

How to Review / Prepare  
Your First OERs –  
A Simple Guide from OPM-4  
for  
Reported on Officers and  
Supervisors

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# Purpose

The OER is the single most important document in a record for speaking to future Promotion Boards, Command Screening Panels, Advanced Education Panels, and the detailers about past performance and potential within the organization. The Boards, Panels, and detailers do not see someone's day-to-day hard work; they see what is presented on their OERs.

It is critical that BOTH Reported On Officers (ROO) and Supervisors understand the purpose of the Officer Evaluation System (OES). This guide is meant to help individuals either receiving their first OERs, or those having to write one for the first time.

Taken straight from the Officer Accessions, Evaluations, and Promotions Manual, **the OES has been designed to:**

- (1) Provide information for important personnel management decisions. Especially significant among these decisions are promotions, assignments, career development, and retention,*
- (2) Set performance and character standards to evaluate each officer,*
- (3) Prescribe organizational values by which each Coast Guard officer can be described, and*
- (4) Provide a means of feedback to determine how well an officer is measuring up to the standards*

# What are the Important References?

**Policy:** Officer Accessions, Evaluations, and Promotions Manual, COMDTINST M1000.3A (specifically, Chapter 5 – Officer Evaluations). This manual discusses the general OER policies, and also spells out exactly what your responsibilities are as the Reported-On Officer are (5.A.2.d.(1)) and Supervisor (5.A.2.d.(2)).

**Procedure:** OES Procedures Manual, PSCINST M1611.1B. This manual spells out the process for preparing, processing, and completing an OER. It provides more of the “tactical” guidance for completing an OER, going line by line through each section of the OER and how it should be completed.

**Officer Support Form (Form CG-5308):** As per 5.A.2.d.(1).(b). of COMDTINST M1000.3A, the Officer Support Form (OSF) is required for Ensigns and Lieutenant Junior Grades. **Read Chapter 1 of PSCINST M1611.1B for guidance! This chapter explains each portion of the OSF and provides examples for how to fill each section out.**

Use the OPM-3 Portal Page. They are the resident experts for preparing, validating, and processing your OER. Their site has references, job aids, PowerPoint presentations, and more: <https://cg.portal.uscg.mil/units/psc/psc-opm/opm-3/SitePages/Home.aspx>

# Recommended Practices

**Continual feedback!** As the ROO, request it, and as the Supervisor, provide it!

***Section 5.A.2.d.(1).(b) of COMDTINST M1000.3A*** puts the responsibility on the ROO to request performance feedback or counseling, if desired. **SEEK THIS OUT!** You always want to align your Supervisor's expectations for you with your actual performance of duties. You may think you are doing great work and amazing things, but if that differs from what your Supervisor is expecting of you for your job, your OER may not look the way you want it to.

A best practice is to get feedback at the end of an old marking period (or the beginning of a new one) AND also during the middle of the marking period. This allows for you to make sure you are meeting your Supervisor's expectations for your work, and if you are not, gives you time to make course corrections during the marking period before your OER is due. Make it a habit to have an actual conversation each time you receive your OER. Do not merely read the OER and sign it, too often JOs do that and miss out on the key discussion piece regarding your performance.

# Recommended Practices (continued)

## **Preparing for your OER as an ROO**

Use the OES Procedures Manual for preparing your OER. It provides specific guidance for important parts of your OER, including filling out the Block 2, Description of Duties, and much more.

## **Brag Sheet**

*Section 5.A.2.d.(1).(e) of COMDTINST M1000.3A* requires that you submit a listing of significant achievements or aspects of performance to your Supervisor at least 21 days prior to the end of the marking period. Regardless of the format your Supervisor requests your bullets to be in, you owe it to yourself and your career to put forth the necessary time and effort to provide your Supervisor with a robust, well-crafted, and accurate set of bullets. You cannot expect your Supervisor to remember and keep track of all that you did over the marking period. With that, keep a brag sheet to help you track your accomplishments from the entire marking period; it will help tremendously with your bullets.

# Recommended Practices (continued)

## **Preparing for your OER as an ROO (continued)**

ALWAYS focus on the impact of what you did, and make sure to stress why it was important. As you are crafting each bullet for your OSF, ask yourself, “So what?” If the answer to that question is elusive, you should probably work on re-crafting the bullet.

Example:

*(The following is a fictional submittal for a bullet for “Evaluations”)*

*Bullet:* I turned in 15 EERs this marking period.

Ok, so what? There could be several different scenarios of someone who turned in 15 EERs in a marking period. Were they submitted early, or were they turned in two weeks late and only after constant reminders from your Supervisor? Were they fair, accurate assessments that required minimal (if any) edits from your Supervisor (and thus reduced his / her workload), or were they constantly sent back down to you to make the same types of edits over and over again? Don't try to over-inflate what you did, but say what you did and provide reasoning for why it matters.

# Recommended Practices (continued)

## **Preparing the OER as a Supervisor**

Does the write-up capture the impact of what happened, and will it accurately distinguish the different level of performance among ROOs?

Sample OER entries:

**Poor Example:** ENS Bland conned to the pier twice this marking period.

**Better Example:** ENS Improved displayed a strong grasp of basic seamanship principles during 2 difficult conning evolutions.

**Great Example:** ENS All-Star has exceptional ship-driving skills; required minimal coaching during 2 tough moorings with 30+ knots wind / 2 knots current, is ship's go-to Conn for most challenging evolutions.

Does the write-up highlight the most significant achievements in the marking period without overly focusing on one event? *(If one event is taking up 4-5 lines of OER text, it may be worth evaluating if it can be consolidated)*

# Reviewing Your OER – Description of Duties and Write-Up

**2. DESCRIPTION OF DUTIES:** List primary duty and summarize all duties and responsibilities.

PRIMARY DUTY:

- Does Block 2 accurately capture your Description of Duties throughout the period? This includes a description of your primary duties and significant collaterals and should include amplifying information to best capture your duties, such as the amount of money you controlled, the number of people you supervised, etc.

<b>3. PERFORMANCE OF DUTIES:</b> <input type="button" value="Open"/>	<b>4. PROFESSIONAL QUALITIES:</b> <input type="button" value="Open"/>	<b>5. LEADERSHIP SKILLS:</b> <input type="button" value="Open"/>	<b>6. COMMUNICATION SKILLS:</b> <input type="button" value="Open"/>
<input type="radio"/> Planning and Preparedness	<input type="radio"/> Initiative	<input type="radio"/> Looking Out for Others	<input type="radio"/> Speaking and Listening
<input type="radio"/> Using Resources	<input type="radio"/> Judgment	<input type="radio"/> Developing Others	<input type="radio"/> Writing
<input type="radio"/> Results/Effectiveness	<input type="radio"/> Responsibility	<input type="radio"/> Directing Others	<b>7. QUALIFICATIONS &amp; COMPETENCIES:</b>
<input type="radio"/> Adaptability	<input type="radio"/> Professional Presence	<input type="radio"/> Teamwork	
<input type="radio"/> Professional Competence	<input type="radio"/> Health and Well-Being	<input type="radio"/> Workplace Climate	
<b>8. COMMENTS:</b> Supervisor selects 3 performance dimensions that best characterize this officer.		<input type="radio"/> Evaluations	

- Do the numbers match what you were expecting?  
 If they don't, refer to the specific performance dimensions as spelled out for each mark, and also Table 2.2 of the OES Procedures Manual. This outlines the specific requirements for each numerical value. Before you dispute a numerical value, make sure that you can say with absolute certainty that you have met every performance dimension requirement, otherwise, ask for how you can improve the numerical value for the next marking period.

- Does the write-up capture the most significant accomplishments?

- Does the write-up capture the impact of what you did?

**9. SUPERVISOR AUTHENTICATION** (YYYY/MM/DD)

a. NAME AND SIGNATURE	b. GRADE	c. EMPLID	d. TITLE OF POSITION	e. DATE
				/ /

# Reviewing Your OER - Potential

<b>10. COMPARISON SCALE:</b> Compare this Officer with others of the same grade whom you have known in your career.						
Unsatisfactory	Marginal performer, limited potential	Fair performer, recommended for limited responsibility	Good performer, give tough, challenging assignments	Excellent performer, give toughest, most challenging leadership assignments	An Exceptional Officer	A Distinguished Officer
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>11. POTENTIAL:</b> Describe the Officer's ability to assume greater leadership roles and responsibilities.						
This is a very significant portion of your OER because it tells Boards, Panels, and detailers how your rating chain evaluates your potential within the service. Writing styles vary drastically, but in general, strive for explicit recommendations. If it is vague to you, it probably vague to a Board, Panel, or detailer.						

## -Do you have a recommendation for promotion? How strong is it?

-Soft: With continued growth, should earn recommendation for promotion next marking period.

-Strong: Highest recommendation for promotion with very best of peers.

## -Are you getting recommended for positions of higher responsibility in your specialty?

- Soft: LTJG Bad Aviator attempting to grasp basic aviation fundamentals, recommended for a high op-tempo Headquarters job following this assignment.

- Strong: LTJG Good Aviator's flying prowess has him on the fast-track for starting his First Pilot syllabus well ahead of schedule; highest recommendation for Flight Safety Officer program.

# Reviewing Your OER – Potential (continued)

<b>10. COMPARISON SCALE:</b> Compare this Officer with others of the same grade whom you have known in your career.						
Unsatisfactory	Marginal performer, limited potential	Fair performer, recommended for limited responsibility	Good performer, give tough, challenging assignments	Excellent performer, give toughest, most challenging leadership assignments	An Exceptional Officer	A Distinguished Officer
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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## - Are you getting recommended for command?

There is a difference between being recommended for “command”, and being recommended for “command cadre”. If you are not getting an explicit recommendation for command, it will be harder to screen for command and be assigned to a CO position.

- Soft: After an add'l operational tour, should be suited for future command cadre afloat.
- Strong: Has my strongest recommendation for command afloat, assign at earliest opportunity.

## - If you are looking to break into a new specialty, are you getting recommended for that?

- Strong: Mbr’s passion for Prevention and sustained high-performance has earned my highest recommendation to be a Marine Inspector

## -What are your goals out of your specialty? Grad School? Special Assignments? Are you getting recommended for those?

- The more often a grad school panel sees a recommendation in your OER for their specific program, the easier it is for them to see your passion and desire for their program.
- The more often a detailer can see a recommendation for you to serve in high-visibility special assignments, the more competitive you’ll be to get one.

# Reviewing Your OER – Negative Trends?

**-Did any numbers go down from the last OER?** *(If you have received one or more OERs already)*

-As a general rule, you want to avoid a drop in numbers as best you can. Each OER, however, is based strictly on performance within that marking period, so a drop very well may happen if you had more opportunities in the previous period. If Hurricane Katrina happened in the previous marking period and you performed well, your Katrina OERs may have more content and substance than the next marking period when the weather calmed down. Boards understand that the OER after the Katrina OER may not be as strong based on opportunity.

-With that, there are 3 times when a drop would be considered “expected”. If the range of the drops in your numbers are within reason and are not major drops, by themselves they should not be detrimental to your promotion potential. Those three cases are:

- if you're new to a unit
- if you have a new rating chain
- if you just promoted

At the same time, you want to avoid numbers going down whenever you can. If you digress in any categories, it is still worth a discussion with your Supervisor to see what you can do to bring the numbers back up.

# I Don't Agree with My OER – What Can I Do?

## **OER Reply**

If disagreements regarding your OER cannot be resolved through discussion with your chain of command, you do have the option of an OER Reply. This is an addendum that will be attached to your OER and remain a permanent part of your record. Guidance on this is in Chapter 6 of the OES Procedures Manual (PSCINST M1611.1B ).

Replies must be submitted to the Supervisor within 21 days from receipt of the validated OER from CG PSC-BOPS-C-MR, Military Records Section. An OER Reply also gives your chain of command a chance to reply to whatever statement you make, so officers are encouraged to really consider the intent of your OER Reply and if it would positively influence a future board or panel. If you are considering this, it is **STRONGLY** encouraged that you reach out to OPM-3 or OPM-4 for guidance prior to submitting one.

## **Other Tools**

For disputed items that an officer wants removed from his or her record (not limited to just OERs), there are two primary options:

- **Personnel Record Review Board (PRRB)**
- **Board of Correction of Military Records (BCMR)**

More information on either of these processes can be found in COMDTINST 1070.1, Correcting Military Records.

# Conclusion

**Seek Continual Feedback Throughout the Marking Period**

**Know Your References and Resources**

**Keep a Robust Brag Sheet**

**Be Specific and Focus on IMPACT!**