinates. - Actions counter to good order and discipline and negatively affect Command/Organizational climate. - Demonstrates exclusionary behavior. Fails to value differences from cultural diversity.	-	- Positive leadership supports Navy's increased retention goals. Active in decreasing attrition. - Actions adequately encourage/support subordinates' personal/professional growth. - Demonstrates appreciation for contributions of Navy personnel. Positive influence on Command climate. - Values differences as strengths. Fosters atmosphere of acceptance/inclusion per EO/EEO policy.	-	- Measurably contributes to Navy's increased retention and reduced attrition objectives. - Proactive leader/exemplary mentor. Involved in subordinates' personal development leading to professional growth/sustained commitment. - Initiates support programs for military, civilian, and families to achieve exceptional Command and Organizational climate. - The model of achievement. Develops unit cohesion by valuing differences as strengths.
36. MILITARY BEARING/ CHARACTER: Appearance, conduct, physical fitness, adherence to Navy Core Values. NOB <input type="checkbox"/>	- Consistently unsatisfactory appearance. - Poor self-control; conduct resulting in disciplinary action. - Unable to meet one or more physical readiness standards. - Fails to live up to one or more Navy Core Values: HONOR, COURAGE, COMMITMENT.	-	- Excellent personal appearance. - Excellent conduct, conscientiously complies with regulations. - Complies with physical readiness program. - Always lives up to Navy Core Values: HONOR, COURAGE, COMMITMENT.	-	- Exemplary personal appearance. - Model of conduct, on and off duty. - A leader in physical readiness. - Exemplifies Navy Core Values: HONOR, COURAGE, COMMITMENT.
37. PERSONAL JOB ACCOMPLISHMENT/ INITIATIVE: Responsibility, quantity of work. NOB <input type="checkbox"/>	- Needs prodding to attain qualification or finish job. - Prioritizes poorly. - Avoids responsibility.	-	- Productive and motivated. Completes tasks and qualifications fully and on time. - Plans/prioritizes effectively. - Reliable, dependable, willingly accepts responsibility.	-	- Energetic self-starter. Completes tasks or qualifications early, far better than expected. - Plans/prioritizes wisely and with exceptional foresight. - Seeks extra responsibility and takes on the hardest jobs.

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RCS BUPERS 1610-1

EVALUATION & COUNSELING RECORD (E7 - E9)

1. Name (Last, First MI Suffix)		2. Grade/Rate		3. Desig		4. SSN	
5. ACT <input type="checkbox"/> FTS <input type="checkbox"/> INACT <input type="checkbox"/> AT/ADSW/265 <input type="checkbox"/>		6. UIC		7. Ship/Station		8. Promotion Status	
9. Date Reported		10. Periodic <input type="checkbox"/>		11. Detachment of Individual <input type="checkbox"/>		12. Detachment of Reporting Senior <input type="checkbox"/>	
13. Special <input type="checkbox"/>		14. From:		15. To:		16. Not Observed Report <input type="checkbox"/>	
17. Regular <input type="checkbox"/>		18. Concurrent <input type="checkbox"/>		19. Ops Cdr <input type="checkbox"/>		20. Physical Readiness	
21. Billet Subcategory (if any)		22. Reporting Senior (Last, FI MI)		23. Grade		24. Desig	
25. Title		26. UIC		27. SSN		28. Command employment and command achievements	
29. Primary/Collateral/Watchstanding duties. (Enter Primary duty abbreviation in box.) <div style="border: 1px solid black; height: 20px; width: 100%;"></div>							
For Mid-term Counseling Use. (When completing FITREP Enter 30 and 31 from counseling worksheet sign 32.)			30. Date Counseled		31. Counselor		32. Signature of Individual Counseled
PERFORMANCE TRAITS: 1.0 - Below standards /not progressing or UNSAT in any one standard; 2.0 - Does not yet meet all 3.0 standards; 3.0 - Meets all 3.0 standards; 4.0 - Exceeds most 3.0 standards; 5.0 - Meets overall criteria and most of the specific standards for 5.0. Standards are not all inclusive.							
PERFORMANCE TRAITS	1.0* Below Standards	2.0 Pro- gressing	3.0 Meets Standards	4.0 Above Standards	5.0 Greatly Exceeds Standards		
33. DECKPLATE LEADERSHIP: - Organizing, motivating and developing others to accomplish goals. - Engaging and visible presence establishes positive tone for command. NOB <input type="checkbox"/>	- Neglects growth/development or welfare of Junior Officer and Enlisted Sailors. - Presence not felt on the deckplates. - Does not set or achieve goals relevant to command mission and vision. - Does not tailor leadership style to situation or individual. - Fails to organize, creates problems for subordinates. - Lacks ability to manage under stress.	<input type="checkbox"/>	- Effectively stimulates growth/development in Junior Officers and Enlisted Sailors. - Visible and engaged on the deckplate; sets positive tone. - Sets/achieves useful, realistic goals that support command mission. - Tailors leadership to situation to accomplish mission. - Organizes successfully, implementing process improvements and efficiencies. - Performs well in stressful situations.	<input type="checkbox"/>	<input type="checkbox"/>	- Inspiring motivator and trainer. Junior Officers and Enlisted Sailors reach highest level of growth and development. - Always visible and engaged on the deckplate; energetically sets positive tone across CMD. - Leadership achievements dramatically further command mission and vision. - Seamlessly tailors leadership to each Sailor's strengths, weaknesses and goals to maximize mission effectiveness. - Superb organizer, great foresight, develops process improvements and efficiencies. - Perseveres through the toughest challenges and inspires others.	<input type="checkbox"/>
34. INSTITUTIONAL AND TECHNICAL EXPERTISE: - Institutional, policy and technical knowledge. - Practical application, procedural compliance. NOB <input type="checkbox"/>	- Lacks basic Navy knowledge. - Unaware and unwilling to learn details of Navy programs and policies. - Lacks basic professional knowledge to perform effectively. - Cannot apply basic skills. - Tactical knowledge and skill in specialty are below standards compared to others of same rank and experience.	<input type="checkbox"/>	- Has thorough knowledge of Navy organization and structure. - Has thorough knowledge of Navy programs and policies. - Has detailed rating knowledge; resolves technical issues within rating. - Competently performs both routine and new tasks. - Tactical knowledge and skill in specialty equal to others of same rank and experience.	<input type="checkbox"/>	<input type="checkbox"/>	- Navy Expert, complete understanding of purpose, organization, and structure. - Detailed, current knowledge and strong advocate for all Navy programs and policies. - Recognized expert, sought after to solve difficult problems, executes innovative ideas. - Exceptionally skilled; complete accuracy and precision in all technical actions, duties and procedures. - Tactical knowledge and skill in command mission and function.	<input type="checkbox"/>
35. PROFESSIONALISM: - Standard enforcement; taking initiative, planning/prioritizing/ solving challenges in Chief's Mess. - Continuous learning; Standards of appearance, conduct, physical fitness, qualifications. NOB <input type="checkbox"/>	- Fails to uphold and enforce standards. - Does not effectively utilize the Chief's Mess to plan and solve challenges. - Improvement of peers, subordinates, and self not a priority. - Unable to meet one or more physical readiness standards. - Consistently unsatisfactory appearance or unsatisfactory demeanor or conduct. - Creates conflict, unwilling to work with others, puts self above team.	<input type="checkbox"/>	- Actively teaches, upholds and enforces standards with peers and subordinates. - Participates in command planning and problem solving through the Chief's Mess. - Committed to professional education/training for self and subordinates. - Complies with physical readiness program. - Excellent personal appearance and representative of the Navy. - Reinforces others' efforts, meets personal commitments to team.	<input type="checkbox"/>	<input type="checkbox"/>	- Proactively teaches, upholds, and enforces standards throughout the command. - Actively leads command activities, solves command challenges, and drives mission accomplishment through the Chief's Mess. - Fosters an environment of improvement, education and professional development. - A leader in physical readiness. - Exemplary personal appearance and representative of the Navy. - Team builder, inspires cooperation and focus on mission accomplishment; leverages talents of all Sailors.	<input type="checkbox"/>
36. LOYALTY: - Loyalty to mission, seniors, peers and subordinates. - Dedication to Sailor success, Sailor advocacy. NOB <input type="checkbox"/>	- Does not consistently demonstrate loyalty to mission, seniors, peers or subordinates. - Not concerned about Sailor success. - Allows command challenges to impact Sailor readiness.	<input type="checkbox"/>	- Loyal to mission, seniors, peers and subordinates; moral courage to raise issues and support the outcome. - Effective mentor, actions adequately encourage/support subordinates' personal/professional growth. - Routinely solves command challenges before they significantly impact Sailor readiness.	<input type="checkbox"/>	<input type="checkbox"/>	- Loyal to mission, seniors, peers and subordinates; moral courage to raise issues and strength to fully support the outcome. - Exemplary mentor, creates environment with outstanding professional growth opportunities for each Sailor. - Proactively identifies and solves command challenges before they impact Sailor readiness.	<input type="checkbox"/>

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RCS BUPERS 1610-1

EVALUATION & COUNSELING RECORD (E7 - E9) (cont 'd)

1. Name (Last, First MI Suffix)		2. Grade/Rate		3. Desig		4. SSN	
PERFORMANCE TRAITS	1.0* Below Standards	2.0 Pro- gressing	3.0 Meets Standards	4.0 Above Standards	5.0 Greatly Exceeds Standards		
37. CHARACTER: - Integrity, adherence to Navy Core Values. - Recognition of Diversity. - Contributes to growth, human worth and community. NOB <input type="checkbox"/>	- Demonstrates exclusionary behavior, fails to value differences from cultural diversity. - Lacks personal integrity and does not take responsibility for actions or decisions. - Fails to live up to Navy Core Values: Honor, Courage and Commitment. <input type="checkbox"/>	<input type="checkbox"/>	- Diversity: values differences as strengths, fosters atmosphere of acceptance/inclusion per EO/EEO policy. - Trustworthy, ethical and honest. - Always lives up to Navy Core Values: Honor, Courage and Commitment. <input type="checkbox"/>	<input type="checkbox"/>	- Seamlessly integrates diversity into all aspects of the command. - Model of achievement. Develops unit cohesion by valuing differences as strengths. - Leads with an uncompromising code of integrity. - Exemplifies Navy Core Values: Honor, Courage and Commitment. <input type="checkbox"/>		
38. ACTIVE COMMUNICATION: - Communication, questioning attitude, energized information flow. NOB <input type="checkbox"/>	- Stifles information exchange, idea sharing and diversity of opinion. - Does not take advantage of the Chief's Mess to discuss, plan, or act on command issues. - Poor communicator; actions negatively impact mission goals and readiness. <input type="checkbox"/>	<input type="checkbox"/>	- Facilitates information exchange, idea sharing and diversity of opinion. - Uses Chief's Mess as an open forum to discuss, plan, and act on command issues. - Effectively communicates and listens to subordinates, peers, and seniors. <input type="checkbox"/>	<input type="checkbox"/>	- Actively facilitates information exchange, idea sharing and diversity of opinion. - Actively uses Chief's Mess as an open forum to discuss, plan, and act on command issues. - Energizes communication flow up and down the chain of command. <input type="checkbox"/>		
39. SENSE OF HERITAGE: - Know and teach customs and traditions, understand naval history. NOB <input type="checkbox"/>	- Lacks knowledge and understanding of naval customs and traditions. - Ignores naval traditions, customs, and practices when considering decisions, in training, or in daily leadership. - No grasp of naval history. <input type="checkbox"/>	<input type="checkbox"/>	- Good understanding of naval customs and traditions. - Integrates naval traditions, customs, and practices into decision making processes, training and daily leadership. - Occasionally uses naval history to demonstrate who we are as a service. <input type="checkbox"/>	<input type="checkbox"/>	- Thorough understanding of naval customs and traditions. - Proactively integrates naval traditions, customs, and practices into decision making processes, training and daily leadership. - Consistently uses naval history to demonstrate who we are as a service. <input type="checkbox"/>		
40. I recommend screening this individual for next career milestone(s) as follows: (Maximum of two) Recommendations may be for competitive schools or duty assignments such as LCPO, DEPT CPO, SEA, CMC							
41. COMMENTS ON PERFORMANCE. *All 1.0 marks, three 2.0 marks, and 2.0 marks in Block 37 must be specifically substantiated in comments. Comments must be verifiable. Font must be 10 or 12 pitch (10 to 12 point) only. Use upper and lower case.							
Promotion Recommendation		NOB	Significant Problems	Progressing	Promotable	Must Promote	Early Promote
42. INDIVIDUAL							44. Reporting Senior Address
43. SUMMARY		<input checked="" type="checkbox"/>					
45. Signature of Reporting Senior					46. Signature of individual evaluated. "I have seen this report, been apprised of my performance, and understand my right to make a statement."		
Date:					I intend to submit a statement <input type="checkbox"/> do not intend to submit a statement <input type="checkbox"/>		
Member Trait Average: 0.00		Summary Group Average:			Date:		
47. Typed name, grade, command, UIC, and signature of Regular Reporting Senior on Concurrent Report							
Date:							

FITNESS REPORT & COUNSELING RECORD (E7 - O6)

RCS BUPERS 1610-1

1. Name (Last, First MI Suffix)				2. Grade/Rate		3. Desig		4. SSN	
5. ACT <input type="checkbox"/>		TAR <input type="checkbox"/>		INACT <input type="checkbox"/>		AT/ADSW/265 <input type="checkbox"/>		6. UIC	
7. Ship/Station				8. Promotion Status		9. Date Reported			
Occasion for Report						Period of Report			
10. Periodic <input type="checkbox"/>		11. Detachment of Individual <input type="checkbox"/>		12. Detachment of Reporting Senior <input type="checkbox"/>		13. Special <input type="checkbox"/>		14. From: To:	
16. Not Observed Report <input type="checkbox"/>		17. Regular <input type="checkbox"/>		18. Concurrent <input type="checkbox"/>		19. Ops Cdr <input type="checkbox"/>		20. Physical Readiness	
21. Billet Subcategory (if any)			22. Reporting Senior (Last, FI MI)			23. Grade		24. Desig	
25. Title			26. UIC		27. SSN				
28. Command employment and command achievements.									
29. Primary/Collateral/Watchstanding duties. (Enter primary duty abbreviation in box.) <div style="border: 1px solid black; height: 20px; width: 100%;"></div>									

For Mid-term Counseling Use. (When completing FITREP enter 30 and 31 from counseling worksheet sign 32.)			30. Date Counseled		31. Counselor		32. Signature of Individual Counseled		
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PERFORMANCE TRAITS: 1.0 - Below standards/not progressing or UNSAT in any one standard; 2.0 - Does not yet meet all 3.0 standards; 3.0 - Meets all 3.0 standards; 4.0 - Exceeds most 3.0 standards; 5.0 - Meets overall criteria and most of the specific standards for 5.0. Standards are not all inclusive.

PERFORMANCE TRAITS	1.0* Below Standards	2.0 Pro-gressing	3.0 Meets Standards	4.0 Above Standards	5.0 Greatly Exceeds Standards
33. PROFESSIONAL EXPERTISE: Professional knowledge, proficiency, and qualifications. NOB <input type="checkbox"/>	- Lacks basic professional knowledge to perform effectively. - Cannot apply basic skills. - Fails to develop professionally or achieve timely qualifications.		- Has thorough professional knowledge. - Competently performs both routine and new tasks. - Steadily improves skills, achieves timely qualifications.		- Recognized expert, sought after to solve difficult problems. - Exceptionally skilled, develops and executes innovative ideas. - Achieves early/highly advanced qualifications.
34. COMMAND OR ORGANIZATIONAL CLIMATE/EQUAL OPPORTUNITY: Contributing to growth and development, human worth, community. NOB <input type="checkbox"/>	- Actions counter to Navy's retention/reenlistment goals. - Uninvolved with mentoring or professional development of subordinates. - Actions counter to good order and discipline and negatively affect Command/Organizational climate. - Demonstrates exclusionary behavior. Fails to value differences from cultural diversity.		- Positive leadership supports Navy's increased retention goals. Active in decreasing attrition. - Actions adequately encourage/support subordinates' personal/professional growth. - Demonstrates appreciation for contributions of Navy personnel. Positive influence on Command climate. - Values differences as strengths. Fosters atmosphere of acceptance/inclusion per EO/EEO policy.		- Measurably contributes to Navy's increased retention and reduced attrition objectives. - Proactive leader/exemplary mentor. Involved in subordinates' personal development leading to professional growth/sustained commitment. - Initiates support programs for military, civilian, and families to achieve exceptional Command and Organizational climate. - The model of achievement. Develops unit cohesion by valuing differences as strengths.
35. MILITARY BEARING/ CHARACTER: Appearance, conduct, physical fitness, adherence to Navy Core Values. NOB <input type="checkbox"/>	- Consistently unsatisfactory appearance. - Unsatisfactory demeanor or conduct. - Unable to meet one or more physical readiness standards. - Fails to live up to one or more Navy Core Values: HONOR, COURAGE, COMMITMENT.		- Excellent personal appearance. - Excellent demeanor or conduct. - Complies with physical readiness program. - Always lives up to Navy Core Values: HONOR, COURAGE, COMMITMENT.		- Exemplary personal appearance. - Exemplary representative of Navy. - A leader in physical readiness. - Exemplifies Navy Core Values: HONOR, COURAGE, COMMITMENT.
36. TEAMWORK: Contributions towards team building and team results. NOB <input type="checkbox"/>	- Creates conflict, unwilling to work with others, puts self above team. - Fails to understand team goals or teamwork techniques. - Does not take direction well.		- Reinforces others' efforts, meets personal commitments to team. - Understands team goals, employs good teamwork techniques. - Accepts and offers team direction.		- Team builder, inspires cooperation and progress. - Talented mentor, focuses goals and techniques for team. - The best at accepting and offering team direction.
37. MISSION ACCOMPLISHMENT AND INITIATIVE: Taking initiative, planning/prioritizing, achieving mission. NOB <input type="checkbox"/>	- Lacks initiative. - Unable to plan or prioritize. - Does not maintain readiness. - Fails to get the job done.		- Takes initiative to meet goals. - Plans/prioritizes effectively. - Maintains high state of readiness. - Always gets the job done.		- Develops innovative ways to accomplish mission. - Plans/prioritizes with exceptional skill and foresight. - Maintains superior readiness, even with limited resources. - Gets jobs done earlier and far better than expected.

FITNESS REPORT & COUNSELING RECORD (E7 - O6) (cont'd)

MAR 12 2010

RCS BUPERS 1610-1

1. Name (Last, First MI Suffix)		2. Grade/Rate	3. Desig	4. SSN			
PERFORMANCE TRAITS	1.0* Below Standards	2.0 Pro- gressing	3.0 Meets Standards	4.0 Above Standards	5.0 Greatly Exceeds Standards		
38. LEADERSHIP: Organizing, motivating and developing others to accomplish goals. NOB <input type="checkbox"/>	- Neglects growth/development or welfare of subordinates. - Fails to organize, creates problems for subordinates. - Does not set or achieve goals relevant to command mission and vision. - Lacks ability to cope with or tolerate stress. - Inadequate communicator. - Tolerates hazards or unsafe practices.	- - - - - - -	- Effectively stimulates growth/development in subordinates. - Organizes successfully, implementing process improvements and efficiencies. - Sets/achieves useful, realistic goals that support command mission. - Performs well in stressful situations. - Clear, timely communicator. - Ensures safety of personnel and equipment.	- - - - - - - - - - -	- Inspiring motivator and trainer, subordinates reach highest level of growth and development. - Superb organizer, great foresight, develops process improvements and efficiencies. - Leadership achievements dramatically further command mission and vision. - Perseveres through the toughest challenges and inspires others. - Exceptional communicator. - Makes subordinates safety-conscious, maintains top safety record. - Constantly improves the personal and professional lives of others.		
39. TACTICAL PERFORMANCE: (Warfare qualified officers only) Basic and tactical employment of weapons systems. NOB <input type="checkbox"/>	- Has difficulty attaining qualifications expected for rank and experience. - Has difficulty in ship(s), aircraft or weapons systems employment. Below others in knowledge and employment. - Warfare skills in specialty are below standards compared to others of same rank and experience.	- - - - - - -	- Attains qualifications as required and expected. - Capably employs ship(s), aircraft, or weapons systems. Equal to others in warfare knowledge and employment. - Warfare skills in specialty equal to others of same rank and experience.	- - - - - - - - - - -	- Fully qualified at appropriate level for rank and experience. - Innovatively employs ship(s), aircraft, or weapons systems. Well above others in warfare knowledge and employment. - Warfare skills in specialty exceed others of same rank and experience.		
40. I recommend screening this individual for next career milestone(s) as follows: (maximum of two) Recommendations may be for competitive schools or duty assignments such as: LCPO, DEPT CPO, SEA, CMC, CWO, LDO, Dept Head, XO, OIC, CO, Major Command, War College, PG School.							
41. COMMENTS ON PERFORMANCE. * All 1.0 marks, three 2.0 marks, and 2.0 marks in Block 34 must be specifically substantiated in comments. Comments must be verifiable. Font must be 10 or 12 pitch (10 to 12 point) only. Use upper and lower case.							
Promotion Recommendation	NOB	Significant Problems	Progressing	Promotable	Must Promote	Early Promote	44. Reporting Senior Address
42. INDIVIDUAL							
43. SUMMARY	X						
45. Signature of Reporting Senior				Date:		46. Signature of individual evaluated. "I have seen this report, been apprised of my performance, and understand my right to make a statement." I intend to submit a statement <input type="checkbox"/> do not intend to submit a statement <input type="checkbox"/>	
Member Trait Average:		Summary Group Average:		Date:			
47. Typed name, grade, command, UIC, and signature of Regular Reporting Senior on Concurrent Report							Date: