eNavFit
USER GUIDE
Version 3.0.1
Getting Started – Online Operations

The eNavFit user guide is a detailed resource that explains the usage and functions of the entire interface. However, based on one’s role, not every page in the user guide will be applicable. Below is a quick reference based on one’s user role within eNavFit for online operations.

Individual Members

Members providing inputs or signing their reports will work out of either the “Start Appraisal” or “Manage Appraisal” sections of eNavFit, depending on the guidance provided at the local level.

Members who access eNavFit and start creating appraisals can create duplicate reports that cause issues throughout the summary groups. It is essential that members do not access eNavFit until clear direction is provided by the Reporting Senior or their Trusted Agents for the cycle.

Individual members working on their own reports should reference the following sections of the eNavFit user guide:

Section 3. Accessing the Interface
Sections 5.2.1 Start Appraisal and 5.2.2 Manage Appraisal
Section 10. Applying Signatures

Reviewers

Reviewers in the standard chop chain of Evals and Fitreps will work under the “Manage Appraisal” section of eNavFit. Unless a reviewer is a trusted agent, they should not create appraisals for their subordinates without prior coordination with command admin (trusted agent or reporting senior).

Reviewers should reference the following sections of the eNavFit user guide:

Section 3. Accessing the Interface
Section 5.2.2 Manage Appraisal
Sections 7.5 Routing Appraisals and 7.6 Reviewing Appraisals
Section 10. Applying Signatures

Trusted Agents and Reporting Seniors

Trusted agents and reporting seniors are the target audience for the eNavFit user guide. While they have full access to eNavFit functionality, reporting seniors may play a more limited role and rely on the “Manage Summary Group” section if their trusted agents are creating and managing summary groups, depending on the reporting senior’s level of involvement within the administrative processes of managing reports.

Sections 6.1 Reporting Senior Acknowledgement (complete only once for their career), 6.1 Assigning a Trusted Agent, and 6.2 Removing a Trusted Agent
Section 7. eNavFit Online Operations
Section 10. Applying Signatures
Section 11. Submission
# Table of Contents

1 Overview .................................................................................................................. 1
  1.1 Introduction ........................................................................................................... 1
  1.2 Using the Guides ................................................................................................... 1
    1.2.1 eNavFit User Guide (Printed Manual) .............................................................. 1
    1.2.2 eNavFit Tutorial Series (Video Manual) ......................................................... 2
  1.3 System Description ............................................................................................... 2
  1.4 Learning Objectives of eNavFit ........................................................................... 2

2 User Roles and Browser Access .............................................................................. 3
  2.1 Roles ....................................................................................................................... 3
    2.1.1 Reporting Senior ............................................................................................. 3
    2.1.2 Trusted Agent .................................................................................................. 3
    2.1.3 Member ............................................................................................................ 3
    2.1.4 Reviewer .......................................................................................................... 3
    2.1.5 Regular Reporting Senior (Concurrent Reports) ............................................. 4
  2.2 Changing Your User Role ..................................................................................... 4
  2.3 Updating Your User Profile .................................................................................. 4
  2.4 Internet Browsers .................................................................................................. 4

3 Accessing the Interface ......................................................................................... 5
  3.1 Information Verification ....................................................................................... 5
  3.2 90-Day Verification Screen .................................................................................. 6
  3.3 Access Denial ......................................................................................................... 6
  3.4 Entering the Interface ........................................................................................... 7
  3.5 BOL Session Automatic Time Out ....................................................................... 7

4 Process Workflow ................................................................................................... 8
  4.1 Expected Summary Group Workflow .................................................................. 8
  4.2 Orphan Reports ..................................................................................................... 8
  4.3 Summary Group Criterion ..................................................................................... 9
  4.4 Unmerge ................................................................................................................ 9
  4.5 Delete .................................................................................................................... 11
    4.5.1 Deleting a Summary Group ............................................................................ 11
    4.5.2 Deleting an Appraisal (Summary Group Level) ............................................ 12
    4.5.3 Deleting an Appraisal (Appraisal Level) ..................................................... 13

5 Navigation ............................................................................................................... 15
  5.1 Home Page .......................................................................................................... 15
  5.2 Navigating Tabs .................................................................................................... 15
    5.2.1 Start Appraisal ............................................................................................... 15
    5.2.2 Manage Appraisal ......................................................................................... 17
    5.2.3 Start Summary Group .................................................................................... 17
    5.2.4 Manage Summary Group ............................................................................. 19
    5.2.5 Upcoming Queue ......................................................................................... 20
  5.3 eNavFit Statuses .................................................................................................. 21
  5.4 Error Validation .................................................................................................... 22
  5.5 Automatic EP/MP Calculation Tool Bar .............................................................. 22
    5.5.1 SG Average ................................................................................................... 22
    5.5.2 Promotion Recommendations ....................................................................... 23
    5.5.3 Early Promote (EP) & Must Promote (MP) Calculations ............................... 23
5.6 Tool Tips .................................................................................................................. 23
  5.6.1 Calendar Operation ............................................................................................ 24

6 Reporting Senior Administration .................................................................................. 25
  6.1 Reporting Senior Acknowledgement ........................................................................ 25
  6.2 Assigning a Trusted Agent ..................................................................................... 26
  6.3 Removing a Trusted Agent ...................................................................................... 28

7 eNavFit Online Operations .......................................................................................... 30
  7.1 Creating Periodic Appraisals ................................................................................ 30
    7.1.1 Start Summary Group ..................................................................................... 30
    7.1.2 Adding Reviewers .......................................................................................... 33
    7.1.3 Adding Members ............................................................................................ 35
  7.2 Not Observed (NOB) Appraisals .......................................................................... 37
  7.3 Concurrent Appraisals ......................................................................................... 38
  7.4 Mid-Term Counseling Performance Inputs .......................................................... 40
  7.5 Routing Appraisals ............................................................................................... 41
  7.6 Reviewing Appraisals ........................................................................................... 42

8 eNavFit Intermittent Operations ................................................................................... 44
  8.1 Appraisal Manager (Intermittent Ops) ................................................................... 44
    8.1.1 Download Created Appraisal Manager as a Reporting Senior/Trusted Agent (Intermittent Ops) 44
    8.1.2 Upload Appraisal Manager (Intermittent Ops) ................................................ 45
  8.2 Download Appraisals (Intermittent Ops) ............................................................. 47
    8.2.1 Downloading and Editing Created Appraisals as a Member ......................... 47
    8.2.2 Downloading and Editing Created Appraisals as a Reporting Senior/Trusted Agent (Intermittent Ops) ... 48
  8.3 Route/Review Appraisals (Intermittent Ops) ....................................................... 50
  8.4 Upload Appraisals (Intermittent Ops) ................................................................. 51

9 eNavFit Offline Operations .......................................................................................... 52
  9.1 Appraisal Manager (Offline Ops) ........................................................................... 52
    9.1.1 Download Pre-Populated Appraisal Manager as a Reporting Senior ............ 52
    9.1.2 Download Pre-Populated Appraisal Manager as a Trusted Agent ............... 53
    9.1.3 Download Blank Appraisal Manager as Reporting Senior/Trusted Agent (Offline Ops) ... 55
    9.1.4 Complete Reporting Senior Information in Offline Appraisal Manager ....... 56
    9.1.5 Name the Summary Group and Create Reviewer Templates in Offline Appraisal Manager 59
    9.1.6 Complete Summary Group Information in Offline Appraisal Manager ......... 61
    9.1.7 Add Members in Offline Appraisal Manager ............................................... 62
    9.1.8 Provide Member Information in Offline Appraisal Manager ....................... 62
  9.2 Download Appraisals (Offline Ops) ..................................................................... 63
    9.2.1 Download Pre-Populated Appraisal Form for Yourself (Offline Ops) .......... 63
    9.2.2 Download Pre-Populated Appraisal Form for Someone Else (Offline Ops) .. 64
    9.2.3 Downloading Blank Appraisal Form (Offline Ops) .................................... 66
  9.3 Route Appraisals (Offline Ops) ............................................................................ 67

10 Applying Signatures with eNavFit ............................................................................. 68
  10.1 Applying Electronic Signatures (Online Ops) ...................................................... 68
    10.1.1 Applying Electronic Signatures as the Reporting Senior ............................ 68
    10.1.2 Applying Electronic Signatures as the Member/Reviewers ......................... 71
    10.1.3 Applying Alternate Signatures as the Reporting Senior (Online) ............... 73
<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Entered By</th>
<th>Reason for Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.0</td>
<td>21APR2022</td>
<td>A. Norton</td>
<td>Interface modification update</td>
</tr>
<tr>
<td>3.0</td>
<td>31OCT2022</td>
<td>A. Norton</td>
<td>Interface modification update</td>
</tr>
<tr>
<td>3.0.1</td>
<td>29NOV2022</td>
<td>A. Norton</td>
<td>Correction to Section 10.2.4, 10.2.5, 10.2.6, 10.2.7</td>
</tr>
</tbody>
</table>
1 Overview

1.1 Introduction

The eNavFit interface:

a. Produces formal evaluation data for use in various downstream talent management processes.
b. Automates NAVFIT98A processes for creating, editing, routing, review, and submission.
c. Provides business rule and policy validations at the user end.

This document is organized around key process workflows for the creation and submission of a performance evaluation and fitness report. It is important to note that while this document contains specific overviews of various eNavFit workflows, it is not fully exhaustive and special circumstances may exist when creating a report. Support for those situations can be found online at: www.mynavyhr.navy.mil/Career-Management/Performance-Evaluation or MyNavy Career Center (MNCC) at 1-833-330-MNCC (6622) or askmncc@navy.mil. For technical issues/questions, sending an email that contains screenshots with the full browser window and a clear description of the problem assists the eNavFit team in troubleshooting issues.

1.2 Using the Guides

1.2.1 eNavFit User Guide (Printed Manual)

This guide explains the usage and functions of the eNavFit interface using screen shots from the interface to display process workflows visually.

- **Symbols.** This guide uses the following symbols and conventions:
  - ![Caution](image) Caution. This indicates important notices and restrictions for using the interface.
  - ![Note](image) Note. This indicates supplementary explanations and useful tips about interface operations.
  - ![Reference](image) Reference. This indicates information relevant to a particular function. “Section X.X” is used to refer to pages within this guide. References external to this guide are displayed by the signatory command and SSIC. (Ex: BUPERSINST 1610.10F).
  - ![Terms](image) Terms. This indicates terms that do not have an explanation in the policy.
1.2.2 eNavFit Tutorial Series (Video Manual)

The tutorial series offers a user the opportunity to watch an eNavFit user operate the interface and performance several specific process workflows for the creation and submission of a performance evaluation or fitness report. The eNavFit Tutorial Series can be found online at: www.mynavyhr.navy.mil/Career-Management/Performance-Evaluation

1.3 System Description

The eNavFit interface is built upon the Adobe Experience Manager (AEM) platform as a technology bridge between NAVFIT98A and the Navy’s future performance appraisal application. It is currently hosted on the BUPERS Online (BOL) web portal with access to users with CAC-PKI credentials. Despite being an interim change, eNavFit boasts many benefits for the Navy enterprise and its Sailors including electronic routing and submission, digital signature, user-end policy validation, and PII reduction.

1.4 Learning Objectives of eNavFit

The purpose of this document is to provide a training tool specifically for the eNavFit interface of the CRM solution for users to develop interface proficiency. The learning objectives are based on evaluation of the learner audience, current training conditions and constraints, existing materials, and industry best practices. Factors identified below will influence design, development, and delivery of interface training.

- Identify key features and functionality
- Understand terms and references
- Identify knowledge resources
- Successfully navigate the eNavFit interface
2 User Roles and Browser Access

2.1 Roles
The eNavFit Interface has four User Roles:

- Reporting Senior
- Trusted Agent
- Member
- Reviewer

2.1.1 Reporting Senior
Every summary group must have a reporting senior regardless of the number of reports. The Reporting Senior must acknowledge their User Role before they can be assigned to a summary group. The reporting senior must review and sign each performance appraisal prior to submission to Navy Personnel Command. This User Role will normally be filled by the commanding officer, officer in charge, or unit commander. However, exceptions apply based on summary group paygrade (See BUPERSINST 1610.10F).

2.1.2 Trusted Agent
A reporting senior may assign a trusted agent through the *shared queue* capability of eNavFit. (Section 6.2). This User Role is only necessary when using the online version. The Reporting Senior must assign the trusted agent before action can be taken by them within the interface. A trusted agent cannot assign themselves. Once assigned, the trusted agent may perform ALL administrative tasks within eNavFit that the Reporting Senior has access to. Trusted agents may *not* apply digital signatures on behalf of the Reporting Senior.

2.1.3 Member
Every summary group must have a member regardless of the number of reports. The member is for whom the performance appraisal is being created.

2.1.4 Reviewer
Reviewers are a group of individuals who the reporting senior or trusted agent assign to review a report. These individuals may be the rater, senior rater, or someone important to the members chain of command who the reporting senior or trusted agent believe can provide some insight into the members' actions during the evaluative period.
2.1.5 Regular Reporting Senior (Concurrent Reports)

The Regular Reporting Senior will have all the responsibilities of the reporting senior user role. The concurrent reporting senior must be a Commanding Officer to whom the member has been assigned for Additional Duty or Temporary Additional Duty by competent written orders or directives, or that CO’s successor or delegated reporting senior. The Regular Reporting Senior will ensure that all reports have been received and have the proper countersignature prior to submission to Navy Personnel Command per BUPERSINST 1610.10F. A countersignature verifies that the report has been properly processed but does not necessarily imply agreement with the contents of the report.

2.2 Changing Your User Role

Personnel assigned to a unit may fill all User Roles throughout an evaluative period, depending on the performance appraisal submission schedule found in BUPERSINST 1610.10F. User roles will be based on the inputs provided by the reporting senior or trusted agent during summary group creation.

2.3 Updating Your User Profile

There are no specific profiles captured and retained within eNavFit. Information for members is downloaded from BOL as part of an auto-fill capability based on login credentials or input by a reporting senior, trusted agent, or reviewer during summary group and performance appraisal creation. Because no profiles are created, it is highly recommended that members maintain their email information within BOL to ensure that the email search for member and routing functionalities of eNavFit work properly. (Section 3.2)

2.4 Internet Browsers

The eNavFit interface has been tested and operates best when using Google Chrome. However, it will work with other HTML 5 compatible internet browsers such as Microsoft Edge (when NOT in Internet Explorer compatibility mode), Mozilla Firefox, and Apple Safari.

⚠️ Caution

The eNavFit interface will not operate correctly when using Microsoft Internet Explorer or other HTML 5 incompatible browsers.

Note

Microsoft Edge users on NMCI Networks will experience errors when using the eNavFit interface due to compatibility mode. Microsoft Edge retained compatibility mode allowing it to access and display legacy websites. It is highly recommended that users do not use Microsoft Edge with eNavFit.
3 Accessing the Interface

3.1 Information Verification

If it has been greater than 90-days since your last login to BOL, you will be asked to verify your email before proceeding into BOL (See Section 3.1).

Step 3.1.1: Using a recommended browser, type: https://www.bol.navy.mil/BAM/ into the browser bar at the top of the screen.

Step 3.1.2: Select Personal Security Credentials (CAC PKI) for access to BOL.

Step 3.1.3: Select “CAC Login”

Step 3.1.4: From the BOL Application Menu, Select “Update” at the top of the screen.

Step 3.1.5: Enter the required information. Do not use dashes in the phone number. Using a “@navy.mil” email address is highly recommended to ensure proper routing within the eNavFit interface.

Although recommended, the eNavFit interface does not require the use of governmental email addresses.
Step 3.1.6: Select the “Update Info” button to save the entered information.

Figure 3-4: Update Info Button

Step 3.1.7: Select the "Main Menu" button to return to the BOL Application Menu.

Figure 3-5: Main Menu Button Selection

3.2 90-Day Verification Screen

Step 3.2.1: If it has been greater than 90-days since your last login to BOL, you will be asked to verify your email before proceeding into BOL.

Figure 3-6: 90-Day Verification

Step 3.2.2: There are three options:

2. Remind Me Later-Receive this verification upon next login.
3. Update-Update personal information (See Section 3.2).

3.3 Access Denial

If you are denied access to BOL or Navy Personnel Command Document Services, contact the BOL Help Desk at:

- (800) 951-6289
- (901) 874-4717
- BUPERS07_IT_EOC.FCT@NAVY.MIL

Personnel (Military/Civilian) with a DODID will be required to submit a completed SAAR-N (OPNAV 5239/14) to the BOL Helpdesk for access. Instructions available on the eNavFit website.
3.4 Entering the Interface

Step 3.4.1: **Select** “eNavFit Program” from the BOL Application Menu.

![Note]
The “eNavFit Program” link points to the same location as the link for “Navy Personnel Command Document Services” and has been added to reduce user confusion.

Step 3.4.1: **Select** Personal Security Credentials for access to Navy Personnel Command Document Services.

Step 3.4.2: **Navigate** to the tab labeled “eNavFit” under the “Categories” located on the left side of the screen.

![Note]
Selecting the eNavFit category will reduce the available tabs to those used only for the eNavFit interface.

3.5 BOL Session Automatic Time Out

BOL has an enterprise level session timeout after 15-minutes of inactivity. This sometimes occurs while working within the eNavFit interface due to workflows being completed in additional browser windows opening.

Step 3.5.1: A black “Operation Failed” error box appears.

Step 3.5.2: Close the browser window and restart BOL.
4 Process Workflow

4.1 Expected Summary Group Workflow

The expected summary group workflow represents the most common workflow executed using the eNavFit interface. The following steps should occur to complete a periodic workflow:

**Reporting Senior Acknowledgement**
- Only required one-time or any-time information is updated
- Only acknowledged by the Reporting Senior

**Assign Trusted Agent**
- Optional
- Online Only

**Start Summary Group**
- Online
- Intermittent modality
- Add inputs that will affect all members of the summary group

**Route Summary Group**
- Online Only
- Status Change
- Must be in route to enable the reviewer template

**Sign Appraisal**
- Reporting Senior cannot delegate signing authority
- Reporting Senior cannot sign more than one appraisal per policy

**Submit Summary Group**
- Electronic Submission Online Only
- Submit appraisals electronically to NPRPERS
- Offline forms will use the method prescribed by policy

4.2 Orphan Reports

The eNavFit interface follows a parent-child relationship. The Summary Group acts as the parent and the Appraisal is the child. To place reports in advanced statuses (i.e., Route, Sign), an appraisal must be linked to a summary group. If an appraisal is created as a standalone document, the result is an orphan report. An orphan report will occur when an appraisal is created and there is no summary group with matching criterion. This may occur when a member provides input through the Start Appraisal menu option and submits it to the interface. Orphaned reports will be auto-grouped with reports that have matching Summary Group Criterion once a summary group is created. They will be visible to the Reporting Senior, Trusted Agent, Member, and/or report creator until a summary group matches. Orphaned reports may be modified in the manage appraisal menu.

Orphan reports occur when an appraisal is created or unmerged before the summary group is created. Once the summary group is created, the orphan report will be binned in the summary group with matching summary group criterion.
4.3 Summary Group Criterion

The following fields are used for Summary Group comparison within the eNavFit interface to determine appraisal similarities with existing or future Summary Groups. Orphan reports will automatically enter a created summary group if the following fields match:

- Paygrade
- Designator (Officer only)
- Duty Code
- Unit Identification Code (UIC)
- Promotion Status
- Period of Report To Date
- NOB Status
- Type of Report
- Billet Subcategory
- Reporting Senior

4.4 Unmerge

Unmerge is a summary group level capability. If a member is selected for advancement, approved for retirement, etc. the report may be unmerged from an existing summary group by modifying the summary group criterion of the report and selecting the Unmerge status. The following steps can only be completed by the Reporting Senior or their Trusted Agent:

Step 4.4.1: **Select** the “Manage Summary Group” tab from the menu options on the left side of the screen.

Step 4.4.2: **Select** the summary group that contains the report to be unmerged.
Step 4.4.3: Select the “Reports” tab.

Step 4.4.4: Select “Show/Hide” next to the member’s name whose appraisal will be removed from the existing summary group.

Step 4.4.5: Modify the summary group information.

Note
The Summary Group information must be changed prior to selecting unmerge. It must be different than the existing summary group criterion (Section 4.3).

Step 4.4.6: Select “Unmerge” from the status drop-down.

Step 4.4.7: Select “Save”.

Note
Following refresh, the appraisal will be removed from the summary group. If a summary group has been created with matching criterion (Section 4.3), it will merge with that summary group. If it has not, it will be available to the reporting senior and trusted under Manage Appraisal>Appraisal I Have Access To
4.5 Delete

4.5.1 Deleting a Summary Group

The summary group must be in an Active, Route, or Reviewed status to be deleted. The following steps can only be completed by the Reporting Senior or their Trusted Agent.

Step 4.5.1.1: **Select** the “Manage Summary Group” tab from the menu options on the left side of the screen.

Step 4.5.1.2: **Open** the summary group to be deleted

Step 4.5.1.3: **Select** “Delete” from the summary group drop-down menu.

Step 4.5.1.4: **Select** “OK” on the pop-up window.
Step 4.5.1.5: Select “Save”  
Following refresh, the summary group will be deleted from the Active summary group tab.

Figure 4-12: Delete SG-Open Summary Group

4.5.2 Deleting an Appraisal (Summary Group Level)

The summary group must be in an Active, Route, or Reviewed status to be deleted. The following steps can only be completed by the Reporting Senior or their Trusted Agent.

Step 4.5.2.1: Select the “Manage Summary Group” tab from the menu options on the left side of the screen.

Figure 4-13: SG Level Delete -Manage SG

Step 4.5.2.2: Open the summary group that contains the Appraisal to be deleted.

Figure 4-14: SG Level Delete-Open SG

Step 4.5.2.3: Select the “Reports” tab.

Figure 4-15: SG Level Delete-Reports Tab
Step 4.5.2.4: Select “Delete” from the status drop-down menu in the row displaying the members name and trait grades.

Figure 4-16: SG Level Delete – Delete in Menu

Step 4.5.2.5: Select “OK” on the pop-up window.

Figure 4-17: SG Level Delete - OK Pop-Up

Step 4.5.2.6: Select “Save”

Note: Following refresh, the summary group will be deleted from the Active summary group tab.

Figure 4-18: SG Level Delete-Save SG

4.5.3 Deleting an Appraisal (Appraisal Level)

The appraisal must be in an Active or Unmerge status to be deleted. The following steps can be completed by the Member, Reporting Senior, or their Trusted Agent if the appraisal is in an Active or Unmerge status AND/OR the appraisal is not aligned to a summary group (orphan report).

Step 4.5.3.1: Select the “Manage Appraisal” tab from the menu options on the left side of the screen.

Note: The Member will select “My Appraisal” and Reporting Senior or Trusted Agents will select “Appraisal I Have Access To”
Step 4.5.3.2: Select the “Open” button next to the appraisal to be deleted.

Step 4.5.3.3: Select the “Delete” button.

Step 4.5.3.4: Select “OK” in the pop-up window.

The interface will automatically save and refresh the browser window.

Step 4.5.3.5: Close the “Appraisal Task” browser window.

Deletion can be verified by repeating Step 4.5.3.1. Appraisal should no longer be listed.
5 Navigation

5.1 Home Page

The eNavFit interface has no dashboard or homepage. A user will encounter all options available within Navy Personnel Command Document Services Hub upon entry.

Navigate to the tab labeled "eNavFit" under the “Categories” located on the left side of the screen to display only the eNavFit interface options.

If the links repeat down the screen, select “To Do” followed by “Start Process“ to reload the links.

5.2 Navigating Tabs

There are five event tabs associated with the eNavFit interface. The Start Appraisal and Manage Appraisal tabs work within individual fitness reports and evaluations. The Start Summary Group and Manage Summary Group tabs provide management functions for summary groups with one or more members. All performance appraisals require a summary group to complete per BUPERSINST 1610.10F.

5.2.1 Start Appraisal

The Start Appraisal Tab allows a user to commence and provide inputs for an appraisal by an individual member. If the Reporting Senior has acknowledged their User Role and a Summary Group has been created, the report will appear in the Report Senior or Trusted Agent queue for action.

The Start Appraisal options begin with the question:

“How would you like to start a FITREP/EVAL?”

- For yourself
- For someone else
- Upload an offline form
- Download a new form
**For yourself:** If you are the member, you can provide inputs and create an appraisal using this radio button. The user must provide as much data as possible to enable the auto-grouping function. The reporting senior data will be auto-populated based on the DODID or email address input and the acknowledgement of user role by the reporting senior.

![Figure 5-5: Start Appraisal for Yourself](image)

**Note**

If the reporting senior has NOT acknowledged their User Role, the error “Reporting senior not found” will be displayed after the DODID or email address is input and the search button or enter are pressed. If no Reporting Senior data and no error message is displayed, verify that you are using a correct browser and that the another member has not acknowledged for or in addition to the reporting senior.

**For someone else:** If you are providing inputs on another member and are not the trusted agent or reporting senior, you will use this menu option to create an appraisal. The initial entry point will require the User to provide the DODID or email address for the summary group reporting senior. The interface will display the information from the most recent reporting senior acknowledgement IF the reporting senior has acknowledged their User Role.

**Upload an offline form:** If you have taken an appraisal offline using the eNavFit download function at any time, you can upload those forms back into the interface using this radio button option. Once you have selected the file to submit, press the Blue “Submit” button in the bottom right corner of the screen.

**Download a new form:** If you need to download an appraisal, select this radio button. Once selected you will need to determine if the report is for yourself as the reporting senior or for someone else (as a trusted agent).
In the download menu, you will have the option to download an auto-populated appraisal, blank appraisal, or a blank summary sheet.

Note

Per BUPERINST 1610.10F, a summary sheet is only required for printed/mailed in submissions to Navy Personnel Command. A summary letter has been added to the online modality for summary groups in a completed status per fleet request to the “Manage Summary Group” tab.

5.2.2 Manage Appraisal

The Manage Appraisal tab allows a user to receive reports commenced by other members including the reporting senior or trusted agent. The Manage Appraisal tab is split into two additional tabs, My FE and FE’s I have Access to. The My FE tab will allow a user to view their own reports and the FE’s I have Access to tab displays reports where a member has tasking for review or inputs.

The Manage Appraisal tabs are:

- My Appraisals
- Appraisals I have access to

My Appraisals: This tab allows a user to see a list of their current and past appraisals that have been captured using the eNavFit interface and require input. This tab will display appraisals that are in an Active, Route, and Submitted Status for the user. If a member is not assigned for routing as part of the Reviewer Template, the member will not see the appraisal when it is in a Route status. Appraisals that were completed using any other method will not be displayed.

Appraisals I have access to: This tab allows a user to see a list of appraisals that they have been assigned action on as a Reviewer. Appraisals will only be visible in this menu when they are in a Route status AND when it is their turn to review the document for inputs per the Reviewer Template.

5.2.3 Start Summary Group

The Start Summary Group tab allows a reporting senior or trusted agent to provide inputs that affect entire summary groups such as reporting senior data, summary group paygrade, end date, command achievements, etc. This information is promulgated to all reports created within the summary group.
The Start Summary Group options begin with the question:
“How would you like to start a Summary Group?”
- For yourself as Reporting Senior
- For someone else as Reporting Senior
- Upload an offline form
- Download a new form

For yourself as Reporting Senior: If you are the reporting senior for a summary group, you can provide inputs and create a summary group without the aid of a trusted agent using this radio button option. The initial entry point will display your data as the reporting senior and provide the option to modify any information that is incorrect.

For someone else as Reporting Senior: If you are the trusted agent for a reporting senior, you can provide inputs and create a summary group using this radio button option. The initial entry point will require the Trusted Agent to provide the DODID or email address for the summary group reporting senior. The interface will display the information from the most recent reporting senior acknowledgement if the reporting senior has acknowledged their User Role.

Note
If the reporting senior has NOT acknowledged their User Role, the error “Reporting senior not found” will be displayed after the DODID or email address is input and the search button or enter are pressed. If no Reporting Senior data and no error message is displayed, verify that you are using a correct browser and that the another member has not acknowledged for or in addition to the reporting senior.

Upload an offline form: If you have taken a summary group offline using the eNavFit download function at any time, you can upload those forms back into the interface using this radio button option. Once you have selected the file to submit, press the Blue “Submit” button in the bottom right corner of the screen.
Download a new form: If you need to download the FE (Fitness Report/Evaluation) Manager, select this radio button. Once selected you will need to determine if the report is for yourself as the reporting senior or for someone else (as a trusted agent).

5.2.4 Manage Summary Group

The Manage Summary Group tab allows a reporting senior or trusted agent edit controls over summary groups that have been created, change summary group status, ability to submit, and other summary group level functions.

The Manage Summary Group tabs are:

- Acknowledge Role
- Active
- Submitted

Acknowledge Role: Chapter 6 details how to acknowledge the Reporting Senior User Role using the on-screen inputs and auto-populated information.

Active: This tab displays information and links to summary groups that are currently in an active workflow status and require input. The black information bar lists key information for summary group verification including the summary group name, status, reporting senior, paygrade of summary group, trait average of all appraisals within the summary group, and expected and uploaded reports. The action button allows the summary group to be opened for modification and is dependent upon summary group status. Some statuses limit user input ability.
Submitted: This tab displays information and links to summary groups that have been submitted to Navy Personnel Command. Selecting the Open button from this menu will display the Manage Summary Group level view. To print or save reports, you must open each report and select the View Report button.

5.2.5 Upcoming Queue

The Upcoming Queue tab allows a user to view workflow tasking that has been assigned to them.

Upcoming Queue: This queue allows a user to see all reports that they have actions and lists:
- Member
- Reviewer
- Reporting Senior

Member: This row displays information pertaining to reports where the user is the member of a summary group if the summary group has been created and has a status.

Reviewer: This row displays information pertaining to reports where the user has been assigned as a reviewer (reviewer, rater, or senior rater).
Reporting Senior: This row displays information pertaining to reports where the user is the reporting senior of a summary group.

5.3 eNavFit Statuses

The summary group status plays an integral role in the workflow functionality.

Online: To change the status of a summary group, navigate to the drop-down menu at the bottom right of the form next to the Save button and select the desired status.

The interface may not allow some statuses to be changed unless validations have passed.

Offline: To change the status of a report in the offline forms, navigate to the upper right. Some statuses are not available in the offline version due to functionality constraints.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Pass Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Initial Status when a summary group or appraisal is created.</td>
<td></td>
</tr>
<tr>
<td>Route</td>
<td>Route appraisal to first Reviewer in the Reviewer Template</td>
<td></td>
</tr>
<tr>
<td>Reviewing</td>
<td>Currently enroute through the Reviewers</td>
<td>Reviewer has selected “Next Reviewer” completing their review.</td>
</tr>
<tr>
<td>Reviewed</td>
<td>All reviews completed</td>
<td>Automatic status when all reviewers have selected “Next Reviewer” and completed their review.</td>
</tr>
<tr>
<td>Sign</td>
<td>Ready to be signed</td>
<td>Document must pass validation.</td>
</tr>
<tr>
<td>Signing</td>
<td>Currently enroute for signature by all included users</td>
<td></td>
</tr>
<tr>
<td>Signed</td>
<td>All required signatures completed</td>
<td>Report signed by all users or alternate signature(s) provided</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
<td>Pass Requirement</td>
</tr>
<tr>
<td>--------</td>
<td>----------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Completed</td>
<td>All appraisals in summary group have passed validation, are signed, and ready to be submitted to NPC PERS for processing</td>
<td>Automatic status when all signatures or alternate signatures have been applied.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete user appraisal or Summary Group</td>
<td>Summary group/appraisal in Active, Route, Reviewed, or Unmerge Status (See Section 4.5)</td>
</tr>
<tr>
<td>Unmerge</td>
<td>Remove an appraisal from an existing Summary Group</td>
<td>(See Section 4.4)</td>
</tr>
<tr>
<td>Submitting</td>
<td>Summary Group is being electronically submitted to NPC</td>
<td>All appraisals passed validation, all required signatures on appraisals</td>
</tr>
<tr>
<td>Submitted</td>
<td>Summary Group has been received by NPC</td>
<td></td>
</tr>
</tbody>
</table>

### 5.4 Error Validation

The eNavFit interface uses real-time AND save error validations to compare current policy to user inputs.

Real-time error validations will occur as inputs are entered without additional action such as spelling check. There are also field validations that require a comparison of inputs from previously entered fields such as promotion recommendation and trait averages.

![Figure 5-32: Error Validation Example](image)

### 5.5 Automatic EP/MP Calculation Tool Bar

<table>
<thead>
<tr>
<th>SG Average</th>
<th>Sig. Problems</th>
<th>Progressing</th>
<th>Promotable</th>
<th>Must Promote</th>
<th>Early Promote</th>
<th>Max EP+MP</th>
<th>Max EP</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

#### 5.5.1 SG Average

The “SG Average" is the summary group trait average from all submitted appraisals. Appraisals must be uploaded or completed within the online eNavFit interface for this field to update.

![Figure 5-33: SG Average](image)
5.5.2 Promotion Recommendations

The promotion recommendations will update as input is provided based on the Summary Group size. Appraisals must be uploaded or completed within the online eNavFit interface for these fields to update.

5.5.3 Early Promote (EP) & Must Promote (MP) Calculations

The eNavFit interface will display the total number of EP and MP authorized for a given summary group in the “Max EP+MP” field. This number is based on the table found in BUPERSINST 1610.10F for summary groups up to 30 members. Summary groups of 31 or more are based on the calculations found in the directive:

- Early Promote + Must Promote Maximum = \( N \times 0.6 \) (60%) = \( X_1 \)
- Early Promote Maximum = \( N \times 0.2 \) (20%) = \( X_2 \) (rounded up).
- Must Promote Maximum = \( X_1 - X_2 = X_3 \).

The validation fields are pictured displaying the error bars. The error bar will display in red if too many EP or MP recommendations are assigned to a summary group.

5.6 Tool Tips

Tool tips are selectable buttons throughout eNavFit to provide the user with basic information from the policy. Tool tips are not meant to replace the policy. For in depth information, see BUPERSINST 1610.10F.

Select the ? from any field within eNavFit.

The tool tip will display summarized policy information pertinent to the field.
5.6.1 Calendar Operation

The eNavFit calendar tool allows a user to quickly select dates from a calendar in the appropriate format. Select the desired day from the calendar.

Select the Month at the top of the tool to display a monthly calendar.

Select the Year at the top of the tool to display a range of years.
6  Reporting Senior Administration

6.1 Reporting Senior Acknowledgement

A reporting senior must acknowledge their User Role to create a summary group. The following steps describe this process workflow for acknowledgement of the reporting senior User Role.

Step 6.1.1:  Follow the steps in Section 3.1 for Accessing the Interface.

Step 6.1.2:  Select the “Manage Summary Group” tab from the menu options on the left side of the screen.

Step 6.1.3:  The "Acknowledge Role" tab will be displayed.

Step 6.1.4:  Verify and/or Update all fields displayed on the webpage.

Note
Use abbreviated titles such as CO, OIC, DEPT HEAD, etc.

Step 6.1.5:  Select the "Acknowledge" button in the “Reporting Senior Role” box on the bottom right side of the screen.
Step 6.1.6: **Select** the “OK” button from the pop-up window at the top of the screen.

Figure 6-5: Acknowledge Role OK

Step 6.1.7 **Verify** that the “Date Acknowledged” field says, “Just Now.”

Figure 6-6: Acknowledgment Date

Step 6.1.8 **Select** the blue "Submit" button on the bottom right side of the screen.

Figure 6-7: Acknowledgment Submission

### 6.2 Assigning a Trusted Agent

A trusted agent (administrative assistant) may be assigned by the reporting senior to share their queue and complete administrative tasking on their behalf. A trusted agent is **NOT** capable of applying digital signatures to documents but has interface authority for all other actions of a reporting senior. All performance appraisals that the reporting senior has action on will be visible and editable by the trusted agent. The reporting senior can add multiple trusted agents if desired. Trusted agents are optional and not necessary to complete the performance appraisal process.

Trusted agents cannot assign themselves to another member’s queue without authorization. The reporting senior must enter the interface and assign a member if they desire to share their queue. The following steps describe the process workflow for assignment of a trusted agent by the reporting senior.

---

**Caution**

The Trusted Agent should be an individual that is trusted to act on behalf of the reporting senior, normally an administrative officer. The Trusted Agent will have access to all appraisals that the reporting senior has action on until they are removed.
Step 6.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 6.2.2: **Select** the “Preferences” option on the black toolbar banner at the top center of the screen.

!! Note

If “Preferences” does not appear at the top of the screen, select the Cog Wheel Icon.

**Figure 6-8: Preferences Selection**

Step 6.2.3: **Select** the “Queues” tab on the top right side of the screen.

**Figure 6-9: Queues Tab**

Step 6.2.4: **Select** the plus sign (+) next to the option "Users currently sharing my queue".

**Figure 6-10: Shared Queue + Sign**

Step 6.2.5: **Enter** the name of the trusted agent to be assigned in the search box in the top right corner of the "Share my queue" window.

!! Note

The name should be entered as: Last Name First Name without a comma, but with a space between the Last Name and First Name. (i.e., Smith John)

**Figure 6-11: Enter Name of Trusted Agent**

Step 6.2.6: **Select** the name or email address of the trusted agent to be assigned from the list of members displayed.

**Figure 6-12: Select the Trusted Agent**
Step 6.2.7: **Select** the “Share” button to share the reporting senior administrative operations within eNavFit.

![Figure 6-13: Share RS Queue](image)

Step 6.2.8: **Verify** that the desired trusted agent is being displayed.

![Figure 6-14: Verify Trusted Agent Assignment](image)

Step 6.2.9: **Select** “Start Process” from the top of the screen to complete this operation.

![Figure 6-15: Select Start Process](image)

### 6.3 Removing a Trusted Agent

A trusted agent may be removed by the reporting senior at any time and will not affect the performance appraisal workflow. The following steps describe the process workflow for removal of a trusted agent by the reporting senior.

**Step 6.3.1:** Follow the steps in Section 3.1 for Accessing the Interface.

**Step 6.3.2:** **Select** the “Preferences” option on the black toolbar banner at the top center of the screen.

- **Note**
  
  If "Preferences" does not appear at the top of the screen, select the Cog Wheel Icon.

![Figure 6-16: Personal Information Entry](image)
Step 6.3.3: Select the "Queues" tab on the top right side of the screen.

Step 6.3.4: Select the “X” next to the Trusted Agent that will be removed.

Step 6.3.5: Verify that the Trusted Agent has been removed from the shared queue.

Step 6.3.6: Select “Start Process” from the top of the screen to complete this operation.
7 eNavFit Online Operations

7.1 Creating Periodic Appraisals

7.1.1 Start Summary Group

Step 7.1.1.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 7.1.1.2: Select the “Start Summary Group” tab from the menu options on the left side of the screen.

Step 7.1.1.3: Select the “For Someone Else as Reporting Senior” radio button from the menu options. If you are the Reporting Senior who is creating the Summary Group, select the “For Yourself as Reporting Senior” and proceed to Step 7.1.1.6.

Step 7.1.1.4: Select the "Reporting Senior Search" tab located on the top of the Start Summary Group screen.

Step 7.1.1.5: Enter the DODID OR Email Address of the Reporting Senior.
Step 7.1.1.6: **Select** the "Summary Group" tab located on the top of the Start Summary Group screen.

Step 7.1.1.7: **Type** a unique identification for the Summary Group into the "Name" field to easily identify it from others (ex: E7 PERIODIC SEP2021). Ensure that the Summary Group name can be identified by others during creation.

Step 7.1.1.8: **Select** the paygrade of the members to be evaluated from the "Paygrade" dropdown list.

Step 7.1.1.9: **Note** The "Designator" field is only enabled at the Summary Group Level if Officer Fitness Reports are being created as a Summary Group criterion. Enlisted warfare qualifications can be entered into the individual member appraisals.

Step 7.1.1.10: **Select** the "Duty/Competitive Status" from the dropdown list.
Step 7.1.1.11: **Type** the "*Unit Identification Code (UIC)*" for the members being evaluated. If the Summary Group will contain reports for multiple UICs, enter the UIC on the members report.

Step 7.1.1.12: **Type** the unit of the member being evaluated in the "*Ship/Station*" Field. This field is limited to 18 characters.

Step 7.1.1.13: **Select** the "*Promotion Status*" from the dropdown list.

Step 7.1.1.14: **Type or Select** the report end date in "*End Date*" Field.

*Note.* The calendar tool can be used in place of typing.

Step 7.1.1.15: **Select** the "*Not Observed (NOB) Flag*" to indicate if the summary group will contain NOB reports. (See Section 7.2)
Step 7.1.1.16: **Verify/Select** the Report Type from the "Report Type" dropdown list. For enlisted members this field will be grayed out as they will always be regular and/or concurrent. Officer fitness reports will have the option to select OPS CDR. Select the correct option at the appraisal level during input.

Step 7.1.1.17: **Select** the Billet Subcategory from the dropdown list.

7.1.2 Adding Reviewers

Separate Reviewer Templates can be created based on the command structure for divisions, departments, or branches (i.e., CS Division, YN Division, N1, etc.). It is important that each of the Reviewer Templates list only one Rater, Senior Rater, and/or Regular Reporting Senior for Concurrent Reports for proper routing. The appraisal will route from the first member listed to the last in sequential order.

Step 7.1.2.1: Follow the steps in Section 7.1.1 for entering Summary Group information.

Step 7.1.2.2: **Select** the "Reviewer Templates" tab located on the top of the Start Summary Group screen.

Step 7.1.2.3: **Skip** the field labeled "1: DEFAULT".
<table>
<thead>
<tr>
<th>Step 7.1.2.4:</th>
<th><strong>Select &quot;Add New Template&quot; Button</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 7.1.2.5:</td>
<td><strong>Type</strong> a unique identification name in the pop-up window. Multiple reviewer templates can be created depending on desire. A different reviewer template can be created for each unit division or department. (Ex., CS Division, N4 Reviewer, etc.)</td>
</tr>
<tr>
<td>Step 7.1.2.6:</td>
<td><strong>Select &quot;OK&quot;</strong></td>
</tr>
<tr>
<td>Step 7.1.2.7:</td>
<td><strong>Type</strong> the DoD ID email address for the desired reviewer in the &quot;Email Address or DoDID&quot; field.</td>
</tr>
<tr>
<td>Step 7.1.2.8:</td>
<td><strong>Select</strong> the Magnifying Glass icon or press Enter to search the interface for the member.</td>
</tr>
</tbody>
</table>
Step 7.1.2.9: Select the dropdown arrow below "Type" to identify the User Role of the reviewer.
- Rater
- Senior Rater
- Concurrent Reporting Senior (RS)

**Note**
If the reviewer is not the Rater, Senior Rater, or Concurrent Reporting Senior leave this field blank.

**Caution**
Due NOT assign the summary group Reporting Senior as the Regular RS. This will create an interface error as the summary group Reporting Senior and the Regular Reporting Senior for Concurrent Reports cannot be the same person.

Step 7.1.2.10: Repeat steps 6.1.2.7 through 6.1.2.9 for each additional reviewer if more than one is desired using the "Add Reviewer Row" button.

### 7.1.3 Adding Members

Step 7.1.3.1: Follow the steps in Section 7.1.1 for entering Summary Group information.

Step 7.1.3.2: Select the "Members" tab located on the top of the Start Summary Group screen.
**Step 7.1.3.3:** Enter the DODID OR email address of the member(s) to be evaluated in the "Email Address or DODID" field.

**Step 7.1.3.4:** Select the Magnifying Glass symbol or press Enter to search the interface for the member.

**Step 7.1.3.5:** Select the desired Reviewer Template from the drop-down menu under the "Reviewer Template" on the right side of the member information to assign a set of reviewers to the member report.

**Step 7.1.3.6:** Select the "Review" tab located on the top of the Start Summary Group screen.

**Step 7.1.3.7:** Select "Submit" on the bottom, right side of the screen.

*Note*

If an error is detected, the interface will take you to the first error detected with a change bar displaying the error in red. The user must navigate through each tab by selecting the available tabs OR the user may select **Back** or **Next** until all errors are resolved. Once the User returns to the review tab and all issues are resolved, **Select** "Submit".
7.2 Not Observed (NOB) Appraisals

Creating a NOB appraisal will lock blocks 16, 31-44, and 46 from editing. To create a NOB appraisal, the Reporting Senior or Trusted Agent must select “NOB (Blk 16)” or “PARTIAL” from the Start Summary Group drop down menu when creating a summary group. If “NONE” is selected, it may result in a Summary Group validation error.

A NOB promotion recommendation up to three performance traits may be applied in blocks 33-39 without resulting in a validation error. This applies to an observed appraisal with a Not Observed Promotion Recommendation only. Block 40 (Promotion Recommendation) is open for editing.

Step 7.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 7.2.2: **Select** the “Start Summary Group” tab from the menu options on the left side of the screen.

Step 7.2.3: **Select** the “Summary Group” tab and navigate to the “Not Observed (NOB) Flag”.

Step 7.2.4: The “Not Observed (NOB) Flag” drop-down menu presents a user with three options:
- **NONE**: If there will be no NOB reports in the summary group.
- **NOB (Blk 16)**: If the entire summary group is NOB.
- **PARTIAL**: If some reports within a summary group are NOB.

Per policy, NOB and regular reports cannot be in the same summary group. Attempting to mix a NOB in a regular summary will result in an error.
Step 7.2.5: **IF** “PARTIAL” was selected on the “Not Observed (NOB) Flag”, the “Not Observed Report” toggle must be selected in the individual appraisal to annotate the report that will be NOB.

![Figure 7-34: Appraisal Level NOB toggle]

### 7.3 Concurrent Appraisals

The Regular Reporting Senior for Concurrent appraisals **must** be added to the Reviewer Template when creating a summary group to identify them for review and signature purposes. The Regular Reporting Senior will receive the report as the last signatory during the signature application process.

**Caution**

If the Concurrent Reporting Senior is not added to the Reviewer Template, they will not receive the appraisal for review or signature.

Step 7.3.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 7.3.2: **Select** the “Start Summary Group” tab from the menu options on the left side of the screen.

![Figure 7-35: Start Summary Group]

Step 7.3.3: **Select** the "Reviewer Templates" tab located on the top of the Start Summary Group screen.

![Figure 7-36: Reviewer Templates Tab]

Step 7.3.4: **Type** the DODID OR email address for the Regular Reporting Senior in the "Email Address or DODID" field.

![Figure 7-37: Add Reviewers by email/DoDID]
Step 7.3.5: **Select** the Magnifying Glass icon or press Enter to search the interface for the member.

Step 7.3.6: **Select** the "*Concurrent RS*" from the Type drop-down menu.

Step 7.3.7: **Select** the “Manage Appraisal” tab from the menu options on the left side of the screen and select the desired report.

Step 7.3.8: **Select** the “Reports” tab from the left side of the screen.

Step 7.3.9: **Select** the *Concurrent* toggle to switch it from “NO” to “YES”.

---

*Figure 7-38: Search for Reviewers based on inputs*

*Figure 7-39: Reviewer Templates Field-Type*

*Figure 7-40: Manage Appraisal Menu*

*Figure 7-41: Appraisal Level -Report Tab*

*Figure 7-42: Concurrent Toggle Switch*
7.4 Mid-Term Counseling Performance Inputs

Users may input mid-term counseling date and counselor, apply not required, or not performed at the individual appraisal level.

Users may use the calendar selection tool or type the counseling performance date into the *Date Counseled* field. Enter the name of the Counselor in the *Counselor Name* field per policy. The *Counseling Performance* field should remain blank if counseling was performed.

If “NOT REQ” is selected, the *Date Counseled* and *Counselor Name* fields will remove inputs and become gray. No entry is required for these fields.

If “NOT PERF” is selected, a user MUST state the reason for non-performance per policy in the counselor’s name block with additional information applied in the comments block (if field capacity exceeded).

The Mid-Term Counseling Performance “Date Counseled” field is known to have errors when ANY user enters and saves using Microsoft Edge (Compatibility Mode) or Internet Explorer resulting in the date field to display “NAN-NAN-NAN” (Not a Number). Ensure users to only use recommended browsers with the eNavFit interface prior to their entry.
7.5 Routing Appraisals

When a summary group is placed in a Route status, the appraisals will be forwarded per the individual Reviewer Templates that have been assigned, sequentially from top to bottom of the listing to each Reviewer. Only the individual Reviewer, Trusted Agent, and Reporting Senior will be capable of viewing/editing the report while in a Route status.

**Step 7.5.1:** Follow the steps in Section 3.1 for Accessing the Interface.

**Step 7.5.2:** Select the “Manage Summary Group” tab from the menu options on the left side of the screen.

**Step 7.5.3:** Select the "Active" Tab

**Step 7.5.4:** Select the "Open" button next to the Summary Group to be routed.

**Step 7.5.5:** Select “Route” in the “Status” drop-down menu at the bottom of the screen.

*Note* Currently displays "Active".
Step 7.5.6: **Select** "OK", on the popup window acknowledging that all Member's in this summary group will be changed to a "route" status.

*Note*

The interface will automatically save when "OK" is selected.

![Figure 7-51: Status Change Acknowledgement](image)

### 7.6 Reviewing Appraisals

When a summary group is in a *Route* Status, the appraisals will be forwarded per the individual *Reviewer Templates* that have been assigned sequentially from top to bottom of the listing. If the Reporting Senior and a Reviewer have an appraisal opened for editing at the same time, the last changes will be the saved appraisal. They will receive a notification that the appraisal has changed since they opened it and provided an opportunity to accept before saving.

Step 7.6.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 7.6.2: **Select** the "Manage Appraisals" tab from the Startpoint options on the left side of the screen.

![Figure 7-52: Manage Appraisal Menu](image)

Step 7.6.3: **Select** "Appraisals I have Access To" Tab

![Figure 7-53: Appraisals I have Access to](image)

Step 7.6.4: **Select** the "Open" button next to a member's name from the summary group.

![Figure 7-54: Opening Member Reports](image)
Step 7.6.5: Select and review the desired tabs of the appraisal. All fields are modifiable with exception to those that display in dark grey.

Step 7.6.6: Note
Reviewers may leave notes during their review for subsequent reviewers. Notes will remain in the Reviewer Comments panel until the appraisal status is no longer in a Route status.

Step 7.6.7: Select the “Next Reviewer” button located on the bottom of the screen. The appraisal will automatically save when the “Next Reviewer” button is selected.

Step 7.6.8: Close the "Appraisal Task" browser window.
Note
When all appraisals have been reviewed, the status interface will automatically change to “Reviewed” when the reporting senior or trusted agent enter the Manage Summary Group tab.
8 eNavFit Intermittent Operations

8.1 Appraisal Manager (Intermittent Ops)
The Appraisal Manager should only be used as an intermittent tool at this time.

8.1.1 Download Created Appraisal Manager as a Reporting Senior/Trusted Agent (Intermittent Ops)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.1.1.1:</td>
<td>Follow the steps in Section 3.1 for Accessing the Interface.</td>
</tr>
<tr>
<td>8.1.1.2:</td>
<td>Select the &quot;Manage Summary Group&quot; tab from the menu options on the left side of the screen.</td>
</tr>
<tr>
<td>8.1.1.3:</td>
<td>Select the &quot;Active&quot; Tab</td>
</tr>
<tr>
<td>8.1.1.4:</td>
<td>Select the &quot;Open&quot; button next to the Summary Group to be downloaded.</td>
</tr>
</tbody>
</table>

Figure 8-1: Manage Summary Group Tab
Figure 8-2: Manage Summary Group-Active Tab
Figure 8-3: Manage Summary Group-Open Report
Step 8.1.1.5: **Select** the "Download" button. Note

A "Save-As" dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Figure 8-4: Download Appraisal

Step 8.1.1.6: If the file does not automatically open, locate the file you saved in the previous step (8.2.2.3) and open it in Adobe Reader. Note

Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe compatibility issues. Use of the desktop version of Adobe Reader is recommended.

Step 8.1.1.7: **Select** “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.

Figure 8-5: Enable All Features

Step 8.1.1.8: **Edit** the information in the PDF as desired

Step 8.1.1.9: **Select Save** icon to save edits to the PDF.

Step 8.1.1.10: **Close** the PDF file once all desired edits are complete.

**8.1.2 Upload Appraisal Manager (Intermittent Ops)**

The Upload Appraisal Manager Process is the same for the Reporting Senior and Trusted Agent.

Step 8.1.2.1: Follow the steps in Section 3.1 for Accessing the Interface.
Step 8.1.2.2: **Select** the “Start Summary Group” tab from the menu options on the left side of the screen.

**Figure 8-6: Start Summary Group Menu**

Step 8.1.2.3: **Select** the radio button next to "Upload Offline Form".

**Figure 8-7: Upload An Offline Form**

Step 8.1.2.4: **Select** the "Browse and Upload" button.

**Figure 8-8: Browse and Upload Button**

Step 8.1.2.5: **Select** the files to be uploaded from the pop-up dialogue box.

Step 8.1.2.6: **Select** the "Open" button in the dialogue box.

Step 8.1.2.7: **Select** the blue "Submit" button on the bottom, right side of the screen.

*Note*

Only 3 files, not exceeding 2000KB total in size can be uploaded at a time. If you have more than 3 files to attached or exceed the file size, the user will need to repeat these steps until all PDFs have been uploaded.

**Figure 8-9: Submit Uploaded Documents**
8.2 Download Appraisals (Intermittent Ops)

**Caution**

The .pdf versions of eNavFit contain metadata tags that identify them as eNavFit forms and allow them to be uploaded and downloaded to/from the eNavFit interface. If these documents are printed and scanned, the metadata will be cleared, and they will no longer be accepted as eNavFit documents. Printed appraisals must be wet-signed and mailed to Navy Personnel Command for processing.

### 8.2.1 Downloading and Editing Created Appraisals as a Member

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.2.1.1:</td>
<td>Follow the steps in Section 3.1 for Accessing the Interface.</td>
</tr>
<tr>
<td>8.2.1.2:</td>
<td>Select the “Manage Appraisal” tab from the Startpoint options on the left side of the screen.</td>
</tr>
<tr>
<td>8.2.1.3:</td>
<td>Select the &quot;Edit&quot; button next to the member’s name in the “My Appraisal” tab.</td>
</tr>
<tr>
<td>8.2.1.4:</td>
<td>Select the &quot;Download&quot; button. <strong>Note</strong>: A “Save-As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.</td>
</tr>
</tbody>
</table>

**Figure 8-10: Manage Appraisal Menu**

**Figure 8-11: Manage Appraisal-Open Button**

**Figure 8-12: Manage Appraisal-Open Button**
Step 8.2.1.5: If the file does not automatically open, locate the file you saved in the previous step (8.2.2.3) and open it using Adobe Reader. Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe compatibility issues. Use of the desktop version of Adobe Reader is recommended.

Step 8.2.1.6: Select “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.

Step 8.2.1.7: Edit the information in the PDF as desired.

Step 8.2.1.8: Select Save icon to save edits to the PDF.

Step 8.2.1.9: Close the PDF file once all desired edits are complete.

8.2.2 Downloading and Editing Created Appraisals as a Reporting Senior/Trusted Agent (Intermittent Ops)

Step 8.2.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 8.2.2.2: Select the "Manage Summary Group" tab from the menu options on the left side of the screen.

Figure 8-13: Enable All Features

Figure 8-14: Manage Summary Group Menu
Step 8.2.2.3: Select the "Active" Tab

Step 8.2.2.4: Select the "Open" button next to the Summary Group that contains the appraisal to be downloaded.

Step 8.2.2.5: Select the "Reports" tab from the top menu.

Step 8.2.2.6: Select the "SHOW" toggle next to the member that you are downloading the appraisal for.

Step 8.2.2.7: Select the Download button that displays at the bottom of the member tab.
Step 8.2.2.8: If the file does not automatically open, locate the file you saved in the previous step (8.2.2.3) and open it in Adobe Reader.

**Note**

Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe compatibility issues. Use of the desktop version of Adobe Reader is recommended.

Step 8.2.2.9: **Select** “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.

![Figure 8-20: Enable All Features](image)

Step 8.2.2.10: **Edit** the information in the PDF as desired.

Step 8.2.2.11: **Select Save** icon to save edits to the PDF.

Step 8.2.2.12: **Close** the PDF file once all desired edits are complete.

**8.3 Route/Review Appraisals (Intermittent Ops)**

The Route and Review Appraisals (Intermittent Ops) process can be completed within the interface using the online *Route* status or offline using an alternative electronic means (email, approved removable media, approved shared drive, etc.) for routing and reviewing. Appraisals may be downloaded and uploaded as necessary during the route process to ensure that all Reviewers have an opportunity to review the appraisal(s).

**Note**

The offline routing process is recommended for those members who have reviewers that do not have BOL accounts (typically non-Navy personnel) or for those units that have limited connectivity.

**Caution**

The .pdf versions of eNavFit contain metadata tags that identify them as eNavFit forms and allow them to be uploaded and downloaded to/from the eNavFit interface. The metadata tags will be cleared from documents that are printed and scanned and they will no longer be accepted as eNavFit documents. Printed appraisals must be wet-signed and mailed to Navy Personnel Command for processing.
8.4 Upload Appraisals (Intermittent Ops)

The Upload Appraisals Process is the same for all users of eNavFit.

Step 8.4.1:  Follow the steps in Section 3.1 for Accessing the Interface.

Step 8.4.2:  Select the “Start Appraisal” tab from the menu options on the left side of the screen.

Step 8.4.3:  Select the radio button next to "Upload Offline Form".

Step 8.4.4:  Select the "Browse and Upload" button.

Step 8.4.5:  Select the files to be uploaded from the pop-up dialogue box.

Step 8.4.6:  Select the "Open" button in the dialogue box.

Step 8.4.7:  Select the blue "Submit" button on the bottom, right side of the screen.

Note: Only 3 files, not exceeding 5000KB total in size can be uploaded at a time. If you have more than 3 files to attached or exceed the file size, the user will need to repeat these steps until all PDFs have been uploaded.

Figure 8-21: Start Appraisal Menu

Figure 8-22: Upload Offline Forms

Figure 8-23: Browse and Upload Button

Figure 8-24: Submit Uploaded Documents
9 eNavFit Offline Operations

9.1 Appraisal Manager (Offline Ops)

The Appraisal Manager is currently used as an intermittent tool. Offline use is not recommended unless connectivity can be restored.

9.1.1 Download Pre-Populated Appraisal Manager as a Reporting Senior

<table>
<thead>
<tr>
<th>Step 9.1.1.1:</th>
<th>Follow the steps in Section 3.1 for Accessing the Interface.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 9.1.1.2:</td>
<td>Select the “Start Summary Group” tab from the menu options on the left side of the screen.</td>
</tr>
</tbody>
</table>

![Figure 9-1: Start Summary Group Menu](image)

<table>
<thead>
<tr>
<th>Step 9.1.1.3:</th>
<th>Select “Download New Form”.</th>
</tr>
</thead>
</table>

![Figure 9-2: Download New Form Button](image)

<table>
<thead>
<tr>
<th>Step 9.1.1.4:</th>
<th>Select “For Yourself”</th>
</tr>
</thead>
</table>

![Figure 9-3: Download Selection Button](image)

<table>
<thead>
<tr>
<th>Step 9.1.1.5:</th>
<th>Select the Download tab</th>
</tr>
</thead>
</table>

![Figure 9-4: Download Tab](image)
| Step | 9.1.1.6: | Select the download button
A “Save As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file. |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Step</td>
<td>9.1.1.7:</td>
<td>Save the Appraisal Manager to a desired location.</td>
</tr>
</tbody>
</table>

### 9.1.2 Download Pre-Populated Appraisal Manager as a Trusted Agent

<table>
<thead>
<tr>
<th>Step</th>
<th>9.1.2.1:</th>
<th>Follow the steps in Section 3.1 for Accessing the Interface.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step</td>
<td>9.1.2.2:</td>
<td>Select the “Start Summary Group” tab from the menu options on the left side of the screen.</td>
</tr>
<tr>
<td>Step</td>
<td>9.1.2.3:</td>
<td>Select “Download New Form”.</td>
</tr>
<tr>
<td>Step</td>
<td>9.1.2.4:</td>
<td>Select “For Someone Else”</td>
</tr>
</tbody>
</table>
Step 9.1.2.5: **Select** the Reporting Senior Search tab

Step 9.1.2.6: **Enter** the Reporting Senior’s DODID or Email Address that you are the Trusted Agent for

Step 9.1.2.7: **Select** the “Search” button

Step 9.1.2.8: **Select** the Download tab

Step 9.1.2.9: **Select** the download button

A “Save As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Step 9.1.2.10: **Save** the Appraisal Manager to a desired location.
9.1.3 Download Blank Appraisal Manager as Reporting Senior/Trusted Agent (Offline Ops)

Step 9.1.3.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 9.1.3.2: Select the “Start Summary Group” tab from the menu options on the left side of the screen.

Step 9.1.3.3: Select “Download New Form”.

Step 9.1.3.4: Select “For Yourself” or “For Someone Else”.

Step 9.1.3.5: Select the Download tab.
Step 9.1.3.6: Select “Use this link to download a blank Appraisal Manager”.

Note

A “Save-As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Figure 9-17: Browse and Upload Button

9.1.4 Complete Reporting Senior Information in Offline Appraisal Manager

Information submitted to the Appraisal Manager will be automatically populated to all reports created from this template at the summary group level.

Step 9.1.4.1: Locate the file you saved in Section 9.1.1.

9.1.2 or 9.1.3 and open the file in Adobe Reader.

Step 9.1.4.2: Select “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.

Figure 9-18: Enable All Features

Step 9.1.4.3: Proceed to page 3 “Reporting Senior Defaults”.

Note

The submission schedule for periodic appraisals is on page 2.

Figure 9-19: Reporting Senior Defaults

Step 9.1.4.4: Complete Reporting Senior information. Some information may be auto-populated based on method of download. Modification to auto-population data is only necessary if updates are required. Ensure that all information is correct prior to selecting the “CONTINUE” button.

Note

Ranking board user defaults is not currently active and planned as part of a future iteration release.
<table>
<thead>
<tr>
<th>Step 9.1.4.5:</th>
<th><strong>Enter</strong> the email address of the reporting senior into the “Reporting Senior Email” field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 9.1.4.6:</td>
<td><strong>Enter</strong> the Department of Defense Identification (DoDID) number of the reporting senior into the “Reporting Senior DoDID” field.</td>
</tr>
<tr>
<td>Step 9.1.4.7:</td>
<td><strong>Note</strong> Refer to BUPERSINST 1610.10(Series) for information concerning reporting seniors assigned as Dual Hat. If the reporting senior meets the criteria for Dual Hat, <strong>Select</strong> this radio button before proceeding.</td>
</tr>
<tr>
<td>Step 9.1.4.8:</td>
<td><strong>Select</strong> the paygrade from the “Summary Group Paygrade” drop-down menu. <strong>Note</strong> The paygrade selection will determine which documents are rendered (Enlisted, Chief, Officer) after the “Continue” button is selected.</td>
</tr>
<tr>
<td>Step 9.1.4.9:</td>
<td><strong>Enter</strong> the name of the reporting senior into the “Reporting Senior Name (Last, First MI)” field.</td>
</tr>
</tbody>
</table>
Step 9.1.4.10: **Enter** the grade (CDR, COL, etc.) of the reporting senior into the “Reporting Senior Grade” field.

Step 9.1.4.11: **Enter** the designator of the reporting senior into the “Reporting Senior Designator” field.

Step 9.1.4.12: **Enter** the unit address of the reporting senior into the “Reporting Senior Address” field.

Step 9.1.4.13: **Enter** the title of the reporting senior into the “Reporting Senior Title” field.

**Note**

Title input can result in different levels of authorization. BUPERSINST 1610.10(Series) lists common reporting senior title abbreviations such as CO, OIC, DEPT HEAD, etc. for use.

Step 9.1.4.14: **Enter** the Unit Identification Code (UIC) of the reporting senior into the “Reporting Senior UIC” field.
Step 9.1.4.15: The DoD ID of the reporting senior that was previously entered will auto-populate within this field. No action is necessary.

Step 9.1.4.16: Enter the Immediate Superior in Command (ISIC) address of the reporting senior into the “ISIC Address” field.

Step 9.1.4.17: This field will be populated if the user has followed the steps in Section 9.1.1 to download a pre-populated appraisal manager.

Step 9.1.4.18: Select the “Continue” button when all fields have been completed.

The “Continue” button MUST be used to open the correct report type. If the PDF form arrow keys are used, the form will only open page one of an appraisal.

9.1.5 Name the Summary Group and Create Reviewer Templates in Offline Appraisal Manager
Step 9.1.5.1: Type a Summary Group Name into the “Name” block to the right of the view/edit folder button.

Step 9.1.5.2: The status will display “Active”.

Step 9.1.5.3: Select the “Templates” icon.

Step 9.1.5.3: Type the name of the Reviewer Template in the pop-up window.

Step 9.1.5.4: Select the “Add Reviewer” button.
Step 9.1.5.5: **Complete** the information for the first reviewer:
   a. Reviewer Email
   b. Reviewer DODID
   c. Reviewer Name

   Manual entry is only required if using the form completely offline.

**Figure 9-39: Add Reviewer Information Offline**

Step 9.1.5.6: **Repeat** steps 9.1.5.4 and 9.1.5.5 until all reviewers are added.

Step 9.1.5.7: **Select** the “Home” button once all reviewers are added.

**Figure 9-40: Home Button Selection Offline**

### 9.1.6 Complete Summary Group Information in Offline Appraisal Manager

Step 9.1.6.1: **Select** the file folder icon under view/edit next to the summary group.

**Figure 9-41: View/Edit Folder Icon Offline**

Step 9.1.6.2: **Complete** Summary Group information:
   a. NOB Flag
   b. UIC (BLK 6)
   c. Designator for the Summary Group (Officers only)
   d. Duty/Competitive Status
   e. Promotion Status (BLK 8)
   f. End Date (BLK 15)
   g. Report Type (BLK 17-19)
   h. Billet Subcategory (BLK 21)
   i. Enter Command Employment and Command Achievements (BLK 28)

**Select** schedule to open the submission schedule if end date is not known.

**Figure 9-42: Summary Group Information Entry Offline**
9.1.7 Add Members in Offline Appraisal Manager

Step 9.1.7.1: Select “Add Report”

Step 9.1.7.2: Type the information in the “Add Report” pop-up dialogue box.
   a. Member DODID
   b. Member Name
   c. Member Email
   d. Member UIC
   e. Member Grade/Rate
   f. Member Designator

Step 9.1.7.3: Select Ok to add the member to the summary group.

9.1.8 Provide Member Information in Offline Appraisal Manager

Step 9.1.8.1: Select View/Edit Reviewers Icon to the left of the member’s name
Step 9.1.8.2: **Type** the member appraisal information into the form.

The appraisal form displayed in the *Appraisal Manager* is an abridged version of the NAVPERS 16XX form.

Step 9.1.8.3: **Select** the Summary Group Icon to return to the member listing.

---

### 9.2 Download Appraisals (Offline Ops)

![Caution]

The .pdf versions of eNavFit contain metadata tags that identify them as eNavFit forms and allow them to be uploaded and downloaded to/from the eNavFit interface. If these documents are printed and scanned, the metadata will be cleared, and they will no longer be accepted as eNavFit documents. Printed appraisals must be wet-signed and mailed to Navy Personnel Command for processing.

#### 9.2.1 Download Pre-Populated Appraisal Form for Yourself (Offline Ops)

Step 9.2.1.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 9.2.1.2: **Select** the “Start Appraisal” tab from the menu options on the left side of the screen.
Step 9.2.1.3: Select “Download New Form”.

Figure 9-50: Appraisal – DL New Form

Step 9.2.1.4: Select “For Yourself”

Figure 9-51: Appraisal – DL For Yourself

Step 9.2.1.5: Select the Download tab

Figure 9-52: Appraisal – DL Tab

Step 9.2.1.6: Select the download button
Note: A “Save As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Figure 9-53: Appraisal – DL Button

Step 9.2.1.7: Save the Appraisal Manager to a desired location.

9.2.2 Download Pre-Populated Appraisal Form for Someone Else (Offline Ops)

Step 9.2.2.1: Follow the steps in Section 3.1 for Accessing the Interface.
Step 9.2.2.2: Select the “Start Appraisal” tab from the menu options on the left side of the screen.

Step 9.2.2.3: Select “Download New Form”.

Step 9.2.2.4: Select “For Someone Else”

Step 9.2.2.5: Select the Member Search tab

Step 9.2.2.6: Enter the Member DODID or Email Address
Step 9.2.2.7: **Select** the “Search” button

Figure 9-59: Appraisal – Search Button

Step 9.2.2.8: **Select** the Download tab

Figure 9-60: Appraisal – Download Tab

Step 9.2.2.9: **Select** the download button

*Note*

A “Save As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Figure 9-61: Appraisal – Download Button

Step 9.2.2.10: **Save** the Appraisal Manager to a desired location.

9.2.3 **Downloading Blank Appraisal Form (Offline Ops)**

The Download Blank Appraisal Form (Offline Ops) process is the same for all users.

Step 9.2.3.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 9.2.3.2: **Select** the “Start Appraisal” tab from the menu options on the left side of the screen.

Figure 9-62: Appraisal – Start Appraisal Menu Tab
Step 9.2.3.3: Select “Download New Form”.

Step 9.1.3.4: Select “For Yourself” or “For Someone Else”.

Step 9.1.3.5: Select the Download tab

Step 9.1.3.6: Select “Use this link to download a blank NAVPERS16XX”.

A “Save As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

9.3 Route Appraisals (Offline Ops)

Follow the steps for downloading an appraisal that applies. There is no method internal to the interface for routing appraisals offline. Users should utilize alternative methods (email, approved removable media, approved shared drive, etc.)
10 Applying Signatures with eNavFit

10.1 Applying Electronic Signatures (Online Ops)

10.1.1 Applying Electronic Signatures as the Reporting Senior

Per BUPERSINST 1610.10F, the Reporting Senior must sign each individual appraisal and it cannot be delegated to a Trusted Agent. The Reporting Senior or Trusted Agent will change the summary group to a “Sign” status to apply digital signatures. Once the summary group is in a “Sign” status, all appraisals will be locked for editing and will begin a routing chain in the following order:

1. Reporting Senior
2. Senior Rater (if assigned)
3. Rater (if assigned)
4. Member
5. Concurrent Reporting Senior (if assigned/Concurrent Appraisals Only)

If the summary group status is changed after signatures have been applied to a lower-level status (e.g., active, route, etc.) all signatures will be cleared from the document.

The following steps describe the process workflow for applying signatures as the reporting senior.

Step 10.1.1.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 10.1.1.2: Select the "Manage Summary Group" tab from the menu options on the left side of the screen.

Step 10.1.1.3: Select the "Active" Tab

Figure 10-1: Manage Summary Group Menu

Figure 10-2: Manage Summary Group-Active Tab
Step 10.1.1.4: Select the "Open" button next to the Summary Group to be signed.

Step 10.1.1.5: Select "Sign" in the "Status" drop-down menu at the bottom of the screen next to the "Save" button.

Step 10.1.1.6: Select the “OK” button on the dialogue box that appears. The appraisal will automatically save.

Note: When the report is placed in Sign status, the appraisals will be locked from editing and if no Senior Rater is assigned, the signature block will be changed to "NONE AVAILABLE".

Step 10.1.1.7: Enter eNavFit as the Reporting Senior (if status was changed by the Trusted Agent).

Note: A Trusted Agent cannot apply a signature on behalf of the Reporting Senior.

Step 10.1.1.8: Select the "Manage Summary Group" tab from the menu options on the left side of the screen.
Step 10.1.1.9: Select the "Active" Tab

Figure 10-7: Manage Summary Group – Active Tab

Step 10.1.1.10: Select the "Open" button next to the Summary Group to be signed.

Figure 10-8: Manage Summary Group-Open Report

Step 10.1.1.11: Select the "Reports" tab from the top menu.

Figure 10-9: Manage Summary Group-Reports Tab

Step 10.1.1.12: Select the "SHOW" toggle next to the first member listed if not currently in expanded view.

Figure 10-10: Show/Hide Report Information Toggle

Step 10.1.1.13: Select the "Open" button in the bottom-left corner of the Member tab.

Note
The user will have to use the show/hide toggle to the left of the member's name to display the tabs associated with each member.

Figure 10-11: Open Appraisal Level View
Step 10.1.1.14: Select the "Signatures" tab in the newly opened browser window "Appraisal Task".

Note

Appraisals cannot be signed from a Summary Group menu by a reporting senior. All reports must be individually signed by the Reporting Senior.

Figure 10-12: Appraisal-Signatures Tab

Step 10.1.1.15: Select the "Sign" button in the Reporting Senior block.

Figure 10-13: Signatures Tab-Sign Button

Step 10.1.1.16: Select the "Ok" button in the pop-up stating, "I certify this is an electronic signature and submitting constitutes a legal signature."

Note

When "OK" is selected, the system automatically saves.

Figure 10-14: Acknowledge Signature Application

Step 10.1.1.17: Repeat steps 12-17 for the remaining members in the summary group.

10.1.2 Applying Electronic Signatures as the Member/Reviewers

Step 10.1.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 10.1.2.2: Select "Manage Appraisal".

Figure 10-15: Manage Appraisal Menu
Step 10.1.2.3: Select "Sign" button next to your Appraisal from the My Appraisals tab.

![Figure 10-16: Manage Appraisals-Sign Button]

Note
Verify that the appraisal is in a “Sign” Status and that the button states “Sign” prior to selecting.

Step 10.1.2.4: Select the "Signatures" tab on the right side of the screen.

![Figure 10-17: Appraisal Level-Signatures Tab]

Step 10.1.2.5: Select the "I do(do not) intend to submit a statement" radio button.

![Figure 10-18: Statement Submission Intention]

Step 10.1.2.6: Select the "Sign" button in the Member block.

![Figure 10-19: Member Signature Application]

Step 10.1.2.7: Select the "Ok" button in the pop-up stating "I certify this is an electronic signature and submitting constitutes a legal signature."

![Figure 10-20: Member Signature Acknowledgement]
Step 10.1.2.8: **Select** the "View Report" button located on the bottom left side of the screen to open new browser tab containing a digital representation of the NAVPERS 16XX form.

*Note*

Use the “View Report” button to print/save completed appraisals for member and command copies.

Figure 10-21: View Report Button

---

10.1.3 Applying Alternate Signatures as the Reporting Senior (Online)

The reporting senior may apply an alternate signature in lieu of member, rater, or senior rater. Alternate signatures may only be applied when a summary group is in a “Sign” status.

*Note*

If the summary group status is changed after signatures have been applied to a lower-level status (e.g., active, route, etc.) all signatures will be cleared from the document.

The following steps describe the process workflow for applying alternate signatures as the reporting senior.

Step 10.1.3.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 10.1.3.2: Commence from a summary group in “sign” status.

Step 10.1.3.3: **Select** the “Manage Summary Group” tab from the menu options on the left side of the screen.

Figure 10-22: Manage Summary Group Menu

Step 10.1.3.4: **Select** the "Active" Tab

Figure 10-23: Manage Summary Group-Active Tab
Step 10.1.3.5: **Select** the "Open" button next to the Summary Group to be signed.

Step 10.1.3.6: **Select** the "Reports" tab from the top menu.

Step 10.1.3.7: **Select** the "SHOW" toggle next to the first member listed if *not* currently in expanded view.

Step 10.1.3.8: **Select** the "Signatures" tab in the newly opened browser window "Appraisal Task".

Step 10.1.3.9: **Select** the “ALT SIG” toggle switch to the left of the User Role where an alternate signature will be applied.

***Note***

An alternate signature cannot be applied to the Reporting Senior field.
Step 10.1.3.10: Select the alternate signature reason from the drop-down menu that most fits the circumstance.

Figure 10-29: Alternate Signature Application Reasons

Step 10.1.3.11: Select the “Save” button on the bottom right of the screen.

Figure 10-30: Save Button

10.2 Applying Digital Signatures (Intermittent Ops)

Individual appraisal reports must be downloaded to apply signatures to the offline PDF documents. Alternative signatures may be applied using the Appraisal Manager.

Step 10.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 10.2.2 Select the "Manage Summary Group" tab from the menu options on the left side of the screen.

Figure 10-31: Manage Summary Group Tab

Step 10.2.3 Select the “Active” Tab

Figure 10-32: Manage Summary Group-Active Tab
Step 10.2.4 **Select** the “Open” button next to the Summary Group to be downloaded.

Figure 10-33: Manage Summary Group-Open Report

Step 10.2.5 **Select** the “Reports” tab.

Figure 10-34: Manage Summary Group Reports Tab

Step 10.2.6 **Select** the “Show” toggle next to the members name to be displayed.

Figure 10-35: Manage Summary Group Show/Hide

Step 10.2.7 **Select** the “Member” tab from the left column.

Figure 10-36: Manage Summary Group-Member Tab

Step 10.2.8 **Select** the “Download” button in the middle of the display.

A “Save-As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Figure 10-37: Download Appraisal
<table>
<thead>
<tr>
<th>Step 10.2.9</th>
<th>If the file does not automatically open, locate the file you saved in the previous step (8.2.2.3) and open it in Adobe Reader.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note</strong></td>
<td>Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe compatibility issues. Use of the desktop version of Adobe Reader is recommended.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 10.2.10</th>
<th><strong>Select</strong> “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Figure 10-38:</strong> Enable All Features</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 10.2.11</th>
<th><strong>Proceed</strong> to page 2 of the appraisal.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Figure 10-39:</strong> Page 2 of 16XX Report</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 10.2.12</th>
<th><strong>Select</strong> the field for the signature to be applied. <strong>Note</strong> Signature application order is not defined on the offline forms. If a signature is applied on the PDF appraisal, ALL signatures must be applied in the same method on that appraisal prior to upload to the interface or it will result in an upload error.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Figure 10-40:</strong> Signatory Fields on 16XX</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 10.2.13</th>
<th><strong>Select</strong> “Yes” to acknowledge that you are authorized to sign and understand that a digital signature is being applied using your credentials. <strong>Note</strong> Signature application order is not defined on the offline forms. If a signature is applied on the PDF appraisal, ALL signatures must be applied in the same method on that appraisal prior to upload to the interface or it will result in an upload error.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Figure 10-41:</strong> Signatory Acknowledgement</td>
<td></td>
</tr>
</tbody>
</table>
Step 10.2.14 Select the signature credentials to be applied.

Step 10.2.15 Repeat the signature application process until all signatures are applied.

Note The Mid-Term Counseling field signature is not required for online submissions. The signature of the Reporting senior (Blocks 45 or 50) and the Individual evaluated (Blocks 46 or 51) verifies that blocks 30 and 31 are accurate but does not necessarily mean that the counseling was considered adequate.

10.3 Applying Wet Signatures (Offline Ops)

The DODID on Individual appraisal reports must be changed to the SSN when applying wet-signature using blue or black ink.

Step 10.3.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 10.3.2 Select the "Manage Summary Group" tab from the menu options on the left side of the screen.

Step 10.3.3 Select the "Active" Tab

Figure 10-42: Manage Summary Group Tab

Figure 10-43: Manage Summary Group-Active Tab
Step 10.3.4 **Select** the “Open” button next to the Summary Group to be downloaded.

![Figure 10-44: Manage Summary Group-Open Report](image)

Step 10.3.5 **Select** the “Download” button.

A “Save-As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

![Figure 10-45: Download Appraisal](image)

Step 10.3.6 If the file does not automatically open, locate the file you saved in the previous step (8.2.2.3) and open it in Adobe Reader.

![Figure 10-46: Enable All Features](image)

Step 10.3.7 **Select** “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.

Step 10.3.8 **Proceed** to page 2 of the appraisal.

![Figure 10-47: Page 2 of the Appraisal Form](image)
| Step 10.3.9 | Select the field for the signature to be applied.  
  
  **Note**  
  Signature application order is not defined on the offline forms. If a signature is applied on the PDF appraisal, ALL signatures must be applied in the same method on that appraisal prior to upload to the interface or it will result in an upload error.  
  
  ![Figure 10-48: Appraisal Signature Fields](image) |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 10.3.10</td>
<td>Select the signature credentials to be applied.</td>
</tr>
</tbody>
</table>
| Step 10.3.11 | Select "Yes" to acknowledge that you are authorized to sign and understand that a digital signature is being applied using your credentials.  
  
  **Note**  
  Signature application order is not defined on the offline forms. If a signature is applied on the PDF appraisal, ALL signatures must be applied in the same method on that appraisal prior to upload to the interface or it will result in an upload error.  
  
  ![Figure 10-49: Signature Acknowledgement](image) |
| Step 10.3.12 | Repeat the signature application process until all signatures are applied and then print and prepare for mailing.  
  
  **Note**  
  The Mid-Term Counseling signature field is not required for online submissions. The signature of the Reporting senior (Blocks 45 or 50) and the Individual evaluated (Blocks 46 or 51) verifies that blocks 30 and 31 are accurate but does not necessarily mean that the counseling was considered adequate. |
11 Submission

11.1 Submitting Reports to NPC (Online Ops)

The Reporting Senior or Trusted Agent may submit a Summary Group to NPC once all of a Summary Group has been validated and all signatures are applied.

Step 11.1.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 11.1.2: Select the “Manage Summary Group” tab from the menu options on the left side of the screen.

Step 11.1.3: Select the "Active" Tab

Step 11.1.4: Select the "Open" button next to the Summary Group to be submitted.

Step 11.1.5: Select the "OK" button signifying that the reports have completed all reviews, zero validation errors, and all signatures have been applied.

Note

Completed is an automatic status change if all pass requirements are met. The “Submit to PERS” button will not enable until this condition is met.
Step 11.1.6: Select the “Save” button on the bottom-right side of the screen.

Step 11.1.7: Select the "Submit to PERS" button at the bottom of the screen.

Step 11.1.8: Select "OK" on the pop-up dialogue box stating, “Please confirm submission to PERS for processing?”

Step 11.1.9: Close the Appraisal Task browser window and refresh the “Manage Summary Group” tab by selecting the “Manage Summary Group” tab.

Step 11.1.10: Select the "Submitted" Tab in the Manage Summary Group task window.

Step 11.1.11: Verify the summary group is in this list and has a status of "submitted" or "submitting" in the status column.
11.2 Submitting Reports to NPC (Intermittent Ops)
The Reporting Senior or Trusted Agent may submit a Summary Group to NPC once all of a Summary Group has been validated and all signatures are applied.

11.2.1 Submitting Uploaded and Electronically Signed Reports to NPC
If all NAVPERS 16XX Forms were uploaded to eNavFit using the Upload Appraisals (Intermittent Ops) process found in Section 8.4 and all signatures have been applied using the Apply Electronic Signatures (Online Ops) signature process found in Section 10.1, the below steps can be used to submit reports to NPC.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.2.1.1:</td>
<td>Follow the steps in Section 3.1 for Accessing the Interface.</td>
</tr>
<tr>
<td>11.2.1.2:</td>
<td>Select the “Manage Summary Group” tab from the menu options on the left side of the screen.</td>
</tr>
<tr>
<td>11.2.1.3:</td>
<td>Select the “Active” Tab</td>
</tr>
<tr>
<td>11.2.1.4:</td>
<td>Select the “Open” button next to the Summary Group to be submitted.</td>
</tr>
</tbody>
</table>
Step 11.2.1.5: **Select** the “OK” button signifying that the reports have completed all reviews, zero validation errors, and all signatures have been applied.

*Note*  
*Completed* is an automatic status change if all pass requirements are met. The “Submit to PERS” button will not enable until this condition is met.

**Figure 11-13: Completed Button Acknowledgement**

Step 11.2.1.6: **Select** the “Save” button on the bottom-right side of the screen.

**Figure 11-14: Save Button**

Step 11.2.1.7: **Select** the "Submit to PERS" button at the bottom of the screen.

**Figure 11-15: Submit to PERS Button**

Step 11.2.1.8: **Select** “OK” on the pop-up dialogue box stating, “Please confirm submission to PERS for processing?”

**Figure 11-16: Submit to PERS Acknowledgement**

Step 11.2.1.9: **Close** the Appraisal Task browser window and refresh the “Manage Summary Group” tab by selecting the “Manage Summary Group” tab.
Step 11.2.1.10: **Select** the "Submitted" Tab in the Manage Summary Group task window.

Figure 11-17: Submitted Tab

Step 11.2.1.11: **Verify** the summary group is in this list and has a status of "submitted" or "submitting" in the status column.

Figure 11-18: Submission Verification

### 11.2.2 Submitting Uploaded and Digitally Signed Reports to NPC

If all NAVPERS 16XX Forms have all signatures have applied using the Apply Digital Signatures (Intermittent Ops) signature process found in Section 10.2 and have been uploaded to eNavFit using the Upload Appraisals (Intermittent Ops) process found in Section 8.4 and, the below steps can be used to submit reports to NPC.

Step 11.2.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 11.2.2.2: **Select** the "Manage Summary Group" tab from the menu options on the left side of the screen.

Figure 11-19: Manage Summary Group Menu

Step 11.2.2.3: **Select** the "Active" Tab

Figure 11-20: Active Tab
Step 11.2.2.4: Select the "Open" button next to the Summary Group to be submitted.

Step 11.2.2.5: Select the “OK” button signifying that the reports have completed all reviews, zero validation errors, and all signatures have been applied.

Note: Completed is an automatic status change if all pass requirements are met. The “Submit to PERS” button will not enable until this condition is met.

Step 11.2.2.6: Select the “Save” button on the bottom-right side of the screen.

Step 11.2.2.7: Select the "Submit to PERS" button at the bottom of the screen.

Step 11.2.2.8: Select “OK” on the pop-up dialogue box stating, “Please confirm submission to PERS for processing?”

Figure 11-21: Manage Summary Group-Open

Figure 11-22: Completed Button Acknowledgement

Figure 11-23: Save Button

Figure 11-24: Submit to PERS Button

Figure 11-25: Submit to PERS Acknowledgement
11.2.2.9: Close the Appraisal Task browser window and refresh the “Manage Summary Group” tab by selecting the “Manage Summary Group” tab.

11.2.2.10: Select the "Submitted" Tab in the Manage Summary Group task window.

11.2.2.11: Verify the summary group is in this list and has a status of "submitted" or "submitting" in the status column.

11.2.3 Submitting Downloaded and Wet Signed Reports to NPC

If all NAVPERS 16XX Forms in the Summary Group have been downloaded from eNavFit and all signatures required have been applied manually (wet-signed) follow the steps in Section 11.3 Submitting Reports to NPC (Offline Ops), to submit the Summary Group for processing.

11.3 Submitting Reports to NPC (Offline Ops)

The Reporting Senior or Trusted Agent may submit a Summary Group to NPC via the mail if all appraisals within the Summary Group have been wet signed by all required signatories and a Summary Letter has been completed and signed by the Reporting Senior.

11.3.1 Download Blank Summary Group Letter (Offline Ops)

A Summary Group Letter is only required when submitting appraisals to NPC via the mail. Submitting appraisals using eNavFit via the Online or Intermittent Ops processes does not require a Summary Group Letter.

Step 11.3.1.1 Follow the steps in Section 3.1 for Accessing the Interface.
Step 11.3.1.2  Select the “Start Summary Group” tab from the menu options on the left side of the screen.

Step 11.3.1.3  Select “Download New Form”.

Step 11.3.1.4  Select the Download tab

Step 11.3.1.5  Select “Use this link to download a blank Summary Letter”.

A “Save-As” dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.

Step 11.3.1.6  If the file does not automatically open, locate the file you saved in the previous step (11.3.1.5) and open it in Adobe Reader.

Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe compatibility issues. Use of the desktop version of Adobe Reader is recommended.
Step 11.3.1.7  **Select** “Enable All Features” if the option displays across the top in a yellow bar of the opened Adobe file.

```
Figure 11-32: Enable All Features
```

Step 11.3.1.8  **Input** summary group data into all applicable fields.

```
Note

The Blank Summary Letter is a manual entry form. Ensure all fields are filled including trait and summary average prior to submission. The current form states that a late letter is required. The policy has been modified and the late letter is no longer required.
```

```
Figure 11-33: Summary Letter-SG Fields
```

Step 11.3.1.9  **Print** the Summary Group Letter using the on screen menu options or hotkeys.

```
Figure 11-34: Summary Letter-Print
```

Step 11.3.1.10  **Sign** the Summary Group Letter (Reporting Senior) in the applicable field.

```
Figure 11-35: Summary Letter - Sign
```

### 11.3.2 Download Summary Group Letter for Record Purposes (Online Ops)

**Note**

A Summary Group Letter is **only** required when submitting appraisals to NPC via the mail. Submitting appraisals using eNavFit via the Online or Intermittent Ops processes does not require a Summary Group Letter. A summary letter has been included in the online interface for units desiring the document for record purposes. The online summary letter can only be downloaded when the summary group is in a Completed, Submitting, or Submitted status.
Step 11.3.2.1: Follow the steps in Section 3.1 for Accessing the Interface.

Step 11.3.2.2: Select the “Manage Summary Group” tab from the menu options on the left side of the screen.

Step 11.3.2.3: Select the "Active" or “Submitted” Tab

Step 11.3.2.4: Select a location to save the downloaded file and open it in Adobe Reader to view.

Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe compatibility issues. Use of the desktop version of Adobe Reader is recommended.
# 12 Field Format & Constraints

## 12.1 NAVPERS 1616/26 (E1-E6)

<table>
<thead>
<tr>
<th>Block</th>
<th>Title</th>
<th>Description</th>
<th>Format/Constraint</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name (Last, First MI Suffix)</td>
<td>Text Box</td>
<td>Up to 27 alpha characters</td>
</tr>
<tr>
<td>2</td>
<td>Rate</td>
<td>Text Box</td>
<td>Up to 5 characters, must end in “1” or “2” or “3” or “A” or “R” or “N”</td>
</tr>
<tr>
<td>3</td>
<td>Enlisted Warfare/Qualification</td>
<td>Text Box</td>
<td>Up to 7 characters</td>
</tr>
<tr>
<td>4</td>
<td>SSN</td>
<td>Text Box</td>
<td>9 digits with a hyphen (-) after the 3rd and 5th digit</td>
</tr>
<tr>
<td>5</td>
<td>Duty / Competitive Status</td>
<td>Check Boxes</td>
<td>Choose one option: ACT, FTS, INACT, and AT/ADSW/265</td>
</tr>
<tr>
<td>6</td>
<td>UIC</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>7</td>
<td>Ship/Station</td>
<td>Text Box</td>
<td>Up to 18 characters</td>
</tr>
<tr>
<td>8</td>
<td>Promotion Status</td>
<td>Pull Down Menu</td>
<td>Select one option: REGULAR, FROCKED, SELECTED, and SPOT</td>
</tr>
<tr>
<td>9</td>
<td>Date Reported</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>10-13</td>
<td>Occasion for Report</td>
<td>Check Boxes</td>
<td>Choose between options: Periodic, Detachment of Individual, Promotion/Frocking, Special</td>
</tr>
<tr>
<td>14</td>
<td>Period of Report (From) Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>15</td>
<td>Period of Report (To) Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>16</td>
<td>Not Observed Report</td>
<td>Check Box</td>
<td>A single check box</td>
</tr>
<tr>
<td>17-18</td>
<td>Type of Report</td>
<td>Check Boxes</td>
<td>Choose: Regular, Regular/Concurrent, Concurrent</td>
</tr>
<tr>
<td>19</td>
<td>Physical Readiness</td>
<td>Four Pull Down Menus</td>
<td>Four separate Pull Down Menus for PFA codes with options P, B, F, M, W, and N.</td>
</tr>
<tr>
<td>22</td>
<td>Reporting Senior (Last, FI MI)</td>
<td>Text Box</td>
<td>Up to 18 alpha characters</td>
</tr>
<tr>
<td>23</td>
<td>Grade (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>24</td>
<td>Desig (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 4 characters</td>
</tr>
<tr>
<td>25</td>
<td>Title (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 14 characters</td>
</tr>
<tr>
<td>26</td>
<td>UIC (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>27</td>
<td>SSN (Reporting Senior)</td>
<td>Text Box</td>
<td>9 digits with a hyphen (-) after the 3rd and 5th digit</td>
</tr>
<tr>
<td>Block</td>
<td>Title</td>
<td>Description</td>
<td>Format/Constraint</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>28</td>
<td>Command employment and command achievements</td>
<td>Text Block</td>
<td>Up to 276 characters OR up to 3 lines</td>
</tr>
<tr>
<td>b29</td>
<td>Primary / Collateral / Watchstanding duties / PFA</td>
<td>Text Box</td>
<td>Up to 14 characters</td>
</tr>
<tr>
<td></td>
<td>(Enter primary duty abbreviation in box)</td>
<td>Text Block</td>
<td>Up to 334 characters OR up to 4 lines</td>
</tr>
<tr>
<td>30</td>
<td>Date Counseled</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>31</td>
<td>Counselor</td>
<td>Text Box</td>
<td>Up to 20 alpha characters</td>
</tr>
<tr>
<td>32</td>
<td>Signature of Individual Counseled</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td>33-39</td>
<td>Performance Traits: (Professional Knowledge, Quality of Work, Command</td>
<td>Check Boxes</td>
<td>Choose one option: 'NOB', ‘1.0’, ‘2.0’, ‘3.0’, ‘4.0’, '5.0'</td>
</tr>
<tr>
<td></td>
<td>or Organizational Climate / Equal Opportunity, Military Bearing / Character, Personal Job Accomplishment / Initiative, Teamwork, Leadership)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Individual Trait Average</td>
<td>Text Box</td>
<td>Auto calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74). The result will be round up if the third decimal is 5 or more, it will be round down if less than 5.</td>
</tr>
<tr>
<td>41</td>
<td>Career Recommendations</td>
<td>Two Text Boxes</td>
<td>Up to 20 alpha characters per text box</td>
</tr>
<tr>
<td>42</td>
<td>Signature of Rater</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Text Box (Date)</td>
<td>7-character date</td>
<td></td>
</tr>
<tr>
<td>43</td>
<td>Comments on Performance</td>
<td>Text Block</td>
<td>Up to 1336 (if 10 pt) or 1216 (if 12 pt) alpha-numeric characters OR up to 18 lines (with 18 lines all space is filled in the block).</td>
</tr>
<tr>
<td>44</td>
<td>Qualifications/Achievements</td>
<td>Text Block</td>
<td>Up to 180 characters OR up to 2 lines</td>
</tr>
<tr>
<td>46</td>
<td>Summary Promotion Recommendation</td>
<td>Text Boxes</td>
<td>Auto calculated, (limited to that Summary Group): Text Boxes for the number of Significant Problems, Progressing, Promotable, Must Promote, and Early Promote in a Summary Group</td>
</tr>
<tr>
<td>47</td>
<td>Retention</td>
<td>Check Boxes</td>
<td>2 Check Box options: Not Recommended OR Recommended</td>
</tr>
<tr>
<td>48</td>
<td>Reporting Senior Address</td>
<td>Text Block</td>
<td>Up to 87 characters</td>
</tr>
<tr>
<td>49</td>
<td>Signature of Senior Rater Date</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Text Box (Date)</td>
<td>7-character date</td>
<td></td>
</tr>
<tr>
<td>Block</td>
<td>Title</td>
<td>Description</td>
<td>Format/Constraint</td>
</tr>
<tr>
<td>-------</td>
<td>-------</td>
<td>-------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>50</td>
<td>Signature of Reporting Senior</td>
<td>Digital Signature</td>
<td>Summary Group Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).</td>
</tr>
<tr>
<td></td>
<td>Summary Group Average Date</td>
<td>Text Box</td>
<td></td>
</tr>
<tr>
<td>51</td>
<td>Signature of Individual Evaluated</td>
<td>Digital Signature</td>
<td>Select from &quot;I intend to submit a statement&quot; OR &quot;I do not intend to submit a statement&quot;</td>
</tr>
<tr>
<td></td>
<td>Submit a Statement Date</td>
<td>Check Box</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Signature of Regular Reporting Senior on Concurrent Report Date</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Text Box (Date)</td>
<td>7-character date</td>
<td></td>
</tr>
</tbody>
</table>

### 12.2 NAVPERS 1616/27 (E7-E9)

<table>
<thead>
<tr>
<th>Block</th>
<th>Title</th>
<th>Description</th>
<th>Format/Constraint</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name (Last, First MI Suffix)</td>
<td>Text Box</td>
<td>Up to 27 alpha characters</td>
</tr>
<tr>
<td>2</td>
<td>Grade/Rate</td>
<td>Text Box</td>
<td>Up to 5 characters.</td>
</tr>
<tr>
<td>3</td>
<td>Officer/Enlisted Warfare/Qualification</td>
<td>Text Box</td>
<td>Up to 7 characters</td>
</tr>
<tr>
<td>4</td>
<td>SSN</td>
<td>Text Box</td>
<td>9 digits with a hyphen (-) after the 3rd and 5th digit</td>
</tr>
<tr>
<td>5</td>
<td>Duty / Competitive Status</td>
<td>Check Boxes</td>
<td>Choose one option: ACT, FTS, INACT, and AT/ADSW/265.</td>
</tr>
<tr>
<td>6</td>
<td>UIC</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>7</td>
<td>Ship/Station</td>
<td>Text Box</td>
<td>Up to 18 characters</td>
</tr>
<tr>
<td>8</td>
<td>Promotion Status</td>
<td>Pull Down Menu</td>
<td>Choose one option: REGULAR, FROCKED, SELECTED, and SPOT.</td>
</tr>
<tr>
<td>9</td>
<td>Date Reported</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>10-13</td>
<td>Occasion for Report</td>
<td>Check Boxes</td>
<td>Choose options: Periodic, Detachment of Individual, Detachment of Reporting Senior, Special</td>
</tr>
<tr>
<td>14</td>
<td>Period of Report (From) Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>15</td>
<td>Period of Report (To) Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>16</td>
<td>Not Observed Report</td>
<td>Check Box</td>
<td>A single check box</td>
</tr>
<tr>
<td>17-19</td>
<td>Type of Report</td>
<td>Check Boxes</td>
<td>Regular, Regular/Concurrent, Concurrent, Ops Cdr</td>
</tr>
<tr>
<td>20</td>
<td>Physical Readiness</td>
<td>Four Pull Down Menus</td>
<td>Four separate Pull Down Menus for PFA Codes with options P, B, F, M, W, and N.</td>
</tr>
<tr>
<td>Block</td>
<td>Title</td>
<td>Description</td>
<td>Format/Constraint</td>
</tr>
<tr>
<td>-------</td>
<td>-------</td>
<td>-------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>22</td>
<td>Reporting Senior (Last, F1 MI)</td>
<td>Text Box</td>
<td>Up to 18 alpha characters</td>
</tr>
<tr>
<td>23</td>
<td>Grade (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>24</td>
<td>Desig (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 4 characters</td>
</tr>
<tr>
<td>25</td>
<td>Title (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 14 characters</td>
</tr>
<tr>
<td>26</td>
<td>UIC (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>27</td>
<td>SSN (Reporting Senior)</td>
<td>Text Box</td>
<td>9 digits with a hyphen (-) after the 3rd and 5th digit</td>
</tr>
<tr>
<td>28</td>
<td>Command employment and command achievements</td>
<td>Text Block</td>
<td>Up to 276 characters OR up to 3 lines</td>
</tr>
<tr>
<td>29</td>
<td>Primary / Collateral / Watchstanding Duties / PFA (Enter primary duty abbreviation in box)</td>
<td>Text Box</td>
<td>Up to 14 characters</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text Block</td>
<td>Up to 334 characters OR up to 4 lines</td>
</tr>
<tr>
<td>30</td>
<td>Date Counseled</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>31</td>
<td>Counselor</td>
<td>Text Box</td>
<td>Up to 20 alpha characters</td>
</tr>
<tr>
<td>32</td>
<td>Signature of Individual Counseled</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>Career Recommendations</td>
<td>Two Text Boxes</td>
<td>Up to 20 alpha characters per text box</td>
</tr>
<tr>
<td>41</td>
<td>Comments on Performance</td>
<td>Text Block</td>
<td>Up to 1336 (if 10 pt) or 1216 (if 12 pt) alphanumeric characters OR up to 18 lines. (18 lines will complete all white space).</td>
</tr>
<tr>
<td>42</td>
<td>Individual Promotion Recommendation</td>
<td>Check Boxes</td>
<td>Choose between: NOB, Significant Problems, Progressing, Promotable, Must Promote, and Early Promote</td>
</tr>
<tr>
<td>43</td>
<td>Summary Promotion Recommendation</td>
<td>Text Boxes</td>
<td>Auto calculated, (limited to that Summary Group): Text Boxes for the number of Significant Problems, Progressing, Promotable, Must Promote, and Early Promote in a Summary Group</td>
</tr>
<tr>
<td>44</td>
<td>Reporting Senior Address</td>
<td>Text Block</td>
<td>Up to 87 characters</td>
</tr>
<tr>
<td>45</td>
<td>Signature of Reporting Senior</td>
<td>Digital Signature</td>
<td></td>
</tr>
</tbody>
</table>
NAVPERS 1616/27 - Evaluation Report & Counseling Record (E7-E9)

<table>
<thead>
<tr>
<th>Block</th>
<th>Title</th>
<th>Description</th>
<th>Format/Constraint</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Summary Group Average Date</td>
<td>Text Box</td>
<td>Individual Trait Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text Box</td>
<td>Summary Group Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>46</td>
<td>Signature of Individual Evaluated Submit a Statement Date</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Check Box</td>
<td>Select from “I intend to submit a statement” OR “I do not intend to submit a statement”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>47</td>
<td>Signature of Regular Reporting Senior on Concurrent Report Date</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
</tbody>
</table>

12.3 NAVPERS 1610/2 (W1-O6)

NAVPERS 1610/2 - Fitness Report & Counseling Record (W1-O6)

<table>
<thead>
<tr>
<th>Block</th>
<th>Title</th>
<th>Description</th>
<th>Format/Constraint</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name (Last, First MI Suffix)</td>
<td>Text Box</td>
<td>Up to 27 alpha characters</td>
</tr>
<tr>
<td>3</td>
<td>Officer Designator</td>
<td>Text Box</td>
<td>Up to 4 characters.</td>
</tr>
<tr>
<td>4</td>
<td>SSN</td>
<td>Text Box</td>
<td>9 digits with a hyphen (-) after the 3rd and 5th digit</td>
</tr>
<tr>
<td>5</td>
<td>Duty / Competitive Status</td>
<td>Check Boxes</td>
<td>Choose one option: ACT, FTS, INACT, and AT/ADSW/265.</td>
</tr>
<tr>
<td>6</td>
<td>UIC</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>7</td>
<td>Ship/Station</td>
<td>Text Box</td>
<td>Up to 18 characters</td>
</tr>
<tr>
<td>8</td>
<td>Promotion Status</td>
<td>Pull Down Menu</td>
<td>Select from options: REGULAR, FROCKED, SELECTED, and SPOT.</td>
</tr>
<tr>
<td>9</td>
<td>Date Reported</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>10</td>
<td>Occasion for Report (Periodic)</td>
<td>Check Boxes</td>
<td>Choose options: Periodic, Detachment of Individual, Detachment of Reporting Senior, Special</td>
</tr>
<tr>
<td>14</td>
<td>Period of Report (From) Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>15</td>
<td>Period of Report (To) Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>16</td>
<td>Not Observed Report</td>
<td>Check Box</td>
<td>A single check box</td>
</tr>
<tr>
<td>17-19</td>
<td>Type of Report</td>
<td>Check Boxes</td>
<td>Regular, Regular/Concurrent, Concurrent, Ops Cdr</td>
</tr>
</tbody>
</table>

95
<table>
<thead>
<tr>
<th>Block</th>
<th>Title</th>
<th>Description</th>
<th>Format/Constraint</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Physical Readiness</td>
<td>Four Pull Down Menus</td>
<td>Four separate Pull Down Menus for PFA Codes with options P, B, F, M, W, and N.</td>
</tr>
<tr>
<td>21</td>
<td>Billet Subcategory (if any)</td>
<td>Pull Down Menu</td>
<td>Choose one option: 'NA', 'BASIC', 'APPROVED', 'CO AFLOAT', 'CO ASHORE', 'OIC', 'INDIV AUG', 'SEA COMP', 'CRF', 'CANVASSER', 'RESIDENT', 'INTERN', 'INSTRUCTOR', 'STUDENT', 'RESAC1', 'RESAC 6', 'SPECIAL01' through 'SPECIAL100'</td>
</tr>
<tr>
<td>22</td>
<td>Reporting Senior (Last, First Initial)</td>
<td>Text Box</td>
<td>Up to 18 alpha characters</td>
</tr>
<tr>
<td>23</td>
<td>Grade (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>24</td>
<td>Desig (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 4 characters</td>
</tr>
<tr>
<td>25</td>
<td>Title (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 14 characters</td>
</tr>
<tr>
<td>26</td>
<td>UIC (Reporting Senior)</td>
<td>Text Box</td>
<td>Up to 5 characters</td>
</tr>
<tr>
<td>27</td>
<td>SSN (Reporting Senior)</td>
<td>Text Box</td>
<td>9 digits with a hyphen (-) after the 3rd and 5th digit</td>
</tr>
<tr>
<td>28</td>
<td>Command employment and command achievements</td>
<td>Text Block</td>
<td>Up to 276 characters OR up to 3 lines</td>
</tr>
<tr>
<td>29</td>
<td>Primary / Collateral / Watchstanding Duties / PFA (Enter primary duty abbreviation in box)</td>
<td>Text Box</td>
<td>Up to 14 characters</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Text Block</td>
<td>Up to 334 characters OR up to 4 lines</td>
</tr>
<tr>
<td>30</td>
<td>Date Counseled</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td>31</td>
<td>Counselor</td>
<td>Text Box</td>
<td>Up to 20 alpha characters</td>
</tr>
<tr>
<td>32</td>
<td>Signature of Individual Counseled</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td>33-39</td>
<td>Performance Traits (Professional Expertise, Command or Organizational Climate / Equal Opportunity, Military Bearing / Character, Teamwork, Mission Accomplishment and Initiative, Leadership, Tactical Performance)</td>
<td>Check Boxes</td>
<td>Choose one option: 'NOB', '1.0', '2.0', '3.0', '4.0', '5.0'</td>
</tr>
<tr>
<td>40</td>
<td>Career Recommendations</td>
<td>Two Text Boxes</td>
<td>Up to 20 alpha characters per text box</td>
</tr>
<tr>
<td>41</td>
<td>Comments on Performance</td>
<td>Text Block</td>
<td>Up to 1336 (if 10 pt) or 1216 (if 12 pt) alphanumeric characters OR up to 18 lines</td>
</tr>
<tr>
<td>42</td>
<td>Individual Promotion Recommendation</td>
<td>Check Boxes</td>
<td>Choose between: 'NOB', 'Significant Problems', 'Progressing', 'Promotable', 'Must Promote', and 'Early Promote'.</td>
</tr>
<tr>
<td>43</td>
<td>Summary Promotion Recommendation</td>
<td>Text Boxes</td>
<td>Auto calculated, (limited to that Summary Group): Text Boxes for the number of Significant Problems, Progressing, Promotable, Must Promote, and Early Promote in a Summary Group</td>
</tr>
<tr>
<td>Block</td>
<td>Title</td>
<td>Description</td>
<td>Format/Constraint</td>
</tr>
<tr>
<td>-------</td>
<td>--------------------------------------------</td>
<td>------------------------------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td>44</td>
<td>Reporting Senior Address</td>
<td>Text Block</td>
<td>Up to 87 characters</td>
</tr>
<tr>
<td>45</td>
<td>Signature of Reporting Senior</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Summary Group Average Date</td>
<td>Text Box</td>
<td>Summary Group Average auto-calculated</td>
</tr>
<tr>
<td></td>
<td>Date</td>
<td>Text Box (Date)</td>
<td>by system. Must contain 2 decimal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>places. Allows numeric characters only</td>
</tr>
<tr>
<td>46</td>
<td>Signature of Individual Evaluated</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Submit a Statement Date</td>
<td>Check Box</td>
<td>Select from &quot;I intend to submit a</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>statement&quot; OR &quot;I do not intend to</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>submit a statement&quot;</td>
</tr>
<tr>
<td>47</td>
<td>Signature of Regular Reporting Senior on</td>
<td>Digital Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Concurrent Report Date</td>
<td>Text Box (Date)</td>
<td>7-character date</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 13 Key Terms, Acronyms, and Abbreviations

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disconnected</td>
<td>No internet. Appraisals will be printed, wet-signed, and paper copy will be mailed via preferred handler.</td>
</tr>
<tr>
<td>Intermittent</td>
<td>Limited internet connectivity and/or limited bandwidth. Connection speeds may be slow and limit online use resulting in a disconnected appraisal draft and with electronic (online) submission electronically.</td>
</tr>
<tr>
<td>Online</td>
<td>The ability to draft and complete an appraisal in an online state using browser.</td>
</tr>
<tr>
<td>NAVPERS 16XX</td>
<td>All three forms of an appraisal (Enlisted E1-E6, Chief E7-E9, Officer W1-O6) and all input forms (Active or Reserve, Officer or Enlisted).</td>
</tr>
<tr>
<td>Appraisal Manager</td>
<td>NAJPERS 1616/26 Evaluation Report and Counseling Record (E1-E6) (EVAL)</td>
</tr>
<tr>
<td>Chief Evaluation</td>
<td>NAJPERS 1616/27 Evaluation Report and Counseling Record (E7-E9)(CHIEFEVAL)</td>
</tr>
<tr>
<td>Fitness Report</td>
<td>NAJPERS 1610/2 Fitness Report and Counseling Record (W1-O6) (FITREP)</td>
</tr>
</tbody>
</table>
List of Figures

Figure 3-1: CAC Login ......................................................................................................................5
Figure 3-2: Update Information ........................................................................................................5
Figure 3-3: Personal Information Entry .............................................................................................5
Figure 3-4: Update Info Button .........................................................................................................6
Figure 3-5: Main Menu Button Selection .........................................................................................6
Figure 3-6: 90-Day Verification .........................................................................................................6
Figure 3-7: eNavFit Program ...........................................................................................................7
Figure 3-8: eNavFit Categories ........................................................................................................7
Figure 3-9: BOL Timeout .................................................................................................................7
Figure 4-1: Manage Summary Group Tab .......................................................................................9
Figure 4-2: Select Summary Group for Unmerge ...........................................................................9
Figure 4-3: Select Reports Tab .........................................................................................................10
Figure 4-4: Select Member to be Unmerged ...................................................................................10
Figure 4-5: Modify Summary Group Criterion ................................................................................10
Figure 4-6: Select Unmerge Status ................................................................................................10
Figure 4-7: Select Save ...................................................................................................................10
Figure 4-8: Manage Summary Group Tab .......................................................................................11
Figure 4-9: Delete SG-Open Summary Group ..............................................................................11
Figure 4-10: Select Delete from Menu ........................................................................................11
Figure 4-11: Select OK Pop-Up Window .........................................................................................11
Figure 4-12: Delete SG-Open Summary Group .............................................................................12
Figure 4-13: SG Level Delete -Manage SG ....................................................................................12
Figure 4-14: SG Level Delete-Open SG .........................................................................................12
Figure 4-15: SG Level Delete-Reports Tab .....................................................................................12
Figure 4-16: SG Level Delete – Delete in Menu ............................................................................13
Figure 4-17: SG Level Delete - OK Pop-Up ....................................................................................13
Figure 4-18: SG Level Delete-Save SG ..........................................................................................13
Figure 4-19: Delete Appraisal - Manage Appraisal Tab .................................................................13
Figure 4-20: Delete Appraisal – Open Button ...............................................................................14
Figure 4-21: Delete Appraisal – Delete Button ............................................................................14
Figure 4-22: Delete Appraisal – OK Button ................................................................................14
Figure 4-23: Delete Appraisal – Close Browser ............................................................................14
Figure 5-1: NPC Document Hub ..................................................................................................15
Figure 5-2: eNavFit Categories .......................................................................................................15
Figure 5-3: Start Appraisal Tab ........................................................................................................15
Figure 5-4: Start Appraisal Tab ........................................................................................................15
Figure 5-5: Start Appraisal for Yourself .........................................................................................16
Figure 5-6: Reporting Senior Not Found Error ............................................................................16
Figure 5-7: Start Appraisal for Someone Else ...............................................................................16
Figure 5-8: Start Appraisal-Upload Offline Form .........................................................................16
Figure 5-9: Start Appraisal-Download Offline Form ....................................................................16
Figure 5-10: Start Appraisal-Download Blank Form ....................................................................17
Figure 5-11: Manage Appraisal Tab ..............................................................................................17
Figure 5-12: Manage Appraisal Menu ..........................................................................................17
Figure 5-13: Start Summary Group Tab ........................................................................................17
Figure 5-14: Start Summary Group Menu Options .......................................................................18
Figure 5-15: Start Summary Group-Yourself ................................................................................18
Figure 5-16: Start Summary Group-Someone Else ......................................................................18
Figure 7-7: Paygrade Field ................................................................. 31
Figure 7-8: Designator Field ........................................................... 31
Figure 7-9: Duty/Competitive Status Field ........................................ 31
Figure 7-10: UIC Field .................................................................... 32
Figure 7-11: Ship/Station Field .......................................................... 32
Figure 7-12: Promotion Status Field .................................................. 32
Figure 7-13: End Date Field ............................................................ 32
Figure 7-14: NOB Flag Selection ...................................................... 32
Figure 7-15: Report Type Field .......................................................... 33
Figure 7-16: Billet Subcategory Field ............................................... 33
Figure 7-17: Reviewer Templates Tab .............................................. 33
Figure 7-18: Skip the “Default” field ............................................... 33
Figure 7-19: Add New Reviewer Template ....................................... 34
Figure 7-20: Reviewer Template Name ............................................ 34
Figure 7-21: Acknowledge Reviewer Template .................................. 34
Figure 7-22: Add Reviewer by email/DoDID ...................................... 34
Figure 7-23: Select Magnifying Glass or Enter .................................. 34
Figure 7-24: Reviewer Type Selection ............................................. 35
Figure 7-25: Add Reviewer Button ................................................... 35
Figure 7-26: Add Members Tab ....................................................... 35
Figure 7-27: Add Member by email/DoDID ........................................ 36
Figure 7-28: Select Magnifying Glass or Enter .................................. 36
Figure 7-29: Select Reviewer Template ........................................... 36
Figure 7-30: Review Inputs Tab ....................................................... 36
Figure 7-31: Submit Summary Group Inputs ..................................... 36
Figure 7-32: Start Summary Group Menu ......................................... 37
Figure 7-33: Not Observed (NOB) Flag Options .............................. 37
Figure 7-34: Appraisal Level NOB toggle ......................................... 38
Figure 7-35: Start Summary Group ................................................... 38
Figure 7-36: Reviewer Templates Tab ............................................. 38
Figure 7-37: Add Reviewers by email/DoDID ................................. 38
Figure 7-38: Search for Reviewers based on inputs .......................... 39
Figure 7-39: Reviewer Templates Field-Type ................................. 39
Figure 7-40: Manage Appraisal Menu ............................................. 39
Figure 7-41: Appraisal Level -Report Tab ......................................... 39
Figure 7-42: Concurrent Toggle Switch ............................................ 39
Figure 7-43: Blank Mid-Term Counseling Performance Field .......... 40
Figure 7-44: Performed Mid-Term Counseling Performance Field ..... 40
Figure 7-45: Not Required Mid-Term Counseling Performance Field . 40
Figure 7-46: Not Performed Mid-Term Counseling Performance Field . 40
Figure 7-47: Manage Summary Group Tab ...................................... 41
Figure 7-48: Manage Summary Group-Active Tab ........................... 41
Figure 7-49: Manage Summary Group-Open Report ....................... 41
Figure 7-50: Change Summary Group to Route Status .................... 41
Figure 7-51: Status Change Acknowledgement ................................ 42
Figure 7-52: Manage Appraisal Menu ............................................ 42
Figure 7-53: Appraisals I have Access to ......................................... 42
Figure 7-54: Opening Member Reports .......................................... 42
Figure 7-55: Appraisal Menu Options ............................................. 43
Figure 7-56: Reviewer Comments Field ......................................... 43
Figure 7-57: Next Reviewer Button ................................................ 43
Figure 8-1: Manage Summary Group Tab ..............................................................44
Figure 8-2: Manage Summary Group-Active Tab ..................................................44
Figure 8-3: Manage Summary Group-Open Report .............................................44
Figure 8-4: Download Appraisal ......................................................................45
Figure 8-5: Enable All Features .........................................................................45
Figure 8-6: Start Summary Group Menu .........................................................46
Figure 8-7: Upload An Offline Form .................................................................46
Figure 8-8: Browse and Upload Button ...............................................................46
Figure 8-9: Submit Uploaded Documents .........................................................46
Figure 8-10: Manage Appraisal Menu ...............................................................47
Figure 8-11: Manage Appraisal-Open Button ..................................................47
Figure 8-12: Manage Appraisal-Open Button ..................................................47
Figure 8-13: Enable All Features .......................................................................48
Figure 8-14: Manage Summary Group Menu ...................................................48
Figure 8-15: Manage Summary Group – Active Tab .........................................49
Figure 8-16: Manage Summary Group-Open Report ........................................49
Figure 8-17: Reports Tab ..................................................................................49
Figure 8-18: Show/Hide Member Data ...............................................................49
Figure 8-19: Download Button on Member Tab ................................................49
Figure 8-20: Enable All Features .......................................................................50
Figure 8-21: Start Appraisal Menu .................................................................51
Figure 8-22: Upload Offline Forms ..................................................................51
Figure 8-23: Browse and Upload Button ............................................................51
Figure 8-24: Submit Uploaded Documents .......................................................51
Figure 9-1: Start Summary Group Menu ...........................................................52
Figure 9-2: Download New Form Button ...........................................................52
Figure 9-3: Download Selection Button ............................................................52
Figure 9-4: Download Tab ................................................................................52
Figure 9-5: Appraisal Manager – DL Pre-populated .........................................53
Figure 9-6: Start Summary Group Menu ...........................................................53
Figure 9-7: Download New Form Button ...........................................................53
Figure 9-8: For Someone Else Button ...............................................................53
Figure 9-9: Reporting Senior Search ...............................................................54
Figure 9-10: Searching for a Reporting Senior ................................................54
Figure 9-11: Search Button for a Reporting Senior ..........................................54
Figure 9-12: Download Tab .............................................................................54
Figure 9-13: Start Summary Group Menu ........................................................55
Figure 9-14: Download New Form Button ........................................................55
Figure 9-15: Download Selection Button ..........................................................55
Figure 9-16: Download Tab .............................................................................55
Figure 9-17: Browse and Upload Button ............................................................56
Figure 9-18: Enable All Features ......................................................................56
Figure 9-19: Reporting Senior Defaults ............................................................56
Figure 9-20: Reporting Senior Email ...............................................................57
Figure 9-21: Reporting Senior DoDID ...............................................................57
Figure 9-22: Reporting Senior Paygrade ...........................................................57
Figure 9-23: Reporting Senior Paygrade ...........................................................57
Figure 9-24: Reporting Senior Name ...............................................................57
Figure 9-25: Reporting Senior Grade ..............................................................58
Figure 9-26: Reporting Senior Designator .......................................................58
Figure 9-27: Reporting Senior Address ............................................................58

Appendix A-4
Figure 9-28: Reporting Senior Title ................................................................. 58
Figure 9-29: Reporting Senior UIC ................................................................. 58
Figure 9-30: Reporting Senior DODID ......................................................... 59
Figure 9-31: ISIC Address .............................................................................. 59
Figure 9-32: User Role Acknowledge (RS) .................................................. 59
Figure 9-33: Reporting Senior Information Continue .................................. 59
Figure 9-34: Summary Group Title Offline .................................................. 60
Figure 9-35: Summary Group Status Offline ................................................ 60
Figure 9-36: Reviewer Templates Offline ...................................................... 60
Figure 9-37: Reviewer Template Line Offline ............................................... 60
Figure 9-38: Reviewer Template Name Offline ............................................. 60
Figure 9-39: Add Reviewer Information Offline .......................................... 61
Figure 9-40: Home Button Selection Offline .............................................. 61
Figure 9-41: View/Edit Folder Icon Offline ................................................... 61
Figure 9-42: Summary Group Information Entry Offline ............................ 61
Figure 9-43: Add Report Offline .................................................................. 62
Figure 9-44: Add Report Dialogue Box ....................................................... 62
Figure 9-45: Add Member OK Button .......................................................... 62
Figure 9-46: View/Edit Button Offline .......................................................... 62
Figure 9-47: Appraisal Manager Member Input Form .................................... 63
Figure 9-48: Return to Summary Group Offline ........................................... 63
Figure 9-49: Appraisal – DL Pre-Populated Form ........................................ 63
Figure 9-50: Appraisal – DL New Form ........................................................ 64
Figure 9-51: Appraisal – DL For Yourself ..................................................... 64
Figure 9-52: Appraisal – DL Tab .................................................................. 64
Figure 9-53: Appraisal – DL Button .............................................................. 64
Figure 9-54: Appraisal – Start Appraisal Menu Tab ...................................... 65
Figure 9-55: Appraisal – DL New Form ........................................................ 65
Figure 9-56: Appraisal – Someone Else Button .......................................... 65
Figure 9-57: Appraisal – Member Search Tab ............................................. 65
Figure 9-58: Appraisal – Member DODID ..................................................... 65
Figure 9-59: Appraisal – Search Button ........................................................ 66
Figure 9-60: Appraisal – Download Tab ....................................................... 66
Figure 9-61: Appraisal – Download Button ................................................. 66
Figure 9-62: Appraisal – Start Appraisal Menu Tab ...................................... 66
Figure 9-63: Appraisal – DL New Form ........................................................ 67
Figure 9-64: Appraisal – Select Who Report is for ....................................... 67
Figure 9-65: Appraisal – Download Tab ....................................................... 67
Figure 9-66: Appraisal – Blank 16XX Form .................................................. 67
Figure 10-1: Manage Summary Group Menu .............................................. 68
Figure 10-2: Manage Summary Group-Active Tab ....................................... 68
Figure 10-3: Manage Summary Group-Open Report ..................................... 69
Figure 10-4: Status Change – Sign Status ..................................................... 69
Figure 10-5: Status Change Acknowledgement .......................................... 69
Figure 10-6: Manage Summary Group Menu .............................................. 69
Figure 10-7: Manage Summary Group – Active Tab ..................................... 70
Figure 10-8: Manage Summary Group-Open Report ..................................... 70
Figure 10-9: Manage Summary Group-Reports Tab .................................... 70
Figure 10-10: Show/Hide Report Information Toggle ................................... 70
Figure 10-11: Open Appraisal Level View ................................................... 70
Figure 10-12: Appraisal-Signatures Tab ......................................................... 71
Figure 10-13: Signatures Tab-Sign Button ................................................................. 71
Figure 10-14: Acknowledge Signature Application ..................................................... 71
Figure 10-15: Manage Appraisal Menu .................................................................... 71
Figure 10-16: Manage Appraisals-Sign Button .......................................................... 72
Figure 10-17: Appraisal Level-Signatures Tab ............................................................. 72
Figure 10-18: Statement Submission Intention ............................................................ 72
Figure 10-19: Member Signature Application ............................................................. 72
Figure 10-20: Member Signature Acknowledgement .................................................. 72
Figure 10-21: View Report Button ............................................................................. 73
Figure 10-22: Manage Summary Group Menu ........................................................... 73
Figure 10-23: Manage Summary Group-Active Tab ................................................... 73
Figure 10-24: Manage Summary Group-Open Button .............................................. 74
Figure 10-25: Reports Tab ......................................................................................... 74
Figure 10-26: Show/Hide Member Data ..................................................................... 74
Figure 10-27: Signatures Tab..................................................................................... 74
Figure 10-28: Alternate Signature Override ............................................................... 74
Figure 10-29: Alternate Signature Application Reasons .............................................. 75
Figure 10-30: Save Button ......................................................................................... 75
Figure 10-31: Manage Summary Group Tab ............................................................... 75
Figure 10-32: Manage Summary Group-Active Tab ................................................... 75
Figure 10-33: Manage Summary Group-Open Report ............................................... 76
Figure 10-33: Manage Summary Group Reports Tab .................................................. 76
Figure 10-33: Manage Summary Group Show/Hide .................................................... 76
Figure 10-33: Manage Summary Group-Member Tab ............................................... 76
Figure 10-34: Download Appraisal ............................................................................ 76
Figure 10-35: Enable All Features ............................................................................. 77
Figure 10-36: Page 2 of 16XX Report ....................................................................... 77
Figure 10-37: Signatory Fields on 16XX ...................................................................... 77
Figure 10-38: Signatory Acknowledgement ............................................................... 77
Figure 10-39: Manage Summary Group Tab ............................................................... 78
Figure 10-40: Manage Summary Group-Active Tab ................................................... 78
Figure 10-41: Manage Summary Group-Open Report ............................................... 79
Figure 10-42: Download Appraisal ............................................................................ 79
Figure 10-43: Enable All Features ............................................................................. 79
Figure 10-44: Page 2 of the Appraisal Form ............................................................. 79
Figure 10-45: Appraisal Signature Fields ................................................................... 80
Figure 10-46: Signature Acknowledgement ............................................................... 80
Figure 11-1: Manage Summary Group Menu ............................................................ 81
Figure 11-2: Active Tab ............................................................................................. 81
Figure 11-3: Manage Summary Group-Open ............................................................. 81
Figure 11-4: Completed Button Acknowledgement ................................................... 81
Figure 11-5: Save Button ......................................................................................... 82
Figure 11-6: Submit to PERS Button ......................................................................... 82
Figure 11-7: Submit to PERS Acknowledgement ....................................................... 82
Figure 11-8: Submitted Tab ...................................................................................... 82
Figure 11-9: Submission Verification .......................................................................... 82
Figure 11-10: Manage Summary Group Menu .......................................................... 83
Figure 11-11: Active Tab ......................................................................................... 83
Figure 11-12: Manage Summary Group-Open ........................................................... 83
Figure 11-13: Completed Button Acknowledgement .................................................. 84
Figure 11-14: Save Button ....................................................................................... 84

Appendix A-6
Figure 11-15: Submit to PERS Button ................................................................. 84
Figure 11-16: Submit to PERS Acknowledgement .............................................. 84
Figure 11-17: Submitted Tab .............................................................................. 85
Figure 11-18: Submission Verification ................................................................. 85
Figure 11-19: Manage Summary Group Menu .................................................... 85
Figure 11-20: Active Tab .................................................................................... 85
Figure 11-21: Manage Summary Group-Open ....................................................... 86
Figure 11-22: Completed Button Acknowledgement ........................................... 86
Figure 11-23: Save Button .................................................................................. 86
Figure 11-24: Submit to PERS Button ............................................................... 86
Figure 11-25: Submit to PERS Acknowledgement ............................................. 86
Figure 11-26: Submitted Tab .............................................................................. 87
Figure 11-27: Submission Verification ............................................................... 87
Figure 11-28: Start Summary Group Menu ......................................................... 88
Figure 11-29: Download New Form Button ....................................................... 88
Figure 11-30: Download Tab ............................................................................. 88
Figure 11-31: Download Blank Summary Letter ............................................... 88
Figure 11-32: Enable All Features ..................................................................... 89
Figure 11-33: Summary Letter-SG Fields .......................................................... 89
Figure 11-34: Summary Letter-Print .................................................................. 89
Figure 11-35: Summary Letter - Sign ................................................................ 89
Figure 11-36: Manage Summary Group Menu .................................................... 90
Figure 11-37: Summary Letter – Active or Submitted ......................................... 90
Figure 11-38: Summary Letter Button ............................................................... 90