

## New W2-W3/02-05 OER, Form CG-5310A

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### Highlights:

- Two-page, condensed 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 may comment on any dimension, but must provide supporting comment to justify marks of 1, 2, 3, and 7. Well crafted comments may apply to more than one dimension
- Supervisor marks the Reported-on Officer in all dimensions
- Bubbled mark indicating the Reporting Officer provided their comparison scale history to the Reviewer
- Promotion scale added to clearly indicate the promotion recommendation; no requirement or prohibition on commenting on promotion potential or making a promotion recommendation in the comments section
- Reviewer has option to "concur" or opportunity to comment regarding "performance and/or potential which is significantly different than the Supervisor or Reporting Officer". This no longer takes place on a separate form, but a truncated space on the OER form itself
- 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](http://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.IC, will be the primary manual for completing the evaluation

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

# New W2-W3/O2-O5 OER, Form CG-5310A

DEPARTMENT OF HOMELAND SECURITY  
U.S. Coast Guard  
**OFFICER EVALUATION REPORT (W2/W3/O2-O5)**

Validation

**OER GUIDANCE**

The Officer Evaluation Report is the single most significant document in the management of an officer's performance used to determine an officer's potential for promotion, retention, advanced education, comm

**1. ADMINISTRATIVE INFORMATION:**

a. REPORTED-ON OFFICER NAME (Last)  (Initials)  b. UNIT

c. PERIOD OF REPORT  to  d. OCCASION FOR REPORT  e. GRADE  f. EMPLID  g. DATE OF RANK  h. DATE REPORTED

i. MID-TERM COUNSELING DOCUMENTATION Mandated. See [PSCINST M1611.1\(series\)](#) for guidance. j. DATE COUNSELED  k. COUNSELOR NAME  l. ROO SIGNATURE

[Click here - email form to Supervisor](#)

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

a. PRIMARY DUTY: OER REVIEWER b. PAL POSITION TITLE: EVALS BR-DUTY

Responsible for the integrity & administration of CG Officer Evaluation System (OES). 1 of 4 Quality Reviewers

**3. EVALUATION:** Provide sufficient justification to support marks assigned in action/result statement. Avoid acronyms, do not use

**3a. PERFORMANCE OF DUTIES:** Measures an officer's ability to manage and get things done and to communicate in a positive.

Open	1	2	3	4	5
a. Planning and Preparedness:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
b. Using Resources:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Results/Effectiveness:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
d. Adaptability:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Professional Competence:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Speaking and Listening:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Writing:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Changed from 13 to 11 lines of text

**3b. LEADERSHIP SKILLS:** Measures an officer's ability to support, develop, direct, and influence others in performing work.

Open	1	2	3	4	5	6	7	N/O
a. Looking Out for Others:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Developing Others:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
c. Directing Others:	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Teamwork:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
e. Workplace Climate:	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Evaluations:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Changed from 12 to 9 lines of text

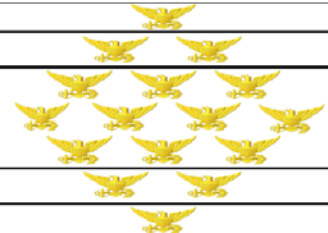
**3c. PERSONAL AND PROFESSIONAL QUALITIES:** Measures an officer's qualities which illustrate the individual's character.

Open	1	2	3	4	5	6	7	N/O
a. Initiative:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Judgment:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Responsibility:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Professional Presence:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Health and Well-Being:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Changed from 11 to 8 lines of text

**5. REPORTING OFFICER AUTHENTICATION:** a. EVALUATION  Concur  Do not concur  RO is Supervisor

b. COMPARISON SCALE: Compare this officer with others of the same grade whom you have known in your career. c. PROMOTION SCALE: (Mark one only)

<input type="radio"/> Best officer of this grade <input checked="" type="radio"/> One of few distinguished officers <input type="radio"/> One of the many high performing officers who form the majority of this grade. <input type="radio"/> Marginally performing officer <input type="radio"/> Unsatisfactory	
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Accelerated promotion  
 In-zone reorder  
 Definitely promote  
 Promote  
 Promotion potential  
 Do not promote

I provided my comparison scale history to the Reviewer (CG Reporting Officer's only; available via Direct Access).

**6. REVIEWER AUTHENTICATION:** a.  Concur  Comments regarding performance and/or potential significantly different than Supervisor

b. FIRST, MIDDLE INITIAL, LAST NAME  c. GRADE  d. EMPLID  e. POSITION TITLE

g. ATTACHMENTS: [Click here - email form to ROO](#)

**7. REPORTED-ON OFFICER:** I understand my signature does not constitute agreement or disagreement. I acknowledge I have reviewed the report.

a. SIGNATURE:  b. DATE:

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

Primary Duty and PAL Position Title do NOT have to match

- 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 for the first semi-annual OERs (LTJG OERs in January and ENS OERs in March)

Overall 24% reduction in text

Bubbled mark indicating the Reporting Officer provided their comparison scale history to the Reviewer

If "comments regarding performance..." is selected, a box with 5 lines of text will appear directly below

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