INDIVIDUAL AUGMENTEE (IA) PERFORMANCE REPORT QUICK REFERENCE GUIDE

 This quick reference guide provides amplifying guidance on preparing performance reports for the four types of IA Sailors—Individual Augmentee Manpower Management Assignments (IAMMs), Overseas Contingency Operations Support Assignments (OSAs), Global Support Assignments (GSAs), and Reserve Component Mobilizations (RC Mobs). This guide reviews general policy guidance and provides specific guidance on completing performance reports using the Adobe forms. For detailed guidance, including block by block instructions on completing reports, refer to BUPERSINST 1610.10C, Navy Performance Evaluation System, which can be found at:
 http://www.public.navy.mil/bupers-npc/reference/Instructions/BUPERSInstructions/Pages/default.aspx

NAVY EVALUATION ADVISER IN NON-NAVY COMMANDS

U.S. commands and agencies other than Navy are encouraged to appoint a Navy Personnel Evaluation Adviser who will monitor evaluation practices with regard to Navy personnel and provide assistance and advice to Army, Air Force and Marine reporting seniors when needed. If necessary, the nearest Navy command shall provide this service. Informal review of rough reports by the Navy Personnel Evaluation Adviser is encouraged to ensure conformity to BUPERSINST 1610.10C policies and to accepted Navy practices. Reviewer endorsements, comments, and signatures on the completed report are not authorized. Problems that cannot be resolved informally should be reported to NAVPERSCOM (PERS-32).

TOOLS

 NAVFIT 98A Version 29 is available for download at: http://www.public.navy.mil/BUPERS-NPC/CAREER/PERFORMANCEEVALUATION/Pages/SoftwareForms.aspx

 NAVFIT98A is not required to complete performance reports. Users may download hard copy forms at: http://www.public.navy.mil/BUPERS-NPC/CAREER/PERFORMANCEEVALUATION/Pages/SoftwareForms.aspx

 The following forms are in use for Navy performance reports:

- NAVPERS 1610/1 (3/02) FITREP/EVAL Summary Letter
- NAVPERS 1610/2 (8/10), Fitness Report and Counseling Record (W2-O6)
- NAVPERS 1616/26 (8/10) Evaluation Report and Counseling Record (E1-E6)
- NAVPERS 1616/27 (8/10) Evaluation and Counseling Record (E7-E9)

For further Fitness/Evaluation Report Policy assistance, please contact PERS-32 (Performance Evaluations Branch) at (901) 874-4881 / 4882 / 3313 or DSN 882-4881 / 4882 / 3313.

 The mailing address for PERS-32 is:

> COMMANDER
> NAVY PERSONNEL COMMAND
> PERS-32
> 5720 INTEGRITY DR
> MILLINGTON, TN 38055-3201

IA SAILOR TERMINOLOGY

IA: Any Sailor in receipt of individual deployment orders from NAVPERSCOM (PERS-4), to include IAMM, OSA, GSA, and RC Mob, not mobilized as part of an established commissioned Reserve Component (RC) unit	**Supported Command:** Location where the individual performs the IAMM/OSA/GSA/RC Mob
IAMM: An Active Component (AC) Sailor serving either voluntarily or involuntarily in a rip-to-fill IA billet under Temporary Additional Duty (TAD) orders away from the Parent Command. The Regular Reporting Senior for IAMMs is the Parent Command	**Active Component (AC) Regular Reporting Senior (Parent Command):** The reporting senior at the member's permanent duty station or unit
	Reserve Component (RC) Regular Reporting Senior (Supported Command Reporting Senior): The member's reporting senior at the Temporary Additional Duty (TAD) station or unit
OSA: An enlisted AC Sailor serving in a voluntary IA billet that applied for the billet using CMS/ID. The Sailor executes TAD orders away from the Parent Command at the end of the normal PCS tour, upon which the Projected Rotation Date (PRD) at the Parent Command is extended for the duration of the IA assignment plus an additional 60 days. The Regular Reporting Senior for OSAs is the Parent Command	**Active Component (AC) Concurrent Reporting Senior (In-Theater Reporting Senior):** The member's reporting senior at the Temporary Additional Duty (TAD) station or unit
GSA: An AC Sailor under Permanent Change of Station (PCS) orders to an Expeditionary Combat Readiness Center (ECRC) with TAD orders to an IA billet. GSAs switched to officers only on 1 NOV 2010. The Regular Reporting Senior for GSAs is ECRC	**Performance Report:** General term that includes Fitness Report (W2-O6), CHIEFEVAL, (E7-E9), and Evaluation (E1-E6)
RC Mob: An RC Sailor not mobilized as part of an established commissioned RC unit	**Regular Report:** Regular reports maintain "day-to-day" continuity. Block 17 must be checked to maintain regular report continuity on concurrent reports
Regular Command: The Sailors permanent duty station or unit	**Concurrent Report:** Report issued to member covering performance at the TAD station or unit

FITREP/EVAL PERIODIC PLANNING CALENDAR

(FITREP/CHIEFEVAL/EVAL ending dates are the last day of the month for officers and the 15th day of the month for enslisted.)

	PERIODIC FITREP/CHIEFEVAL/EVAL		
	Officers (Active)	**Officers (FTS/Inac)**	**Enlisted (All)**
Jan	O3	O3	
Feb	O2	O2	
Mar	W5, W4, W3	W5, W4, W3	E5
Apr	O5	O5	E9
May	O1	O1	
Jun			E4
Jul	O6	O6	E3, E2, E1
Aug			
Sep	W2	W2	E8, E7
Oct	O4	O4	
Nov			E6
Dec			

ACTIVE COMPONENT (AC) REGULAR REPORTING SENIORS
(PARENT COMMANDS)

IAMM/OSA performance reports(s) requirements are as follows:

1.) Maintain regular performance report continuity.

2.) Per BUPERSINST 1610.10C, use billet subcategory (Block 21) code "INDIV AUG" on performance evaluations for the following occasions:

- For Sailors with reporting period end dates occurring while on IA assignment who have been at their Parent Command for less than 240 days or whose period of performance is less than 240 days
- For Sailors with reporting period end dates occurring 180 days or less after they have completed an IA assignment (inapplicable if Sailor has transferred to a new Parent Command)

3.) Per BUPERSINST 1610.10C, evaluate Sailors with their peers for the following occasions and DO NOT use the billet subcategory entry of "INDIV AUG" in Block 21:

- For Sailors with reporting period end dates occurring while on IA assignment who have been at their Parent Command for 240 days or more
- For Sailors with reporting period end dates occurring more than 180 days after they have completed an IA assignment

4.) Sign Block 47 (FITREP/CHIEFEVAL) or Block 52 (EVAL) of the report(s).

5.) Send the original report(s) to PERS-32 (see mailing address on Page 1).

GSA performance report(s) requirements are as follows (Note: ECRC is the Regular Reporting Senior for GSAs):

1.) Use pre-arranged concurrent/regular reports to maintain day-to-day continuity.

2.) Per BUPERSINST 1610.10C, use billet subcategory (Block 21) code "INDIV AUG" on performance evaluations.

3.) Initial Block 17.

4.) Sign Block 47 (FITREP/CHIEFEVAL) or Block 52 (EVAL) of the report(s).

5.) Send the original report(s) to PERS-32 (see mailing address on Page 1).

6.) Forward a signed copy of the report(s) back to the Concurrent Reporting Senior.

ACTIVE COMPONENT (AC) CONCURRENT REPORTING SENIORS (IN-THEATER REPORTING SENIORS)

IAMM/OSA/GSA performance reports(s) requirements are as follows:

1.) Write a concurrent report for the following occasions:

- Detachment of individual from IA command
- Detachment of Concurrent Reporting Senior (officers only)
- Periodic reports (covering 90 days or more; see Periodic Planning Calendar on Page 3)
- Special reports

Pre-arranged concurrent/regular reports may be submitted on the occasions listed above under the following conditions:

- Regular and Concurrent Reporting Seniors agree in advance to submit report as concurrent/regular
- A concurrent/regular report must maintain continuity with the last regular report (overlapping the previous report is acceptable)
- Short periods less than 90 days, not covered by the Regular Reporting Senior prior to IA assignment, shall be covered on the pre-arranged concurrent/regular report issued by the Concurrent Reporting Senior

2.) Per BUPERSINST 1610.10C, use billet subcategory (Block 21) code "INDIV AUG" on performance evaluations.

3.) Rank all assigned Sailors against each other under the "INDIV AUG" billet subcategory using traditional ranking procedures (rank, rate, duty/competitive status, etc.).

4.) Sign Block 45 (FITREP/CHIEFEVAL) or Block 50 (EVAL) of the report(s).

5.) Forward advance copies of entire summary group(s) directly to NAVPERSCOM (PERS-32; see mailing address on Page 1).

6.) Send original performance report(s) to the Regular Reporting Senior for counter-signature.

7.) Retain a reproduced copy in case the originals are lost or misplaced.

8.) Mail the performance reports and summary letters to PERS-32 (see mailing address on Page 1).

Notes

1. For active duty members on an IA assignment, the regular command should do an observed periodic report when there has been a sufficient period of observation by the reporting senior to evaluate the period of performance with confidence.
2. A concurrent (but not a concurrent/regular report) may exceed 15 months.
3. A concurrent report may be endorsed as concurrent/regular when there is no gap between the beginning date of the concurrent report and the ending date of the previous regular report (i.e., the last regular report ends 30APR2008 and the concurrent report begins 01MAY2008 or earlier)..
4. Concurrent reports are normally grouped together but separately from regular reports for summary group comparison.
5. If a Sailor received an observed regular report ending no more than 3 months prior to the periodic report date, the periodic report may be omitted. If omitted, include the period in the next Regular report.

Examples

1. CDR Jones detached from Navy Personnel Command for follow-on GSA orders to Iraq. NPC gave him a detachment of individual fire with an end date of 10JUL2008. CDR Jones took 30 days of leave before reporting to ECRC (permanent duty station). Before reporting to Iraq for the six-month GSA, he attended a two-week school (20JUL2008-30JUL2008).
At the end of his GSA assignment, the supported command would write a concurrent report on CDR Jones and include the following information:
Block 14: 11JUL2008   Block 15: 02FEB2009
Block 29: LEAVE/TRANSIT: 11JUL2008-09AUG2008; TEMADD: 20JUL2008-30JUL2008.
To make CDR Jones' report a concurrent/regular fire, ECRC would check block 17 and endorse block 47.
2. While assigned to Norfolk Naval Shipyard, PN1 Smith receives IA orders for a six-month assignment to Afghanistan. She must report to her temporary duty assignment in Afghanistan on 01MAY2008. At the conclusion of her IA assignment, PN1 Smith will receive a concurrent report for the period from 01MAY2008-01DEC2008. Norfolk Naval Shipyard would do her periodic report that will cover the period from 16NOV2007 to 15NOV2008.

RESERVE COMPONENT (RC) REGULAR REPORTING SENIORS
(SUPPORTED COMMAND REPORTING SENIORS)

Individual Recall to Active duty performance report(s) requirements are as follows:

1. Navy Reservists recalled to active duty for 90 days or more are recommended to receive a detachment of individual report from their Inactive Duty Training Regular Reporting Senior (unit CO/OIC will receive this from gaining command reporting senior) ending the day before commencement of active duty.

2. The supported command to which assigned for active duty is responsible for submitting regular reports for the following occasions:

- Detachment of individual from supported command
- Detachment of supported command's reporting senior (officers only)
- Periodic reports (see Periodic Planning Calendar on Page 3)
- Special reports

3. Send original performance report(s), consisting of the entire summary group and summary letter, to PERS-32 (see mailing address on Page 1).

4. The period between the time the member detaches from the Navy Operational Support Center (NOSC) until the member physically reports to the active duty supported command shall be covered in the first report issued by the supported command's reporting senior. If the member has been on leave, travel, and/or training prior to physically arriving, capture that information in block 29 of the performance report. Refer to chapter 10 of BUPERSINST 1610.10C for specific guidance on completing the report. Ensure that block 5 is marked AT/ADSW and that block 14 is the day after the Sailor's last report.

Create and save Evaluation	Create and save Summary Letter
This section explains how to complete and save an evaluation using the Adobe forms. To assist in identifying the block numbers for each performance report the following naming convention is used: 1. A number "1" in the block column means that the same block title applies to all forms. 2. EVAL followed by a number means that block title applies to the enlisted evaluation only (E1-E6). 3. FITREP followed by a number means that block title applies to the officer or CHIEFEVAL performance report	This section explains how to complete and save a Summary Letter Adobe form. This interactive form will assist you in accurately completing each block by performing constraint checks.

This version of the summary letter performs limited auto calculations. The user must manually determine the Breakout distribution. A sample Summary Letter is located on page 1-37 of BUPERSINST 1610.10C. |

Create an evaluation:
1. Open the form.
2. Complete each block per guidance.
3. Member Trait Average is auto calculated.
4. Handwrite Summary Group Average
5. After saving evaluation, click on Clear Form to submit additional reports

The form underlines misspelled words in red similar to Microsoft Word. Move mouse over the underlined word and right click on mouse to see options.

Breakout Distribution:
1. All blocks must have a value.
2. See BUPERSINST 1610.10C Table 1-3 (page 1-21) to determine maximum promotion recommendations.

Summary Group Breakout
See the enlisted table on Table 1-5, page 1-25 and the officer table on Table 1-4, page 1-22 of BUPERSINST 1610.10C, for criteria used to determine summary groups. It is recommended that commands create separate summary letters for each summary group. The summary letter breakout (block 13) and the evaluation block 43 summary needs to match.

Save an evaluation:
1. Click Save Form button.
2. Select directory to store file.
3. Name File and click the Save button.

Note: Do not use the Save As menu option under File toolbar.

Summary Group Average:
1. Sum Individual Trait Averages and divide by number of individuals with graded reports.
2. NOB reports are not included.
3. Average is rounded up at two decimal places (i.e. 3.855 would round to 3.86).

Print an evaluation:
1. Click the Adobe print button
2. Top print double sided (printer must be capable of duplex printing)

   a. Select printer properties
   b. Select Flip on long edge
   c. Click OK

Note: Make sure the Print to File button is unchecked.

Adobe version: The NMCI gold disk now includes Adobe Acrobat Reader v9. Users with a lower version may submit a MAC request to upgrade. For non-NMCI users the Adobe website contains the latest free Adobe Reader for download. http://www.adobe.com/products/acrobat/readstep2.html

Adobe Auto-complete
Reader or Acrobat has an auto-complete feature that the user can turn on or off. Open Reader or Acrobat and hit CTRL+K (or from the menu bar Edit->Preferences->General). Look for "Forms" under the "Categories:" column. Under the Auto-Complete section, you can turn off or modify the previous entry behavior.

EVALUATION/FITREP INSTRUCTIONS

Block	Block Name	Constraint	Remarks
1	Name	Allows up to 27 alpha characters	JOHNSON, ROBERT M
		Member's last name separated with a comma	
2	Grade/Rate	Limit of 5 alpha characters. Grade or rate on the ending date of the report	Use standard rate or grade abbreviations: SA, BM1, CAPT or LT
3	Desig	Allows up to 12 alpha and/or special characters	For enlisted personnel, designate warfare quals such as AW/SW. If none, leave this block blank. For officers enter the four-digit designator-examples 1310, 1315, 1110
4	SSN	Allows 9 numeric characters	123-45-6789
5	ACT	An 'X' shall be placed in the box if selected	Only 1 box can contain an 'X.' Reservists on recall use AT/ADSW/265 block
	FTS	An 'X' shall be placed in the box if selected	
	INACT	An 'X' shall be placed in the box if selected	
	AT/ADSW/265	An 'X' shall be placed in the box if selected	
6	UIC	Allows up to 5 alpha-numeric characters	Navy UIC such as 1234A. For other services, enter five zeros. Concurrent Reporting Seniors enter your UIC
7	Ship/Station	Allows up to 18 alpha-numeric characters	CG-47 TICONDEROGA. Do not spell out numbers or letters. Concurrent Reporting Seniors enter your command name
8	Promotion Status	Dropdown containing: 'REGULAR,' 'FROCKED,' 'SELECTED,' 'SPOT'	In most cases, Regular would go in this block
9	Date Reported	Use 'YYMMDD' format (07SEP16)	
10	Periodic	'X' appears on selected box	Cannot have an 'X' if Block 13 selected
11	Detachment of Individual	'X' appears on selected box	Cannot have an 'X' if Block 13 selected
EVAL 12	Promotion/Frocking	'X' appears on selected box	Cannot have an 'X' if Block 13 selected
FITREP 12	Detachment of Reporting Senior	'X' appears on selected box	Cannot have an 'X' if Block 13 selected
13	Special	'X' appears on selected box	
14	From	Use 'YYMMDD' format (07SEP16)	
15	To	Use 'YYMMDD' format (07SEP16)	
16	Not Observed Report	'X' appears on selected box	Block 42 defaults to NOB. Three trait grades can be graded if desired

Block	Block Name	Constraints	Remarks
17	Regular	'X' appears on selected box	If Ops Cdr selected box 18 is blank. For active duty, check Concurrent. For reservists check Regular. For concurrent/ regular reports, check Concurrent and Regular
18	Concurrent	'X' appears on selected box	
19	Ops Cdr	'X' appears on selected box	
20	Physical Readiness	Allows up to 4 alpha-numeric characters	Enter a one letter PFA code without a space or slash for each official PFA administered during the reporting period. PFA codes are as follows: P – Passed both PRT and BCA F – Overall PFA failure (failed BCA or PRT) M – Medically waived from entire PFA (BCA and PRT) W – Passed BCA but medically waived from 1 or more PRT events B – Passed BCA but was authorized non-participation in PRT for other than medical waiver reasons (a comment will be made in Block 43 (E1-E6 EVAL) or Block 41 (FITREP, CHIEFEVAL) with reason for non-participation N – No PFA conducted during reporting period (due to Deployment/ Operational (DEP/OP), IAMM, OSA, GSA, pregnancy, TAD, or excused) Example: "FPM" indicates member participated in 3 PFAs during the reporting period and that the member failed the first, passed the second, and had a medical waiver for the third
21	Billet Subcategory	Dropdown containing: 'NA,' 'BASIC,' 'APPROVED,' 'CO AFLOAT,' 'CO ASHORE,' 'OIC,' 'SEA COMP,' 'CRF,' 'CANVASSER,' 'RESIDENT,' 'INDIV AUG,' 'INTERN,' 'INSTRUCTOR,' 'STUDENT,' 'RESAC1,' 'RESAC6,' 'SPECIAL01' through 'SPECIAL20'	SPECIAL01 through SPECIAL50 used only with prior written approval from PERS-32. For IAMM/OSA/GSA performance reports, select 'INDIV AUG' from the dropdown. Per NAVADMIN 215/10, Reserve Component Sailor's reports are completed in accordance with Chapters 9 &10 of BUPERSINST 1610.10C. Billet Sub Category will be assigned by length of time on Active Duty: RESAC1 or RESAC6
22	Reporting Senior	Allows up to 27 alpha characters	
		Members last name separated with a comma	SMITH, JOHN H
23	Grade (of reporting senior)	Allows up to 5 alpha-numeric characters	RADM, COL, LTC, CPT or GS-15. If civilian with no grade enter CIV

Block	Block Name	Constraints	Remarks
24	Desig (of reporting senior)	Allows up to 5 alpha-numeric characters	For other services, enter the abbreviation of the branch (USA, USMC, or USAF). For civilians leave blank
25	Title (of reporting senior)	Allows up to14 alpha-numeric characters	CO, XO, COMMANDER, DEPT HEAD
26	UIC (of reporting senior's command)	Allows up to 5 alpha-numeric characters	Navy UIC such as 1234A. For other services, enter five zeros
27	SSN (of reporting senior)	Allows 9 numeric characters	123-45-6789
28	Command employment and command achievements	Allows up to 276 characters	
29	Primary/Collateral/ Watchstanding Duties/PFA	Allows up to 14 alpha-numeric characters (small box) Allows up to 460 alpha-numeric characters (large box)	Reservists enter type of duty: ADSW, OYR, MOB, etc. In remainder of block describe the duty performed such as WATCH OFFICER
30	Date Counseled	Use 'YYMMDD' format (07SEP16)	If counseling not performed put NOT PERF or NOT REQ
31	Counselor	Free text field	
32	Signature of Individual Counseled	No constraints	
33-39	Performance Traits	Place an 'X' in only one box	
EVAL 40	Individual Trait Average	Auto-calculated by form when trait grades are checked	
EVAL 41 FITREP 40	Career Recommendations	Enter one or two recommendations	If no recommendation enter NONE or NA in the first block
EVAL 42	Signature of Rater		
EVAL 43 FITREP 41	Comments on Performance	Limited to 18 lines	
EVAL 44	Qualifications/ Achievements	Limited to 3 lines	
EVAL 45 FITREP 42	Individual Promotion Recommendation	'X' appears on selected box	
EVAL 46 FITREP 43	Summary Promotion Recommendation	Allows numeric characters only. User must manually determine summary group and force distribution	See Table 1-5, page 1-25 of BUPERSINST 1610.10C for criteria used to determine summary groups. Review Table 1-3 of the instruction for force distribution guidelines
EVAL 47	Retention	Place an 'X' in one and only one box	
EVAL 48 FITREP 44	Reporting Senior Address	Free text field	

Block	Block Name	Constraints	Remarks
EVAL 49	Signature of Senior Rater		
EVAL 50 FITREP 45	Signature of Reporting Senior	No constraints	Member trait average is auto calculated when traits have assigned grades
EVAL 51 FITREP 46	Signature of Individual Evaluated	No constraints	
EVAL 52 FITREP 47	Regular Reporting Senior Signature on Concurrent Report	No constraints	

SUMMARY LETTER INSRUCTIONS

Block	Block Name	Constraint	Remarks
N/A	FILENAME	N/A	Leave this field blank
1	Name of Reporting Senior	Allows up to 18 alpha characters	
		Members last name separated with a comma	Can validate that last name has a comma afterward.
2	Grade	Allows up to 5 alpha-numeric characters	CAPT
3	SSN	Allows 9 numeric characters with imbedded hyphens after the 3rd and 5th digits	123-45-6789 The form will format the SSN to include the dashes.
4	UIC	Allows up to 5 alpha-numeric characters	12345
5	Paygrade	Allows up to 2 alpha-numeric characters	E7, 05
6	Promotion Status	Dropdown containing: 'REGULAR', 'FROCKED', 'SELECTED', 'SPOT'	
7	Desig (Off Only)	Allows up to 12 alpha and/or special characters	Ignore errors message when putting in officer designator. For enlisted personnel enter NA.
8	Duty Status	Dropdown containing: 'ACT', 'FTS', 'INACT', 'AT/ADSW/265'	
9	Billet Subcategory	Dropdown containing: 'NA', 'BASIC', 'APPROVED', 'CO AFLOAT', 'CO ASHORE', 'OIC', 'SEA COMP', 'CRF', 'CANVASSER', 'RESIDENT', 'INTERN', 'INSTRUCTOR', 'STUDENT', 'RESAC1', 'RESAC 6', 'SPECIAL01 through 'SPECIAL20' '	SPECIAL01 through SPECIAL20 used only with prior written approval from PERS-32
10	Report Type	Enter 'Regular', 'Concurrent', 'Ops Cdr'	
11	MBR UIC (Enl Only)	Allows up to 5 alpha-numeric characters	12345 ■▾
12	Rpt End Date	Use 'YYMmmDD' format (07Sep16).	Select down arrow to see calendar
13	Breakout	Allows numeric characters	Breakout must be identical to Block 43 on every report listed. **The Total field is auto-calculated for you.**
NA	Last Name (ALPHA Order)	Allows up to 50 alpha characters per name	
NA	SSN (Last 4)	Allows 4 numeric characters per SSN	
NA	Trait Average	Allows up to 14 numeric and/or special characters per trait average	Leave blank for NOB reports. For all others take

Block	Block Name	Constraint	Remarks
			from Individual Trait Average on performance report.
NA	Total	Allows up to 14 numeric and/or special characters	Sum Individual Trait Average of all evaluations. **This field is auto-calculated for you.**
NA	Number of Individuals	Allows up to 14 numeric characters	Number of evaluations. **This field is auto-calculated for you.**
NA	Summary Group Average	Shall allow up to 14 numeric and/or special characters	**This field is auto-calculated for you.** (Total/Number of Individuals). Round up, i.e. 3.855 = 3.86
NA	Continuation Sheet	'X' appears on selected box	
NA	Report Submitted on Time	'X' appears on selected box	
NA	Signature of Reporting Senior (Sign and Date)	No constraints	
NA	ISIC Address	No constraints	
NA	Reporting Senior Address	No constraints	