

## Creating a Counseling form/NCOER (DA 2166-8-1) using MYFORMS

### Created by: Darrome M. Morris

Presented by Michael J. Danberry

Edited on: 20 September 2010

# Step 1: Log into AKO and double click the **Forms** button



### Select Inbox by clicking on the tab

Ø My Forms on Army Knowledge Online - Windows Internet Explorer provided by Microsoft	
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Army transitions to Vista Operating System The Army's Vista and XP compatible forms (Lotus Forms Viewer 3.5.1) and digital signature (ApproveIt 6.1) solution is now available via the Army Gold Master (AGM) and CHESS	
APD Rolls Out Phase 1 of the Wizardized DA Form 260	
Welcome to APD's "My Forms" Portal (Version 2.0)	
What is the "My Forms" Portal v2.0? The "My Forms" Portal is the Army Publishing Directorate's (APD) next-generation forms content management system. "My Forms" Portal v2.0 provides an Army enterprise forms system situated behind the Army Knowledge Online (AKO) to improve the management of thousands of forms-based processes. The solution includes Army enterprise-wide licenses for new electronic forms software, Lotus Forms Viewer, and new electronic approval software, ApproveIt Desktop	
What you will be able to do:	-
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#### In Form Number: type 2166 and click Search

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#### Click on NCOER COUNSELING AND SUPPORT FORM

Form Number       Form Title       Published Date       Signature Enabled       Form Ver         DA 2166-8       Directoration recent       Mar 01, 2006 01:00:00 GMT       YES       6.00         DA 2166-8       Directoration recent       Mar 01, 2006 Directoration recent       Yes       4.00	崔 https://myforms.us.army.mil/wps/PA_1_0_FL/SessionCheckServlet?action=search&field.userid=darrom 🖃 🗆 🔯							
Form Number         Form Title         Published Date         Signature Enabled         Form Ver           DA 2166-8         D-4000 EVALUATION RECENT         Mar 01, 2006 00:00:00 GMT         YES         6.00           DA 2166-8-1         D-NCOER COUNSELING AND SUPPORT FORM         Mar 01, 2006 D-400:00 GMT         Yes         4.00	Form Search Results							
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	Yes 4.00	Mar 11, 2006 09.00:00 GMT	DINCOER COUNSELING AND SUPPORT FORM	DA 2166-8-1				
				<i>ब</i> ी -				

#### Click the box next to *Complete NCOER and Support form using wizard format,* then select *Next*



#### Drop down windows:

<u>Component</u>: **USAR** (United States Army Reserve)

Status Code: TPU (Troop Program Unit)

NOTE: These are examples for this presentation.

U.S. ARNY	NCOER COUNSELING AND SUPPORT FORM DA FORM 2166-8-1
You have selected to create Soldier belongs to and click again. Vertice ecoponent does the Component USAR Status Code TPU	an NCOER form using the wizard. If this is correct, select the component the the Next button to continue. If this is not correct select the Previous button to try Rated Soldier belong to? NOTE: Not sure in what component the Rated Soldier is serving? Ask the following question: Who manages the Rated Soldier's career and promotions as of the thru date of the report? If the answer is EREC, then the Soldier is Regular Army (RA). If the answer is HRC-St Louis, then the Soldier is USAR. If the answer is HQS, National Guard, or his home state, then the Soldier is ARNG. Still not sure? You will have the option to edit the component on the View
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#### Select Begin NCOER Counseling and Support Form

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$\cdot$ NO DATA. Please click the Begin NCOER Counseling and Support Form button be	elow to initiate a form.
NCOER COUNSELING AND SUPPORT FORM DA FORM 2166-8-1	Link to AR 623-3
Introduction	
Welcome to the NCOER Counseling and Support Form Wizard! Evaluation Reports are used to qualified for promotion and assignments to positions of greater responsibility. Evaluation Reports be retained on duty and in grade, or eliminated from service. Most importantly, evaluations enco development and enhance mission accomplishment.	identify Soldiers who are best s also identify Soldiers who will burage leader professional
Using the NCOER Counseling and Support Form for initial and follow up face to face counseling process between rating officials and the Rated Soldier, develops elements of duty description, re objectives, and enhances mission-related planning, assessment, and performance development. Using this wizard gives you regulatory guidance which is built into the form. You will also be able information from the personnel database of record. Also, while using the NCOER Counseling an may:	solidifies the communication sponsibilities, and performance e to pre-populate administrative d Support Form Wizard, you
Navigate between sections and pages using the tabs along the top and left side of the Wizard View the form by selecting "View Form" Electronically sign the form by selecting "View Form" and clicking on the desired signature block This form is stored within the AKO MyForms portal and can be updated at any time. At the end of use this form to initiate an NCOER by selecting this option in the "sp. tasks" function button.	< of the rating period, raters may
To learn how to create a NCOER from a completed NCOER Counseling and Support Form Counseling	<u>CK HERE</u>
View Form Begin NCOER Counseling and Support Form	Page 1 o
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#### Select Automatically populate the Rated Soldier's...

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	· NO DATA. Please click the Begin NCOER Counseling and Support Form button below to initiate	e a form.
	NCOER COUNSELING AND SUPPORT FORM DA FORM 2166-8-1	Link to AR 623-3
	Administrative Data Rater Actions	
Data Entry - Rated Soldier	Select Method for Data Entry – Rated Soldier	
Admin Data - Rated Soldier Data Entry - Rating Chain	You may automatically populate this NCOER Counseling and Support form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.	
Auth - Rating Chain Duty Des - Rated Soldier Duty Des - Continued	Automatically populate the Rated Soldier's administrative data by searching the Army personnel datal the administrative information is incorrect as pulled from the personnel database of record, you can n change the information within the form. You must use other channels (S1 or Admin Support) to have information changed.	base. If any of hanually the incorrect
	Enter requested data and click SEARCH. (All fields highlighted in yellow are required.)	
	Rated Soldier's Last Name (First Two Letters)	SEARCH
	View Form	Page 1 of 6
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## Type in rated Soldier's SSN and first 2 letters of Last Name

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	$\cdot$ NO DATA. Please click the Begin NCOER Counseling an	d Support Form button below to initiate a form.	
U.S.ARMY	NCOER COUNSELING AND SUPPO DA FORM 2166-8-1	RT FORM Link to AR 62	23-3
	Administrative Data Rater Actions		
Data Entry - Rated Soldier	Select Method for Data Entry – Rated Soldier		
Admin Data - Rated Soldier Data Entry - Rating Chain Auth - Rating Chain	You may automatically populate this NCOER Counseling and Support form personnel information from the Army personnel database. If you choose no required to manually enter all required information.  Manually enter Rated Soldier's administrative data.  Automatically populate the Rated Soldier's administrative data to the Rated	by retrieving the Rated Soldier's of to prepopulate this form, you will be	
Rated Soldier Duty Des - Continued	the administrative information is incorrect as pulled from the pe change the information within the form. You must use other cha information changed.	sonnel database of record, you can manually annels (S1 or Admin Support) to have the incorrect	
	Enter requested data and click SEARCH. (All fields highlighted in yellow	are required.)	
	Rated Soldier's SSN Rated Soldier's Las	t Name (First Two Letters)	
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Then Click SEARCH

#### Select Continue NCOER Counseling Support Form

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RATED SOLDIER: MORRIS, DARROME MAURICE	
NCOER COUNSELING AND SUPPORT FORM DA FORM 2166-8-1	
Search Results - Rated Soldier	
If search results are correct, click Continue NCOER Counseling and Support Form to view data. If search results are incorrect, click SEARCH AGAIN to begin a new search or Continue to manually enter data. Soldier Found	
NAME: MORRIS, DARROME MAURICE SSN: 1231	
RANK: SSG	<mark>∖gair</mark> ] 1a of 6
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## Update / correct data that was uploaded from the Army data base

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RATED SOLDIER: MORRIS, DARROME MAURICE	
NCOER COUNSELING AND SUPPORT F	ORM Link to AR 623-3
Administrative Data Rater Actions	
Data Entry - Rated Soldier Administration Data - Rated Soldier	
Admin Data - Bated Soldier a. Name (Last, First, Middle Initial) b. SSN	
MORRIS, DARROME MAURICE -1231	1
Rating Chain c. Rank d. Date of Rank e. PMOSC <u>CLICK HERE</u>	
Auth - SSG 🛛 🔽 20070901	
Rating Chain f.1. Unit Organization Station Zip Major Comman	nd f.2. Status Code
Duty Des - MAINT HQ Rated Soldier	TPU
Duty Des - Continued I. Rated NCO'S AKO Email Address n. CMD	o. PSB
darrome.m.morris@us.army.mil m. UIC Code	Code
WSM7T1	
Recommend you use a .gov or.mil	
Enter the first date of the rating period: <u>CLICK HERE</u>	
(TTTTMMDD)	
View Form  View Form  Next	Page 2 of 6

### a. Abbreviate Middle name, (M.) e. Add PMOSC, (42A3O), f. Add Company name (0322 CS CO MAINT, Arden Hills, MN 55126-5862), n. CMD Code (5C) dropdown selection



#### Select Automatically populate the rating chain data ...



### Type in SSNs of the **Rater, Senior Rater**, and **Reviewer** and first 2 letters of their Last Name

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	RATED SOLDIER	: MORRIS, DARROME M.	
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	Administrative Data Rater Actions		
	Select Method for Data Er	ntry – Rating Chain	
Admin Data - Rated Soldier Data Entry -	Manually enter rating c	hain data.	
Rating Chain Auth - Rating Chain Duty Des - Rated Soldier	Automatically populate administrative informat change the information incorrect information c	the rating chain data by searching the Army personnel database. ion is incorrect as pulled from the personnel database of record, y within the form. You must use other channels (S1 or Admin Supp hanged.	If any of the rou can manually rort) to have the
Duty Des - Continued	Enter requested data and click SE	ARCH Rater Last Name (First Two Latters)	
	4462 Senior Rater SSN	bu Senior Rater Last Name (First Two Lette	ers)
	3580 Reviewer SSN	da Reviewer Last Name (First Two Letters)	
	3306	ko	
	Ensure that the rating chain for thi	s soldier is accurate and reflects a published rating scheme.	SEARCH
	View Form	Previous	Page 3 of 6
		Click Search	
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## You will see some information is missing, the next slide will show you what to correct

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Administrative Data Rater Actions	
Data Entry - Authentication – Rating Chain	
Admin Data - RATER Name BURRELL, DYRAL SSN 4462	2
Rated Soldier Rank SFC V PMOSC/Branch 63X Organization	
Data Entry - Duty Assignment AKO Email Address dyral.bur	rell@us.army.mil
Recommend	l you use a .gov or.mil
Autn - Rating Chain SENIOR Name DANBERRY, MICHAEL JOHNNY SSN	-3580
Duty Des- RATER Rank CW2 V PMOSC/Branch 915A Organization	
Rated Soldier Duty Assignment AKO Email Address michael.	j.danberry@us.army.mil
Duty Des - Continued Recommend	d you use a .gov or.mil
REVIEWER Name KOY, PUNNARIN SSN 3300	5
Rank CPT V PMOSC/Branch Organization	
Duty Assignment AKO Email Address punnarin	.koy@us.army.mil
Recommend	you use a .gov or.mil
View Form View Form	Page 4 of 6
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Rater: PMOSC / Branch(63X4O), Duty Assignment(Motor Sergeant) Senior Rater: Name / change to middle initial (J.), PMOSC/Branch (915/OD), Duty Assignment (Senior Automotive Maintenance Warrant Officer) *abbreviated* Reviewer: PMOSC/Branch(OD), Duty Assignment (Commander) ALL: Organization (0322 CS CO MAINT)

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		Rank CPT 🔽 PMOS	SC/Branch <u>OD</u>	Organization 0322 C	CS CO MAINT	_
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#### Fill in the fields for **Principle Duty title**, **Duty MOSC**, and **Daily Duties and Scope**

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RATED SOLDIER: MORRIS, DARROME MAURICE	
NCOER COUNSELING AND SUPPOR DA FORM 2166-8-1	RT FORM Link to AR 623-3
Administrative Data Rater Actions	
ata Entry - ted Soldier Duty Description – Rated Soldier	
ted Soldier for performance counse first counseling session to inform the Rated Soldier of his or her du at Entry.	ling and evaluation should be used during the uties and areas of emphasis. It may change record what was important about the duties.
Enter Principal Duty Title and DMOS that most accurately reflect a	ctual duties performed.
Auth - ting Chain Principal Duty Title	
ity Des - Duty MOSC	
Late Solution aty Des- continued Enter Daily Duties and Scope. This portion should address the mo- continued Ideally, this should include number of people supervised, equipment other routine duties and responsibilities critical to mission accomple	ost important routine duties and responsibilities. ant, facilities, and dollars involved and any lishment.
View Form Previous Next	Page 5 of 6

\***Note:** DA PAM 611-21 has duties descriptions for every MOS Intersection and the second second

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RATED SOLDIER: MORRIS, DARROME MAURICE

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	Administrative Data Rater Actions	
Data Entry - Rated Soldier	Duty Description – Rated Soldier	
Admin Data - Rated Soldier	The Duty Description of the Rated Soldier for performance counseling and evaluation should be used during first counseling session to inform the Rated Soldier of his or her duties and areas of emphasis. It may char over the rating period. It is used at the end of the rating period to record what was important about the duties	) the ige is.
Rating Chain	Enter Principal Duty Title and DMOS that most accurately reflect actual duties performed.	
Auth - Rating Chain	Principal Duty Title Human Resources Sergeant	
Duty Des - Rated Soldier	Duty MOSC 42A20	
Duty Des - Continued	Enter Daily Duties and Scope. This portion should address the most important routine duties and responsib Ideally, this should include number of people supervised, equipment, facilities, and dollars involved and any other routine duties and responsibilities critical to mission accomplishment.	ilities.
	Responsibilities include unit level personnel administrative support to include actions on individual Soldier's records; organizing, maintaining and reviewing personnel records. Management of company admin section, responsible for the supervision, training and development of 3 Soldiers in the accomplishment of their duties; preparing, updating and coordinating requests for NCOERs and OERs, maintaining and updating NCOER and OER rating schemes; responsibility of unit files for promotions and decoration/awards.	
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### Input Areas of **Special Emphasis** and / or **Appointed Duties** (recommended)

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Administrative Data Rater Actions	
Data Entry - Duty Description (Continued) – Rated Soldier	
Admin Data - Rated Soldier Data Entry - Rating Chain Auth - Ratiog Chain Duty Des - Rated Soldier Data Soldier Ratiog Chain Duty Des - Rated Soldier	the first g rating the JTC ance
Enter Appointed Duties. These should include those duties that are appointed and are not normally associated of the duty description.	with
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There are 2 tabs for each subject: What is expected and what was performed. I.E. the Army Values subject has Army Values-<u>Task/Actions</u> and Army Values-<u>Performance</u>. In sentence form describe what is expected of the rated NCO in 2-3 lines that are on the <u>LEFT SIDE</u> under the <u>FIRST TAB</u> (of two) of the Army Values-Task /Actions



#### What is expected of rated NCO



\*Note: Bullett Formatting Guidance is found here:

#### In bullet format in the **Army Values / Performance Summary** on the <u>Right-Side</u> starting with a lowercase "o" describe what the rated NCO did based on what was expected

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Army Value. Task/Actions	Army Values – Performand	e Summar	у	
Army Values- Performance Complications Task/Actions	Enter the Rated Soldier's accom click ADD PAGE to add a contil pages <u>CLICK HERE</u>	nplishments re nuation page	elevant to the Army Values. If you need additional space within the wizard. For more information on continuation	≥,
Performance Physical Fit - Task/Actions	Loyalty Duty		o a faithful and loyal leader who cares about the mission and Soldiers	
Physical Fit - Performance Leadership -	Selfless- Honor	EU/EEU Service	o stellar example of selfless service and dedication to the Army and nation	
Leadership - Performance	Integrity Personal	Courage	o consistently enforces fair treatment of all Soldiers	
Training - Task/Actions Training - Performance Responsibility -			Rullet Formatting Cuidapool	
Task/Actions Responsibility - Performance				
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## **Competence-Task/Actions**=<u>*Left-Side*</u>, what is expected of rated NCO

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	Army Values - Task/Actions	Competence – Task/Actions						
<	Army Values - . enormance Competence - Task/Actions Competence - Performance	Enter Tasks or Actions relevant to Competence. Us expectations of the Rated Soldier during the rating results. If you need additional space, click ADD P/ more information on continuation pages <u>CLICK HER</u>	se this part of the form to explain and define your period. Provide clear objectives with quantifiable AGE to add a continuation page within the wizard. For E					
	Physical Fit - Task/Actions	Strive to achieve promotion						
t	Physical Fit - Performance Leadership -	Be diligent on completing and correcting NCOERs	o Duty proficiency; MOS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment					
	Task/Actions Leadership - Performance	Know your lane and be knowledgeable	o Seeking self-improvement; always learning o Accomplishing tasks to the fullest capacity; committed					
	Training - Task/Actions	Seek civilian education	to excellence					
	Training - Performance							
	Responsibility - Task/Actions	Bullet Formatting Guidance	ADD PAGE					
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\*Note: there are 2 tabs for each subject

#### **Competence-Performance**=<u>*Right side*</u> what the rated NCO did to fulfill what was expected from the **Actions**

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	Administrative Data Rater Actions		
Army Values - Task/Actions	Competence – Performance Summary		
Army Values - Performance Competence - Tast/Actions Competence - Performance	Enter the Rated Soldier's accomplishments rele PAGE to add a continuation page within the wi	evant to Competence. If you need additional space, o izard. For more information on continuation pages of	Slick ADD SLICK HERE
Physical Fit- Task/Actions Physical Fit- Performance Leadership - Task/Actions Leadership - Performance Training - Task/Actions Training - Performance	o Duty proficiency; MOS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment o Seeking self-improvement; always learning o Accomplishing tasks to the fullest capacity; committed to excellence	o promoted to SSG during the rating period o received a coin from the Battalion Commander for exceptional work on NCOERs o currently attending Grantham University in general studies	
Responsibility - Task/Actions Responsibility - Performance Counseling Complete	View Form	Bullet Formatting Guidance	ADD PAGE Page 4 of 13
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Click Next

## Physical Fitness & Military Bearing-Task/Actions = what is expected of rated NCO (left side)

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	RATED SOLDIER: MORRIS, DARROM		
	NCOER COUNSELING DA FORM	AND SUPPORT FORM I 2166-8-1	Link to AR 623-3
U.S.ARMY	Administrative Data Rater Actions		
Army Values - Task/Actions	Physical Fitness & Military Bearing – Task/A	Actions	
Army Values- Performance Competence - Task/Actions Competence - erromance	Enter Tasks or Actions relevant to Physical Fitness & and define your expectations of the Rated Soldier du quantifiable results. If you need additional space, cl wizard. For more information on continuation pages	Military Bearing. Use this part of the form to expl uring the rating period. Provide clear objectives wit ick ADD PAGE to add a continuation page within the <u>CLICK HERE</u>	ain h ne
Physical Fit- Task/Actions Physical Fit- Performance Leadership - Task/Actions Leadership - Performance Training - Task/Actions Training - Performance Performance	Set the example for your Soldiers Demonstrate professionalism and motivate Soldiers in APFT and weapons qualification Uphold Army values and live the NCO creed by actions	o Mental and physical toughness o Endurance and stamina to go the distance o Displaying confidence and enthusiasm; looks lik	ke a soldier
TasAActions TasAActions Responsibility - Performance Counseling Complete	Bullet Formatting Guidance	ADD PAGE	Page 5 of
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		Click <b>Next</b>	

### **Physical Fitness & Military bearing-Performance =** what the rated NCO did to fulfill the **/Actions**

	RATED SOLDIER: MORRIS, DARROME MAURICE	
	NCOER COUNSELING AND SUPPORT FORM DA FORM 2166-8-1	Link to AR 623-3
	Administrative Data Rater Actions	
Army Values - Task/Actions	Physical Fitness & Military Bearing – Performance Summary	
Army Values - Performance Competence - Task/Actions Competence - Performance Physical Fit- Performance Leadership - Performance Training - Task/Actions Training - Performance Responsibility - Task/Actions	Enter the Rated Soldier's accomplishments relevant to Physical Fitness & Military Bearing. If you ne additional space, click ADD PAGE to add a continuation page within the wizard. For more informatic continuation pages <u>CUCK HERE</u> o Mental and physical toughness       o his "set the example" attitude reflected in the accomplishments of his Soldiers         o Isplaying confidence and enthusiasm;       o demonstrated exemplary character and professionalism which motivates his Soldiers to score 270+ on APFT o upholds the Army values and truly demonstrated the NCO creed in his actions         Eullet Formatting Guidance       ADD PAGE         If available, enter APFT and HT/WT data for rated Soldier.	red on on
Responsibility - Performance	APFT PASS Telepht(in) 68 Weight(lt	os) 201
Counseling Complete	APFT Date 20071013	€▼
د الأ	View Form	Page 6 of 1
	Click Novt	

#### After completing all sections of the counseling



Click Next or View form

All information will be filled in on the 1<sup>st</sup> and 2<sup>nd</sup> pages of the DA 2166-8-1 with the **Tasks** and **Actions** of the rated NCO into what would be the equivalent of a DA 4856 (counseling form). Update and/or correct any data as necessary

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MORRIS, DARROME M		1231	550	20070901	42A20	
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND	STATUS CODE	I. RATED NCO'S EI	WAIL ADDRESS	m. UIC	n. CMD 0. PSB	
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55126-5862 89TH RRC	IPO 🔻	darrome.m.mor	ris@us.army.mi	WSM7T1	5C 🔻 🔻	
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b. NAME OF SENIOR RATER (Last, First, Middle Initial) DANBERRY, MICHAEL J.	SSN 358	0 INITIAL /··	··· LATER /	···· LATER /-	LATER /····	Γ
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c. NAME OF REVIEWER (Last, First, Middle Initial) KOY, PUNNARIN	SSN 330	6 INITIAL	LATER /	···· LATER /·	LATER /····	
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Click **Next>>** to view 2<sup>nd</sup> page



Click **<<previous** to go back to 1<sup>st</sup> page

### Start the counseling with the first counseling date (*initial*) by <u>Rated Soldier</u>, <u>Senior Rater</u>, and <u>Reviewer</u> with your CAC (It will be very tiny)

#### First page-top

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	PART I - ADMINIS	STRATIVE DA	ТА			
a. NAME (Last, First, Middle Initial) MORRIS, DARROME M.	b. SSN	-1231	c. RANK SSG	d. DATE OF RANK 20070901	e. PMOSC 42A2O	
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND 0322 CS CO MAINT, ARDEN HILLS, MN 55126-5862 89TH RRC	STATUS CODE	I. RATED NCC	'S EMAIL ADDRESS (gov or mil)	m. UIC	n. CMD o. PSB CODE CODE 5C V	Ţ
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b. NAME OF SENIOR RATER (Last, First, Middle Initial) DANBERRY, MICHAEL J.	SSN	0	/···· LATER	LATER	LATER	_
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e. NAME OF REVIEWER (Last, First, Middle Initial) KOY, PUNNARIN	330	6	Z DTER	LATER	LATER /	_
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a. ARMY VALUES: PART IV - ARMY VA	ALUES/ATTR	RIBUTES/SKILLS/ACTI	ONS (Rater)		
TASK/ACTIONS: Be a faithful and loval leader and care about the r	mission	PERFORMANCE SU	MMARY: oval leader who cares	about the missi	on
and your Soldiers		and Soldiers			
Be a stellar example of selfless service and be de to the Army and nation	edicated	o stellar exampl Army and natior	e of selfless service an 1	d dedication to	the
Consistently enforce fair treatment to all Soldiers	ŝ	o consistently er	nforces fair treatment of	f all Soldiers	
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PERFORMANCE

#### \*Note: 1st

counseling (initial), quarterly counseling, (LATER) would be the next quarterly 3 months later, etc.

\*Note: All must sign the counseling on each quarter

ACTIONS

After corrections/updates have been made click <u>SAVE</u> not SAVE AS when completed. (This is because you are working in myForms and saving the form to the repository).

#### Second page-top

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TASK/ACTIONS:			PERFORMANCE SUMMARY:				
Strive to achieve promotion		o promoted to SSG during the rating period					
Be diligent on cor Know your lane a	npleting and correction	ng NCOERs	o received a coin exceptional work	from the Battalic on NCOERs	on Commander for		
Seek civilian edu	cation		o currently attendi	ng Grantham Uni	iversity in general studies		
c. PHYSICAL FITNESS	6 & MILITARY BEARING:	o Mental and physical tou o Displaying confidence a	ughness o Endurance and and enthusiasm; looks like	d stamina to go the dis a soldier	tance		
TASK/ACTIONS:			PERFORMANCE SUMM	IARY:			
Set the example for your Soldiers		o his "set the example" attitude reflected in the accomplishments of his Soldiers					
Demonstrate profe APFT and weapo	essionalism and moti ns qualifications	vate Soldiers in	o demonstrated ex which motivates h	emplary charact is Soldiers to sc	er and professionalism ore 270+ on APFT		
Uphold Army values and live the NCO creed by actions		creed in his action	ly values and tru	iy demonstrated the NCO			
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e. TRAINING: Officer and team	o Mission focused; performance oriented	
TASK/ACTIONS:	PERFORMANCE SUMMARY:	
What is expected	What the rated soldier's actually did	
RESPONSIBILITY & ACCOUNTABILITY: o Care and main     o Conservation o	lenance of equipment/facilities o Soldier and equipment safety supplies and funds o Encouraging soldiers to learn and grow	_
TASK/ACTIONS:	PERFORMANCE SUMMARY:	
What is expected	What the rated soldier's actually did	
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DA FORM 2166-8-1, MAR 2006	Page 21	of 2
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#### If all worked correctly, you will get this screen



#### Click **Yes**



#### Close out by clicking the **X**

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b. NAME OF SENIOR RATER (Last, First, Middle Initial) DANBERRY, MICHAEL J.	SSN3580	INITIAL				:R	
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#### Click <u>Y</u>es


#### Click the X to exit screen

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# Click on the <u>Drafts</u> tab and place a check in the box NCOER COUNSELING AND SUPPORT FORM and select option Rename in the lower left side of the screen

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#### Highlight the entire **NCOER COUNSELING AND SUPPORT FORM** and rename (type) something simple to remember (For example this will be named **Morris 2**)



#### Click the Rename box

# Click the box of the renamed form <u>Morris 2</u>, now click the drop-down **Sp.Tasks**, then click **Create NCOER**

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#### Press Continue



# This process turned the 2166-8-1(**NCO counseling form**) into 2166-8 (**NCOER**) and still left the original counseling (morris 2 / 2166-8-1)

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# Rename with Soldiers' rank, type of report, and time frame, ie, (SSG Morris/ANL/20061016-20071015) Click *Rename*



#### Select Continue



# Click the renamed link to open and update/correct information

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#### Click an X in Complete NCOER using wizard format



#### Click Begin NCOER



#### Click box next to Automatically populate..., Enter: SSN, and first 2 letters of Rated Soldier's Last Name

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		RATED SOLDIER:	MORRIS, DARROME M.					
	U.S.ARMY		NCO EVALUATION REPORT DA FORM 2166-8	Link to AR 623-3				
		Admin/Auth Data Rater Actions	Senior Rater Actions Reviewer Actions	Rated Soldier Enclosures				
	Data Entry - Rated Soldier	Select Method for Data Entry – Rated Soldier						
	Admin Data - Rated Soldier Admin Data -	You may automatically populate this N the Army personnel database. If you o all required information.	You may automatically populate this NCOER form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.					
*Note: The	Continued	Manually enter Rated Sold	ier's administrative data.					
Automatic populate option can only be used while	Auth - Rating Chain Duty Des - Rated Soldier	Automatically populate the administrative information information within the form changed.	Rated Soldier's administrative data by search is incorrect as pulled from the personnel data . You must use other channels (S1 or Admin S	ing the Army personnel database. If any of the base of record, you can manually change the Support) to have the incorrect information				
in myForms		Enter requested data and click SE/	ARCH. (All fields highlighted in yellow are requi	red.)				
		Rated Soldier's SSN	Rated Soldier's Last Name (Firs	t Two Letters)				
		1231	mo	SEARCH				
		_	Clic	k Search				
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#### **Continue NCOER**



# Fix errors that occur from the information that the Army data base down loaded on the NCOER

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	RATED SOLE	IER: MORRIS	S, DARROME MA	URICE			
		Ν	CO EVALUAT DA FORM	'ION REPOR 1 2166-8	т	Link to AR	623-3
U.S.ABMY	Admin/Auth Data Rater Actio	ons Senior R	ater Actions R	eviewer Actions	Rated Soldier	Enclosures	
Data Entry - Rated Soldier	Administration Data - F	Rated Soldie	r				
Admin Data - Rated Soldier	a. Name (Last, First, Mi	ddle Initial)		b. SSN			
Admin Data -	MORRIS, DARROME MA	AURICE					
Continued	c. Rank d. Date	of Rank	e. PMOSC <u>cl</u>	ICK HERE			
Data Entry - Rating Chain	SSG ▼ 200709	01 🛄	Ctation	Zin	Major Command	f 2 Status Co	ebo
Auth -	I.I. UNIL Urganiz	ation	Station	Zip	Major Command		
Rating Chain	MAINT HQ AK	-:					
Duty Des - Rated Soldier	I. Rated NCU'S AKU Em	all Address			m. UIC	Code Code	
	darrome.m.morris@us.ar	пу.ппп			WSM7T1	<b>T T</b>	
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# Update same changes and corrections as the previous 2166-8-1 (NCOER counseling form)

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	RATED SOLD	IER: MORRIS, DAR	ROME MAURICE			
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0.5.ABMT	Admin/Auth Data Rater Actio	ns Senior Rater Ac	tions Reviewer Act	ions Rated Soldier	Enclosures	
Data Entry - Rated Soldier	Administration Data - R	ated Soldier				
Admin Data - Rated Soldier	a. Name ( <i>Last, First, Mi</i> d	ldle Initial)	b. SSN			
Admin Data -	MORRIS, DARROME M.			1231		
Continued	c. Rank d. Date	of Rank e. PN	10SC <u>CLICK HERE</u>			
Data Entry -	SSG 🛛 🔽 200709	01 🛄 42A2	0			
Rating Chain	f.1. Unit Organiz	ation	Station Zip	Major Command	f.2. Status Code	-
Autn - Rating Chain	0322 CS CO MAINT, ARI	DEN HILLS, MN 554	126-5862	89TH RRC	TPU	
Duty Des - Rated Soldier	I. Rated NCO'S AKO Ema	ail Address		m. UIC	n. CMD o. PSB Code Code	
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# Admin Data: Use drop-down for the '**Reason for submission', From** and **Thru dates,** and **counseling dates.**



\*Note: the Non rated codes are used for time away, such as schools w/ 1059s, and enroute between units, etc.

# Go through each section of Parts 1 through 4 completing all of the ratings (among the best, Fully capable, Marginal).

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RATED SOLDIER:	MORRIS, DARROM	ME M.		
U.S.ARHY	NCO EVAI DA F	Link to AR 623-3		
Admin/Auth Data Rater Actions	Senior Rater Actions	Reviewer Actions	Rated Soldier	Enclosures
Army Values Overall Performance and	Potential			
Competence Select Pated	Soldier's overall p	otential for promotion a	nd/or service in posit	ions
Physical Fit; of greater re Military Bear	sponsibility.		ind/or service in posit	10115
Leadership Among the	e Best	Fully Capable	Margina	L
Training				
Responsible List 3 positions & Account current or next	in which the Rated higher grade.	l Soldier could best se	rve the Army at his/he	er
Overall Perf	0 0			
	Battalion PSN	100		
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	RATED SOLDIER: MORRIS, DARROME M.	
	NCO EVALUATION REPORT Link to AR 623- DA FORM 2166-8	-3
	Admin/Auth Data Rater Actions Senior Rater Actions Reviewer Actions Rated Soldier Enclosures	
Army Values	Rater's Signature	
Competence	This completes the Rater section of the NCOER.	
Physical Fit; Military Bear	At this time the Rater may select VIEW FORM and :	
Leadership	o Review the DA Form 2166-8.	
Training	<ul> <li>Electronically sign the form by selecting the signature button located in the Rater's Signature Block and sign the report using your Common Access Card (CAC). All rating officials must sign this report in order for it to be</li> </ul>	
Responsible & Account	submitted to HQDA for processing.	
Overall Perf & Potential	<ul> <li>Save the form in the AKO MyForms Portal or locally on your computer. If you are working on-line (connected to internet), you can save the DA Form 2166-8 to the AKO MyForms Portal by clicking "Save". If you are working</li> </ul>	
Rater's Signature	on-line or off-line, you can save the DA Form 2166-8 locally by clicking "Save As".	
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# Senior rater Bullets should be done by the Senior Rater when routed through MYFORMS

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	RAT	FED SOLDIER: MORRIS, DARROME M.	
U.S.ARMY		NCO EVALUATION REPORT L DA FORM 2166-8	ink to AR 623-3
	Admin/Auth Data	Rater Actions Senior Rater Actions Rated Soldier Enclo	sures
Overall Performance	Overall Perfor	mance and Potential	
Sen. Rater's Signature	Does the Senior	Rater meet the minimum time requirements to rate? Yes ☐ No ☐	
Obtain Rated Soldier's Sig	Comments	o send to BNCOC now	
		o promote ahead of peers; a total Army asset	
	Bullet Formatting Guidance	o demonstrates the potential for higher responsibility	
	Select overall performance.	Select overall potential for promotion and/or service in 1 2 3 4 5 Successful Fair Poor Positions of greater responsibility. Superior Fair I	5 Poor
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	RATED SOLDIER: MORRIS, DARROME M.	
U.S.ARMY	NCO EVALUATION REPORT Link to AR 623 DA FORM 2166-8	-3
	Admin/Auth Data Rater Actions Senior Rater Actions Reviewer Actions Rated Soldier Enclosures	
Overall Performance	Senior Rater's Signature	
Sen. Rater's Signature	This completes the Senior Rater section of the NCOER. At this time the Senior Rater may select VIEW FORM and :	
Obtain Rated Soldier's Sig	o Review the DA Form 2166-8.	
	<ul> <li>Electronically sign the form by selecting the signature button located in the Senior Rater's Signature Block and sign the report using your Common Access Card (CAC). All rating officials must sign this report in order for it to be submitted to HQDA for processing.</li> </ul>	9
	o Save the form in the AKO MyForms Portal or locally on your computer. If you are working on-line (connected to internet), you can save the DA Form 2166-8 to the AKO MyForms Portal by clicking "Save". If you are working on-line or off-line, you can save the DA Form 2166-8 locally by clicking "Save As"	
	o You are responsible for ensuring the completed/signed DA Form 2166-8 is submitted to HQDA. However, you should coordinate with your S-1/Admin Support personnel to get specific guidance on the processing of evaluations within your organization, to include submission to HQDA. You, someone you designate, or S-1/Admin Support personnel can submit the DA Form 2166-8 to HQDA by selecting the "Send to HQDA" option in the "Special Tasks (Sp. Texte)" dropdown in the portal action buttons.	
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	RATED SOLDIER: MORRIS, DARROME M.		
U.S.ARMY	NCO EVALUATION REPORT DA FORM 2166-8	Link to AR	623
	Admin/Auth Data Rater Actions Senior Rater Actions Reviewer Actions Rated Soldier	Enclosures	
Concur/ Non-concur	Concur/Non-concur		
Reviewer's Signature	The Reviewer is responsible for rating safeguard over-watch. He or she may comment only v disagreement with the Rater and/or Senior Rater.	vhen in	
	The Reviewer will.		
	o Ensure the proper rating officials complete the report.		
	<ul> <li>Ensure evaluations are clear, consistent, and just, in accordance with known facts.</li> </ul>		
	o Ensure bullet comments support the appropriate rating.		
	Concur		
	Non-Concur		
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	RATED SOLDIER: MORRIS, DARROME M.	
U.S.ARMY	NCO EVALUATION REPORT Link DA FORM 2166-8	to AR 623-3
	Admin/Auth Data Rater Actions Senior Rater Actions Reviewer Actions Rated Soldier Enclosures	
Concur/ Non-concur	Reviewer's Signature	
Reviewer's Signature	This completes the Reviewer section of the NCOER. At this time the Reviewer may select VIEW FORM an	d :
	o Review the DA Form 2166-8.	
	<ul> <li>Electronically sign the form by selecting the signature button located in the Reviewer's Signature Block the report using your Common Access Card (CAC). All rating officials must sign this report in order for it submitted to HQDA for processing.</li> </ul>	and sign to be
	o Save the form in the AKO MyForms Portal or locally on your computer. If you are working on-line (con internet), you can save the DA Form 2166-8 to the AKO MyForms Portal by clicking "Save". If you are working on-line or off-line, you can save the DA Form 2166-8 locally by clicking "Save As".	nected to orking
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RATED SOLDIER: MORRIS, DARROME M.	
NCO EVALUATION REPORT DA FORM 2166-8	-3
Admin/Auth Data Rater Actions Senior Rater Actions Reviewer Actions Rated Soldier Enclosures	
Rated Soldier's Signature Rated Soldier's Signature	
The NCOER is completed and all Rating Officials have signed the form. Select VIEW FORM and electronically sign and secure the form by selecting the "Click to Approve" button located in the Rated Soldier's signature block. Changes may be made to this report after the Rated Soldier's signature; however, changes will cancel the Rated Soldier's signature. If changes are made the Rated Soldier will have to resign the report. Once you have signed the report, save the DA Form 2166-8 to the AKO MyForms portal by clicking SAVE while in the View Form and forward to the Senior Rater. The Senior Rater will forward the report to HQDA. View Form Page	1 of 1
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#### Click *Next* or *View form*

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	RATED SOLDIER: MORRIS, DARROME M.		
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	Admin/Auth Data Rater Actions Senior Rater Actions Reviewer Actions Rated So	dier Enclosures	
Enclosure Detail	Enclosures		
	To edit an enclosure click "Select". To add an enclosure to the NCOER as an addi	tional page, click "Add Ei	nclosure".
	Thirty Day Minimum Waiver for Rendering a Relief for Cause	🛛 🖾 Add Enclosure	emove
	Relief for Cause NCOER Directed by an Official Other Than Rater or Senior Rater	🛛 🗐 Add Enclosure 📃	emove
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### Review and make changes or corrections accordingly

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Edit Component Compon	U.S. ARMY Forms Content Menagements Save Save AS PRINT EMAIL WIZARD & PREVIOUS
+ COR EVALUATION REPORT FOR OFFICIAL USE ONLY (FOUD) SEE PRIVACY ACT STATEMENT + N AR 623-3 (the proponent agency is DCS, G-1. IN AR 623-3)	RATED NCO'S NAME (Last, First, Middle initial)         SSN         THRU DATE           +         MORRIS, DARROME M.         31         20081015         +
PART I - ADMINISTRATIVE DATA	PART IV (Rater) - VALUES/NCO RESPONSIBILITIES Builte comments are marked or. "EXCELLENCE" or "INEEDS IMPROVEMENT."
a. NAME (Lost, First, Middle Initial)	b. COMPETENCE o promoted to SSG during the rating period
MORRIS, DARROME M1231 S3G ▼ ( ) 20070901 42A20	o Duty protectency, MUS competency o Technical Attictal, knowledge, skills, and
11. ONIT ORG. STATION 21P CODE OR APO, MADOR COMMAND 1.2. STATUS CODE 9. RESOUN FOR SOBIISSION	abilities o received a coin from the Battation Commander for exceptional work on NCOEks
b period covered in PATEN INDEX TIMES AND STORE OF THE AND ADDRESS MUCH CALL PROFILE	o Seeking self-improvement, always learning a Accompletion tacks to the fullest cancelly o commended of exceptional of military knowledge and bearing during promotion
FROM THRU MONTHS RATED ENCL (GOVOR.mil) CODE CODE	committed to excellence to excellence to board
VEAR MOWTHDAY VEAR MOWTHDAY 20071016 20081015 12 0 darrome m morris@us army.mil WSM/TT1 5C V	EXCELLENCE SUCCESS MEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much) o currently attending Grantham University in general studies
PART II - AUTHENTICATION	c. PHYSICAL FITNESS & MILITARY BEARING APFT PASS ▼ 20071013 HEIGHTWEIGHT 68/ 201 YES ▼
a. NAME OF RATER (Last, First, Middle Initial) SSN SIGNATURE DATE (YYYYMMDD)	o Mental and physical toughness
BURRELL, DIRAL 9100 000 000 000 000 000 000 000 000 00	o Endurance and stamina to go the distance o Displaying confidence and entrusiasmi,
SFC ▼ 63X4O 0322 CS CO MAINT MOTOR SERVICE ANT dural burneli@us army mi	looks like a Soldier o demonstrated exemplary character and professionalism which motivates his Soldiers
b. NAME OF SENIOR RATER (Last, First, Middle Initia) SSN SIGNATURE DATE (YYYYMMDD)	to score 270+ on APFT
DANBERRY, MICHAEL J. 580 /	EXCELLENCE SUCCESS MEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much) o upholds the Army values and truly demonstrated the NCO creed in his actions
RANK PMOSC/BRANCH ORGANIZATION DUTY ASSIGNMENT SENIOR RATER S AKO EMAIL ADDRESS ( GOV. or. mil)	
C NAME OF REVENUE (LAS FUR MINIGE IDIA) SSN SIGNATURE DATE (AS FUR MINIGE IDIA)	d. LEADERSHIP o his leadership and team's dedication on updating and tracking NCOERs ect.
KOY, PUNNARIN 3306 /···	o Mission first
RANK PMOSC/BRANCH ORGANIZATION DUTY ASSIGNMENT REVIEWER'S AKO EMAIL ADDRESS (.gov. or. mil)	o Instilling the spirit to achieve and win
CPT ▼ OD 0322 CS CO MAINT COMMANDER punnarin koy@us army.mil	0 Setting the example, Be, Know, Do
d. CONCUR WITH RATER AND SENIOR RATER EVALUATIONS NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL (See attached commenta)	EXCELLENCE SUCCESS NEEDS IMPROVEMENT
RATED NCC: 1 undestand my signature does not constitute agreement or disagreement with the evaluations of SIGNATURE     DATE (YYYYMMDD)	(Exceeds std) (Meets std) (Some) (Much)
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Front page

#### Back page

When completed click the X to exit

# Sign NCOER with CAC by signing in appropriate block (Rater, Senior rater, Reviewer, Soldier)

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P	ART II - AUTHENTICA	TION				
a. NAME OF RATER (Last, First, Middle Initial) BURRELL, DYRAL	SSN 000-00-0000	SIGNATURE	-	DATE <i>(YYYYMMDD</i> )		
RANK PMOSC/BRANCH ORGANIZATION SFC V 63X4O 0322 CS CO MAINT	N DU MO	TY ASSIGNMENT TOR SERGEANT	RATER'S AKO EMA dyral.burrell@u	NLADDRESS <i>(.gov.</i> Is.army.mil	or .mil)	
b. NAME OF SENIOR RATER (Last, First, Middle Initial) DANBERRY, MICHAEL J.	SSN 000-00-0000	SIGNATURE DANBERRY.MICHAEL.	KOHDNNY.1137320	DATE <i>(YYYY<b>MMDD</b>)</i> 20080911		
RANK         PMOSC/BRANCH         ORGANIZATION           CW2         ▼         915A / OD         0322 CS CO MAINT		TY ASSIGNMENT AUTO MINT WO	senior rater s av michael.j.danbe	ю email address (.; rry@us.army.mi	gov. or .mil) 1	Ξ
c. NAME OF REVIEWER (Last, First, Middle Initial) KOY, PUNNARIN	SSN 000-00-0000	SIGNATURE	-	DATE (YYYYMMDD)		
RANK         PMOSC/BRANCH         ORGANIZATIO           CPT         OD         0322 CS CO MAINT	N DU COI	TY ASSIGNMENT MMANDER	REVIEWER'S AKO punnarin.koy@	EMAIL ADDRESS ( 15. army.mil	gov. or .mil)	
d. CONCUR WITH RATER AND SENIOR RATER EVALUATIONS		R WITH RATER AND/OF	R SENIOR RATER EV	/AL (See attached co	omments)	
P. RATED NCO: I understand my signature does not constitute agreement or disag the rater and senior rater. I further understand my signature verifies that the admini officials in Part II, the duty description to include the courseling dates in Part III, an entries in Part IVo are correct. I have seen the completed report. I am aware of the	reement with the evaluation strative data in Part I, the ra Id the APFT and height/we appeals process of AR 673-	s of SICHATURE	¢		MMDD)	
PART	III - DUTY DESCRIPT	(Rater)				
a. PRINCIPAL DUTY TITLE Human Resources Sergeant		b. DUTHMEEC 42A2O				
c. DAILY DUTIES AND SCOPE ( <i>To include, as appropriate, people, equ</i> Responsibilities include unit level personnel administrativ maintaining and reviewing personnel records. Managemen development of 3 Soldiers in the accomplishment of their maintaining and updating NCOER and OER rating schemes	<i>ipment, facilities and do</i> , ve support to includ t of company admin duties; preparing, u s; responsibility of	<i>liars)</i> e actions on indivi- n section, responsi updating and coord unit files for prom	dual Soldier's re ble for the super inating requests otions and decor	ecords; organizin vision, training a for NCOERs and ration/awards.	g, nd l OERs,	
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### Click **OK**



### Click Sign



#### Click your name with 'DOD-CA' option (NOT the EMAIL CA)

Approvelt - Certificate Selection							
MORRIS.DARROME.MAURICE.10	DOD CA-15						
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Sign <u>u</u> sing	OK Cancel						

Click OK

# When the **ActivClient** login appears type in your 4 to 6 digit Personal Identification Number (PIN) and press **OK**



### When <u>Approvelt</u> comes up click **Sign**

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Name:	MURRIS.DARRUME.MAURICE.1044125390
Signature:	MORRIS.DARROME.MAURICE.1044125990
	Sign Cancel

# Click OK



# Save by clicking the **SAVE** button in the upper left corner

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BATED NCO: Lunderstand my signature does not constitute agreement or d	isagreement with the evaluations of S		· .			changed
the rater and senior rater. I further understand my signature verifies that the ad officials in Part II, the duty description to include the counseling dates in Part II	ninistrative data in Part I, the rating					
entries in Part IVc are correct. I have seen the completed report. I am aware o	f the appeals process of AR 623-3.	MORRIS.DARROME.MAU	RICE 10441259	0080916		
	RT III - DUTY DESCRIPTION (	Rater)				
a. PRINCIPAL DUTY TITLE Human Resources Serveant	0.	2A2O				
c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, (	equipment, facilities and dollars)	<u>5120</u>			-	
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development of 3 Soldiers in the accomplishment of th	eir duties; preparing, updat	ing and coordinating	requests for NC	OERs and OE	Rs,	
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#### Select Continue



#### Click Yes to save your changes


### Click <u>Y</u>es



### Click the **X** to close out

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B. RATED NCO: I understand my signature -	does not constitute agreement o	r disagreement w	ith the evaluations	of I SIGNATURE				DATE (YY)	(YMMDD)	

The updates have been saved in the repository (a file or folder that stores forms in the MyForms database), the next step is to route to the Senior Rater for bullet comments and signature.



Now this NCOER is ready to be routed

## Please take a short break

 We will be covering Routing the form via MyForms next



# Routing a form through MYFORMS

### Created by: SSG Darrome M. Morris

Presented by: CW3 Michael J. Danberry

Last Revision: 20 September 2010

## Two Documents should be in the drafts: the <u>original</u> renamed counseling form (**2166-8-1**) and the <u>renamed</u>

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### Check the box next to SSG Morris ANL(20061016-20071015) and select Route Slip

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# In Search Users type in Last Name: and First Name: of the individual who the form needs to be routed to.

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Click Search

Similar names may appear; Choose correct selection by checking the *right* name in the box. Click <u>Add as original</u> when sending for bullet comments and signatures. Use <u>Add as info</u> for anyone to view, they will <u>not</u> have access to make any changes or corrections, this is <u>view only</u> with this option

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# Select the correct name out of the given choices and click *Add as original*

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There are several different options under the drop-down menus: **No date**- set a suspense date for completion with the Month, day, Year, hour, and minute. (optional)

**Email**-<u>Yes</u>, or <u>no</u> if you want to send a message with the routed form for further instructions or comments. (optional)



### Click the ROUTE button



## A notification that the NCOER has been routed

### to the name selected will appear

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#### Click Continue

#### Tracking will be recorded in your **inbox** at the top (as the last form received). It will tell you if the NCOER has been viewed by recipient. Also tracks when and who has possession

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You should receive a notice in AKO email that the form has been routed back into your **Inbox** for review after the S/R, Reviewer has signed and routed. Repeat process until the NCOER is completed and signed by all involved with <u>the last signature is always the rated soldier</u>. **ROUTE** to S-1 for processing to PERMS.

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#### \*Key Notes

When you get the NCOER for signature as a rated individual you must have the software and a CAC reader. All involved must have a CAC and reader to use this process through MYFORMS.

Sign NCOER with your CAC and press the Save button at the top of the form

Counselings are quarterly and always should be done through MYFORMS that will upload into an NCOER when the THRU date for the period comes near.

The Rated NCO has to be the <u>LAST</u> to sign the NCOER. The signatures should either read as the order is on the NCOER or signatures will have the same date.

Once the NCOER has been created then the creator is the owner of the form and when it is routed it will post owned by whomever created it and who has in possession of it. Only the creator can delete it from the system.

Only the higher chain of command is allowed to send NCOERs to HQDA. If anyone else does remember......your name is on it and can be tracked.

Congratulations: If you have followed along from the beginning, you should have created a counseling form, an NCOER, routed between users and digitally signed the forms.

For help or instructions on installation and troubleshooting your CAC reader and software visit: https://MilitaryCAC.com

Another presentation by: Michael J. Danberry <u>chief@militarycac.com</u> <u>https://MilitaryCAC.com</u> Further questions: <u>https://militarycac.com/questions.htm</u>