

OHIO MILITARY RESERVE



Regulation 623-2

OFFICER EVALUATION REPORTING SYSTEM (OERS)

Headquarters, Ohio Military Reserve
Office of the Assistant Chief of Staff,
Personnel and Administration, G1
1000 Lawrence Road
Camp Perry Training Site
Port Clinton, Ohio
43452-9578

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OHMR Regulation 623-2

Headquarters
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Officer Evaluation Reporting System

By Order of the Governor:

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Summary. This Regulation sets forth policy and procedures for the Officer Evaluation Reporting System (OERS). It provides instructions for preparing, processing and using OHMR Form 67-8 (OHMR Officer Evaluation Report).

Supersedes. This regulation supersedes OHMR-R 623-2, 01 January 1986

Applicability. This regulation applies to all commissioned and warrant officers in the Ohio Military Reserve.

Supplementation. Supplementation of this regulation and establishment of command and local policies are prohibited without prior written approval from the Assistant Chief of Staff, Personnel and Administration, OHMR-G1.

Suggested Improvements. Suggested improvements which may be considered for this regulation should be forwarded in writing to the proponent agency of this regulation, the Office of the Assistant Chief of Staff, Personnel and Administration, OHMR-G1, Camp Perry Training Site, 1000 Lawrence Avenue, Port Clinton, Ohio 43452-9578.

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Chapter 1

General

1-1. Purpose.

a. This regulation sets policies and procedures for the Officer Evaluation Reporting System (OERS). It gives instructions for preparing, processing, and using OHMR Form 67-8 (Officer Evaluation Report).

b. Requests for clarification or exceptions to policy should be sent to HQOHMR.

1-2. Reference AR 623-105

1-3. OHMR Officer Evaluation System (OES)

a. Approving authorities for issuance of ID cards are Battalion S2 and Brigade S2 as delegated by OHMR-G2/S2.

b. Under the OES, an officer is evaluated on his or her performance and potential.

1-4. Officer Evaluation Reporting System (OERS).

a. The OERS is an important subsystem of the OES. It largely determines the quality of the officer corps, the selection of future OHMR leaders, and the course of each officer's career.

b. The primary function of the OERS is to provide information to HQOHMR for use in making personnel management decisions.

1-5. Responsibilities of commanders.

a. Commanders will insure that -

(1) A copy of this regulation is available to the rate officer and rating officials.

(2) Reports are prepared by the individual's named in the published rating chain.

(3) Each rating official knows how the subordinates he or she evaluates have performed.

(4) Each senior rater understands that he or, she must examine the entries on the evaluation reports to insure that objectivity and fairness have been maintained.

(5) Completed reports arrive at HQOHMR not later than 60 calendar days after the "THRU" data of the report.

1-6. Responsibilities of HQOHMR. HQOHMR is responsible for the effective operation of the

Chapter 2

The Evaluation Reporting Process

OERS and will exercise final review authority on all evaluation reports received at HQOHMR.

2-1. General

a. The OERS process is designed to -

(1) Set objectives for the rated officer that support the organization's mission.

(2) Evaluate the rated officer's potential.

(3) Insure a review of the entire process.

b. In the evaluation process the OHMR Form 67-8 is used by the organizational rating chain.

2-2. The beginning of the rating period.

a. The evaluation process starts at the beginning of the rating period. At that time, the rated officer and the rater have a face-to-face discussion of duties and objectives.

b. This discussion will be held within 30 days after the beginning of the rating period.

2-3. During the rating period.

a. Throughout the rating period, both the rater and the rated officer should continually assess whether the duty description and performance objectives are adequate.

b. The rater has the responsibility to coach the rated officer on his or her personal and professional development.

2-4. At the end of the rating period. At the end of the rating period the officer to be rated completes his or her portion of the OHMR Form 67-8. The OHMR Form 67-8 will then be given to the rater and he will complete his portion of the form and forward to HQOHMR.

2-5. Actions at HQOHMR.

a. On arrival at HQOHMR the OHMR Form 67-8 is reviewed. The report is placed in the rated officers official Military Personnel Record Jacket.

b. A duplicate copy will, be returned to the rater so that he or she may discuss with the rated officer areas of performance which need corrective action. The rated officer will then retain this copy of the OHMR Form 67-8.

Chapter 3

The Rating Chain

3-1. The rating chain.

a. The rating chain must correspond as nearly as practical to the chain of command and supervision within an organization.

b. A rating chain is established to provide the best evaluation of an officer's performance and potential. A rating chain also ties the rated officer's performance to a specific senior/subordinate relationship. This allows for the proper counseling to develop the rated officer and accomplish the mission.

c. Rating chains will normally consist of the rated and senior rater are the first officials designated.

3-2. The rated officer.

a. The rated officer is the subject of the evaluation. He or she has considerable responsibility in the evaluation process. (See para 3-3).

b. To be eligible for an evaluation report, a rated officer must complete 90 calendar days in the same position under the same rater.

3-3. Responsibilities of the rated officer. The rated officer will

a. Perform each assigned task or implied duty to the best of his or her ability. To do this, the rated officer must periodically evaluate his or her own performance. When in doubt, seek the advice of their superior in the rating chain.

b. Begin a discussion of his or her duty description and performance objectives with his or her rater.

c. Assess throughout the rating period the validity of his or her objectives.

3-4. The rater.

a. The rater is the person in the rating chain who

(1) Is the most familiar with the drill-to-drill performance of the rated officer.

(2) Most directly guides the rated officer's participation in the organization's mission.

b. Normally, to evaluate an officer the rater must be designated and serve in that capacity for at least 90 calendar days.

3-5. Designating the rater.

a. The rater will normally be the immediate supervisor of the rated officer. The immediate supervisor is the individual who directs and is most responsible for the rated officers' performance.

b. The rater must be senior to the rated officer in grade or date of rank.

c. Commanders will normally be rated by the next higher commander.

3-6. Responsibilities of the rater. The rater will

a. Discuss the scope of the rated officer's duties with his or her within 30 days after the beginning of the rating period. This discussion will include the rated officer's duty description and performance objectives.

b. If the rated officer has been recently assigned to the organization, the rater may use the discussion to outline a duty description and performance objectives.

c. If the rater has been recently assigned, he might use this first discussion to ask the rated officer what he or she thinks the duty description and objectives should be.

d. Assess the real performance of the rated officer using all reasonable means. These include

(1) Personnel contact.

(2) Records and reports

e. Provide an objective and comprehensive evaluation of the rated officer's performance and potential.

3-7. The senior rater.

a. The senior rater is the senior rating official in the rating chain. The senior rater uses his or her position and experience to evaluate the rated officer from a broad organizational perspective.

b. In addition to evaluating the rated officer, the senior rater normally performs the final rating chain review.

3-8. Responsibilities of the senior rater. The senior rater will

a. Use all reasonable means to become familiar with the rated *officer's performance*. When practical the following means should be used:

(1) Personal contact.

(2) Records and reports.

(3) The rater's and the intermediate rater's evaluations of the rated officer given on the OHMR Form 67-8.

Chapter 4

Report Preparation, Submission and Access

4-1. Introduction.

a. This chapter describes the policies and procedures for submitting evaluation reports. Reports are submitted on all officers

through the grade of colonel. Reports are either mandatory or optional.

b. Reports will not be submitted unless authorized by HQOHMR.

4-2. Basic rule. Reports must be prepared on the following occasions. Specific time requirements if any, are listed with each occasion that a report is written.

a. Change of duty. Mandatory upon change of duty assignment involving a different type of duty. (Ex: Staff duty to company commander; but not Personnel Officer to Assistant SI).

b. Selection for promotion. Prior to appearing before a promotion selection board.

c. Relief for cause. Relief for cause is defined as an early release of an officer from a specific duty or assignment directed by superior authority and based on a decision that the officer has failed in his or her performance of duty.

4-3. Annual evaluation report. An annual evaluation report is mandatory on completion of one calendar year of duty following the "THRU" date of the last submitted under this regulation or OHMR Regulation 624-2.

4-4. Preparation and submission.

a. Preparation. OHMR Form 67-8 will be typed. Facsimile signatures are NOT authorized. Signature will be either blue or *blue-black ink*.

b. Copies. Copies will be distributed as follows

(1) Each rated officer will be given a copy of his or her completed and processed OHMR Form 67-8

(2) Rated officers who fail to receive a copy of their OHMR Form 67-8 should request a copy from HQOHMR.

4-5. Access to reports. Access to reports at HQOHMR is limited to individuals responsible for maintaining the file. Access to reports at the local level is limited to those persons having

command, administrative, or rating official responsibility for the report.

Chapter 5

Warrant Officer Evaluations

5-1. General. Since the warrant officer is a separate category of officer personnel, the rating chain must recognize the basic differences between warrant and commissioned officers when evaluating performance and potential.

5-2. Evaluation considerations.

a. Both commissioned and warrant officers are authorized to perform similar functions (i.e., command a unit, administer oaths; and impose discipline). Despite their mutual functions however, the professional development, use, and evaluation of warrant officers differ from those of commissioned officers. These differences must be considered when evaluating warrant officers.

b. Warrant officers are appointed to serve in technical military occupational specialties. Thus, their professional development is aimed at increasing competence in their specialties.

c. Because of their technical orientation, warrant officers are qualified to supervise only those people in technical occupations similar to their own.

d. Warrant officers are generally viewed as middle managers or technical administrators. Warrant officers should be evaluated on their potential for continued service in their technical field. They should not be evaluated on their potential to fill positions or responsibility outside their specialties.

5-3. The evaluation form. OHMR Form 67-8 will be used for warrant officer in the same manner as prescribed for commissioned officers.