

# Indian Health Service

## Promotion Series: Commissioned Officer Effectiveness Report (COER)

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SEPTEMBER 2024



# Agenda

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- Preparation
- Timeline
- Submission Process
- Officers Role for Concurrence and Non-Concurrence
- Rebuttal Process
- Complaints and Redress Process
- COER Officer Requirements
- Tips



# Preparation

- Consider discussing your performance and accomplishments with your Rater before being rated.
- Ensure your Rater's Email Address is populated in "RDB-Self Service"
  - Dates must match
- Use MS Word or equivalent to prepare your part of the COER:
  - Description of Duties and Responsibilities
  - Goals
  - Accomplishments
- Have someone look over your documents (spelling, grammar, impact)
- Include both what you did, how you did it, and what was the impact or outcome.

#	Supervisor SERNO	First Name	Last Name	Work Phone	Cell Phone	Email	Agency	From Date	To Date		
1.								09/20/2021		Edit	Delete
2.								03/22/2019	09/19/2021	Edit	Delete



# Timeline

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COER opens 1 September 2024; for 2024, will open on 4 September 2024 (Open)

COER is due to the Rater by 31 October 2024

COER is due to the Reviewing Official (RO) by 30 November 2024

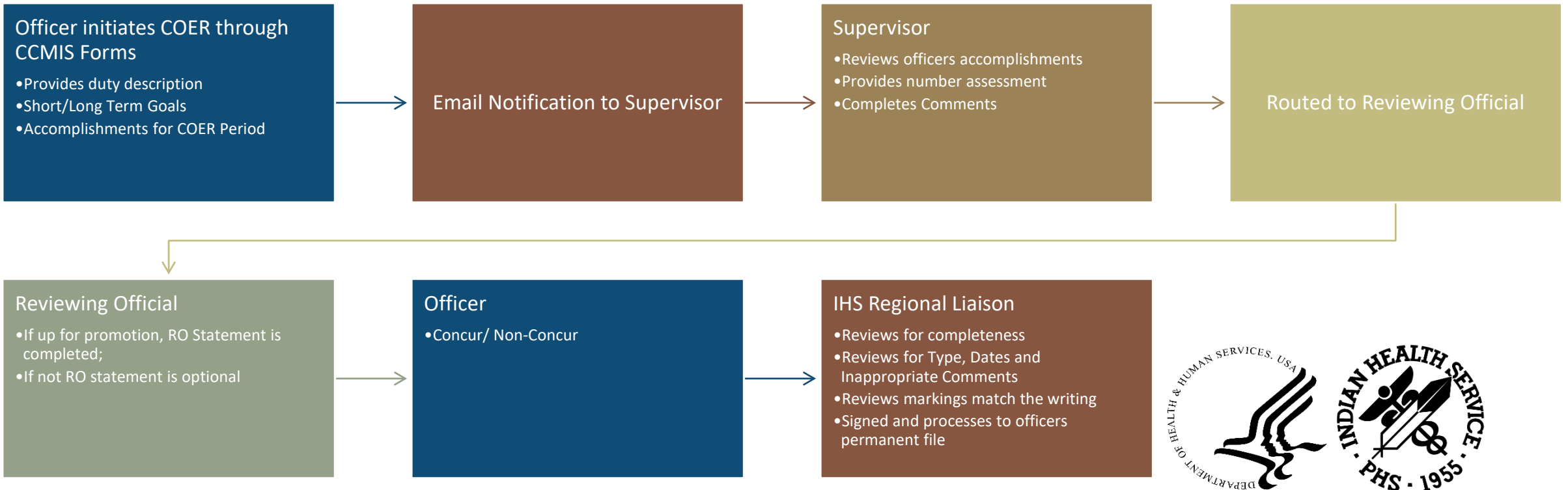
COER is due to the Agency Liaison by 31 December 2024

COER is due to Commissioned Corps Headquarters (CCHQ) by 15 January 2025

Note: If the officer or the supervisor transfers or changes positions, COER can be started as soon as 30 days before the effective date of transfer.



# Submission Process



# Officers Role for Concurrence and Non-Concurrence

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- Officers may choose to concur or non-concur with their COER
- This should not delay or stop the processing of the COER
- If an officer does non-concur on their COER, please reach out to the Regional Liaison to assist with all of your options available



# Rebuttal Process

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- If an officer does not agree with a rating or comment on the COER, the officer may submit a rebuttal. Officers are reminded that a rebuttal does not substitute as a remedy for a formal grievance.
- The rebuttal is submitted through the online COER system. Please see the COER System User Guide for details on submitting the rebuttal.
- It is recommended that this document be a professionally written explanation that clearly identifies and itemizes to which areas of the evaluation the officer does not agree.
- The rebuttal must only reflect comments or responses to the text and or scoring in the evaluation itself.



# Rebuttal Process Continued

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- After an officer submits a rebuttal in the COER system, it is routed to the liaison for approval and routed to the Rater and RO. If the Rater and RO wish, they may submit a response to the officer's rebuttal through the system. The Rater and RO rebuttal to 15,000 characters (~5 pages). The rebuttal response is submitted through the COER system.
- Rebuttals for all COER types are accepted for inclusion into the officer's eOPF within 90 days of when the completed COER is placed into the officer's eOPF.
- The Rater and RO have 60 days to submit a rebuttal once the officer's rebuttal is received.





# Complaints and Redress Process

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- If informal attempts with the Rater to adjust the COER are unsuccessful, the officer may seek redress by filing a formal complaint in accordance with CCI 211.04, “Complaints and Redress.”
- If an officer elects to proceed with a formal complaint, they should seek assistance from their Regional Liaison.
- The Corps’ policy is to resolve complaints, when possible, at the lowest level of command and to provide adequate administrative procedures for such resolution.
- Reach out to your Regional Liaison for specific instructions.



# Complaints and Redress Process

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- Redress may be sought for but not limited to:
  - Discretionary acts or omissions of a supervisor or senior official that has a direct and adverse effect on the officer or are in violation of law, executive order, regulation, or policy
  - Beyond the legitimate authority of that supervisor or senior official
  - Arbitrary, capricious, or an abuse of discretion; and/or
  - Clearly unfair (e.g., selective application of standards)
- Redress may not be sought for:
  - Related to the working environment
  - Interpersonal relationships between the officer, coworkers, and/or supervisor unrelated to duty requirements or expectations
  - Mid-cycle performance review or the issuance of a performance improvement plan (PIP)
  - A counseling session regarding performance and/or conduct
  - Complaints seeking disciplinary action against another officer or employee



# COER Officer Requirements

## ➤ Description of Duties and Responsibilities

- Main duties and responsibilities in your job based upon your current position assigned

## ➤ Goals

- Work-related goals for the next performance period and long-term career goals
- Attainable and can be accomplished within the next 1-5 years

## ➤ Accomplishments (Precepts and Benchmarks)

- Accomplishments related to the elements (Leadership, Initiative and Growth, Communications Skills, Interpersonal Skills, Planning and Organization, Professional Competencies, Analysis, Judgement, and Decision-Making)
- Be specific, clear, and concise
- Avoid fluff and canned statements
- Action – Impact (What did you do, how did you do it, what was the impact/outcome)

SECTION 2: OFFICER'S COMMENTS: To Be Completed by Officer.
<b>OFFICER INSTRUCTIONS:</b> Describe your duties, goals and accomplishments during the performance period. Use the space provided.
<b>Description.</b> Describe the main duties and responsibilities in your job during the performance period.
<b>Goals.</b> List your work-related goals for the next performance period and long term career goals.
<b>Accomplishments.</b> List your accomplishments related to the elements you will be rated on in section 3.



# Tips

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- Ensure that you meet all established deadlines
  - As necessary, follow up with your Rater and/or RO
  - Seek assistance from your Regional Liaison, if needed
- Engage your Rater at the beginning of the evaluation period and then periodically throughout, so there are no surprises.
- Maintain a working file throughout the year of all of your duties and accomplishments.
- Work with your Regional Liaison on COER issues, e.g. mistakenly assigned Rater or RO.
- Information included can only be from time as a Corps officer
- During the rating period (exception comparison from one year to another)
  - (e.g. GPRA scores increased 24.5%-2023 to 27.9% in 2024)



# Tips

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- The COER as a whole is an important document (40% promotion score)
  - Tells the story of what you have accomplished in this rating cycle
  - Avoid focusing on their scores
- Narrative plays an even more significant role
  - Include only job-related accomplishments
  - Do not include Commissioned Corps Requirements: USPHS Basic Readiness, Mandatory Certifications: BLS, ACLS, etc; daily wear of the PHS Uniform, Commissioned Corps Committee(s) – PAGs, PACs, SG etc



# Examples

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- Original: Chair, Pharmacy Expansion Committee
- Improved: Chair, Pharmacy Expansion Committee; led 3 teams to implement pharmacy mail outs, improved processing line; increased output from ~2,300 prescriptions to 4,000+ daily
  
- Original: Empaneled 1,323 patients for outpatient services
- Improved: Modified calendar appointment scheduling for a 5-minute overlap; increased daily schedule for an additional five appointments; increased empaneled patients from 923 to 1,323—decreased appointment wait time by 6 days.



# Examples

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- Original: Oversaw delivery of the EPA Clean Water Act Technical Assistance Interagency Agreement, including approval of new funding from FY19. Printed and distributed hard copies of the updated SDS guide to the Areas, contracted for Section 508 compliance, and published it on the IHS website. Developed a training plan for the new SDS guidance and delivered it to the Areas in four separate sessions. Provided guidance to the Bemidji, Oklahoma City, Billings, and Albuquerque Areas on developing their Area-specific SDS guidance.
- Improved: Led/delivered EPA Clean Water Act Technical Assistance Interagency Agreement; developed guidance (hard copy/electronic) and trained xxx staff in four sessions. Technical led in the development for 4/12 Areas SDS guidance.



# Examples

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- Original: Edited the NCC Internal Medicine Resident Handbook
- Improved: Lead Editor for NCC Internal Medicine Resident Handbook; updated 6 sections and coordinated with SMEs on updated technology and process; implemented handbooks both electronically and hard copy; reduced processing time of admin documentation from two weeks to three days





# Questions?

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