

New Ensign and W4 OER, Form CG-5310B

Highlights:

- One page form
- OER Guidance header emphasizing the importance of the OER and the gravity of rating chain member responsibilities in fulfilling their roles
- New policy mandates mid-term counseling; the OER captures that it took place
- Primary Duty and PAL Position block: including both of these job duty descriptions provides users of the OER a clearer picture of the member's primary duty
- Access dimension descriptions via a button that expands respective evaluation area on a different page
- Updated Workplace Climate dimension
- Supervisor marks the Reported-on Officer in all dimensions
- Only need to comment on three performance dimensions that best characterize the officer
- Comments should be more narrative - less of a bulleted list of accomplishments
- Must also comment on substandard marks of 1, 2 and 3. Comment Form, CG-5315, may be used if additional space is needed to comment on the substandard marks only
- Two member rating chain; Reporting Officer must be a CG officer
- Reported-on Officer signature is required prior to submitting the OER to PSC

When will the new form be in place?

- Planned for the 2017 OER rating cycle starting 01Jan2017
- ALCGPSC 128-16, Officer and Enlisted Evaluation Status Update has additional information

What was the reason for the change?

- Result of a six month OER Work Group
- Approved by CG-1 and briefed to CCG

How will PSC ensure the field is trained?

- An informational video on OPM-3's CG Portal and www.uscg.mil/oer released December 2016 with an overview of OES policy and procedure changes and a walk thru of the new OER forms
- Senior level briefs highlighting changes
- The OES and OER changes will be included in the 2017 OPM roadshows
- PSC OES Procedures Manual, PSCINST M1611.1C, will be the primary manual for completing the evaluation

An OER example with specific highlights continues on the next page...

New Ensign and W4 OER

DEPARTMENT OF HOMELAND SECURITY U.S. Coast Guard OFFICER EVALUATION REPORT (W4/O1)						Validation
<p>OER GUIDANCE</p> <p>The Officer Evaluation Report is the single most significant document in the management of an officer's career. It is the official record of performance, promotion, advanced education, command screening and for selection to positions of increased responsibility. Accordingly, our Officer Evaluation System demands integrity, fairness, accuracy, and timeliness. The responsibility for preserving these tenets rests upon all parties. In addition to regular feedback and mid-period counseling, providing timely, accurate, evaluations is a basic leadership function. While every member is responsible for providing carefully crafted supporting material, it is incumbent upon the OER rating chain to draft the appropriate sections and ensure each officer receives the feedback he or she deserves.</p>						
1. ADMINISTRATIVE INFORMATION:						
a. REPORTED-ON OFFICER NAME (Last)		(Initials)	b. UNIT			
Jones		A. F.	CGC UNDERWAY			
c. PERIOD OF REPORT		d. OCCASION FOR REPORT		e. GRADE	f. EMPLID	g. DATE OF RANK
01Apr2016 to 30Sep2016		Semi-annual		O1	1234567	16May2015
h. DATE REPORTED		i. MID-TERM COUNSELING DOCUMENTATION		j. DATE COUNSELED		k. COUNSELOR NAME
10Jun2015		Mandated. See PSCINST M1611.1(series) for guidance.		24Jun2016		I. M. Coastie
l. ROO SIGNATURE						
2. DESCRIPTION OF DUTIES: List primary duty and summarize all duties and responsibilities.						
a. PRIMARY DUTY: DECK WATCH OFFICER			b. PAL POSITION TITLE: DECK OFFICER - TRAINING BILLI			
Underway (UW) Officer of the Deck (OOD): Commanding Officer's (CO) direct rep for cutter's operations and 120+ crew. In port (IP) OOD: CO's rep for safety, security, and work; leads 15 mbr duty section. Gunnery Division (G) rep for live-fire exercises and maint of all small arms, ammunition, and weapon systems. EKMS manager. Period incl 76 days u/w, CART, TSTA, OTI/ETI, Helo & B						
Collateral Duties: Marine Manual Off, Educational Services Off, Force Protection Action Off and Boarding O						
3a. PERFORMANCE OF DUTIES: <input checked="" type="radio"/> Open						
f. Speaking and Listening: 6		d. Teamwork: 5				
a. Planning and Preparedness: 5		g. Writing: 6		e. Workplace Climate: 5		
b. Using Resources: 4		3b. LEADERSHIP SKILLS: <input checked="" type="radio"/> Open		f. Evaluations: 4		
c. Results/Effectiveness: 5		a. Looking Out for Others: 4		3c. PROFESSIONAL QUALITIES: <input checked="" type="radio"/> Open		
d. Adaptability: 5		b. Developing Others: 6		a. Initiative: 5		
e. Professional Competence: 6		c. Directing Others: 5		b. Judgment: 5		
Well ahead of peers with regards to earning qualifications in a timely manner and professional competence as an operator. almost effortlessly qualified as an I/P and U/W OOD, breezing through his oral boards. Excellent ship handling ability; served officer team during 12+ boardings; served on nav team during evolutions with restricted waters; perfected advanced seamanship when I need someone to make a notable presentation, and not just port briefs or pre-briefs for drills; speaks very well in audience and conveys great confidence. Mbr additionally delivered 6 hours of damage control navigation training to crew in inspection. Really impressed with ROO's team orientation as mbr quickly coalesced new 4-man boarding team into most effective team - recorded one drug bust after team found 400lbs of marijuana in a S/V's concealed compartment at sea; conducted high risk boarding.						
4. SUPERVISOR AUTHENTICATION:						
a. FIRST, MIDDLE INITIAL, LAST NAME		b. GRADE	c. EMPLID	d. POSITION TITLE	e. DATE	
Q. T. Smith		O3	9876543	Operations Officer	05Oct2016	
5. REPORTING OFFICER AUTHENTICATION:						
a. EVALUATION <input checked="" type="radio"/> Concur <input type="radio"/> Do not concur						
b. COMPARISON SCALE: Compare this officer with others of the same grade whom you have known in your career.						
Unsatisfactory <input type="radio"/> Marginally performing officer <input type="radio"/> One of the many high performing officers who form the majority of this grade <input type="radio"/> One of few distinguished officers <input checked="" type="radio"/> Best officer of this grade <input type="radio"/>						
c. REPORTING OFFICER COMMENTS: Supplement or amplify Supervisor's evaluation. Describe ability to assume greater leadership roles and responsibilities (e.g. command, special assignment, and skills).						
ENS Jones is an intelligent, well rounded, highly reliable officer who has become a cornerstone for the success of UNDERWAY's crew. Desires and is highly recommended for follow-on afloat assignments as XO WPB/FRC/WTGB or OPS WLB. Highly recommended for selection to Sector Response, special assignments as flag aide, and for advanced education program Organizational Leadership, MPA, or International Affairs. Well deserved recent selection to O2 and has already demonstrated ability to work at the O3 level. My best JO on board! Challenge this mbr - I strongly encourage the Junior Command Screening Panel to select him.						
d. FIRST, MIDDLE INITIAL, LAST NAME		e. GRADE	f. EMPLID	g. POSITION TITLE	h. DATE	
D. G. Salty		O5	8675309	Commanding Officer	25Oct2016	
i. ATTACHMENTS:						Click here - email form to ROO
6. REPORTED ON OFFICER: I understand my signature does not constitute agreement or disagreement. I acknowledge I have reviewed the report.						
a. SIGNATURE:		b. DATE		Active duty click here - email form to PSC-OPM-3		Reserve click here - email form to PSC-RPM-1
		27Oct2016				
PRIVACY ACT STATEMENT						
Authority: 14 USC 633 and COMDTINST M1000.3 (series). Purpose: To determine an officer's suitability for promotion, selection and assignment. Routine Uses: Same. Disclosure: Mandatory. Failure to disclose required information may adversely affect promotion, selection and assignment decisions.						

The new form is designed with buttons, dropdown menus, and calendar functions to make filling in the OER more user friendly

Bubbles indicate the three performance dimensions that best characterize the ROO

Mid-term counseling: Block 1.J is the date the counseling took place. This does not have to match the date that Block 1.I is signed.
 - There isn't an expectation for an OER to be started when the mid-term counseling takes place
 - If this mid-term counseling does not occur, it is required to be documented on Comments Form, CG-5315
 - Mid-term counseling is waived for all 2017 annual OERs and the first semi-annual OERs (LTJG OERs in January and ENS OERs in March)

Performance dimension criteria is accessed by the 'Open' button that will expand a respective evaluation area on a different page

Email buttons to submit the OER to OPM or RPM. The OER submission procedures are determined by the unit.