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

Created by: Darrome M. Morris

Presented by Michael J. Danberry

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Step 1: Log into AKO and double click the **Forms** button.
Select **Inbox** by clicking on the tab.
In Form Number: type 2166 and click **Search**
Click on **NCOER COUNSELING AND SUPPORT FORM**
Click the box next to **Complete NCOER and Support form using wizard format**, then select **Next**
Drop down windows:
Component: **USAR** (United States Army Reserve)
Status Code: **TPU** (Troop Program Unit)

NOTE: These are examples for this presentation.
Select **Begin NCOER Counseling and Support Form**
Select **Automatically populate the Rated Soldier’s...**
Type in rated Soldier’s SSN and first 2 letters of Last Name

Then Click **SEARCH**
Select *Continue NCOER Counseling Support Form*
Update/correct data that was uploaded from the Army data base
a. Abbreviate Middle name, (M.)  
e. Add PMOSC, (42A3O),  
f. Add Company name (0322 CS COMAINT, Arden Hills, MN 55126-5862),  
n. CMD Code (5C) dropdown selection

*Note: beginning day of rating period (1st of 4 quarterly counselings)
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.
Click boxes of **Rater**, **Senior Rater**, **Reviewer** and click ‘Continue NCOER counseling’
You will see some information is missing, the next slide will show you what to correct.
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)

*Note: use the spell-check option in all fields especially on the bullet comments*
Fill in the fields for **Principle Duty title, Duty MOSC,** and **Daily Duties and Scope**

*Note: DA PAM 611-21 has duties descriptions for every MOS*
Duty Description – Rated Soldier

The Duty Description of the Rated Soldier for performance counseling and evaluation should be used during the first counseling session to inform the Rated Soldier of his or her duties and areas of emphasis. It may change over the rating period. It is used at the end of the rating period to record what was important about the duties.

Enter Principal Duty Title and DMOS that most accurately reflect actual duties performed.

Principal Duty Title: Human Resources Sergeant

Duty MOSC: 42A20

Enter Daily Duties and Scope. This portion should address the most important routine duties and responsibilities. Ideally, this should include number of people supervised, equipment, facilities, and dollars involved and any other routine duties and responsibilities critical to mission accomplishment.

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.
Input Areas of **Special Emphasis** and / or **Appointed Duties** (recommended)

![Screenshot of form](https://myforms.us.army.mil/wps/PA_1.0_FL/SessionCheckServlet?UserID=darrone.m.morris%27s&action=oe - Microsoft Internet Explorer)

**Duty Description (Continued) – Rated Soldier**

Enter Areas of Special Emphasis. This portion is most likely to change somewhat during the rating period. For the first counseling session, it includes those items that require top priority effort at least for the first part of the upcoming rating period. At the end of the rating period, it should include the most important items that applied at any time during the rating period (examples are preparation for deployment, combined arms drills training for FTX, preparation for NTC rotation, revision of battalion maintenance SOP, training for tank table qualification, ITEP and company AMTP readiness, related tasks cross-training, reserve components annual training support (AT) and SIPERS acceptance rate).

**Areas of Special Emphasis**

Enter appointed duties. These should include those duties that are appointed and are not normally associated with the duty description.

**Appointed Duties**
There are 2 tabs for each subject: What is expected and what was performed. I.E. the Army Values subject has Army Values-**Task/Actions** and Army Values-**Performance**. In sentence form describe what is expected of the rated NCO in 2-3 lines that are on the **LEFT SIDE** under the **FIRST TAB (of two)** of the Army Values-Task/Actions.

*Note: Two Army Values Tabs*
What is expected of rated NCO

*Note: Bullet Formatting Guidance is found here:

Click Next
In bullet format in the Army Values / Performance Summary on the Right-Side starting with a lowercase “o” describe what the rated NCO did based on what was expected.
Competence-Task/Actions = \textit{Left-Side}, what is expected of rated NCO

*Note: there are 2 tabs for each subject

Click \textbf{Next}
Competence-Performance = Right side what the rated NCO did to fulfill what was expected from the Actions.
Physical Fitness & Military Bearing - Task/Actions

= what is expected of rated NCO (left side)

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

Click Next
After completing all sections of the counseling form, please click "Next" or "View form" to proceed.
All information will be filled in on the 1st and 2nd 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.

Click **Next>>** to view 2nd page

Click **<<previous** to go back to 1st page
Start the counseling with the first counseling date (initial) by Rated Soldier, Senior Rater, and Reviewer with your CAC (It will be very tiny)

*Note: 1st counseling (initial), quarterly counseling, (LATER) would be the next quarterly 3 months later, etc.

*Note: Left –side ACTIONS

*Note: All must sign the counseling on each quarter
After corrections/updates have been made click **SAVE** not **SAVE AS** when completed. (This is because you are working in myForms and saving the form to the repository).
If all worked correctly, you will get this screen

Your form was submitted into the repository successfully at: Sep 09, 2008 23:51:47 GMT

Click *Continue*
Click **Yes**
Close out by clicking the X
Click **Yes**
Click the X to exit screen

<table>
<thead>
<tr>
<th>Form Number</th>
<th>Form Title</th>
<th>Published Date</th>
<th>Signature Enabled</th>
<th>Form Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>DA 2166-0</td>
<td>NCO EVALUATION REPORT</td>
<td>Mar 01, 2006 00:00:00 GMT</td>
<td>YES</td>
<td>6.00</td>
</tr>
<tr>
<td>DA 2166-0-1</td>
<td>NCOER COUNSELING AND SUPPORT FORM</td>
<td>Mar 01, 2006 00:00:00 GMT</td>
<td>Yes</td>
<td>4.00</td>
</tr>
</tbody>
</table>
Click on the **Drafts** 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.
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 **Morris 2**, now click the drop-down **Sp.Tasks**, then click **Create NCOER**
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)

Next step; Rename
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
Click an X in Complete NCOER using wizard format

Click Next
Click **Begin NCOER**
Click box next to **Automatically populate**..., Enter: SSN, and first 2 letters of Rated Soldier’s Last Name

*Note: The Automatic populate option can only be used while in myForms
Continue NCOER

*Note: if an error occurs with any of the SSNs try the 'search Again' option.
Fix errors that occur from the information that the Army database downloaded on the NCOER
Update same changes and corrections as the previous 2166-8-1 (NCOER counseling form)

Click Next
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.

*Note:* click the calendar and set the time frame (Annuals automatically populate the end date)

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

Click Next
Click *Next*
Senior rater Bullets should be done by the Senior Rater when routed through MYFORMS

Click Next
Click **Next** or **View Form**
Concur/Non-concur

The Reviewer is responsible for rating safeguard over-watch. He or she may comment only when in disagreement with the Rater and/or Senior Rater.

The Reviewer will:

- Ensure the proper rating officials complete the report.
- Ensure evaluations are clear, consistent, and just, in accordance with known facts.
- Ensure bullet comments support the appropriate rating.

- Concur
- Non-Concur
Click Next
Click *Next*
Click **Next** or **View form**
Review and make changes or corrections accordingly

When completed click the X to exit
Sign NCOER with CAC by signing in appropriate block (Rater, Senior rater, Reviewer, Soldier)
Click **OK**
Click **Sign**
Click your name with ‘**DOD-CA**’ option (NOT the **EMAIL CA**)

![Certificate Selection Window](image)

Click **OK**
When the **ActivClient** login appears, type in your 4 to 6 digit Personal Identification Number (PIN) and press **OK**.
When Approvelt comes up click Sign
Click **OK**
Save by clicking the **SAVE** button in the upper left corner

*Note:* dates on the signatures automatically fill and cannot be deleted or changed.
Select *Continue*
Click **Yes** to save your changes
Click Yes
Click the X to close out
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
Two Documents should be in the drafts: the original renamed counseling form (2166-8-1) and the renamed NCOER (2166-8)........
Check the box next to SSG Morris ANL(20061016-20071015) and select Route Slip
In **Search Users** type in **Last Name:** and **First Name:** of the individual who the form needs to be routed to.

Click **Search**
Similar names may appear; Choose correct selection by checking the right name in the box. Click Add as original when sending for bullet comments and signatures. Use Add as info for anyone to view, they will not have access to make any changes or corrections, this is view only with this option.
Select the correct name out of the given choices and click *Add as original*
A box will appear on the left side under the word **Original** by the selected name. Click the box to insert a check mark.
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** - Yes, or no if you want to send a message with the routed form for further instructions or comments. (optional)
Click the **ROUTE** button

*Note: any block that is highlighted can be used besides the ‘Add as original option’*
A notification that the NCOER has been routed to the name selected will appear.
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.

*Note: At anytime you may double click the form name and view.*
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 the last signature is always the rated soldier. ROUTE to S-1 for processing to PERMS.
*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 **LAST** 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
chief@militarycac.com
https://MilitaryCAC.com

Further questions: https://militarycac.com/questions.htm