Common EES Solutions

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Cannot Find / View the OER

a. Rater / Intermediate Rater (if required) / Senior Rater / Rated Officer / Reviewer (if required):

- Verify with the OER's initiator, rater, senior rater or a delegate that your SSN was correctly annotated on the OER draft (if incorrect have initiator or a delegate correct the SSN).

- If the SSN is correct, from the EES home page, click on the "Continue/View Active Evaluations" button and search the listing of OERs one page at a time (using the hyperlinked page numbers at the top left).

- OER is locked by other rating officials for a short period, 5 – 20 minutes, after they have viewed / edited an OER. The OER will unlock after this "cycle."

- Last Rating Official did not use "exit" out of OER when exited EES. Have that Rating Official log back into OER and use the "exit" button to close OER.

b. Delegate - Ensure that the rater or senior rater that you are a delegate for has authorized you the proper "rater or senior rater delegate" rights. Most common issue is the delegate has rater delegate only rights and is searching for an OER that the delegate's rating official is a senior rater (if this is the case, ask the rating official to grant you "senior rater delegate" rights).

Ensure to select the proper role (Rater/Senior Rater)

Manage Delegates

Delegates for Denise Camacho ▼ in the role of SENIOR RATER ▼

	Name	Manage Delegates	View Rating Profile	Edit and Submit Evaluations	Start		End		
1.	John Omohundro	☑	☑	☑	20140417	🗓	20150417	🗓	Remove
2.	Scott Holm	☑	☑	☑	20140417	🗓	20150417	🗓	Remove
3.	Raquel Rangel	☐	☐	☑	20140417	🗓	20150417	🗓	Remove
4.									
5.									
6.									
7.									
8.									
9.									
10.									

You must click 'update permission' to validate this as a successful transaction.

Update Permissions   Add Delegate

NOTE: Ensure the start date is set to 20140401 (if the start date is after this date, any evaluation/support form submitted prior to the delegation date will not be visible to the delegate.

Deleting OERs

a. When you are on the landing page of EES, select the evaluation that needs to be deleted by selecting the "Continue/View Active Evaluations" radio button.

Frequently Asked Questions

TOOLS

External Links and Resources

- AR 623-3
- DA PAM 600-3
- DA PAM 600-4
- DA PAM 623-3
- S1 NET
- MYBOARDFILE

Continue/View Active Evaluations

View Profiles where I am a delegate

Manage Rating Chain

Signature Removal

Evaluation Status and Management Tools (ERS)

View my Rater and Senior Rater Profile

View Forms

Manage Delegates

b. Select the evaluation from the list of active OERs.

c. Click the delete button on the upper right hand corner. Only the rater, senior rater or delegate can delete an evaluation.

d. If rater has locked his/her block check, senior rater must request HRC Evaluations Branch unlock and recalculate the rater's profile before the OER can be deleted (covered under "Unlock Rater Performance Block Check / Profile").

ERS Request Process

ERS has replaced IWRS' capabilities and will enable units to track their 67-10s. Currently, personnel can request ERS access through their HIMS account manager, typically found in the S1/G1 section.

ERS access HIMS Request

*HIMS manager must keep access request on file.
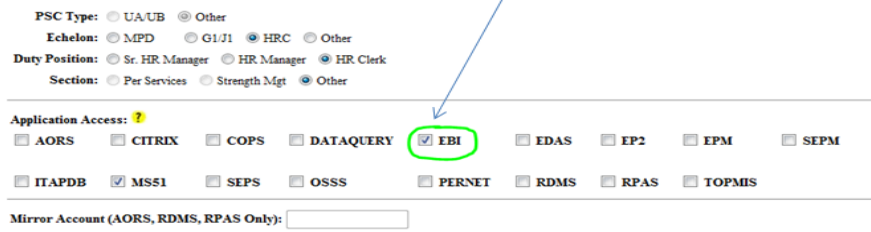
From HRC Website select Self Service
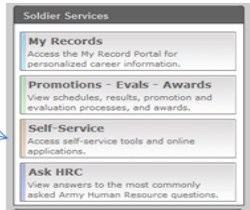
Account manager scroll down and select HIMS
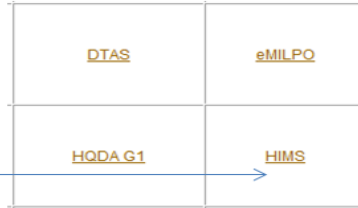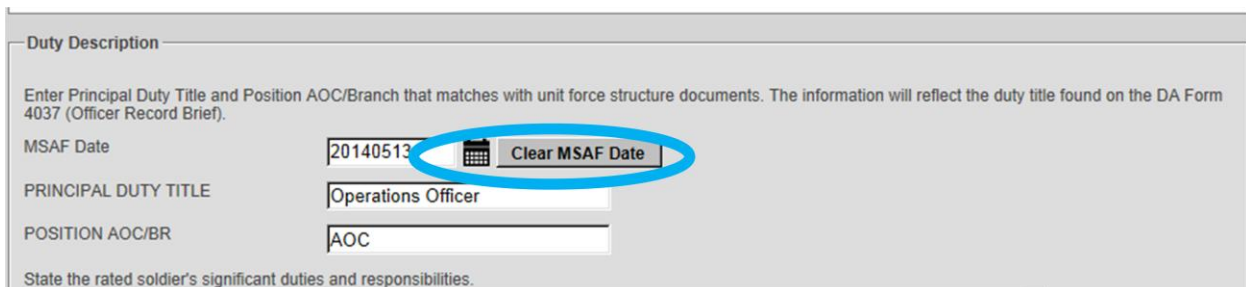
Sponsor or Account access manager should Select "EBI" for ERS access

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MSAF Issues

a. Enter the date in the appropriate block in Part II if the MSAF completion date is within 3 yrs prior to the OER's thru date.

b. Leave the date block blank and the Rater states the projected MSAF completion date in the Rater section, if the MSAF completion date is after the OER's thru date.

c. The Clear MSAF Date button enables Raters to delete erroneous MSAF dates.

OER Status (using EES)

a. Go to EES home page.

- Click "Continue/View Active Evaluations" button (under TOOLS)
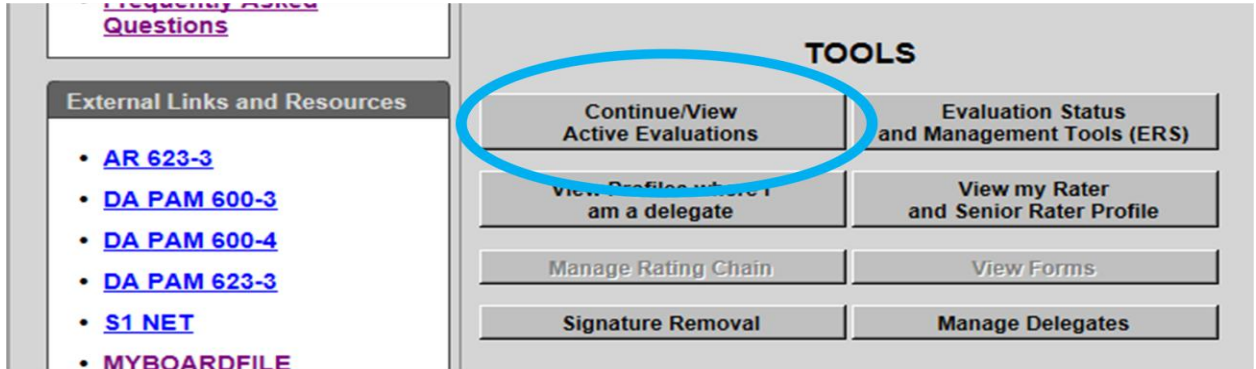
- Navigate through pages of active OERs using hyperlinked page numbers in upper left corner.
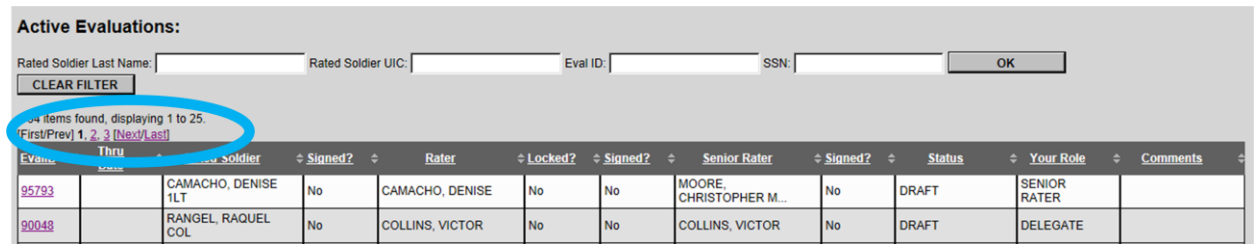
b. Column Headings (in order left to right)

- EvalID – the OER's ID # (required for OER help / Ask the Expert assistance)

- Thru Date – OER's Thru Date

- Rated Soldier – for that OER

- Signed? – has the Rated Soldier signed the OER (Yes or No)

- Rater – for that OER

- Signed? – has the Rater signed the OER (Yes or No)

- Locked? – has the Rater locked the Rater block check (if yes the Rater Profile is auto-updated at time of locking action)

- Senior Rater – for that OER

- Signed? – has the Senior Rater signed the OER (Yes or No)

- Status – current status of that OER

- **Draft** – still with unit / has not been submitted to HQDA

- **Received** – unit has clicked the "Submit to HQDA" button

- **w Examiner** – OER has been assigned to an Examiner

- **Misfire** – profile does not support SR potential indicated

- **Rejected** – report has been rejected by HQDA

- **Returned** – Examiner returned OER to unit for corrections

- **Submitted to IPERMS** – submitted by HRC to AMHRR/IPERMS

- **Pending IPERMS** – IPERMS has accepted the document into the permanent record

- **Accepted/IPERMS** – OER has cleared the Examination phase and is now sent to IPERMS **(OER will drop from list of active OERs in 90 days after this action)**

- **Withdrawn** – report returned at Senior Rater request

- **Thru Date Updated** – Last OER Thru date is updated on Soldier's ORB

- Your Role – for that OER

- Comments – place cursor over **"Hover to View Comments"** to read the Examiner's reason for returning the OER

EvalID	Thru Date	Rated Soldier	Signed?	Rater	Locked?	Signed?	Senior Rater	Signed?	Status	Your Role	Comments
95793		CAMACHO, DENISE 1LT	No	CAMACHO, DENISE	No	No	MOORE, CHRISTOPHER M...	No	DRAFT	SENIOR RATER	
90048		RANGEL, RAQUEL COL	No	COLLINS, VICTOR	No	No	COLLINS, VICTOR	No	DRAFT	DELEGATE	
81578	20131223	HOLM, SCOTT MAJ	Yes	MOORE, CHRISTOPHER M...	Yes	No	CAMACHO, DENISE	Yes	DRAFT	RATER	Hover to View Comments

STATUS	CODE	DESCRIPTION	INSTANCE FROM	INSTANCE TO	PROFILE COUNT
Initiated	I	The evaluation has been initiated and is in the EES	EES Wizard	EPS to V Status	N/A
Rejected	R	The evaluation is rejected by the EPS team manually	Any status within EPS via the ESO Module change status functionality	Archival for reporting, profiling backed out, system storage, no user interface retrieval.	Deduct
Return	T	The evaluation is returned to the field via EES, removes signature, maintains eval ID	E, M in the workflow, or any manual change status in ESO	EES "I" Status, to the queue it left from last	User Option
Verified	V	The evaluation is submitted successfully from the wizard	EES Wizard	Assignment queues, EPS	Maintain
Examining	E	The evaluation is in an examiner's user queue or in the supervisors user queue	V Status or existing E status when given to a Supervisor for review, T return from field IF sent to field from E status	Completed, Return to field, or Appeals, or misfire if the misfire flag exists when trying to return to field	Maintain
Completed	C	The evaluation is completed in the EPS system and is ready for submission to iPERMS	E, D, M, J	iPERMS workflow	Maintain
Withdrawn	W	The evaluation is withdrawn from the workflow in EPS manually by an EPS admin or supervisor per a Senior Rater request	Any status within EPS via the ESO Module change status functionality	Archival for reporting, profiling backed out, system storage, no user interface retrieval.	Deduct
Misfire	M	The evaluation has failed a profiling sum check in the system	V status during intial entry into the EPS, T return from field IF sent to field from M status or manually from ESO Module	Completed, Return to field	Maintain until Misfire action
Hold	H	The evaluation is maintained, but put on hold and taken out of the workflow for business process manually	Any status within EPS via the ESO Module change status functionality	Remains stationary until Admin or Supervisor user changes the status for re- entry into the workflow. This is done in the ESO Module change status. There is a Hold Queue for user retrieval.	Maintain
Appealed	J	The evaluation is being appealed by 1) the examiner with a derogatory remark, 2) by the return from iPERMS process, or 3) return from field as a correction	C and E	C Status. Appeals only completes	Maintain
Derogatory	D	The evaluation has been determined derog by an examiner or supervisor. The user has the option to continue the eval to PERMS or send to Appeals	E	C for Perms - either with errors or without.	Maintain
Classified	S	The evaluations that come into EPS via synchronization from CD-R file upload for classified data	CD-R	V - Verified	N/A
Kofax	K	The evaluations that come into ESP via hard copy scan, Kofax	Kofax	V-Verified	N/A

Profile (Rater / Senior Rater)

a. Reviewing Profiles in EES

- Go to EES home page

- click "View my Rater and Senior Rater Profile" button (under Tools)
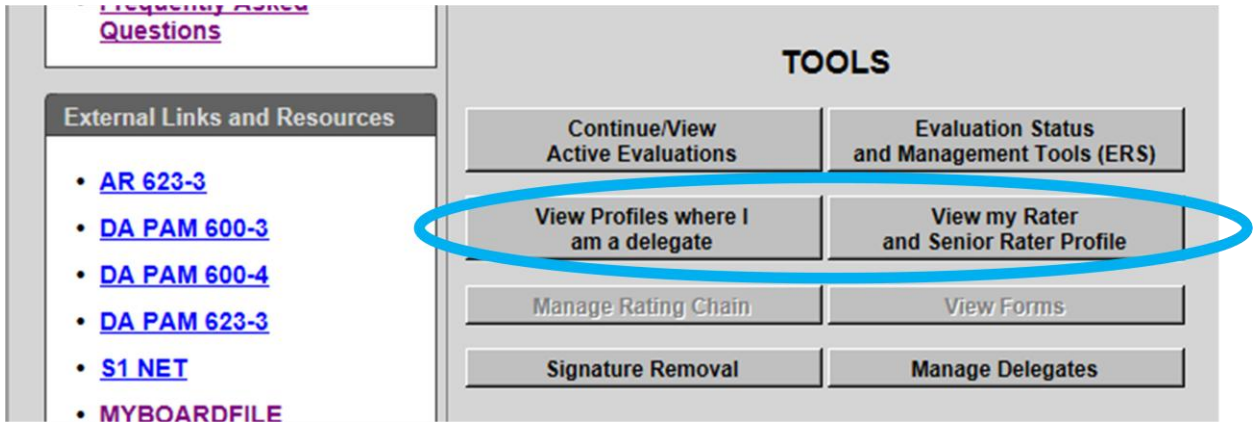
- EES will show both your Rater and Senior Rater Profiles for Ranks that you have submitted Ratings (once locked) and Senior Ratings (once submitted to HQDA)

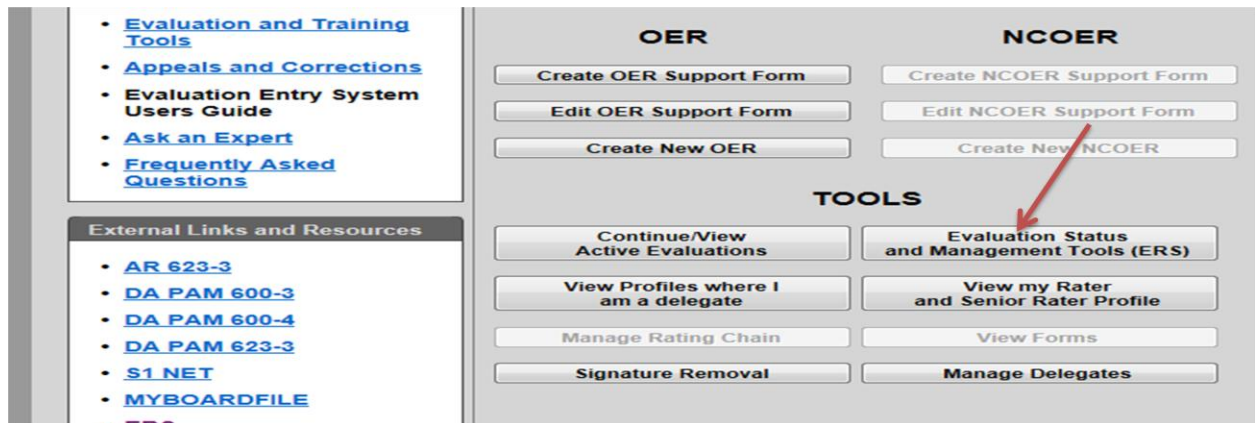### Rater Profiles

3 items found, displaying all items.

Role	Rank Rated	EXCELS	PROFICIENT	CAPABLE	UNSATISFACTORY
RATER	CPT	1	3	0	0
RATER	CW2	1	3	0	0
RATER	MAJ	0	4	0	0

Senior Rater Profiles

One item found.

Role	Rank Rated	MOST QUAL / MULTI STAR	HIGHLY QUAL / PROMOTE TO BG	QUAL / RETAIN AS COL	UNQUAL / UNSATISFACTORY
SENIOR RATER	1LT	0	0	1	0

b. Using ERS to access Senior Rater DASH-2

b. Incorrect Profile Numbers – Some Senior Rater Profiles have incomplete / incorrect data transferred into their EES Senior Rater Profile. To correct, the Senior Rater (due to sensitive nature of the information only the Senior Rater may request) submit a request via email to:

- usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil

- Subject: Senior Rater Profile Verification

- Include Senior Rater's full SSN, Ranks that need to be verified, why you think the data is incorrect

c. Use the link below to download profile management tools. These tools will assist leaders in properly projecting future OERs and subsequent block checks.

https://www.hrc.army.mil/TAGD/Evaluation%20Systems%20Homepage.

d. Sequencing – IAW AR 623-3 para 3-11, HQDA processes OERs in order of receipt. This is extremely important to remember when submitted OERs by the three means available – EES, Mail and Email (deployed units only).

e. Misfire - A report with an "Excels" rating that causes a rater's profile to exceed the 49.9% limitation for "Excels" ratings in the rated officer's grade will be automatically processed with a "Proficient" HQDA electronically generated label. The rater and the senior rater listed on the report will be notified of the misfire in EES, and the report will process accordingly.

f. Unlock Rater Performance Block Check / Profile

- Email request to usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil for review and consideration.

- Subject: Unlock Evaluation

- See example memo below.

OFFICIAL LETTERHEAD

OFFICE SYMBOL   *DATE*

MEMORANDUM THRU (**Rater's Rater**)

FOR U.S. Army Human Resources Command, Attention: AHRC-PDV-ER, 1600 Spearhead Division Avenue, Dept #470, Fort Knox, KY 40122-5407

SUBJECT: Request an Exception to Policy to Unlock Rater Profile (**Eval ID XXXXX**)

1. Request (**Rater's rank, full name**) rater profile for (**Eval ID XXXXX**) be unlocked due to (**provide justification**).

2. Point of contact for this request is (**POC's rank/title, full name, telephone number, and email address**).

                                                       Signature Block
                                                       (**Rater's Senior Rater**)

Signatures

a. Signatures must be signed sequentially in the below order.

  - Rater signs Part II block a6.

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VI and the administrative data is correct)					
a1. NAME OF RATER (Last, First, Middle Initial) COLLINS, VICTOR, D		a2. SSN	a3. RANK MG	a4. POSITION Deputy Commanding General	
a5. EMAIL ADDRESS (.gov or .mil)		a6. RATER'S SIGNATURE ⊕ Click Here to Sign		a7. DATE(YYYYMMDD)	
b1. NAME OF INTERMEDIATE RATER (Last, First, Middle Initial)		b2. SSN (Optional)	b3. RANK	b4. POSITION	
b5. EMAIL ADDRESS(.gov or .mil)		b6. INTERMEDIATE RATER'S SIGNATURE ⚠ Why Can't I sign?		b7. DATE(YYYYMMDD)	
c1. NAME OF SENIOR RATER (Last, First, Middle Initial) MOORE, CHRISTOPHER, L		c2. SSN	c3. RANK LTG	c4. POSITION Commanding General	
c5. SENIOR RATER'S ORGANIZATION HQs, III Corps	c6. BRANCH GO	c7. COMPONENT A	c9. EMAIL ADDRESS (.gov or .mil)		
	c8. SENIOR RATER PHONE NUMBER 555-111-4444		c10. SENIOR RATER'S SIGNATURE ⊕ Click Here to Sign		c11. DATE(YYYYMMDD)
d. This is a referred report, do you wish to make comments? ⊙ Referred ⊙ Yes, comments are attached ○ No			e1. RATED OFFICER'S SIGNATURE		e2. DATE(YYYYMMDD)
f1. Supplementary Review Required? ○ Yes ⊙ No			f2. NAME OF REVIEWER (Last, First, Middle Initial)		
f3. RANK	f4. POSITION		f5. Comments Enclosed ○ Yes ⊙ No		
f6. REVIEWER'S SIGNATURE ⚠ Why Can't I sign?		f7. DATE (YYYYMMDD)	g. MSAF Date (YYYYMMDD) 20130116		

  - Intermediate Rater signs Part II block b6. (if required)

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VI and the administrative data is correct)					
a1. NAME OF RATER (Last, First, Middle Initial) COLLINS, VICTOR, D		a2. SSN	a3. RANK MG	a4. POSITION Deputy Commanding General	
a5. EMAIL ADDRESS (.gov or .mil)		a6. RATER'S SIGNATURE ⊕ Click Here to Sign		a7. DATE(YYYYMMDD)	
b1. NAME OF INTERMEDIATE RATER (Last, First, Middle Initial)		b2. SSN (Optional)	b3. RANK	b4. POSITION	
b5. EMAIL ADDRESS(.gov or .mil)		b6. INTERMEDIATE RATER'S SIGNATURE ⚠ Why Can't I sign?		b7. DATE(YYYYMMDD)	
c1. NAME OF SENIOR RATER (Last, First, Middle Initial) MOORE, CHRISTOPHER, L		c2. SSN	c3. RANK LTG	c4. POSITION Commanding General	
c5. SENIOR RATER'S ORGANIZATION HQs, III Corps	c6. BRANCH GO	c7. COMPONENT A	c9. EMAIL ADDRESS (.gov or .mil)		
	c8. SENIOR RATER PHONE NUMBER 555-111-4444		c10. SENIOR RATER'S SIGNATURE ⊕ Click Here to Sign		c11. DATE(YYYYMMDD)
d. This is a referred report, do you wish to make comments? ⊙ Referred ⊙ Yes, comments are attached ○ No			e1. RATED OFFICER'S SIGNATURE		e2. DATE(YYYYMMDD)
f1. Supplementary Review Required? ○ Yes ⊙ No			f2. NAME OF REVIEWER (Last, First, Middle Initial)		
f3. RANK	f4. POSITION		f5. Comments Enclosed ○ Yes ⊙ No		
f6. REVIEWER'S SIGNATURE ⚠ Why Can't I sign?		f7. DATE (YYYYMMDD)	g. MSAF Date (YYYYMMDD) 20130116		

- Senior Rater signs Part II block c10.

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VI and the administrative data is correct)				
a1. NAME OF RATER (Last, First, Middle Initial) COLLINS, VICTOR, D	a2. SSN ▮▮▮▮	a3. RANK MG	a4. POSITION Deputy Commanding General	
a5. EMAIL ADDRESS (.gov or .mil) ▮▮▮▮	a6. RATER'S SIGNATURE ⊕ Click Here to Sign		a7. DATE(YYYYMMDD)	
b1. NAME OF INTERMEDIATE RATER (Last, First, Middle Initial)	b2. SSN (Optional)	b3. RANK	b4. POSITION	
b5. EMAIL ADDRESS(.gov or .mil)	b6. INTERMEDIATE RATER'S SIGNATURE ⓘ Why Can't I sign?		b7. DATE(YYYYMMDD)	
c1. NAME OF SENIOR RATER (Last, First, Middle Initial) MOORE, CHRISTOPHER, L	c2. SSN ▮▮▮▮	c3. RANK LTG	c4. POSITION Commanding General	
c5. SENIOR RATER'S ORGANIZATION HQs, III Corps	c6. BRANCH GO	c7. COMPONENT A	c9. EMAIL ADDRESS (.gov or .mil) ▮▮▮▮	
	c8. SENIOR RATER PHONE NUMBER 555-111-4444		**c10. SENIOR RATER'S SIGNATURE ⊕ Click Here to Sign**	c11. DATE(YYYYMMDD)
d. This is a referred report, do you wish to make comments? ⦿ Referred ⦿ Yes, comments are attached ○ No			e1. RATED OFFICER'S SIGNATURE	e2. DATE(YYYYMMDD)
f1. Supplementary Review Required? ○ Yes ⦿ No			f2. NAME OF REVIEWER (Last, First, Middle Initial)	
f3. RANK	f4. POSITION		f5. Comments Enclosed ○ Yes ⦿ No	
f6. REVIEWER'S SIGNATURE ⓘ Why Can't I sign?		f7. DATE (YYYYMMDD)	g. MSAF Date (YYYYMMDD) 20130116	

- Rated Officer signs Part II block e1.

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VI and the administrative data is correct)				
a1. NAME OF RATER (Last, First, Middle Initial) COLLINS, VICTOR, D	a2. SSN ▮▮▮▮	a3. RANK MG	a4. POSITION Deputy Commanding General	
a5. EMAIL ADDRESS (.gov or .mil) ▮▮▮▮	a6. RATER'S SIGNATURE ⊕ Click Here to Sign		a7. DATE(YYYYMMDD)	
b1. NAME OF INTERMEDIATE RATER (Last, First, Middle Initial)	b2. SSN (Optional)	b3. RANK	b4. POSITION	
b5. EMAIL ADDRESS(.gov or .mil)	b6. INTERMEDIATE RATER'S SIGNATURE ⓘ Why Can't I sign?		b7. DATE(YYYYMMDD)	
c1. NAME OF SENIOR RATER (Last, First, Middle Initial) MOORE, CHRISTOPHER, L	c2. SSN ▮▮▮▮	c3. RANK LTG	c4. POSITION Commanding General	
c5. SENIOR RATER'S ORGANIZATION HQs, III Corps	c6. BRANCH GO	c7. COMPONENT A	c9. EMAIL ADDRESS (.gov or .mil) ▮▮▮▮	
	c8. SENIOR RATER PHONE NUMBER 555-111-4444		c10. SENIOR RATER'S SIGNATURE ⊕ Click Here to Sign	c11. DATE(YYYYMMDD)
d. This is a referred report, do you wish to make comments? ⦿ Referred ⦿ Yes, comments are attached ○ No			**e1. RATED OFFICER'S SIGNATURE**	e2. DATE(YYYYMMDD)
f1. Supplementary Review Required? ○ Yes ⦿ No			f2. NAME OF REVIEWER (Last, First, Middle Initial)	
f3. RANK	f4. POSITION		f5. Comments Enclosed ○ Yes ⦿ No	
f6. REVIEWER'S SIGNATURE ⓘ Why Can't I sign?		f7. DATE (YYYYMMDD)	g. MSAF Date (YYYYMMDD) 20130116	

- Supplementary Reviewer signs Part II f6. (if required)

- Fields or errors that must be addressed before signing are listed once official clicks on **"Why Can't I sign."**

b. Troubleshooting tips for EES signature issues.

- On the main landing page, press the F12 button on your keyboard. You should see a pop up appear from the bottom of your screen. Look on the top row for Browser Mode and Document Mode it should read Internet Explorer 9 and Document Mode of 9. If it is not showing IE9, click on the Document Mode and select IE9. Your screen will refresh and you will be able to add delegates. In

some instances, IE8 will work but will be slightly degraded. The root cause may be a Windows permission issue when accessing the CAC reader and Digital Certificate store on your Windows workstation through Internet Explorer. If you could work with your IT staff in changing the access permissions of Internet explorer to be at the same level as an Army Gold Master workstation the signature process should work without any further issue.

- Some user's computers appear to be loading the control but some systems are not letting it access the Certs/CAC reader through windows internal cryptography system.

- Another resolution if needed, is to go to your Tools, click on Internet Options, click the Security tab and uncheck the Enable Protected Mode (requires restarting Internet Explorer).

Go to:
1. Internet Explorer Tools
2. Then Internet Options
3. Then Security and uncheck "Enable Protected Mode"
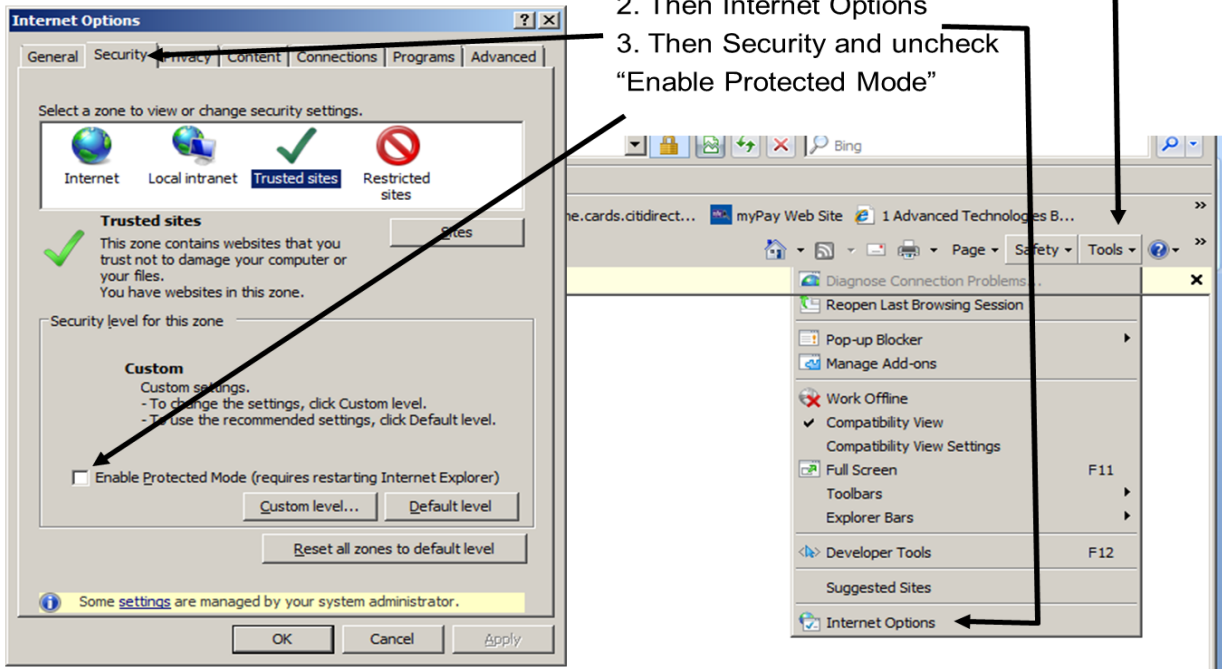
- 64 bit encryption hides signatures. See below.

c. Redlined Signatures – click on the signature and look for error. Some errors require signature to be deleted/resigned, others do not.

d. Remove / Delete Signatures (can only be removed by the rating official or rating official's delegate that signed that block).

- Signature Removal / Deletion Sequence (if all signatures must be removed)

  o   Reviewer (if needed)
  o   Rated Officer
  o   Senior Rater
  o   Intermediate Rater (if needed)
  o   Rater

- "Delete option" – Rating official or delegate can use delete button.

- "Signature Removal" option - button (lower left corner of the EES homepage)

- select the OER that needs the signature deleted

EvalID	Thru Date	Rated Soldier	Signed?	Rater	Locked?	Signed?	Senior Rater	Signed?	Status	Your Role	Comments
95793		CAMACHO, DENISE 1LT	No	CAMACHO, DENISE	No	No	MOORE, CHRISTOPHER M...	No	DRAFT	SENIOR RATER	
90048		RANGEL, RAQUEL COL	No	COLLINS, VICTOR	No	No	COLLINS, VICTOR	No	DRAFT	DELEGATE	
81578	20131223	HOLM, SCOTT MAJ	Yes	MOORE, CHRISTOPHER M...	Yes	No	CAMACHO, DENISE	Yes	DRAFT	RATER	

Ways to Submit OERs

a. EES – click "Submit to HQDA" button at top of OER once all appropriate signatures are obtained.

b. Mail – mail hard copies to the following addresses:

- AERs:

U.S. Army Human Resources Command
(AHRC–PDV–ER) (Evaluation Processing)
1600 Spearhead Division Avenue, Department 470
Fort Knox, KY 40122–5407

- OERs:

U.S. Army Human Resources Command
(AHRC–PDV–ER) (Evaluation Processing)
1600 Spearhead Division Avenue, Department 470
Fort Knox, KY 40122–5407

- Appealed OERs:

U.S. Army Human Resources Command
(AHRC–PDV–EA) (Evaluation Appeals)
1600 Spearhead Division Avenue, Department 470
Fort Knox, KY 40122–5407

c. Email – this option is for deployed units only (subject line: Deployed OER), **must select 600 DPI or greater resolution for scanned OERs.**

- usarmy.knox.hrc.mbx.tagd-eval-policy@mail.mil