United States Army
Soldier Support Institute
Adjutant General School

Brigade S-1 Operations Course

Evaluations Reporting System (ERS)

Officer Rating Scheme
Senior Rater Profile

PE2 PRACTICAL EXERCISE 2 PE2

January 2011

STUDENT INSTRUCTIONS

OBJECTIVE: This practical exercise measures your knowledge of the evaluation reporting system in the role of a BDE S-1 Officer. You will demonstrate your knowledge of the evaluation reporting system by verifying your BDE Rating Scheme and accurately creating a Senior Rater Officer Evaluation Report Management Plan for Majors.

MATERIALS REQUIRED:

AR 623-3, Evaluation Reporting System
DA PAM 623-3, Evaluation Reporting System
Laptop Computer

INSTRUCTIONS:

1. Ensure that your name, student number, course/class number, and today's date are on your answer sheet.

2. This practical exercise contains 5 TABs for supplemental Information. Check now to see if you have all the supplemental information. Inform your instructor if you are missing any documents or your documents are illegible.
    a. TAB 1: ORBs
    b. TAB 2: Student Worksheets
    c. TAB 3: SR Profile Exercise Worksheet
    d. TAB 4: Zones of Consideration
    e. TAB 5: Officer Professional Timeline

3. You will complete this PE in groups of 3-4. You may NOT communicate with other students outside of your group, give or receive assistance, make record of your answers anywhere but on your answer sheet, or pass on information about this practical exercise to other students. You will complete and turn in this practical exercise IAW your class schedule.

4. You have 20 minutes to complete this practical exercise.

SITUATION 1: Today is 10 August 2006. You are the S-1 for 4th BCT, 3d Infantry Division. Your new brigade commander wants to see an updated officer rating scheme for the BCT and wants you to create a Senior Rater Officer Evaluation Report (OER) Management Plan for MAJs. Your HR Specialist provided you with the rating scheme and a blank Senior Rater OER Management Plan. You have reviewed most of the rating scheme and now have only 10 officer record briefs (ORBs) for Majors left to verify. The ORBs will also assist you with building the management plan.

ADDITIONAL INFORMATION: You know the following moves will occur within the BCT:

1. MAJ Thumb, Tom will be PCSing 20 Dec 06
2. MAJ Beel, Richard will backfill MAJ Thumb's position, with only 5 days overlap.
3. MAJ Kirk, Tim will move to a 3d ID JAG position on 15 Feb 07.

REQUIREMENTS: Complete your review and provide an updated MAJ rating scheme and Senior Rater OER Management Plan to your BCT Commander NLT COB today. Additionally, answer the questions your commander has asked you.

INSTRUCTIONS: Update Rating Scheme
PE Supplemental: TAB 1, TAB 2, and TAB 4

The Rating Scheme is designed to assist senior raters in providing 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.

1. Review rating scheme data with ORBs and verify/update with the correct data.

2. Ensure you give an updated copy to your commander for review and signature.

3. Answer the following questions your BCT commander asked:

   a. How are official rating schemes published and what information must be included on the rating scheme?
   b. What sources should you use to verify information?
   c. What must Brigade S-1/admin office complete to ensure that the Rating Scheme is official?
   d. What tools are available to assist senior raters in managing their profiles?
   e. What are the criteria for a Complete the Record (CTR) report and a Senior Rater Option (SRO) report?

INSTRUCTIONS: Senior Rater OER Management Plan
PE Supplemental: TAB 1, TAB 2, and TAB 4

This worksheet is designed to assist senior raters in projecting ratings for their evaluations under the Evaluation Reporting System (ERS) using DA Form 67-9. Senior raters should maintain a separate worksheet for each rank, for the ranks of CW3, CW4, MAJ, LTC, COL, and BG. Promotable officers serving in positions authorized at the promotable grade are profiled at the higher grade by entering a rank with (P) in Part Ic on the OER.

This is an unofficial worksheet which may be modified to meet individual needs. Fill in each column on the worksheet follows:

Name: Name of rated officer
Position: Duty position of rated officer
 # OERs Received in that Position: Includes OERs from previous senior raters.
OER Type: Date of OER/Type of OER/Rating received.
- Type codes: Change of Rater-CR, Change of Duty-CD, PCS-PCS, Annual-AN, Complete the Record-CTR, Senior Rater Option-SO, Relief for Cause-RFC.
- Ratings received: ACOM, COM, and BCOM

Projected OER: Date of next projected OER
Projected Type: Projected type of next OER (use codes)
Projected Rating: How would I rate this officer today?
- Note: maintain <50% ACOM evaluations - adjust as events dictate.

OER to DA: Date report needs to be at DA (90 days after report THRU date).
- Exception: Board reports need to be at DA in accordance with board zone messages.

Subsequent OER: Will the officer receive any more OERs from me? Yes/No. If so, how many?
Cohort YG: Year Group of rated officer
Next Board: Next selection board for this officer, type, and expected date.
- Use profile chart which shows board dates by year group which is available on HRC On-line "OER Information Page"
https://www.hrc.army.mil/site/active/tagd/OERS/seniorraterinformation.htm
or the actual board schedule nearby:
https://www.hrc.army.mil/site/active/tagd/MSD/msdweb.htm

Projected Departure: Officer's projected departure date.

SITUATION 2: After your brigade commander reviewed the documents you provided him, he asks you for some additional help. He wants to give as many ACOMs as he possibly can without a misfire. To assist you with your task, your commander hands you a copy of his DA 67-9-2 (Senior Rater Profile Report Officer Evaluation Reporting System) and informs you that there is one additional Major that he rated ACOM that has not been posted yet (see TAB 2, SR OER Management Plan). Remember that OERs are processed together as a batch and incremented against the Senior Rater's profile based on date of receipt at HRC-Fort Knox. Except for the 1st single top box in each grade, less than 50% is passing. Furthermore, promotable officers serving in positions authorized the promotable grade will be profiled at the higher grade if listed as (P) in the grade block of the OER.

ADDITIONAL INFORMATION: The 703d BN commander is recommending an ACOM for MAJ Beel when he moves up to Bde. Additionally, the BCT S-3 is recommending that MAJ Thumb receive an ACOM upon his PCS. Your commander understands that he will have the option to submit several CTR OERs. He may want to give the officers an ACOM for their selection board. Can your commander support both of his rater's recommendations and give ACOMs for the CTR OERs?

REQUIREMENTS: Complete a Senior Rater Profile Record for MAJs to determine the number of Above Center of Mass (ACOM) and Center of Mass (COM) the commander can give without having a misfire. Send an email to the Brigade Commander (write a brief paragraph) on what actions need to be identified and taken based on this scenario and your commanders' question.

INSTRUCTIONS: Senior Rater Profile Record
PE Supplemental: TAB 2 and TAB 4

This worksheet is designed to assist senior raters in keeping track of ratings rendered under the Officer Evaluation Reporting System (OERS) using DA Form 67-9. This unofficial worksheet should mirror information found on the DA Form 67-9-2. Senior raters should maintain a separate worksheet for each rank, for the ranks of CW3, CW4, MAJ, LTC, COL, and BG. Promotable officers serving in positions authorized at the promotable grade are profiled at the higher grade by entering a rank with (P) in Part Ic on the OER.

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This is an unofficial worksheet, which may be modified to meet individual needs. Fill in each column on the worksheet follows:

Name: Name of rated officer.

Type of Report: Change of rater-CR; Change of Duty-CD, PCS-PCS; Annual-AN; Complete the Record-CTR; Senior Rater Option-SO; Relief for Cause-RFC.

Thru Date: From the OER.

Box Checks: The check the SR made on the OER, for tracking and profiling purposes BCOM box checks are combined. The total column (in yellow) calculates as data is entered.

Profile: The senior rater's profile at the time the report is rendered (including the current OER). Information should be verified with HRC (by requesting an updated dash 2) periodically.

Date to DA: Date the report was sent to HQDA.

Date Received DA. Validate date of receipt with HRC. Active Component OERs can use IWRS – either the individual look up or any of the reports. The SR Status Report was designed for this purpose. USAR OERs can use the reports on 2x Citizen. ARNG can use reports on GKO.

DA Label: Title on DA label. Can validate information with HRC if profile is close.

% Total Top Block: Calculated number (in tan). Total in top box divided by profile total.

- Must remain below 50%. Will turn red when percentage equals or exceeds 50%.
- Exception is made for first four OERs in each grade wherein any one, but only one, may be an ACOM evaluation.