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 3. Accessing the Interface, 4. Process Workflow, and 5. Navigation

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

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Record of Changes

Version	Date	Entered By	Reason for Change
2.0	21APR2022	A. Norton	Interface modification update
3.0	31OCT2022	A. Norton	Interface modification update
3.0.1	29NOV2022	A. Norton	Correction to Section 10.2.4, 10.2.5, 10.2.6, 10.2.7

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

Caution. This indicates important notices and restrictions for using the interface.

Note

Note. This indicates supplementary explanations and useful tips about interface operations.

Reference

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

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.

> **Terms**
>
> **Shared Queue**: eNavFit allows the reporting senior to assign trusted agents capable of providing inputs on their behalf.

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

Note

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).

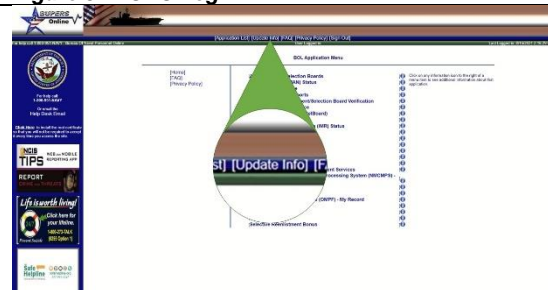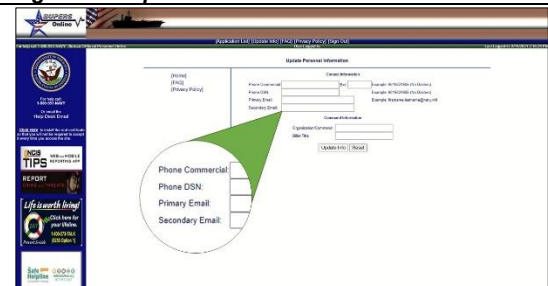|		
Step 3.1.1:	Using a recommended browser, **type**: https://www.bol.navy.mil/BAM/ into the browser bar at the top of the screen.	eNavFit Recommended Browsers Google Chrome Mozilla Firefox Apple Safari eNavFit will not operate properly in Microsoft Internet Explorer or Edge
Step 3.1.2:	**Select** Personal Security Credentials (CAC PKI) for access to BOL.	
Step 3.1.3:	**Select** "*CAC Login*"	*Figure 3-1: CAC Login*
Step 3.1.4:	From the BOL Application Menu, **Select** "*Update*" at the top of the screen.	*Figure 3-2: Update Information*
Step 3.1.5:	**Enter** the required information. <u>Do not</u> use dashes in the phone number. Using a "*@navy.mil*" email address is highly recommended to ensure proper routing within the eNavFit interface. **Note** Although recommended, the eNavFit interface does not require the use of governmental email addresses.	*Figure 3-3: Personal Information Entry*
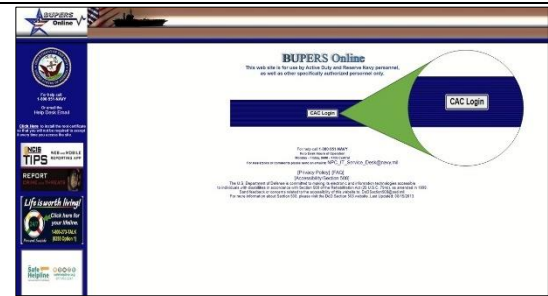
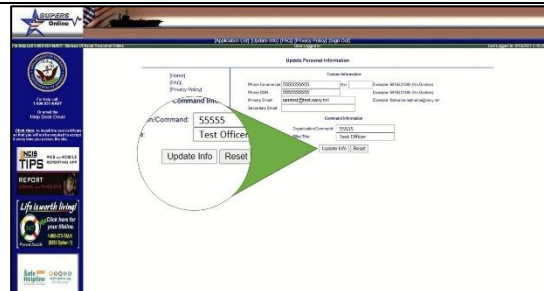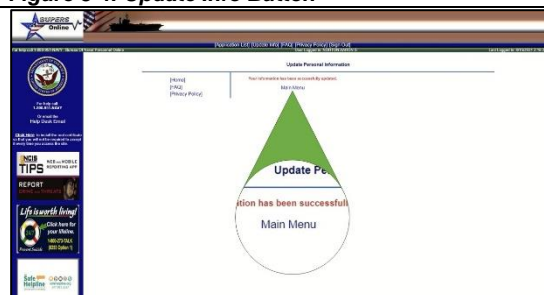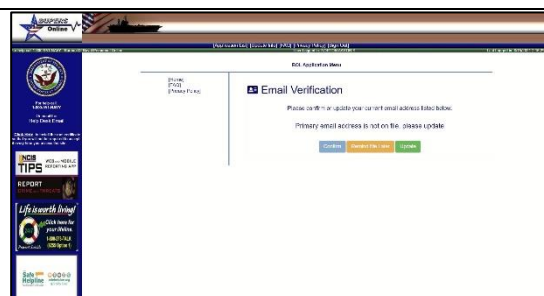| Step 3.1.6:	**Select** the "*Update Info*" button to save the entered information.	
		Figure 3-4: Update Info Button
Step 3.1.7:	**Select** the "*Main Menu"* button to return to the BOL Application Menu.	
		Figure 3-5: Main Menu Button Selection

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: 1. Confirm-Continue using the information on file. 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

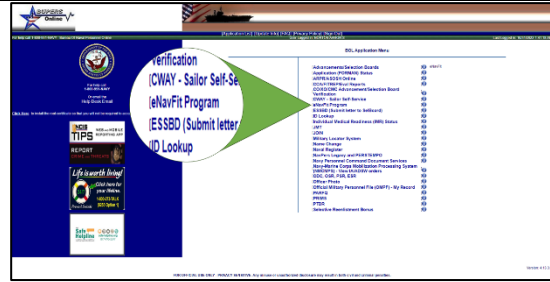| Step 3.4.1:	**Select** "*eNavFit Program*" from the BOL Application Menu.	
	Note	
	The "eNavFit Program" link points to the same location as the link for "Navy Personnel Command Document Services" and has been added to reduce user confusion.	*Figure 3-7: eNavFit Program*
Step 3.4.1:	**Select** Personal 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.	 *Figure 3-8: eNavFit Categories*
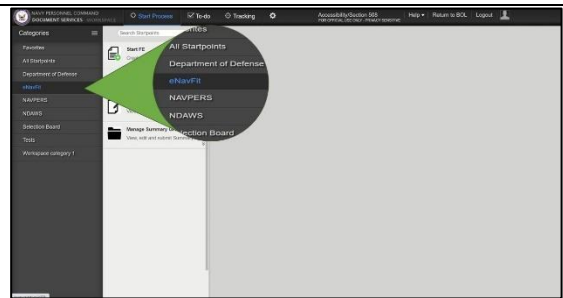
3.5 BOL Session Automatic Time Out

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.
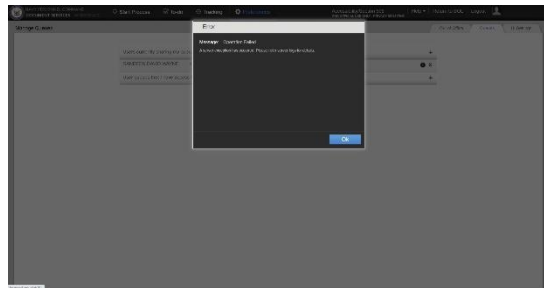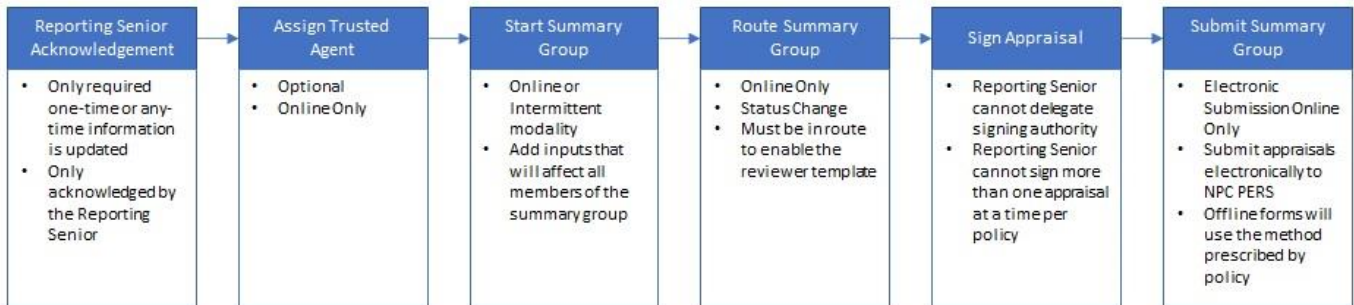
| Step 3.5.1:	A black "Operation Failed" error box appears.	 *Figure 3-9: BOL Timeout*
Step 3.5.2:	Close the browser window and restart BOL.	

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	Assign Trusted Agent	Start Summary Group	Route Summary Group	Sign Appraisal	Submit Summary Group
• Only required one-time or any-time information is updated • Only acknowledged by the Reporting Senior	• Optional • Online Only	• Online or Intermittent modality • Add inputs that will affect all members of the summary group	• Online Only • Status Change • Must be in route to enable the reviewer template	• Reporting Senior cannot delegate signing authority • Reporting Senior cannot sign more than one appraisal at a time per policy	• Electronic Submission Online Only • Submit appraisals electronically to NPC PERS • 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.
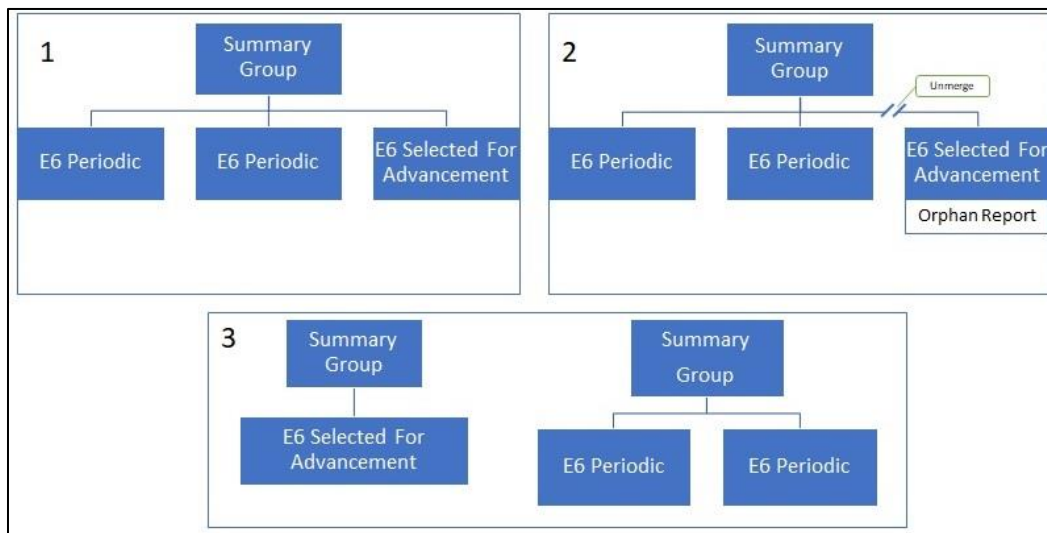
Orphan reports occur when an appraisal is created or unmerged before the summary group is created. Once the summary group is created, the orphan report will be binned in the summary group with matching summary group criterion.

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:

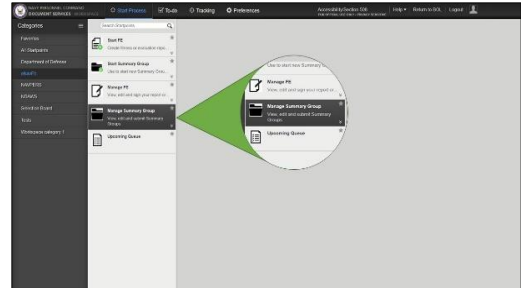| Step 4.4.1: | **Select** the "*Manage Summary Group*" tab from the menu options on the <u>left</u> side of the screen. | |
		Figure 4-1: Manage Summary Group Tab
Step 4.4.2:	**Select** the summary group that contains the report to be unmerged.	
		Figure 4-2: Select Summary Group for Unmerge
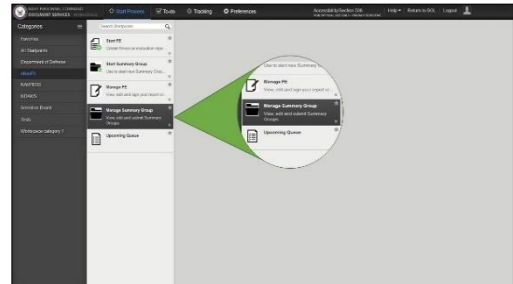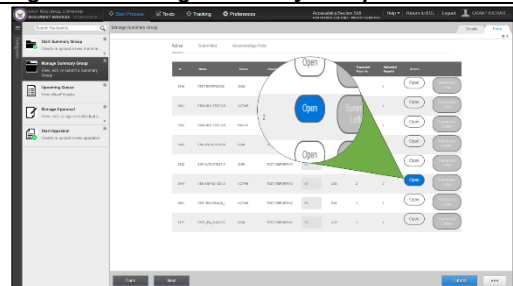
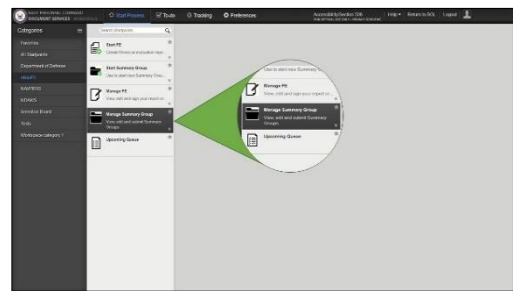| Step 4.4.3:	**Select** the "Reports" tab.	 *Figure 4-3: Select Reports Tab*
Step 4.4.4:	**Select** "Show/Hide" next to the member's name whose appraisal will be removed from the existing summary group.	 *Figure 4-4: Select Member to be Unmerged*
Step 4.4.5:	**Modify** the summary group information. 📋 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).	 *Figure 4-5: Modify Summary Group Criterion*
Step 4.4.6:	**Select** "*Unmerge"* from the status drop-down.	 *Figure 4-6: Select Unmerge Status*
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	 *Figure 4-7: Select Save*
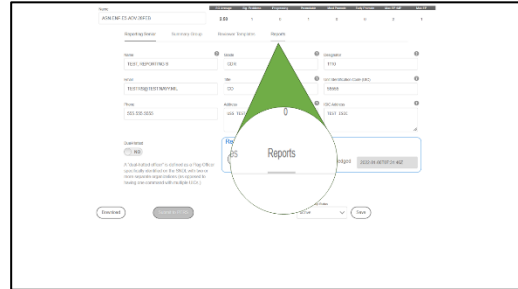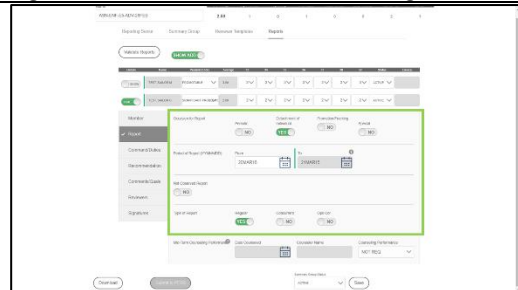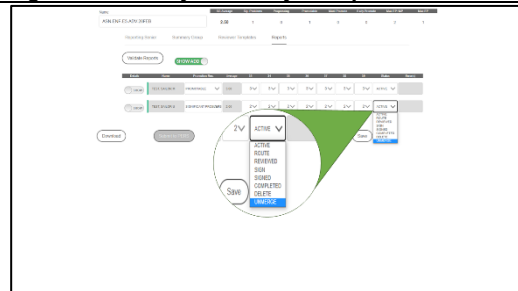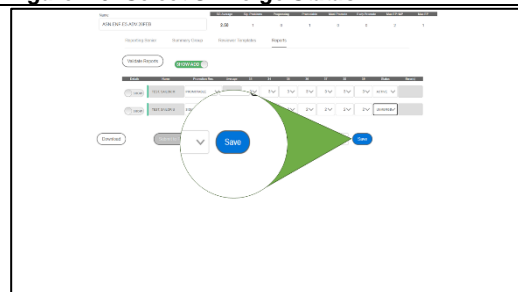
4.5 Delete

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 <u>left</u> side of the screen.	Figure 4-8: Manage Summary Group Tab
Step 4.5.1.2:	**Open** the summary group to be deleted	Figure 4-9: Delete SG-Open Summary Group
Step 4.5.1.3:	**Select** "Delete" from the summary group drop-down menu.	Figure 4-10: Select Delete from Menu
Step 4.5.1.4:	**Select** "OK" on the pop-up window.	Figure 4-11: Select OK Pop-Up Window
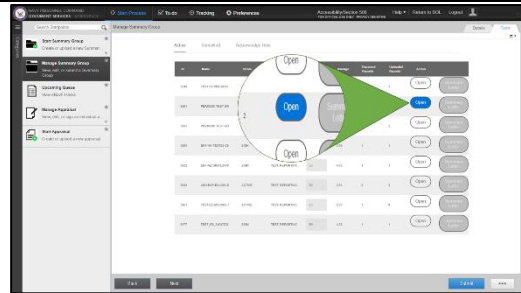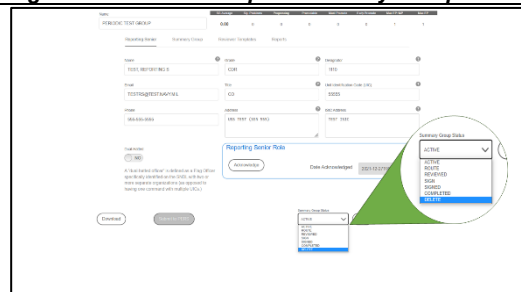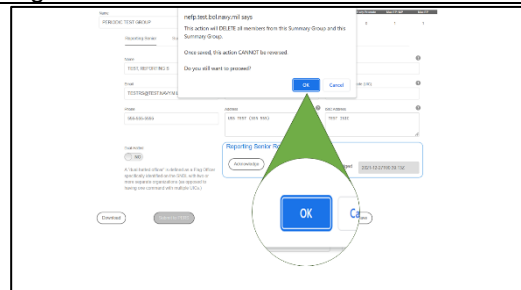
Step 4.5.1.5:	**Select** "Save"

Following refresh, the summary group will be deleted from the Active summary group tab.
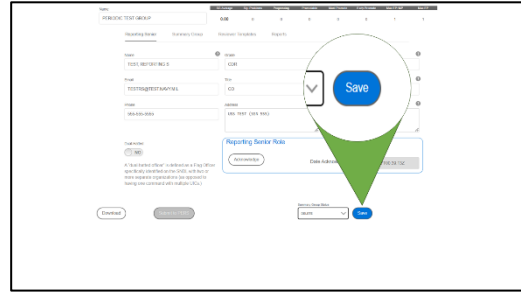
Figure 4-12: Delete SG-Open Summary Group

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 <u>left</u> 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.
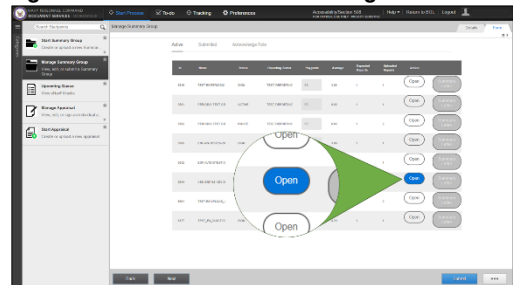
Figure 4-14: SG Level Delete-Open SG

Step 4.5.2.3:	**Select** the "*Reports*" tab.
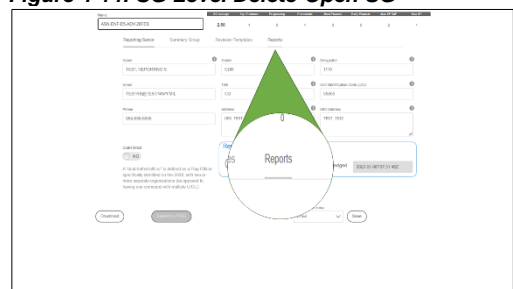
Figure 4-15: SG Level Delete-Reports Tab

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
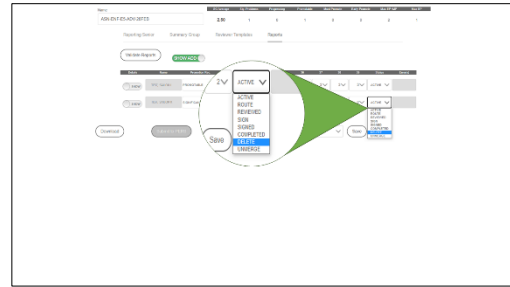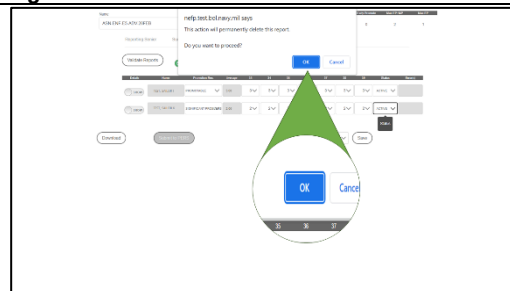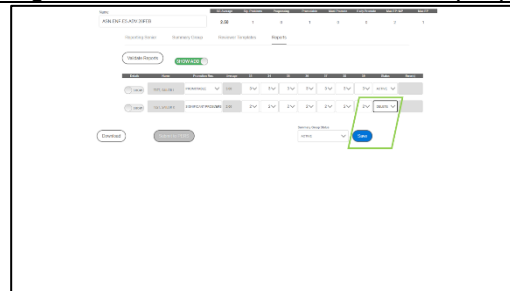
4.5.3 Deleting an Appraisal (Appraisal Level)

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 <u>left</u> side of the screen. **Note** The Member will select "My Appraisal" and Reporting Senior or Trusted Agents will select "Appraisal I Have Access To"	*Figure 4-19: Delete Appraisal - Manage Appraisal Tab*
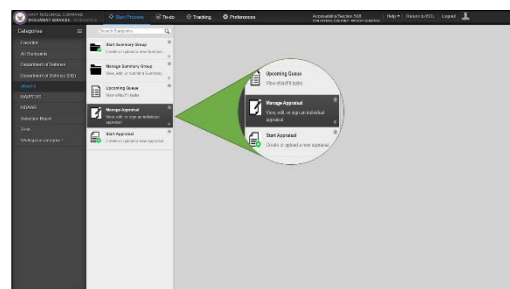
| Step 4.5.3.2: | **Select** the "Open" button next to the appraisal to be deleted. | |
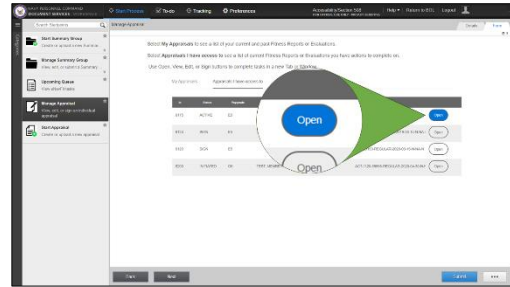
Figure 4-20: Delete Appraisal – Open Button

| Step 4.5.3.3: | **Select** the "Delete" button. | |

Figure 4-21: Delete Appraisal – Delete Button

| Step 4.5.3.4: | **Select** "OK" in the pop-up window.

Note

The interface will automatically save and refresh the browser window. | |
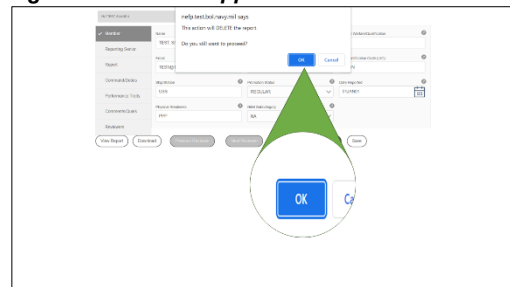
Figure 4-22: Delete Appraisal – OK Button

| Step 4.5.3.5: | **Close** the "Appraisal Task" browser window.

Note

Deletion can be verified by repeating Step 4.5.3.1. Appraisal should no longer be listed. | |
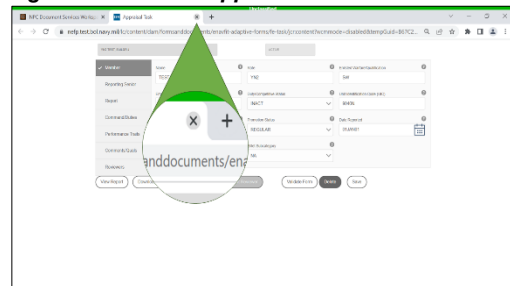
Figure 4-23: Delete Appraisal – Close Browser

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.
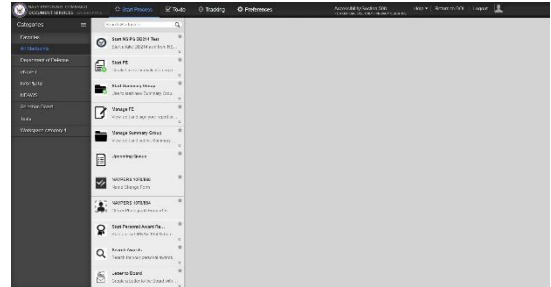
Figure 5-1: NPC Document Hub

Navigate to the tab labeled "*eNavFit"* under the "*Categories*" located on the <u>left</u> 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.
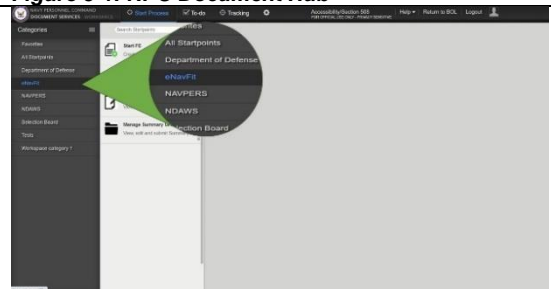
Figure 5-2: eNavFit Categories

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.
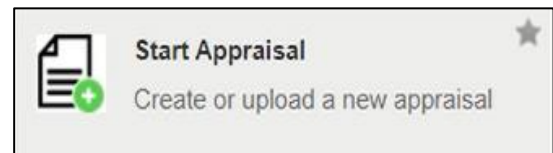
Figure 5-3: Start Appraisal Tab

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
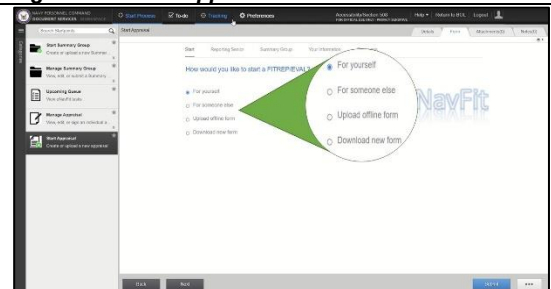
Figure 5-4: Start Appraisal Tab

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.
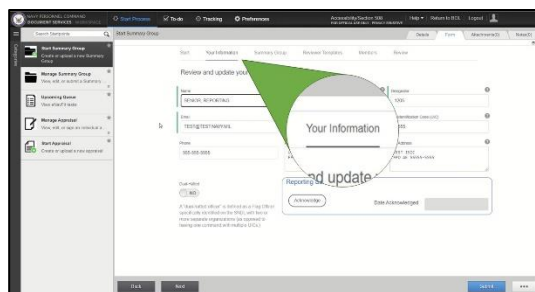

Figure 5-5: Start Appraisal for Yourself

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.
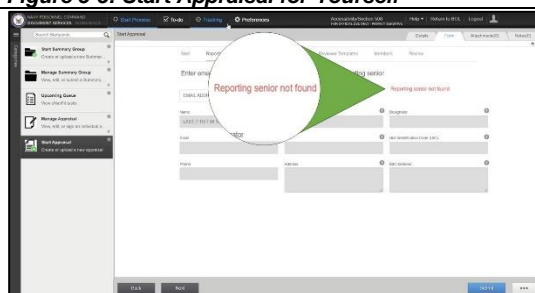
Figure 5-6: Reporting Senior Not Found Error

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.
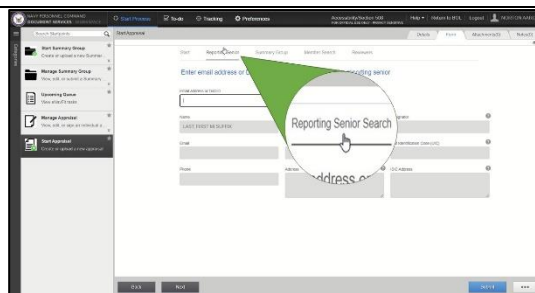
Figure 5-7: Start Appraisal for Someone Else

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.
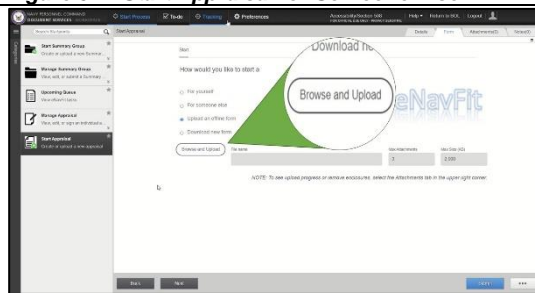
Figure 5-8: Start Appraisal-Upload Offline Form

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).
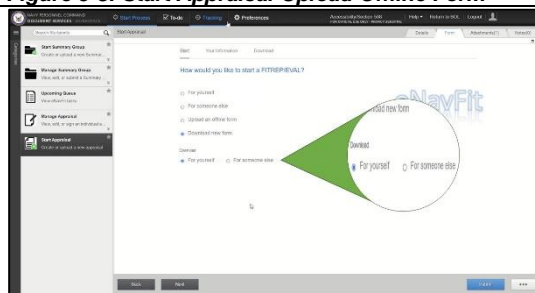

Figure 5-9: Start Appraisal-Download Offline Form

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.
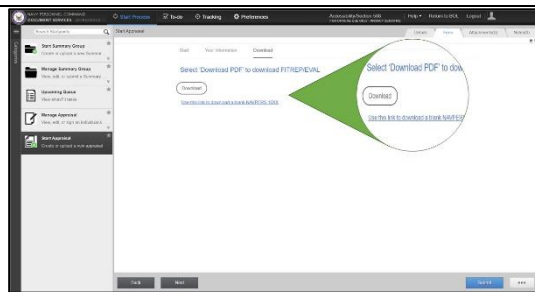
Figure 5-10: Start Appraisal-Download Blank Form

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 *FEs I have Access to* tab displays reports where a member has tasking for review or inputs.

Figure 5-11: Manage Appraisal Tab

The *Manage Appraisal* tabs are:

- My Appraisals
- Appraisals I have access to
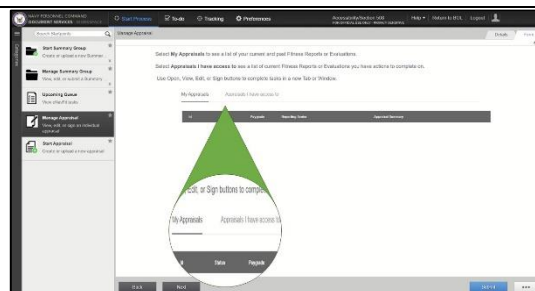
Figure 5-12: Manage Appraisal Menu

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.
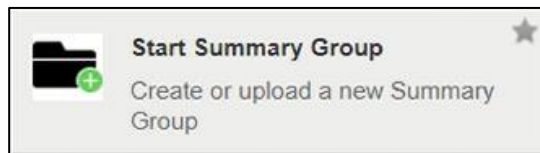
Figure 5-13: Start Summary Group Tab

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
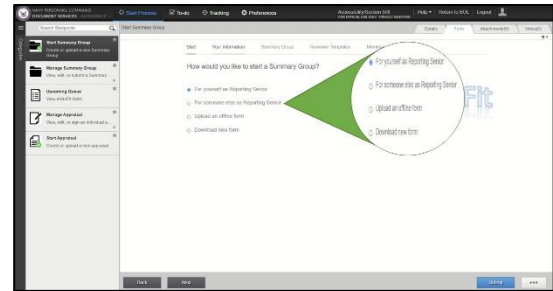- Upload an offline form
- Download a new form

Figure 5-14: Start Summary Group Menu Options

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.
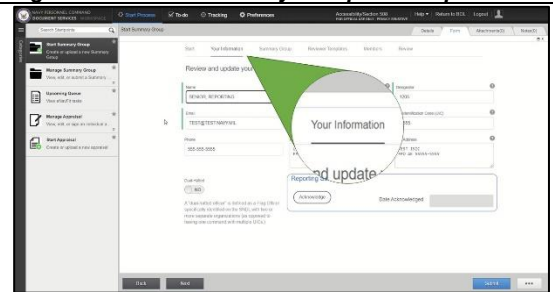
Figure 5-15: Start Summary Group-Yourself

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.
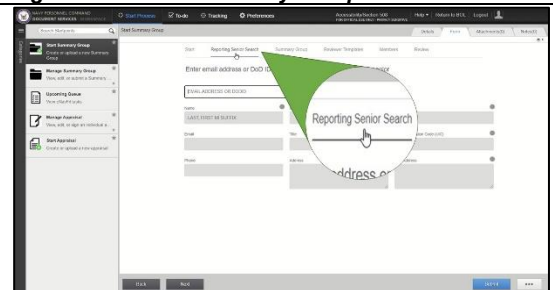
Figure 5-16: Start Summary Group-Someone Else

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.
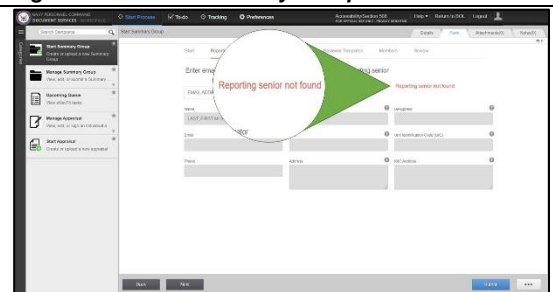
Figure 5-17: Start Summary Group-RS Find Error

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.
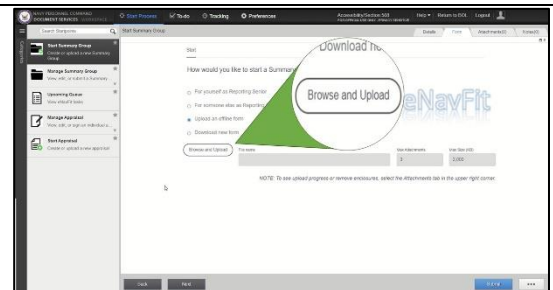
Figure 5-18: Start Summary Group-Upload

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).
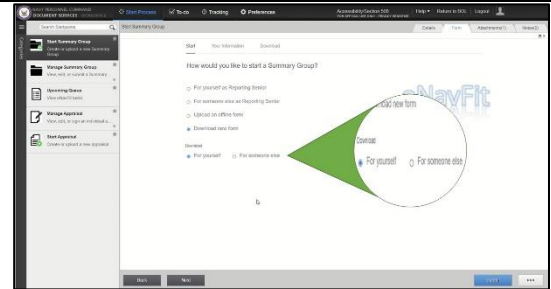
Figure 5-19: Start Summary Group-Download

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.
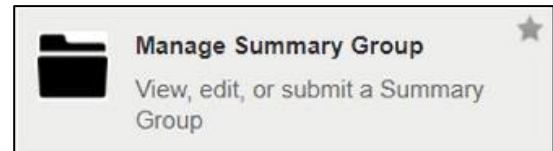
Figure 5-20: Manage Summary Group Tab

The *Manage Summary Group* tabs are:

- Acknowledge Role
- Active
- Submitted
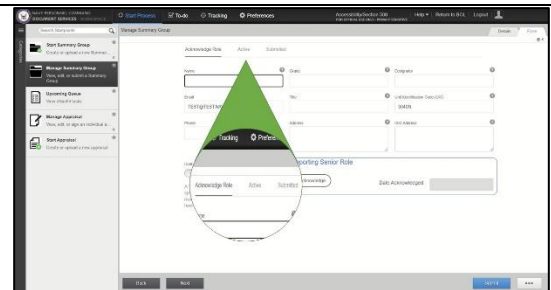
Figure 5-21: Manage Summary Group-Options

Acknowledge Role: Chapter 6 details how to acknowledge the Reporting Senior User Role using the on-screen inputs and auto-populated information.
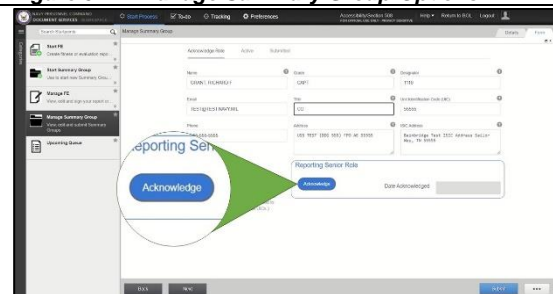
Figure 5-22: Acknowledge Role Button

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.
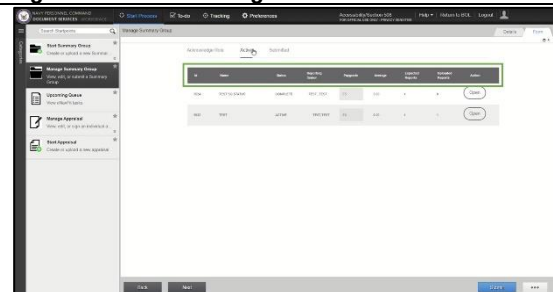
Figure 5-23: Manage Summary Group-Active Tab

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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.
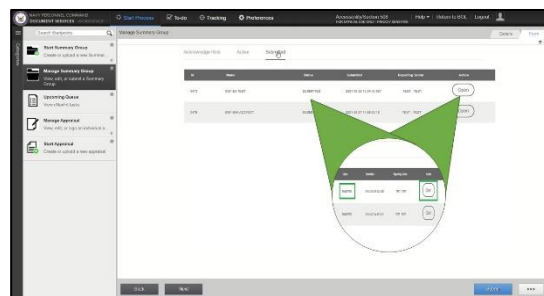
Figure 5-24: Manage Summary Group-Submitted Tab

5.2.5   Upcoming Queue

The *Upcoming Queue* tab allows a user to view workflow tasking that has been assigned to them.
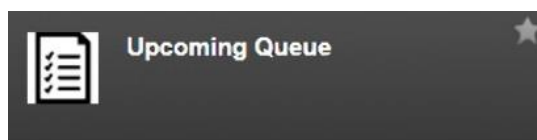
Figure 5-25: Upcoming Queue Tab

Upcoming Queue: This queue allows a user to see all reports that they have actions and lists:

- Member
- Reviewer
- Reporting Senior

Figure 5-26: Upcoming Queue

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.
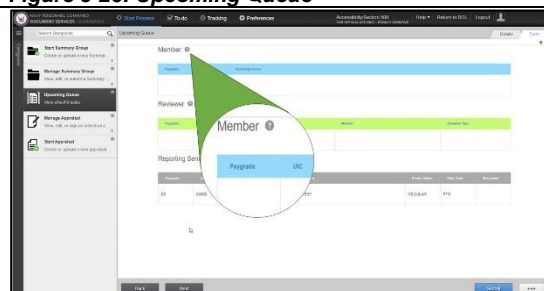
Figure 5-27: Upcoming Queue-Member Row

Reviewer: This row displays information pertaining to reports where the user has been assigned as a reviewer (reviewer, rater, or senior rater).

Figure 5-28: Upcoming Queue-Reviewer Row

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Reporting Senior: This row displays information pertaining to reports where the user is the reporting senior of a summary group.
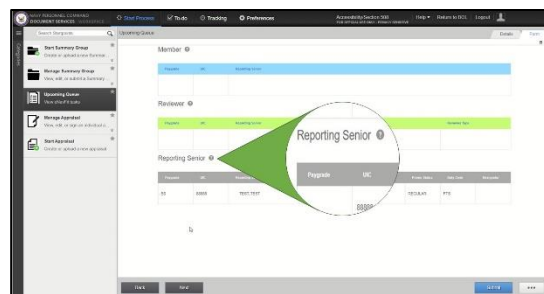
Figure 5-29: Upcoming Queue-Reporting Senior Row

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.

> **Note**
>
> The interface may not allow some statuses to be changed unless validations have passed.
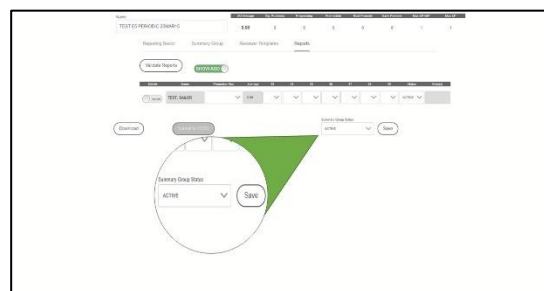
Figure 5-30: Online Status Change Field

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.
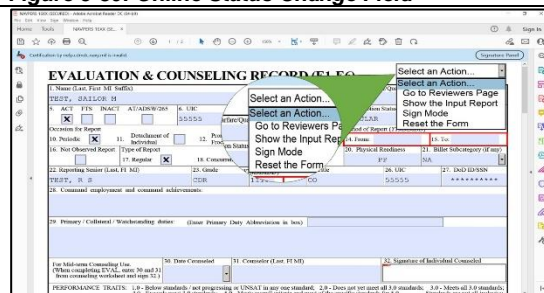
Figure 5-31: Offline Status Change Field

Status	Description	Pass Requirement
Active	Initial Status when a summary group or appraisal is created.	
Route	Route appraisal to first Reviewer in the Reviewer Template	
Reviewing	Currently enroute through the Reviewers	Reviewer has selected "Next Reviewer" completing their review.
Reviewed	All reviews completed	Automatic status when all reviewers have selected "Next Reviewer" and completed their review.
Sign	Ready to be signed	Document must pass validation.
Signing	Currently enroute for signature by all included users	
Signed	All required signatures completed	Report signed by all users or alternate signature(s) provided

Status	Description	Pass Requirement
Completed	All appraisals in summary group have passed validation, are signed, and ready to be submitted to NPC PERS for processing	Automatic status when all signatures or alternate signatures have been applied.
Delete	Delete user appraisal or Summary Group	Summary group/appraisal in Active, Route, Reviewed, or Unmerge Status (See Section 4.5)
Unmerge	Remove an appraisal from an existing Summary Group	(See Section 4.4)
Submitting	Summary Group is being electronically submitted to NPC	All appraisals passed validation, all required signatures on appraisals
Submitted	Summary Group has been received by NPC	

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.
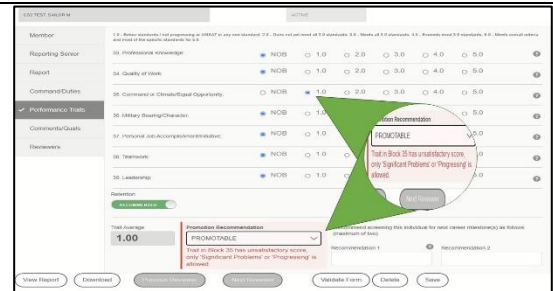
Figure 5-32: Error Validation Example

5.5 Automatic EP/MP Calculation Tool Bar

SG Average	Sig. Problems	Progressing	Promotable	Must Promote	Early Promote	Max EP+MP	Max EP
0.00	0	0	0	0	0	1	1

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.
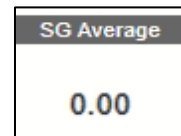
Figure 5-33: SG Average

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.

Sig. Problems	Progressing	Promotable	Must Promote	Early Promote
0	0	0	0	0

Figure 5-34: Promotion Recommendations

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:

Max EP+MP	Max EP
1	1

Figure 5-35: EP/MP Calculations

- Early Promote + Must Promote Maximum = $\underline{N}$ x $\underline{0.6\ (60\%)}$ = *X1*

- Early Promote Maximum = $\underline{N}$ x $\underline{0.2\ (20\%)}$ = *X2* (rounded up).

- Must Promote Maximum = *X1 – X2* = *X3*.

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.

Figure 5-36: Tool Tip Selection

Select the ❓ from any field within eNavFit.
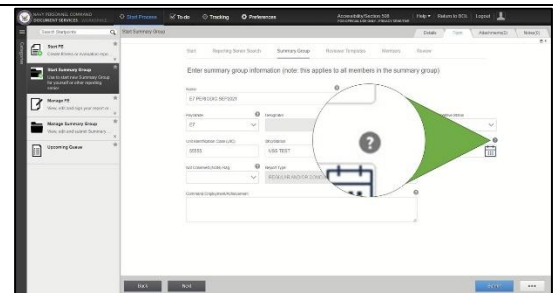
Figure 5-37: Tool Tip On Screen

The tool tip will display summarized policy information pertinent to the field.
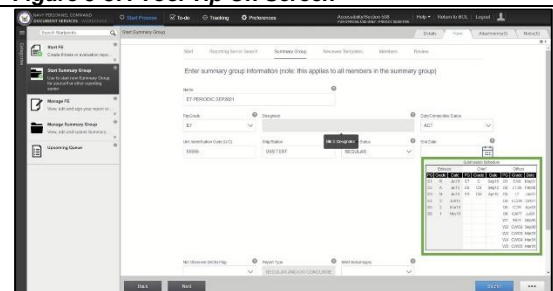
Figure 5-38: Tool Tip Description

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.	 *Figure 5-39: Day Selection*
Select the Month at the <u>top</u> of the tool to display a monthly calendar.	 *Figure 5-40: Month Selection*
Select the Year at the <u>top</u> of the tool to display a range of years.	 *Figure 5-41: Year Selection*

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 <u>left</u> side of the screen.	*Figure 6-1: Manage Summary Group Tab*
Step 6.1.3:	The "Acknowledge Role" tab will be displayed.	*Figure 6-2: Acknowledge Role Tab*
Step 6.1.4:	**Verify** and/or **Update** all fields displayed on the webpage. Use abbreviated titles such as CO, OIC, DEPT HEAD, etc.	*Figure 6-3: Acknowledge Role Inputs*
Step 6.1.5:	**Select** the "*Acknowledge"* button in the "Reporting Senior Role" box on the <u>bottom right</u> side of the screen.	*Figure 6-4: Acknowledge Role Button*
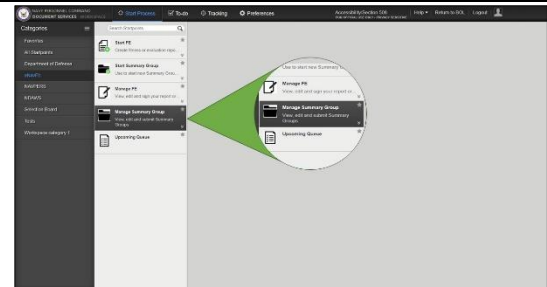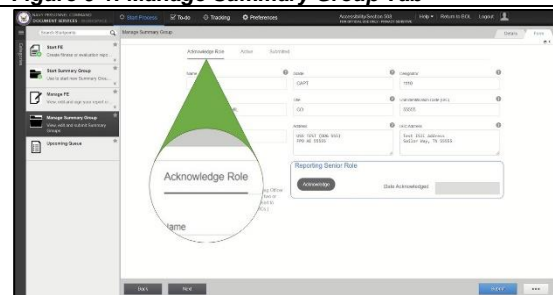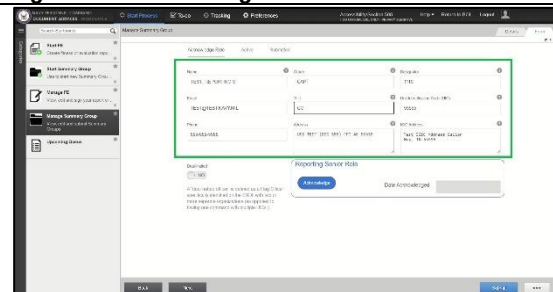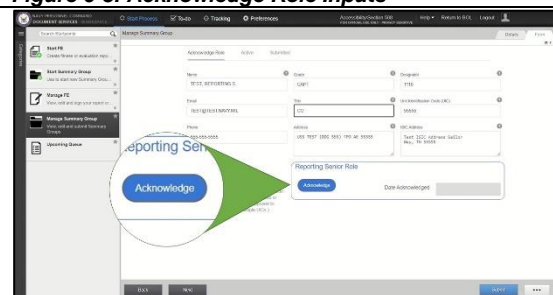
Step 6.1.6:	**Select** the "*OK*" button from the pop-up window at the top of the screen.	
		Figure 6-5: Acknowledge Role OK
Step 6.1.7	**Verify** that the "Date Acknowledged" field says, "Just Now."	
		Figure 6-6: Acknowledgment Date
Step 6.1.8	**Select** the blue "Submit" button on the <u>bottom right</u> side of the screen.	
		Figure 6-7: Acknowledgment Submission
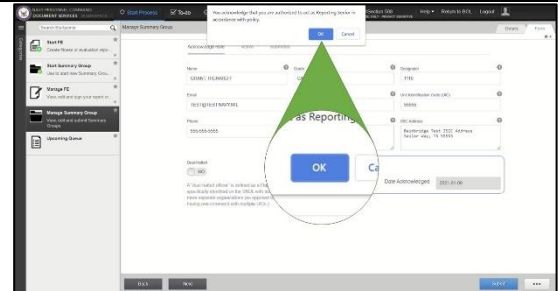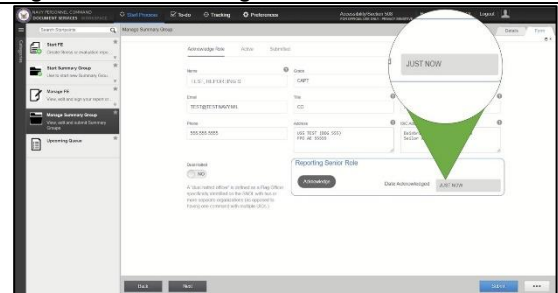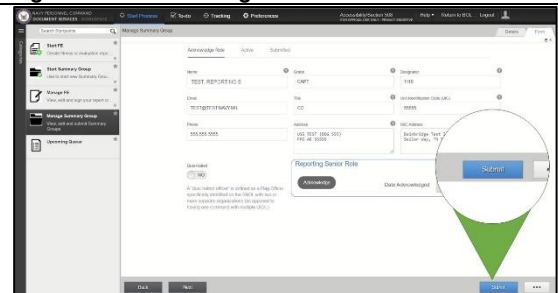
6.2 Assigning a Trusted Agent

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.

> ⚠️ **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.

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.

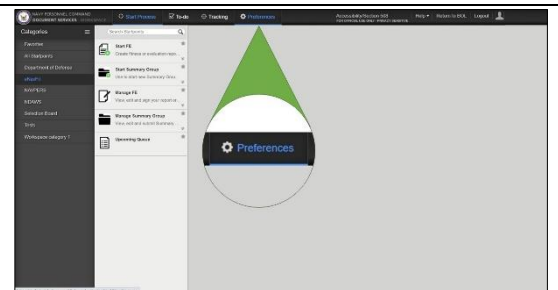| Step 6.2.1:	Follow the steps in Section 3.1 for Accessing the Interface.	
Step 6.2.2:	**Select** the "Preferences" option on the black toolbar banner at the <u>top center</u> of the screen. 📋 Note If "Preferences" does not appear at the top of the screen, select the Cog Wheel Icon. ⚙️	 *Figure 6-8: Preferences Selection*
Step 6.2.3:	**Select** the "Queues" tab on the <u>top right</u> 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 <u>top right</u> 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*
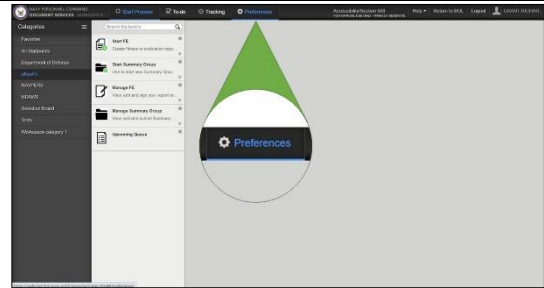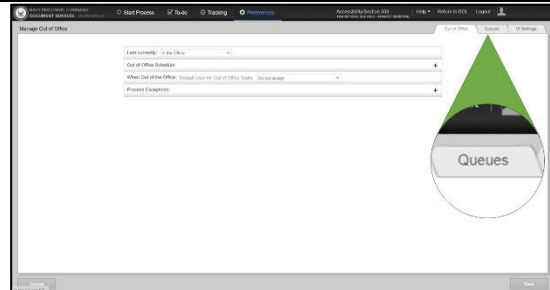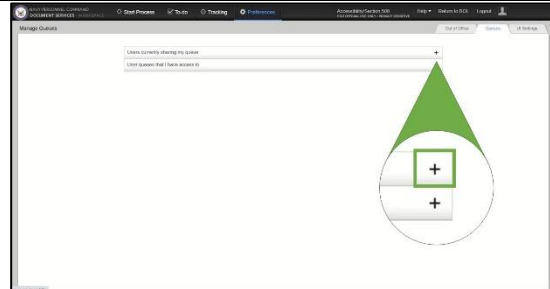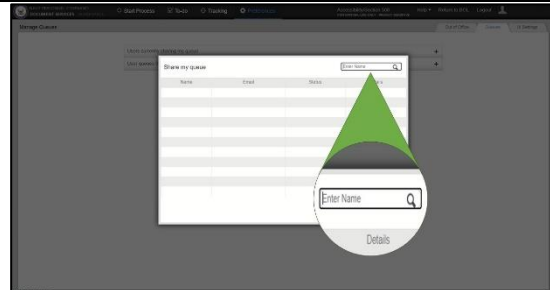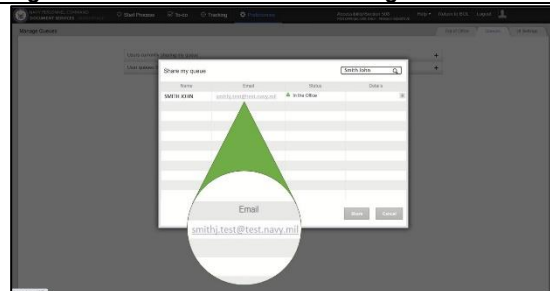
Step 6.2.7:	**Select** the "Share" button to share the reporting senior administrative operations within eNavFit.	
		Figure 6-13: Share RS Queue
Step 6.2.8:	**Verify** that the desired trusted agent is being displayed.	
		Figure 6-14: Verify Trusted Agent Assignment
Step 6.2.9:	**Select** "Start Process" from the top of the screen to complete this operation.	
		Figure 6-15: Select Start Process
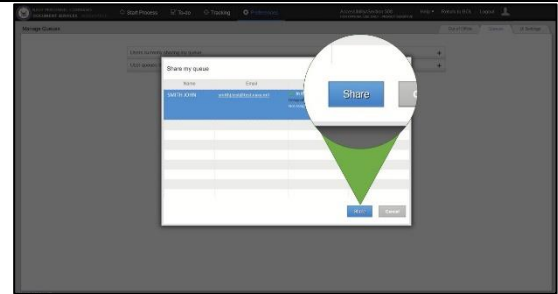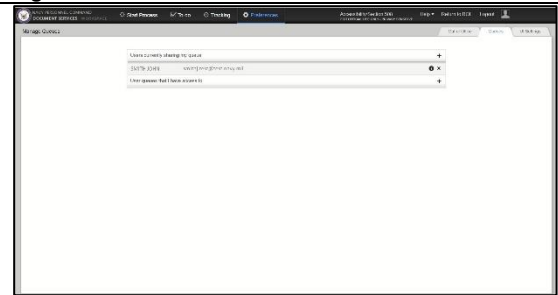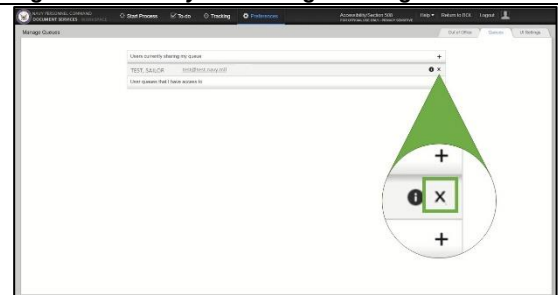
6.3 Removing a Trusted Agent

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 <u>top center</u> 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

Step 6.3.3:	**Select** the "Queues" tab on the <u>top right</u> side of the screen.	
		Figure 6-17: Queue Selection Tab
Step 6.3.4:	**Select** the "X" next to the Trusted Agent that will be removed.	
		Figure 6-18: Remove Trusted Agent "X"
Step 6.3.5:	**Verify** that the Trusted Agent has been removed from the shared queue.	
		Figure 6-19: Verify Trusted Agent Removed
Step 6.3.6:	**Select** "Start Process" from the top of the screen to complete this operation.	
		Figure 6-20: Select Start Process
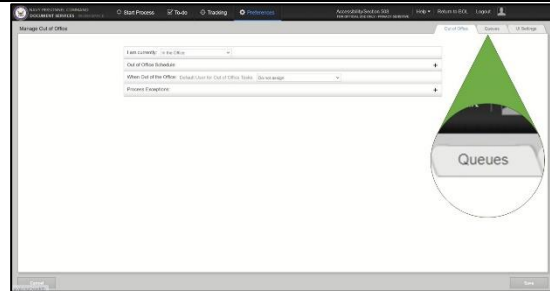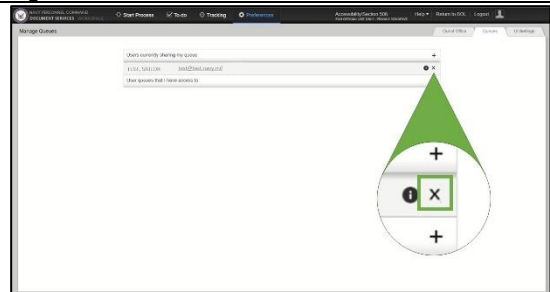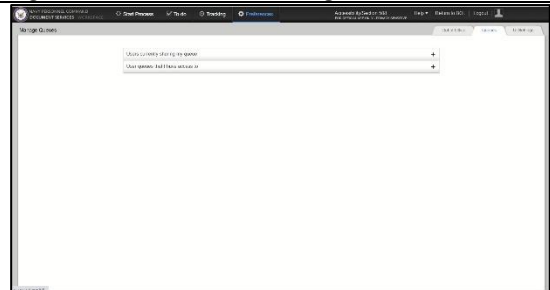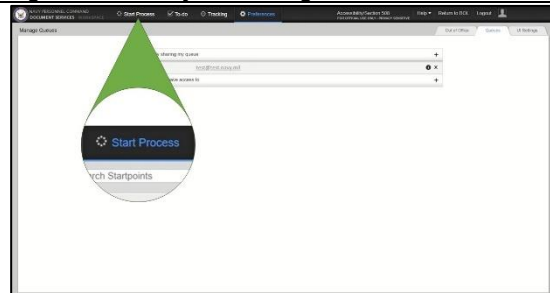
29

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 <u>left</u> side of the screen.
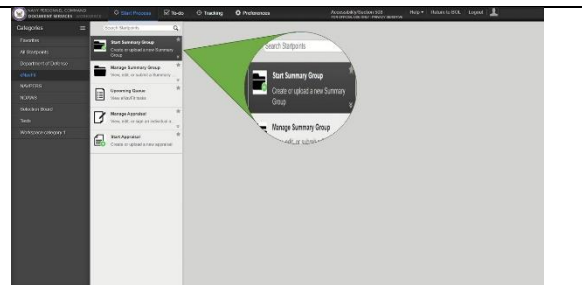
Figure 7-1: Start Summary Group Menu

Step 7.1.1.3:	**Select** the *"For Someone Else as Reporting Senior"* radio button from the menu options. **Note** 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**.
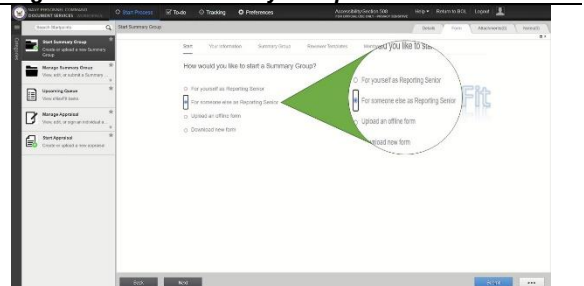
Figure 7-2: For Someone Else as Reporting Senior

Step 7.1.1.4:	**Select** the "*Reporting Senior Search*" tab located on the <u>top</u> of the *Start Summary Group* screen.
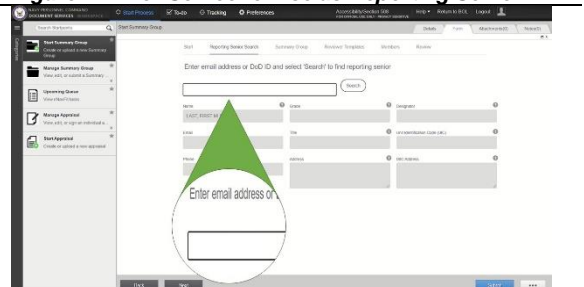
Figure 7-3: Reporting Senior Search Field

Step 7.1.1.5:	**Enter** the DODID <u>*OR*</u> Email Address of the Reporting Senior.
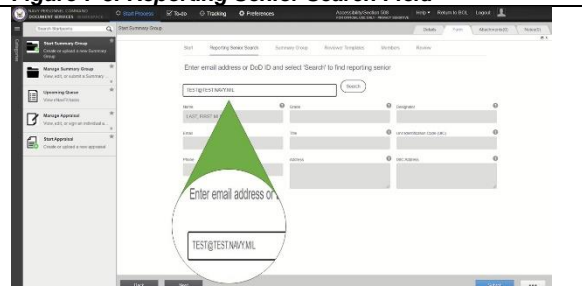
Figure 7-4: Reporting Senior Email/DoDID

Step 7.1.1.6:	**Select** the "*Summary Group"* tab located on the top of the *Start Summary Group* screen.	*Figure 7-5: Summary Group Tab*
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.	*Figure 7-6: Summary Group Name Field*
Step 7.1.1.8:	**Select** the paygrade of the members to be evaluated from the "*Paygrade*" dropdown list.	*Figure 7-7: Paygrade Field*
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.	*Figure 7-8: Designator Field*
Step 7.1.1.10:	**Select** the "*Duty/Competitive Status"* from the dropdown list.	*Figure 7-9: Duty/Competitive Status Field*
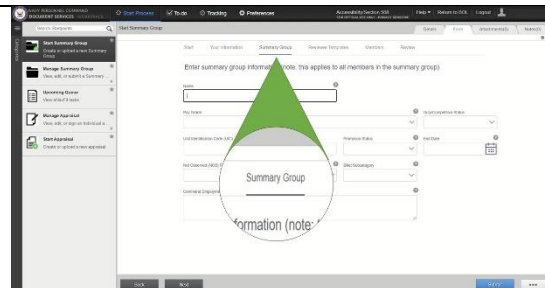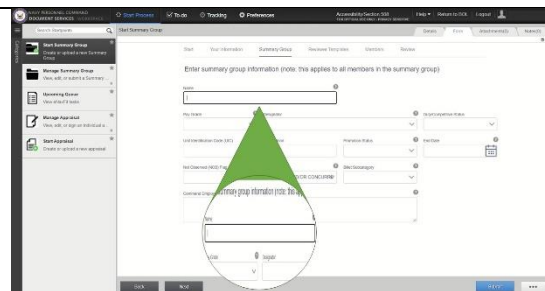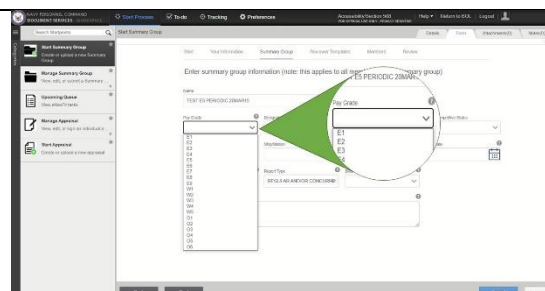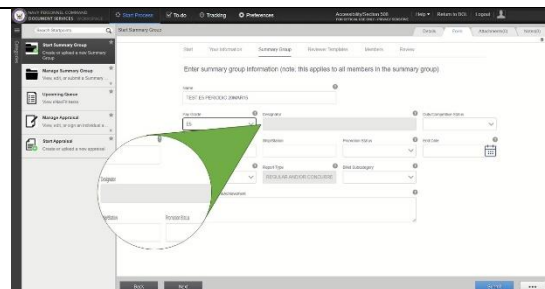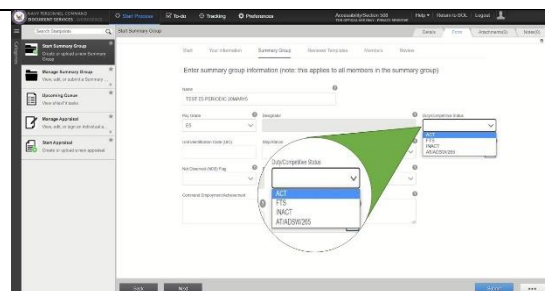
Step 7.1.1.11:	**Type** the "*Unit Identification Code (UIC)"* for the members being evaluated. If the Summary Group will contain reports for multiple UICs, enter the UIC on the members report.	 *Figure 7-10: UIC Field*
Step 7.1.1.12:	**Type** the unit of the member being evaluated in the "*Ship/Station"* Field. This field is limited to 18 characters.	 *Figure 7-11: Ship/Station Field*
Step 7.1.1.13:	**Select** the "*Promotion Status"* from the dropdown list.	 *Figure 7-12: Promotion Status Field*
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.	 *Figure 7-13: End Date Field*
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)	 *Figure 7-14: NOB Flag Selection*
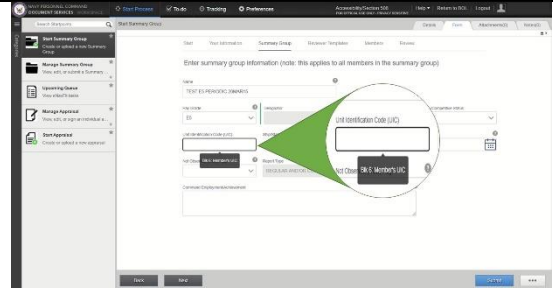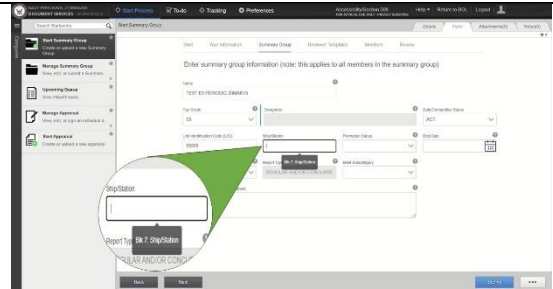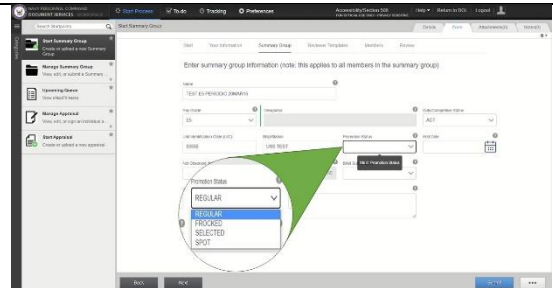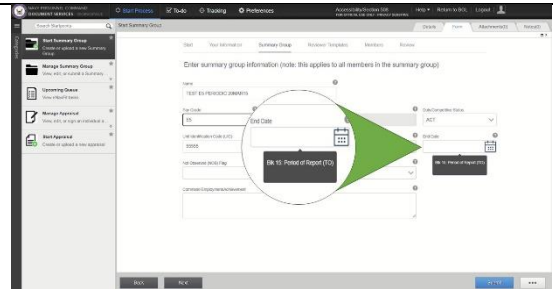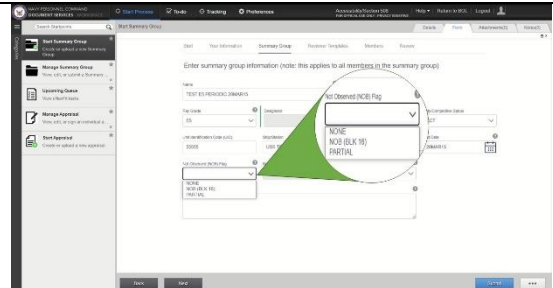
Step 7.1.1.16:	**Verify/Select** the Report Type from the "*Report Type"* dropdown list. For enlisted members this field will be grayed out as they will always be regular and/or concurrent. Officer fitness reports will have the option to select OPS CDR. Select the correct option at the appraisal level during input.	
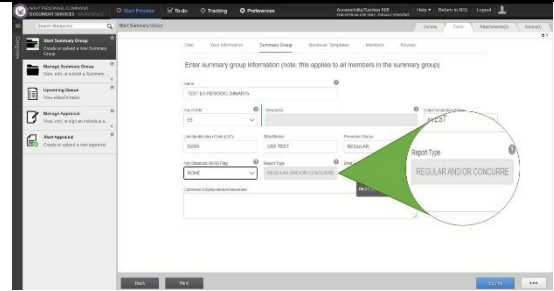
Figure 7-15: Report Type Field

Step 7.1.1.17:	**Select** the Billet Subcategory from the dropdown list.	
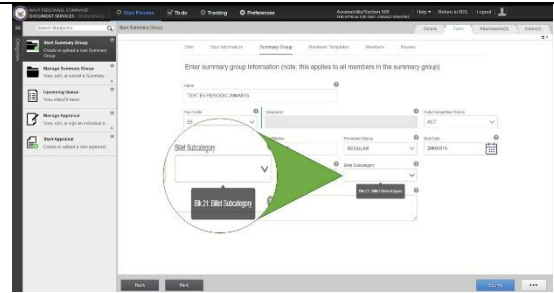
Figure 7-16: Billet Subcategory Field

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.	
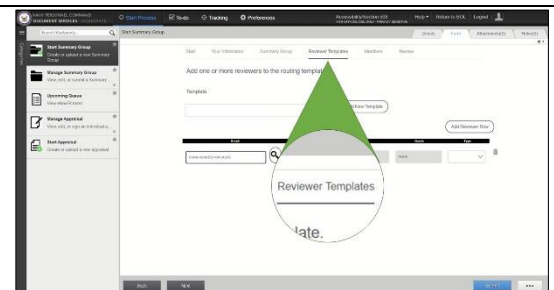
Figure 7-17: Reviewer Templates Tab

Step 7.1.2.3:	**Skip** the field labeled "1: DEFAULT".	
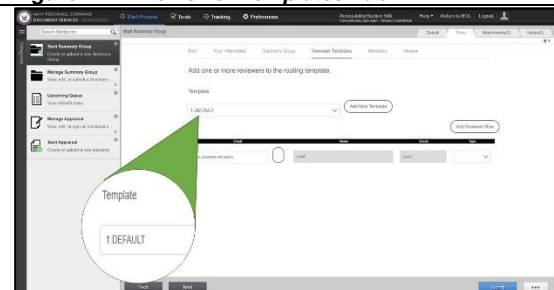
Figure 7-18: Skip the "Default" field

Step 7.1.2.4:	**Select** "*Add New Template*" Button	*Figure 7-19: Add New Reviewer Template*
Step 7.1.2.5:	**Type** 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.)	*Figure 7-20: Reviewer Template Name*
Step 7.1.2.6:	**Select** "OK"	*Figure 7-21: Acknowledge Reviewer Template*
Step 7.1.2.7:	**Type** the DoDID *OR* email address for the desired reviewer in the "*Email Address or DoDID"* field.	*Figure 7-22: Add Reviewer by email/DoDID*
Step 7.1.2.8:	**Select** the Magnifying Glass icon or press Enter to search the interface for the member.	*Figure 7-23: Select Magnifying Glass or Enter*
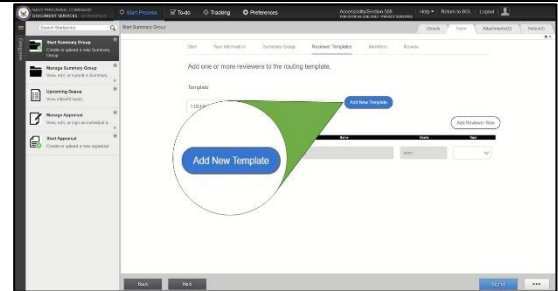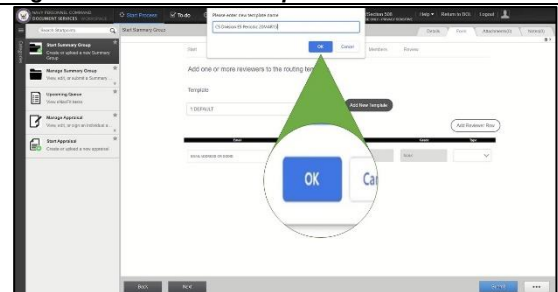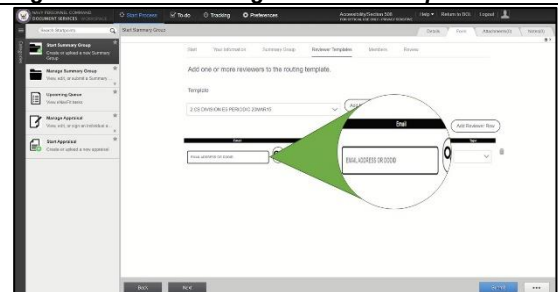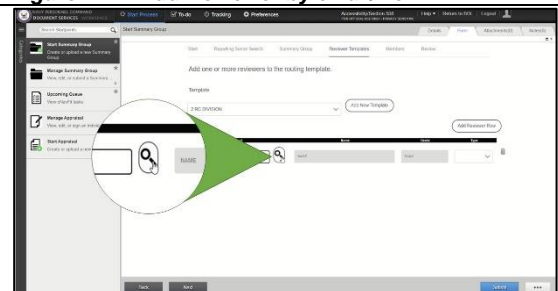
Step 7.1.2.9:	**Select** the dropdown arrow below "*Type"* to identify the User Role of the reviewer*.*
	    - Rater
	    - Senior Rater
	    - Concurrent Reporting Senior (RS)	

	Note If the reviewer is not the Rater, Senior Rater, or Concurrent Reporting Senior leave this field blank.	*Figure 7-24: Reviewer Type Selection*
	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.	 *Figure 7-25: Add Reviewer Button*
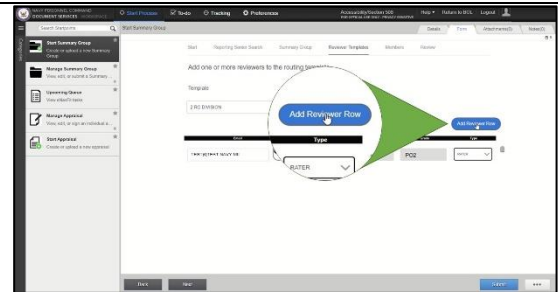
7.1.3   Adding Members

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 <u>top</u> of the *Start Summary Group* screen.	 *Figure 7-26: Add Members Tab*
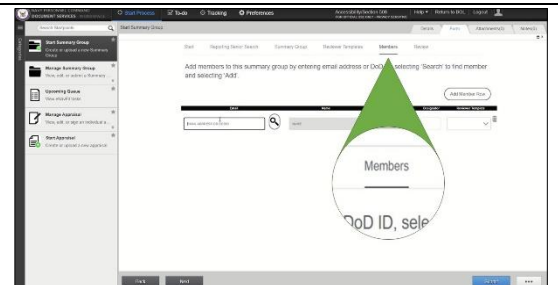
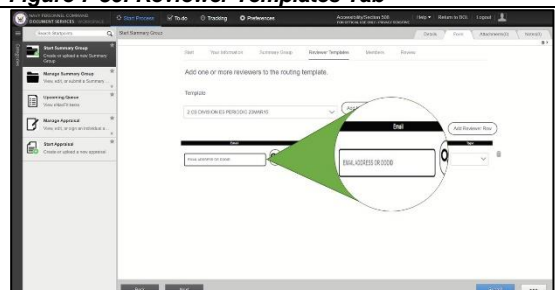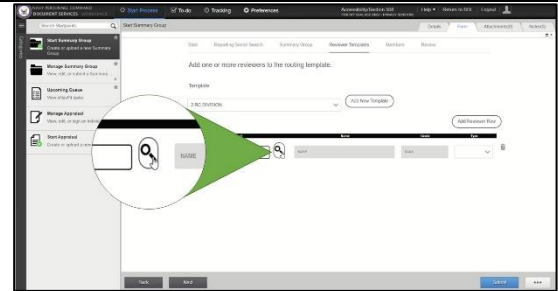| Step 7.1.3.3:	**Enter** the DODID *OR* email address of the member(s) to be evaluated in the "*Email Address or DODID"* field.	
		Figure 7-27: Add Member by email/ DoDID
Step 7.1.3.4:	**Select** the Magnifying Glass symbol or press Enter to search the interface for the member.	
		Figure 7-28: Select Magnifying Glass or Enter
Step 7.1.3.5:	**Select** the desired Reviewer Template from the drop-down menu under the "*Reviewer Template"* on the <u>right</u> side of the member information to assign a set of reviewers to the member report.	
		Figure 7-29: Select Reviewer Template
Step 7.1.3.6:	**Select** the "Review*"* tab located on the <u>top</u> of the *Start Summary Group* screen.	
		Figure 7-30: Review Inputs Tab
Step 7.1.3.7:	**Select** "Submit" on the <u>bottom, right</u> 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".	
		Figure 7-31: Submit Summary Group Inputs
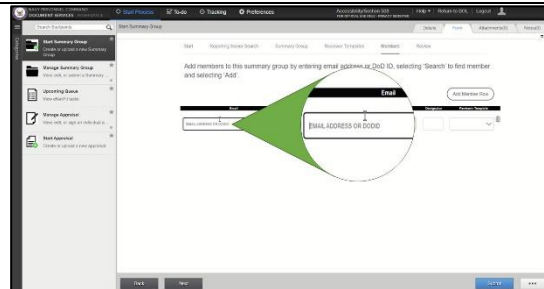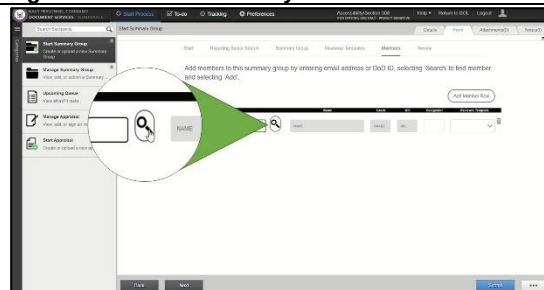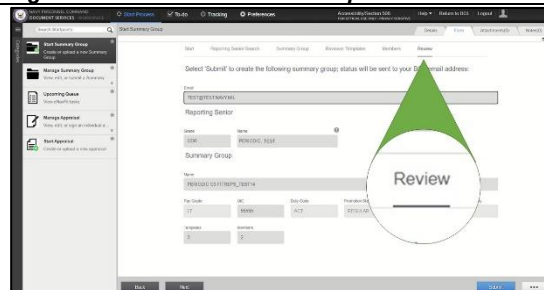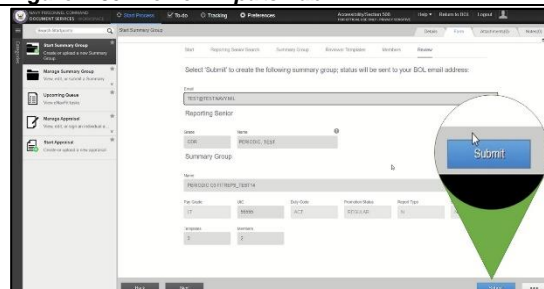
7.2 Not Observed (NOB) Appraisals

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.

Note

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.	*Figure 7-32: Start Summary Group Menu*
Step 7.2.3:	**Select** the *"Summary Group"* tab and navigate to the "*Not Observed (NOB) Flag"*.	**Figure 7-33: Not Observed (NOB) Flag Options**
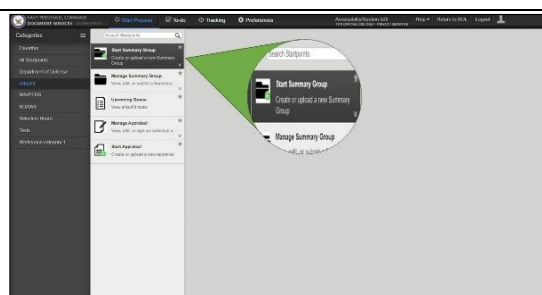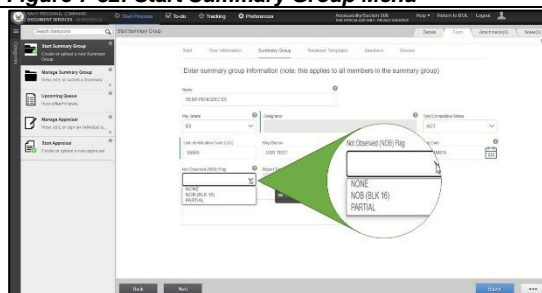
Step 7.2.4: The *"Not Observed (NOB) Flag"* drop-down menu presents a user with three options:
- NONE: If there will be no NOB reports in the summary group.
- NOB (Blk 16): If the entire summary group is NOB.
- PARTIAL: If some reports within a summary group are NOB.

Note

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.	
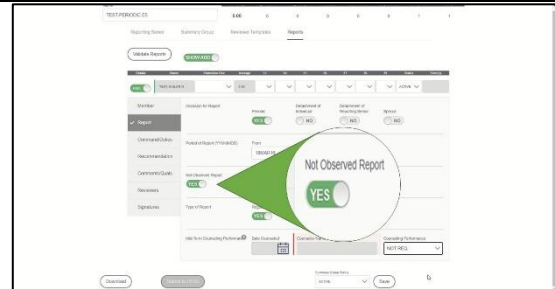
Figure 7-34: Appraisal Level NOB toggle

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.

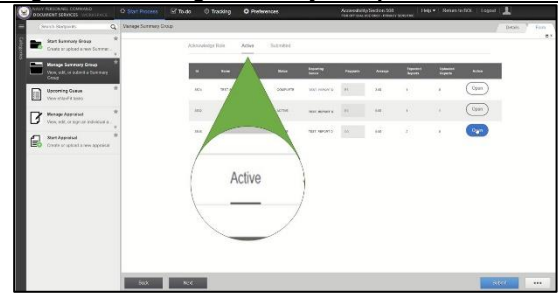| Step 7.3.1:	Follow the steps in Section 3.1 for Accessing the Interface.	
Step 7.3.2:	**Select** the "*Start Summary Group*" tab from the menu options on the left side of the screen.	**Figure 7-35: Start Summary Group**
Step 7.3.3:	**Select** the "*Reviewer Templates"* tab located on the top of the *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**
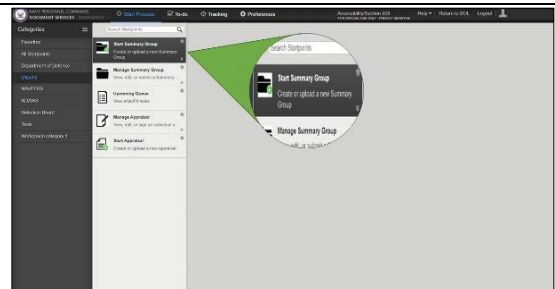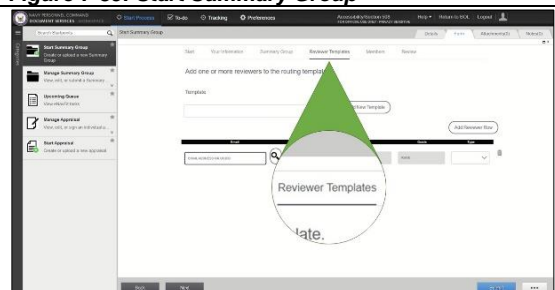
Step 7.3.5:	**Select** the Magnifying Glass icon or press Enter to search the interface for the member.	*Figure 7-38: Search for Reviewers based on inputs*
Step 7.3.6:	**Select** the "*Concurrent RS*" from the *Type* drop-down menu.	*Figure 7-39: Reviewer Templates Field-Type*
Step 7.3.7:	**Select** the "Manage Appraisal" tab from the menu options on the <u>left</u> side of the screen and select the desired report.	*Figure 7-40: Manage Appraisal Menu*
Step 7.3.8:	**Select** the *"Reports"* tab from the left side of the screen*.*	*Figure 7-41: Appraisal Level -Report Tab*
Step 7.3.9:	**Select** the *Concurrent* toggle to switch it from "NO" to "YES".	*Figure 7-42: Concurrent Toggle Switch*
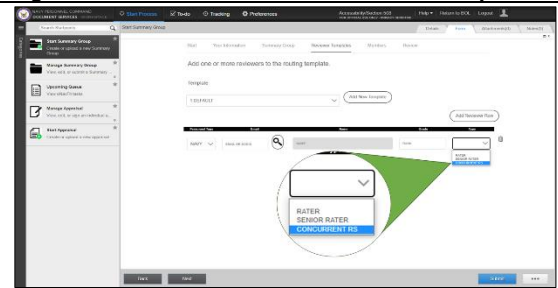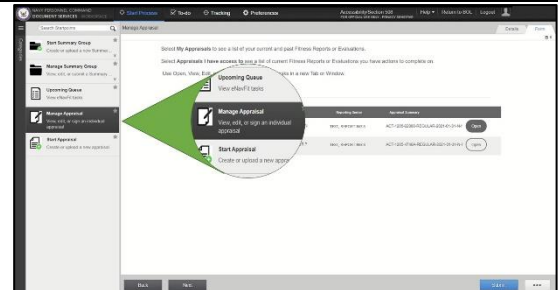
7.4 Mid-Term Counseling Performance Inputs

Users may input mid-term counseling date and counselor, apply not required, or not performed at the individual appraisal level.
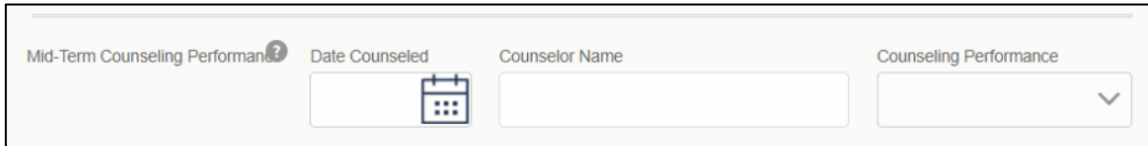
Figure 7-43: Blank Mid-Term Counseling Performance Field

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.

Figure 7-44: Performed Mid-Term Counseling Performance Field

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.
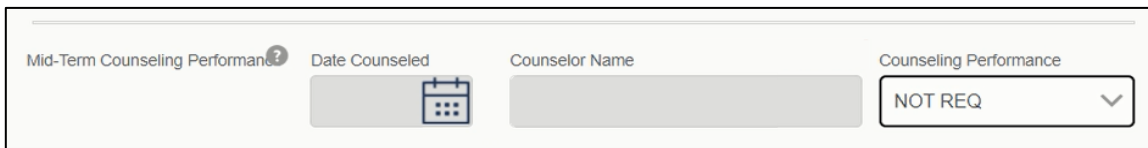
Figure 7-45: Not Required Mid-Term Counseling Performance Field

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).

Figure 7-46: Not Performed Mid-Term Counseling Performance Field

> **Caution**

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.	*Figure 7-47: Manage Summary Group Tab*
Step 7.5.3:	**Select** the "*Active*" Tab	*Figure 7-48: Manage Summary Group-Active Tab*
Step 7.5.4:	**Select** the "*Open*" button next to the Summary Group to be routed.	*Figure 7-49: Manage Summary Group-Open Report*
Step 7.5.5:	**Select** "Route" in the "Status" drop-down menu at the bottom of the screen. ⬛ Note Currently displays "Active".	*Figure 7-50: Change Summary Group to Route Status*
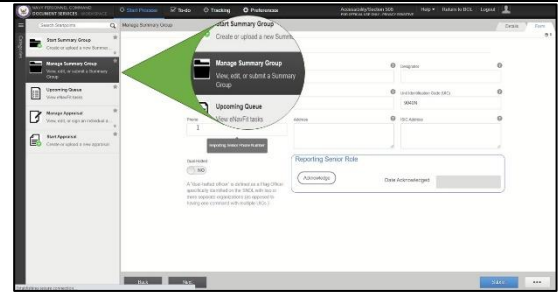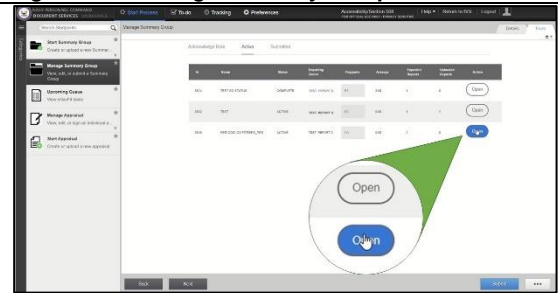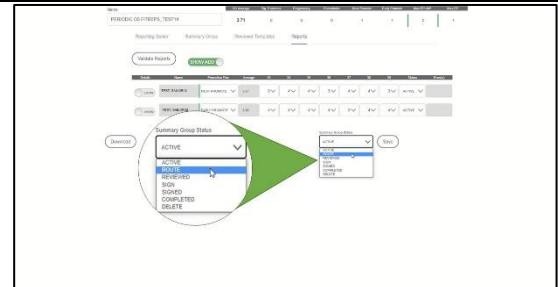
Step 7.5.6:	**Select** "OK", on the popup window acknowledging that all Member's in this summary group will be changed to a "route" status.

Note

The interface will automatically save when "OK" is selected.
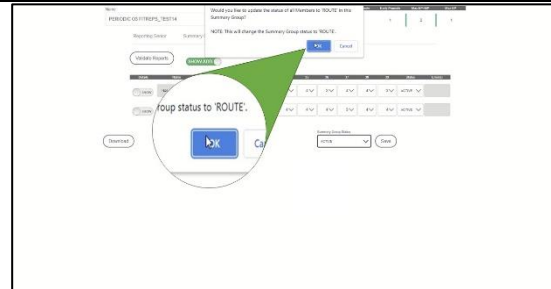
Figure 7-51: Status Change Acknowledgement

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.
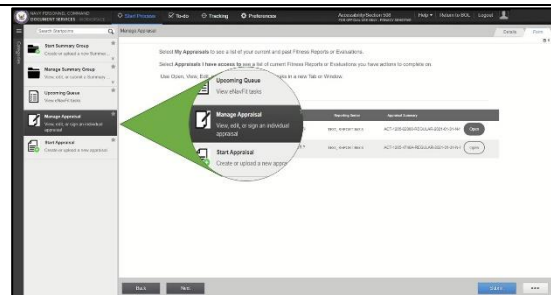
Figure 7-52: Manage Appraisal Menu

Step 7.6.3:	**Select** "Appraisals *I have Access To*" Tab
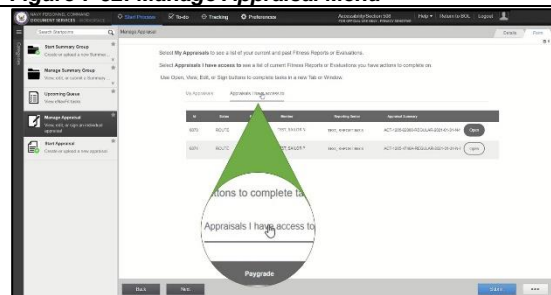
Figure 7-53: Appraisals I have Access to

Step 7.6.4:	**Select** the "*Open*" button next to a member's name from the summary group.
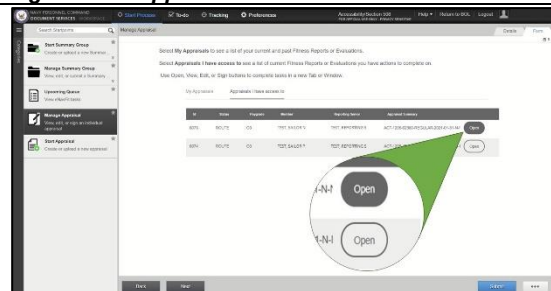
Figure 7-54: Opening Member Reports

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.	*Figure 7-55: Appraisal Menu Options*
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.	*Figure 7-56: Reviewer Comments Field*
Step 7.6.7:	**Select** the "Next Reviewer" button located on the <u>bottom</u> of the screen. The appraisal will automatically save when the "Next Reviewer" button is selected.	*Figure 7-57: Next Reviewer Button*
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.	
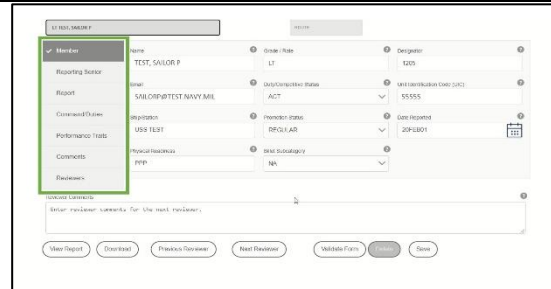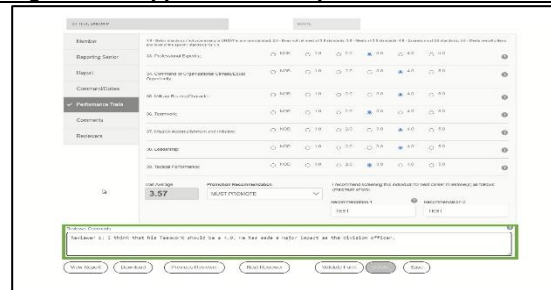
8 eNavFit Intermittent Operations

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)

Step 8.1.1.1:	Follow the steps in Section 3.1 for Accessing the Interface.
Step 8.1.1.2:	**Select** the "*Manage Summary Group*" tab from the menu options on the <u>left</u> side of the screen.
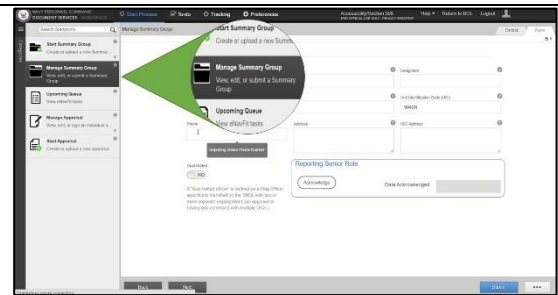
Figure 8-1: Manage Summary Group Tab

Step 8.1.1.3:	**Select** the "*Active*" Tab
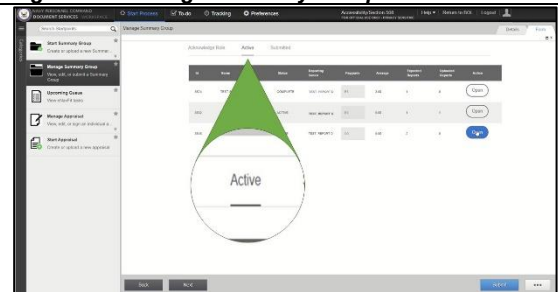
Figure 8-2: Manage Summary Group-Active Tab

Step 8.1.1.4:	**Select** the "*Open*" button next to the Summary Group to be downloaded.
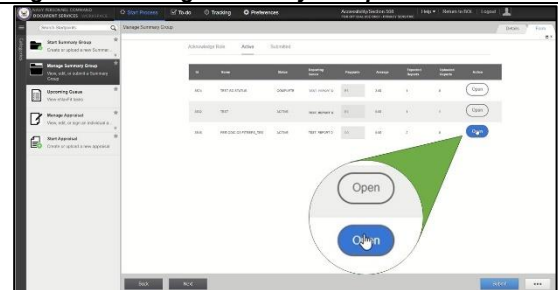
Figure 8-3: Manage Summary Group-Open Report

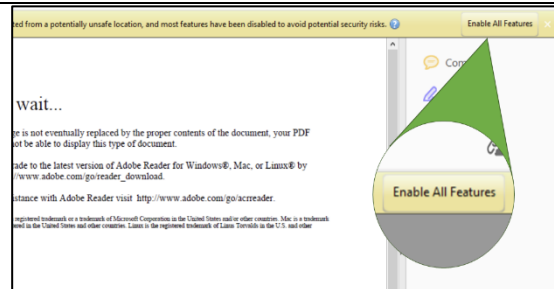| Step 8.1.1.5:	**Select** the "Download" button. Note A "Save-As" dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.	*Figure 8-4: Download Appraisal*
Step 8.1.1.6:	If the file does not automatically open, locate the file you saved in 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.	
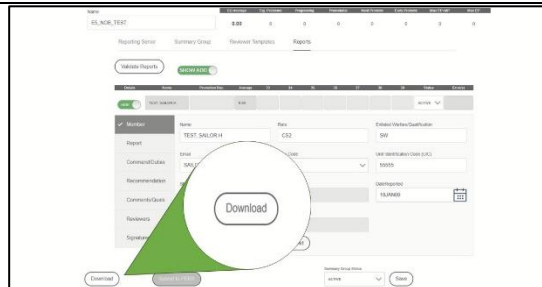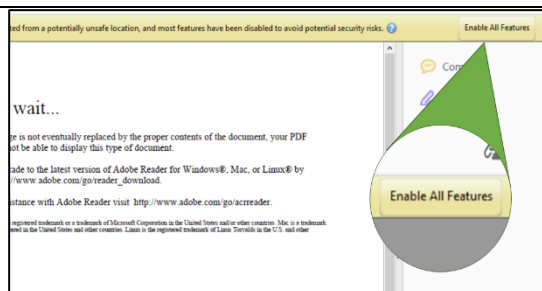
8.1.2 Upload Appraisal Manager (Intermittent Ops)

Note

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 <u>left</u> 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 <u>bottom, right</u> 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
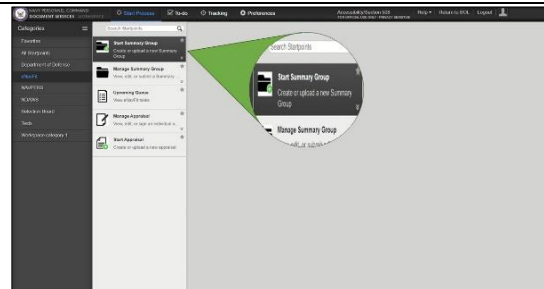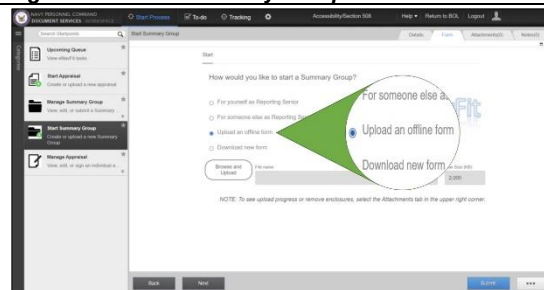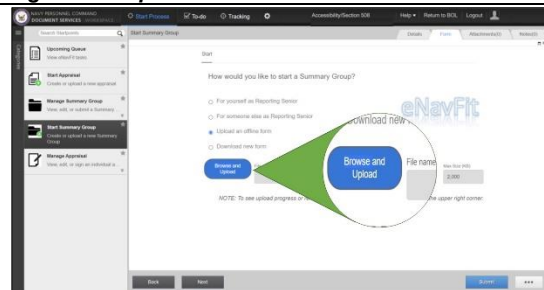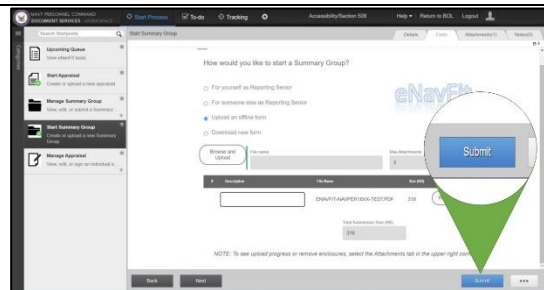
8.2 Download Appraisals (Intermittent Ops)

⚠️ **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

Step 8.2.1.1:	Follow the steps in Section 3.1 for Accessing the Interface.

Step 8.2.1.2:	**Select** the "Manage Appraisal" tab from the Startpoint options on the <u>left side</u> of the screen.
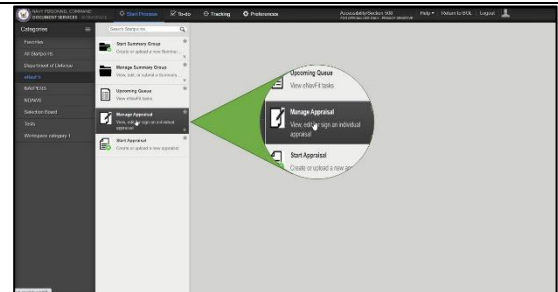
Figure 8-10: Manage Appraisal Menu

Step 8.2.1.3:	**Select** the "Edit" button next to the member's name in the "My Appraisal" tab.
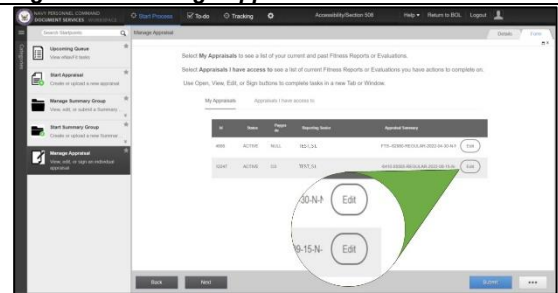
Figure 8-11: Manage Appraisal-Open Button

Step 8.2.1.4:	**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 8-12: 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. ![Note icon] 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 8.2.1.6:	**Select** "Enable All Features" if the option displays across the top in a yellow bar of the opened Adobe file.	 *Figure 8-13: Enable All Features*
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 <u>left</u> side of the screen.	 *Figure 8-14: Manage Summary Group Menu*
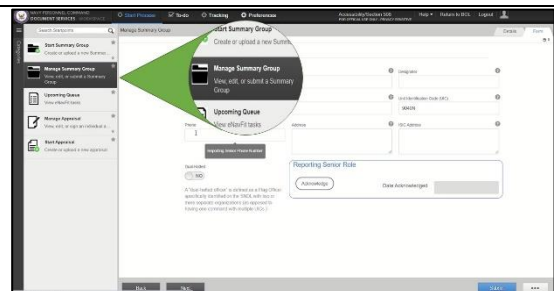
Step 8.2.2.3:	**Select** the "*Active*" Tab	 *Figure 8-15: Manage Summary Group – Active Tab*
Step 8.2.2.4:	**Select** the "*Open*" button next to the Summary Group that contains the appraisal to be downloaded.	 *Figure 8-16: Manage Summary Group-Open Report*
Step 8.2.2.5:	**Select** the "*Reports*" tab from the top menu.	 *Figure 8-17: Reports Tab*
Step 8.2.2.6:	**Select** the "*SHOW*" toggle next to the member that you are downloading the appraisal for.	 *Figure 8-18: Show/Hide Member Data*
Step 8.2.2.7:	**Select** the Download button that displays at the bottom of the member tab.	 *Figure 8-19: Download Button on Member Tab*
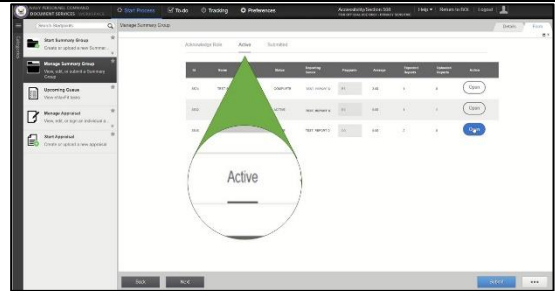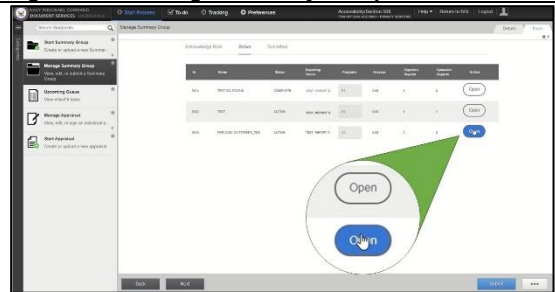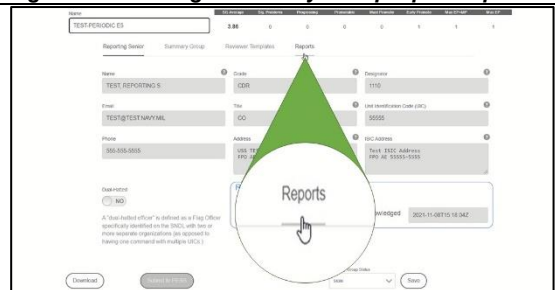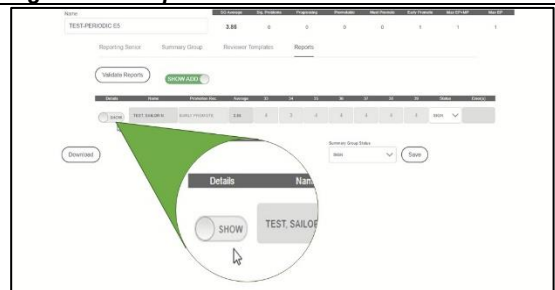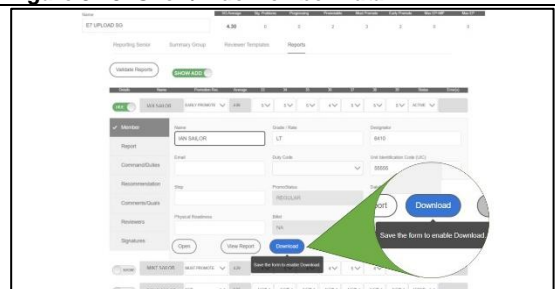
Step 8.2.2.8:	If the file does not automatically open, locate the file you saved in the previous step (8.2.2.3) and open it in Adobe Reader.
	Note
	Adobe .pdf files open based on user preferences. If you have set your internet browser to open .pdf files within them, you may experience rendering or Adobe 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.
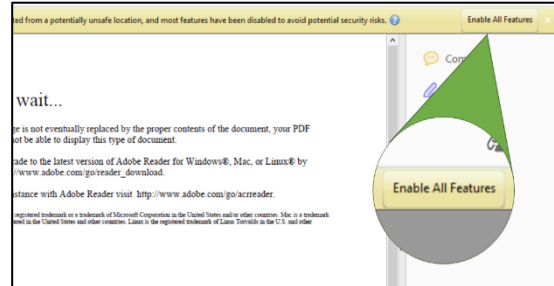
Figure 8-20: Enable All Features

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 <u>left</u> side of the screen.	*Figure 8-21: Start Appraisal Menu Main Menu Selection*
Step 8.4.3:	**Select** the radio button next to "*Upload Offline Form*".	*Figure 8-22: Upload Offline Forms*
Step 8.4.4:	**Select** the "Browse and Upload" button.	*Figure 8-23: 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 <u>bottom, right</u> 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 8-24: Submit Uploaded Documents*
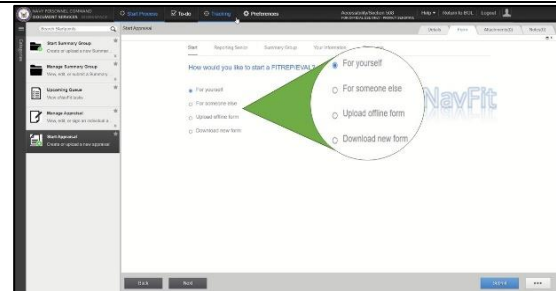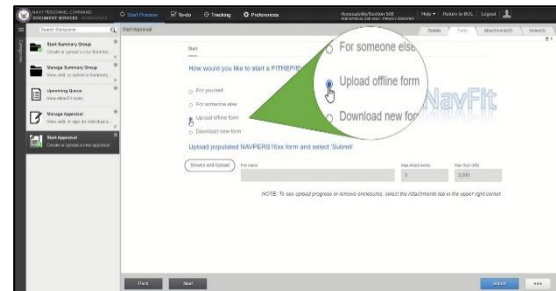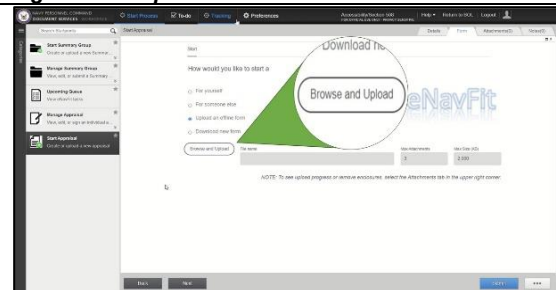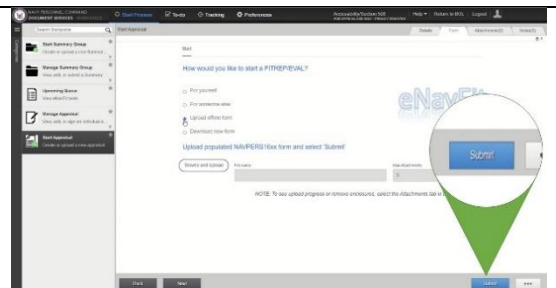
9 eNavFit Offline Operations

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

Step 9.1.1.1:	Follow the steps in Section 3.1 for Accessing the Interface.	
Step 9.1.1.2:	**Select** the "Start Summary Group" tab from the menu options on the left side of the screen.	Figure 9-1: Start Summary Group Menu
Step 9.1.1.3:	**Select** "Download New Form".	Figure 9-2: Download New Form Button
Step 9.1.1.4:	**Select** "For Yourself"	Figure 9-3: Download Selection Button
Step 9.1.1.5:	**Select** the Download tab	Figure 9-4: Download Tab
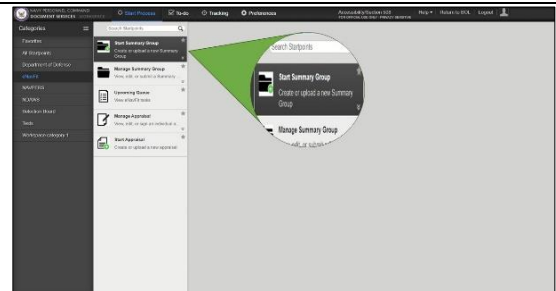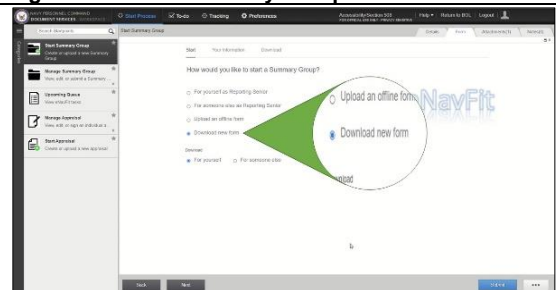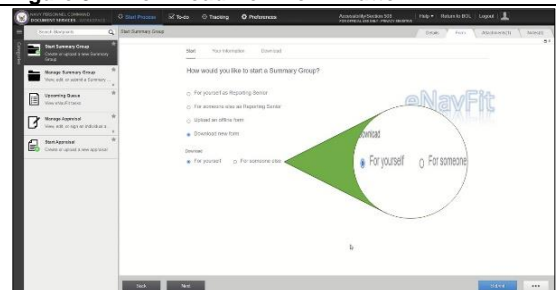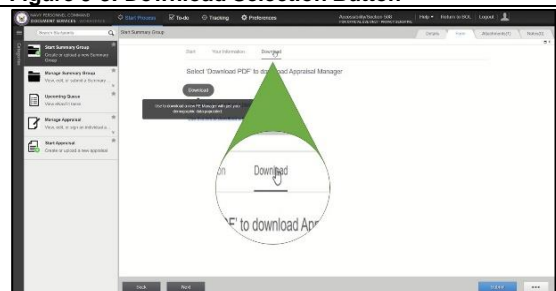
Step 9.1.1.6:	**Select** the download button Note A "Save As" dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.	 **Figure 9-5: Appraisal Manager – DL Pre-populated**
Step 9.1.1.7:	**Save** the Appraisal Manager to a desired location.	
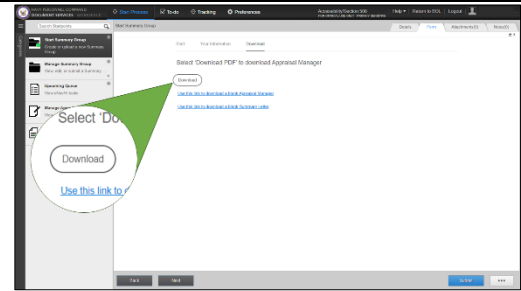
9.1.2 Download Pre-Populated Appraisal Manager as a Trusted Agent

Step 9.1.2.1:	Follow the steps in Section 3.1 for Accessing the Interface.	
Step 9.1.2.2:	**Select** the "Start Summary Group" tab from the menu options on the left side of the screen.	 **Figure 9-6: Start Summary Group Menu**
Step 9.1.2.3:	**Select** "Download New Form".	 **Figure 9-7: Download New Form Button**
Step 9.1.2.4:	**Select** "For Someone Else"	 **Figure 9-8: For Someone Else Button**
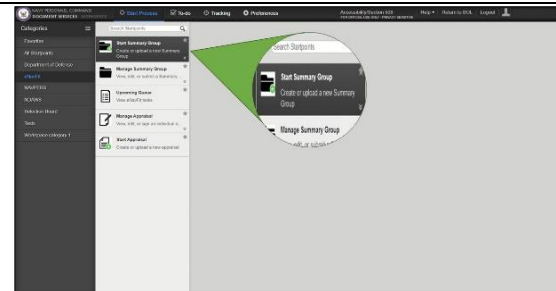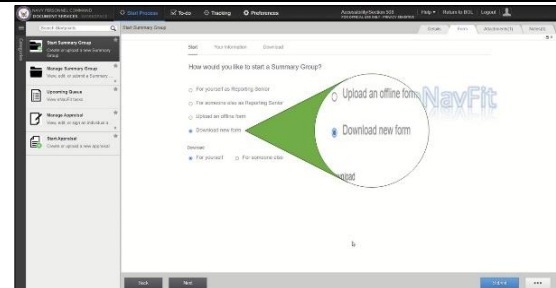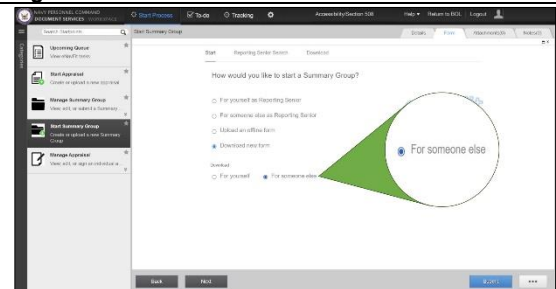
Step 9.1.2.5:	**Select** the Reporting Senior Search tab	 **Figure 9-9: Reporting Senior Search**
Step 9.1.2.6:	**Enter** the Reporting Senior's DODID or Email Address that you are the Trusted Agent for	 **Figure 9-10: Searching for a Reporting Senior**
Step 9.1.2.7:	**Select** the "Search" button	 **Figure 9-11: Search Button for a Reporting Senior**
Step 9.1.2.8:	**Select** the Download tab	 **Figure 9-12: Download Tab**
Step 9.1.2.9:	**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.	
Step 9.1.2.10:	**Save** the Appraisal Manager to a desired location.	
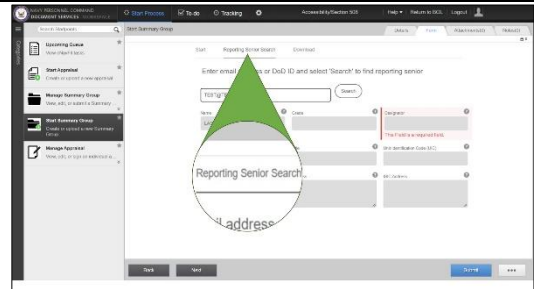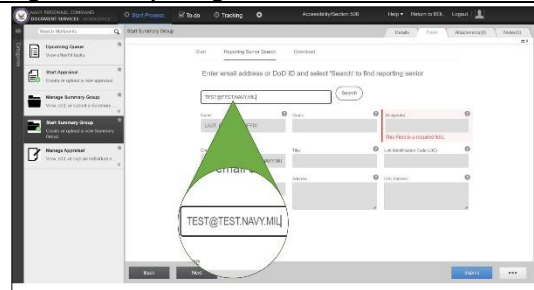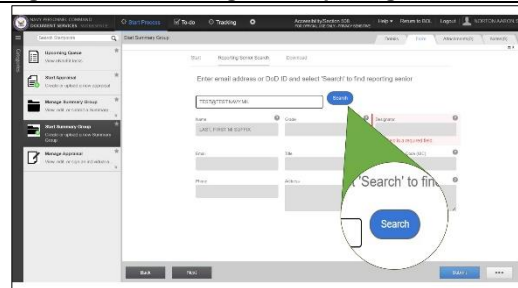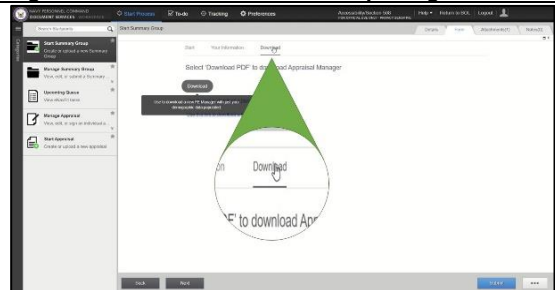
9.1.3 Download Blank Appraisal Manager as Reporting Senior/Trusted Agent (Offline Ops)

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.	**Figure 9-13: Start Summary Group Menu**
Step 9.1.3.3:	**Select** "Download New Form".	**Figure 9-14: Download New Form Button**
Step 9.1.3.4:	**Select** "For Yourself" or "For Someone Else".	**Figure 9-15: Download Selection Button**
Step 9.1.3.5:	**Select** the Download tab	**Figure 9-16: Download Tab**
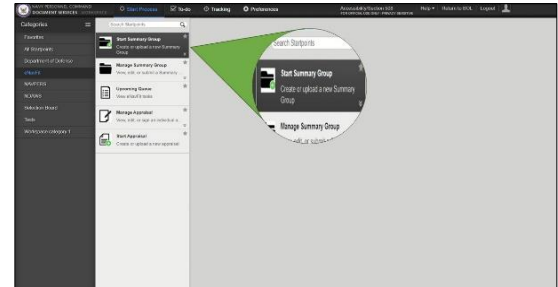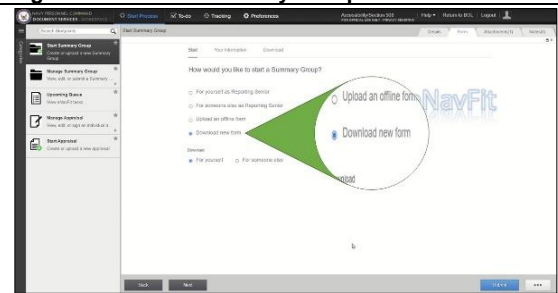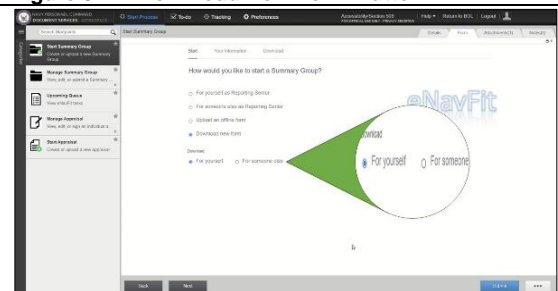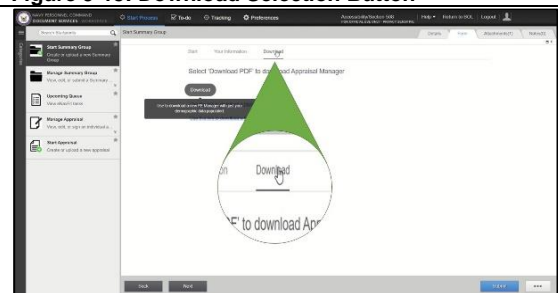
Step 9.1.3.6:	**Select** "Use this link to download a blank Appraisal Manager". ![Note] **Note** A "Save-As" dialogue box will open with a generated file name. Users may rename the file and select a location to save the file.	
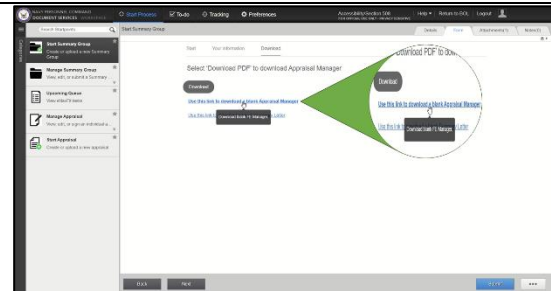
Figure 9-17: Browse and Upload Button

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] **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] **Note** Ranking board user defaults is not currently active and planned as part of a future iteration release.	
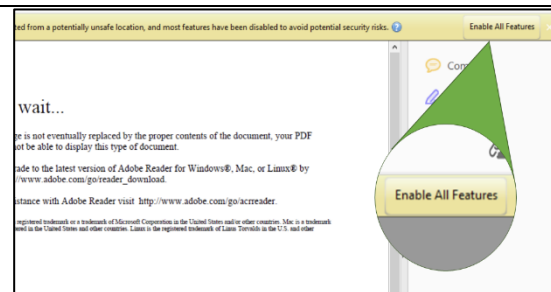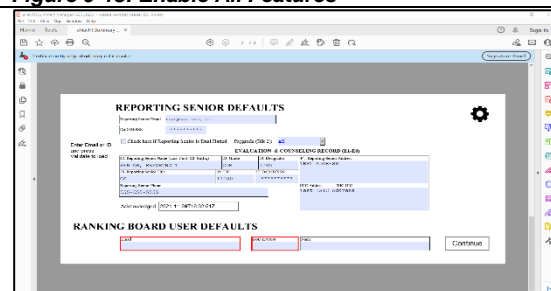
Step 9.1.4.5:	**Enter** the email address of the reporting senior into the "Reporting Senior Email" field.	*Figure 9-20: Reporting Senior Email*
Step 9.1.4.6:	**Enter** the Department of Defense Identification (DoDID) number of the reporting senior into the "Reporting Senior DoDID" field.	*Figure 9-21: Reporting Senior DoDID*
Step 9.1.4.7:	📋 Note 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, **Select** this radio button before proceeding.	*Figure 9-22: Reporting Senior Paygrade*
Step 9.1.4.8:	**Select** the paygrade from the "Summary Group Paygrade" drop-down menu. 📋 Note The paygrade selection will determine which documents are rendered (Enlisted, Chief, Officer) after the "Continue" button is selected.	*Figure 9-23: Reporting Senior Paygrade*
Step 9.1.4.9:	**Enter** the name of the reporting senior into the "Reporting Senior Name (Last, First MI)" field.	*Figure 9-24: Reporting Senior Name*
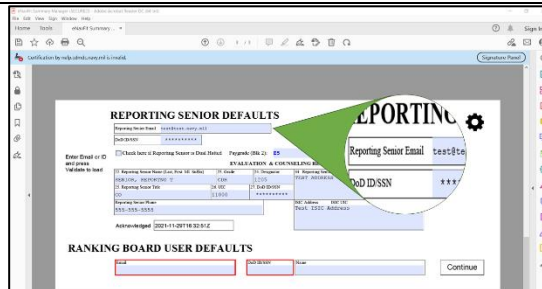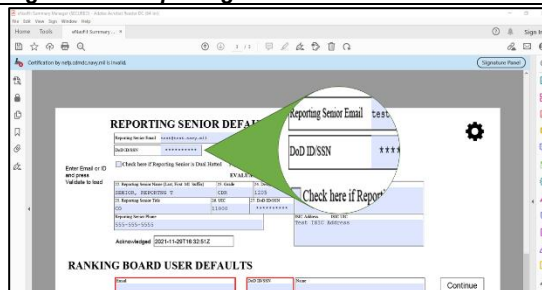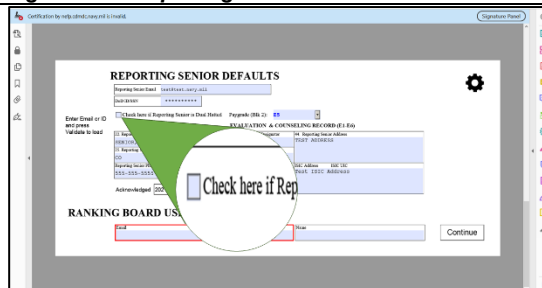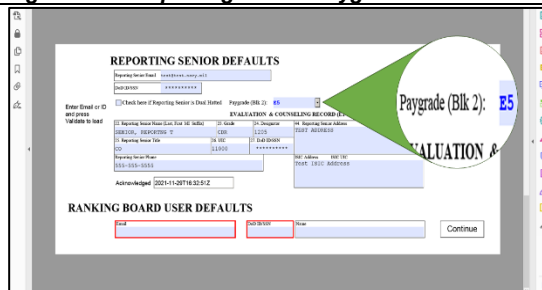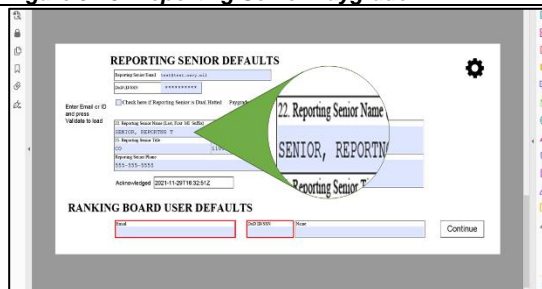
Step 9.1.4.10:	**Enter** the grade (CDR, COL, etc.) of the reporting senior into the "Reporting Senior Grade" field.	
		Figure 9-25: Reporting Senior Grade
Step 9.1.4.11:	**Enter** the designator of the reporting senior into the "Reporting Senior Designator" field.	
		Figure 9-26: Reporting Senior Designator
Step 9.1.4.12:	**Enter** the unit address of the reporting senior into the "Reporting Senior Address" field.	
		Figure 9-27: Reporting Senior Address
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.	
		Figure 9-28: Reporting Senior Title
Step 9.1.4.14:	**Enter** the Unit Identification Code (UIC) of the reporting senior into the "Reporting Senior UIC" field.	
		Figure 9-29:Reporting Senior UIC
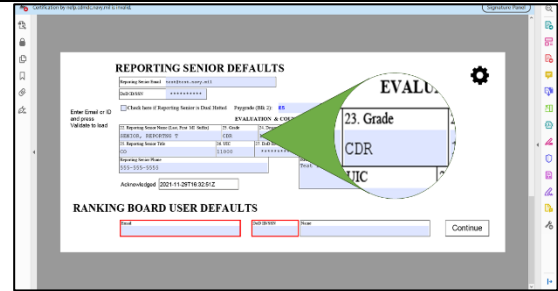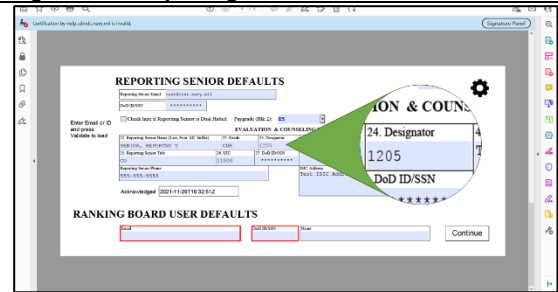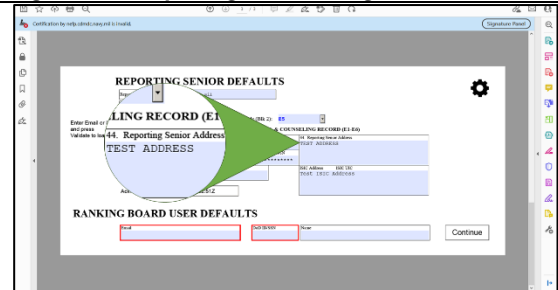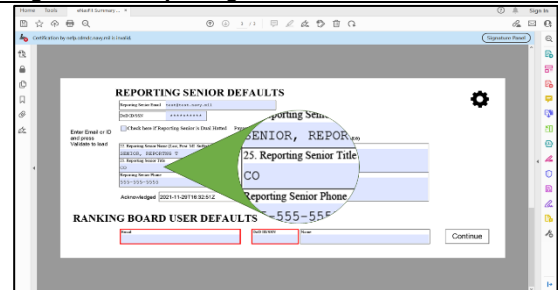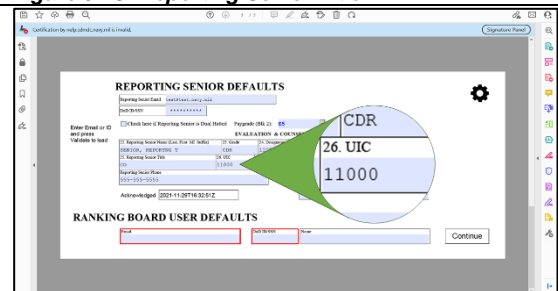
| Step 9.1.4.15: | ![Note] The DoDID of the reporting senior that was previously entered will auto-populate within this field. No action is necessary. |
Figure 9-30: Reporting Senior DODID |
| Step 9.1.4.16: | **Enter** the Immediate Superior in Command (ISIC) address of the reporting senior into the "ISIC Address" field. |
Figure 9-31: ISIC Address |
| Step 9.1.4.17: | ![Note] This field will be populated if the user has followed the steps in Section 9.1.1 to download a pre-populated appraisal manager. |
Figure 9-32: User Role Acknowledge (RS) |
| Step 9.1.4.18 | **Select** the "Continue" button when all fields have been completed.
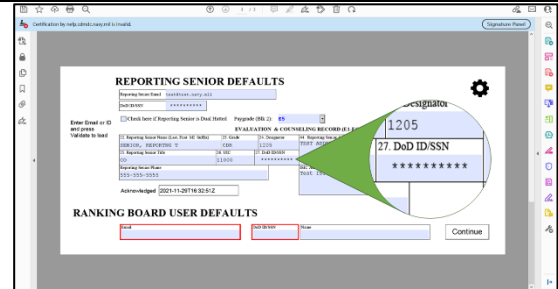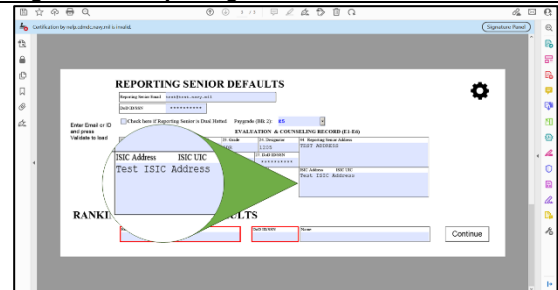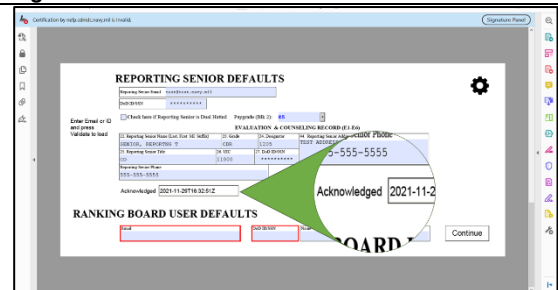
![Note] The "Continue" button MUST be used to open the correct report type. If the PDF form arrow keys are used, the form will only open page one of an appraisal. |
Figure 9-33: Reporting Senior Information Continue |
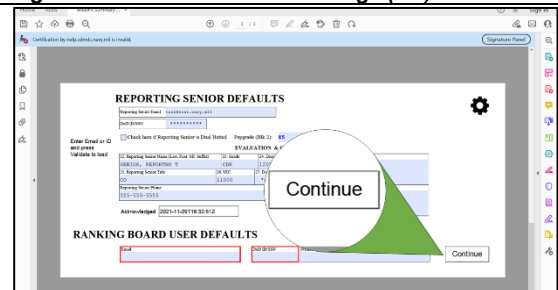
9.1.5 Name the Summary Group and Create Reviewer Templates in Offline Appraisal Manager

Step 9.1.5.1:	**Type** a Summary Group Name into the "Name" block to the right of the view/edit folder button.	 *Figure 9-34: Summary Group Title Offline*
Step 9.1.5.2:	The status will display "Active".	 *Figure 9-35: Summary Group Status Offline*
Step 9.1.5.3:	**Select** the "Templates" icon.	 *Figure 9-36: Reviewer Templates Offline*
Step 9.1.5.3:	**Type** the name of the Reviewer Template in the pop-up window.	 *Figure 9-37: Reviewer Template Line Offline*
Step 9.1.5.4:	**Select** the "Add Reviewer" button.	 *Figure 9-38: Reviewer Template Name Offline*
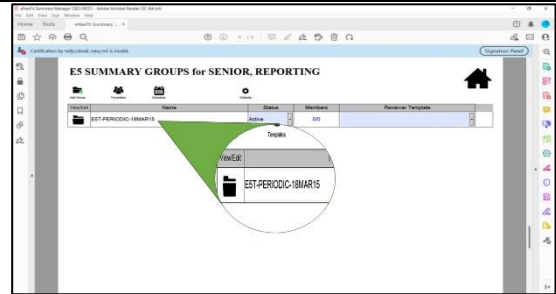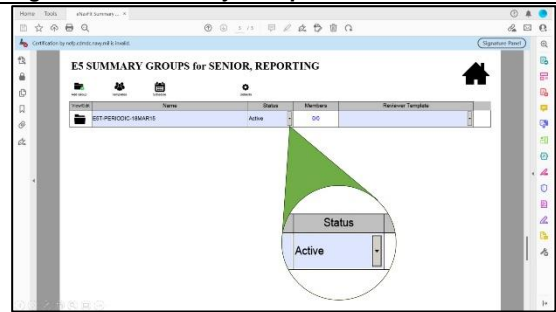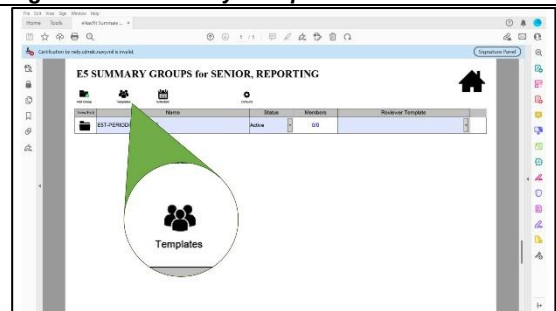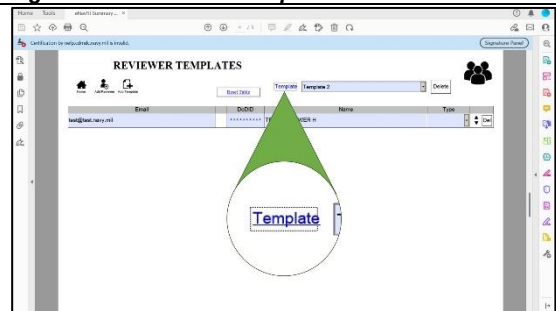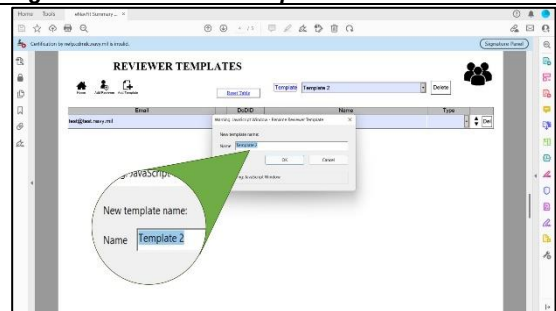
Step 9.1.5.5:	**Complete** the information for the first reviewer:
	   a. Reviewer Email
	   b. Reviewer DODID
	   c. Reviewer Name
	
	📋 Note
	
	Manual entry is only required if using the form completely offline.
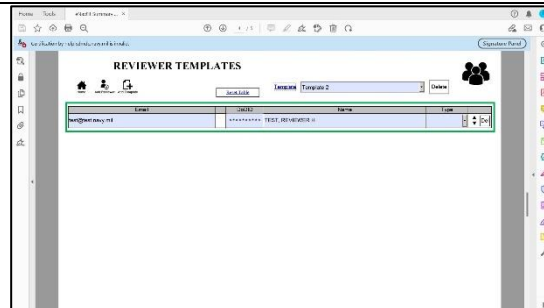		
		Figure 9-39: Add Reviewer Information Offline

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*
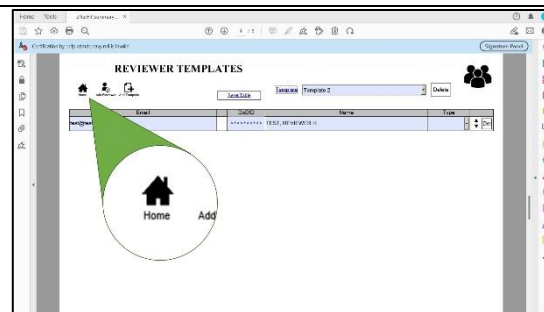
9.1.6 Complete Summary Group Information in Offline Appraisal Manager

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*
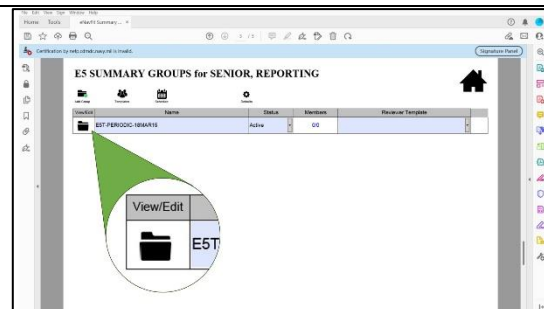
Step 9.1.6.2:	**Complete** Summary Group information:
	   a. NOB Flag
	   b. UIC (BLK 6)
	   c. Designator for the Summary Group (Officers only)
	   d. Duty/Competitive Status
	   e. Promotion Status (BLK 8)
	   f. End Date (BLK 15)
	   g. Report Type (BLK 17-19)
	   h. Billet Subcategory (BLK 21)
	   i. Enter Command Employment and Command Achievements (BLK 28)
	
	📋 Note
	
	Select schedule to open the submission schedule if end date is not known.
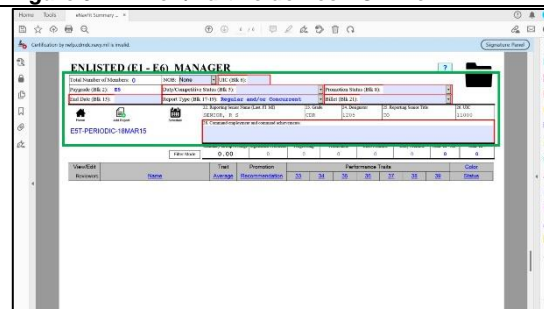		
		Figure 9-42: Summary Group Information Entry Offline

9.1.7   Add Members in Offline Appraisal Manager

Step 9.1.7.1:	**Select** "Add Report"	*Figure 9-43: Add Report Offline*
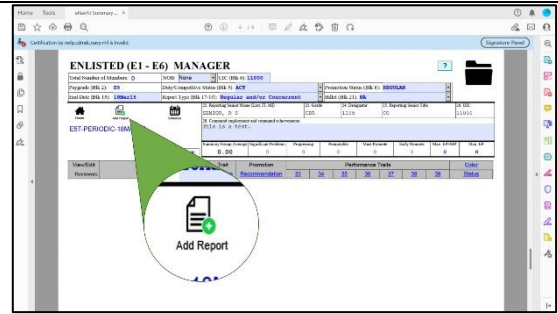
Step 9.1.7.2:	**Type** the information in the "Add Report" pop-up dialogue box.
	    a. Member DODID
	    b. Member Name
	    c. Member Email
	    d. Member UIC
	    e. Member Grade/Rate
	    f. Member Designator
		Figure 9-44: Add Report Dialogue Box
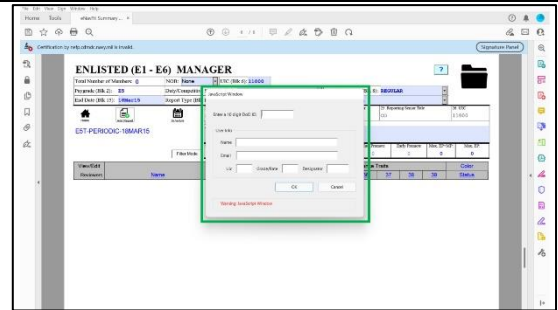
Step 9.1.7.3:	Select Ok to add the member to the summary group.	*Figure 9-45: Add Member OK Button*
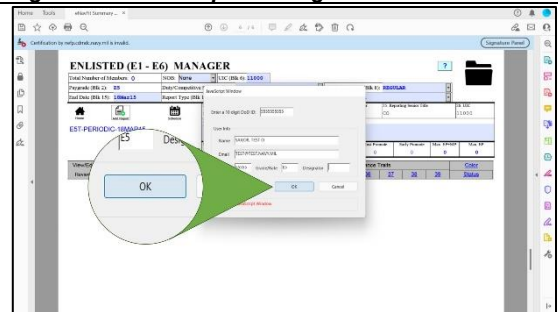
9.1.8   Provide Member Information in Offline Appraisal Manager

Step 9.1.8.1:	Select View/Edit Reviewers Icon to the left of the member's name	*Figure 9-46: View/Edit Button Offline*
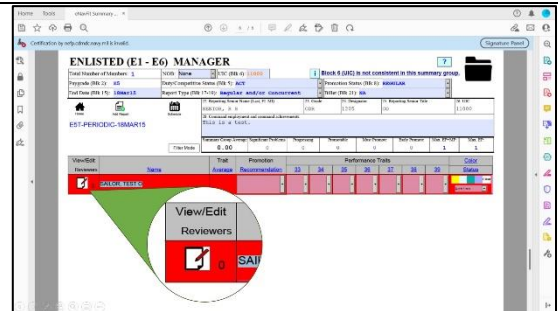
Step 9.1.8.2:	**Type** the member appraisal information into the form.	
	Note	
	The appraisal form displayed in the *Appraisal Manager* is an abridged version of the NAVPERS 16XX form.	
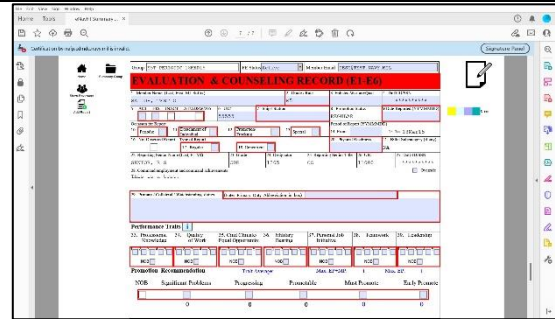
Figure 9-47: Appraisal Manager Member Input Form

| Step 9.1.8.3: | **Select** the Summary Group Icon to return to the member listing. | |
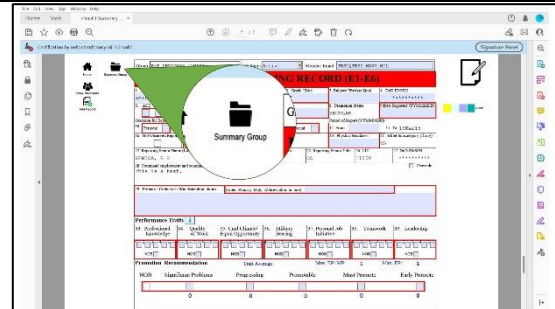
Figure 9-48: Return to Summary Group Offline

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. | |
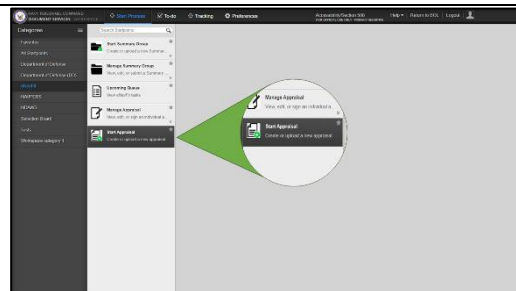
Figure 9-49: Appraisal – DL Pre-Populated Form

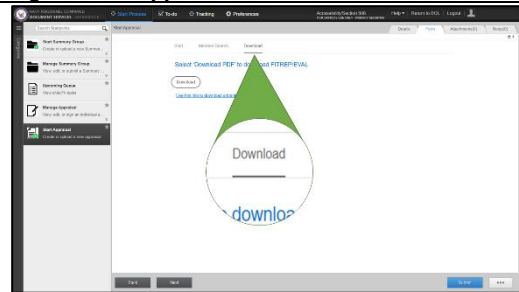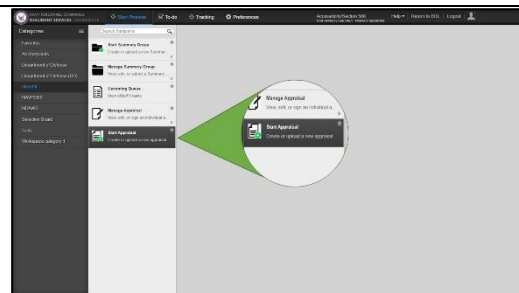| Step 9.2.1.3:	**Select** "Download New Form".	 *Figure 9-50: Appraisal – DL New Form*
Step 9.2.1.4:	**Select** "For Yourself"	 *Figure 9-51: Appraisal – DL For Yourself*
Step 9.2.1.5:	**Select** the Download tab	 *Figure 9-52: Appraisal – DL Tab*
Step 9.2.1.6:	**Select** the download button Note A "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.	
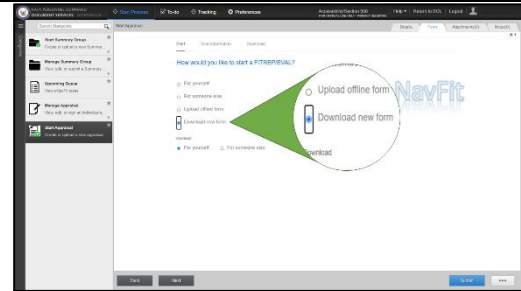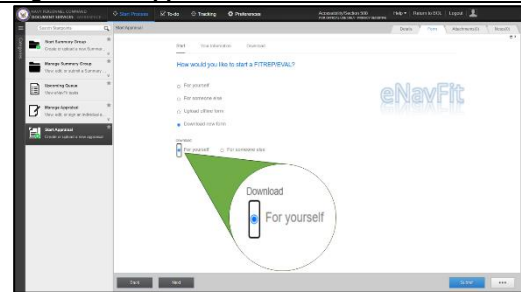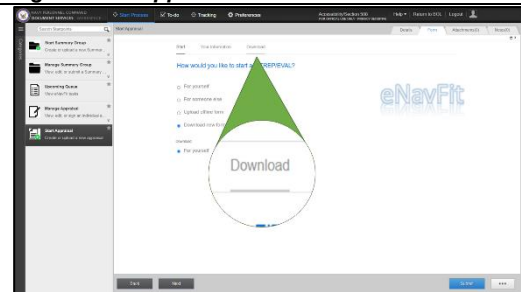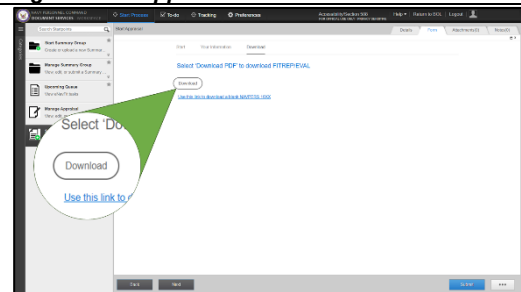
9.2.2 Download Pre-Populated Appraisal Form for Someone Else (Offline Ops)

Step 9.2.2.1:	Follow the steps in Section 3.1 for Accessing the Interface.

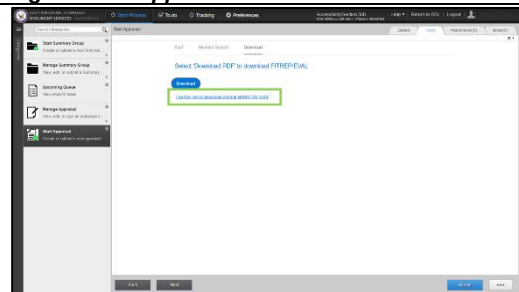|		
Step 9.2.2.2:	**Select** the "*Start Appraisal"* tab from the menu options on the <u>left</u> side of the screen.	 *Figure 9-54: Appraisal – Start Appraisal Menu Tab*
Step 9.2.2.3:	**Select** "Download New Form".	 *Figure 9-55: Appraisal –DL New Form*
Step 9.2.2.4:	**Select** "For Someone Else"	 *Figure 9-56: Appraisal –Someone Else Button*
Step 9.2.2.5:	**Select** the Member Search tab	 *Figure 9-57: Appraisal –Member Search Tab*
Step 9.2.2.6:	**Enter** the Member DODID or Email Address	 *Figure 9-58: Appraisal –Member DODID*
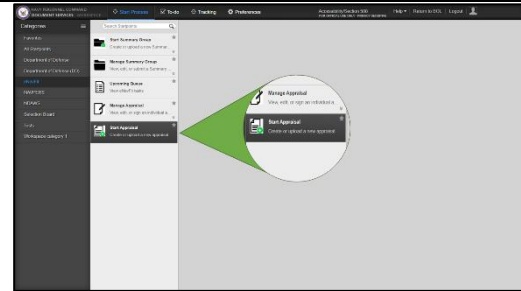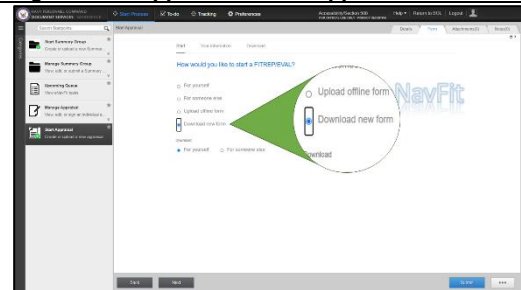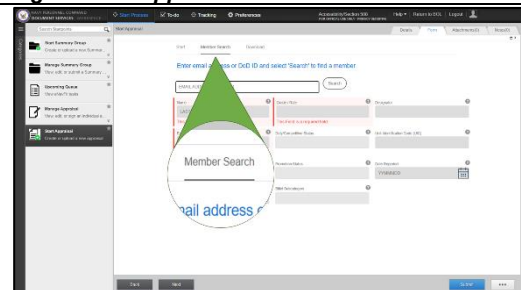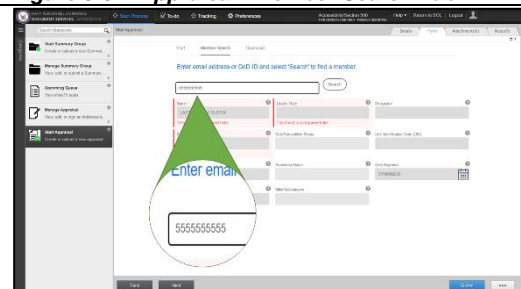
Step 9.2.2.7:	**Select** the "Search" button	 *Figure 9-59: Appraisal – Search Button*
Step 9.2.2.8:	**Select** the Download tab	 *Figure 9-60: Appraisal – Download Tab*
Step 9.2.2.9:	**Select** the download button ⚠️ Note A "Save As" dialogue box will open with a generated file name. Users may rename 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.	
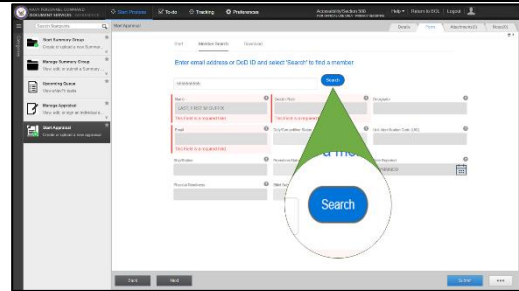
9.2.3 Downloading Blank Appraisal Form (Offline Ops)

⚠️ Note

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 |

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Step 9.2.3.3:	**Select** "Download New Form".	*Figure 9-63: Appraisal – DL New Form*
Step 9.1.3.4:	**Select** "For Yourself" or "For Someone Else".	*Figure 9-64: Appraisal – Select Who Report is for*
Step 9.1.3.5:	**Select** the Download tab	*Figure 9-65: Appraisal – Download Tab*
Step 9.1.3.6:	**Select** "Use this link to download a blank NAVPERS16XX". ![Note] **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 9-66: Appraisal – Blank 16XX Form*
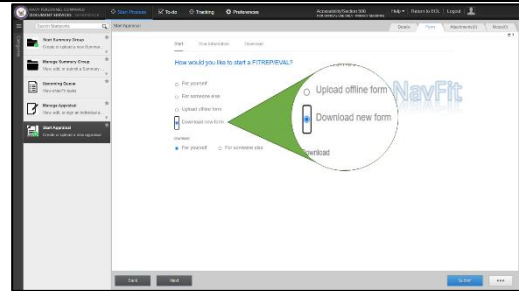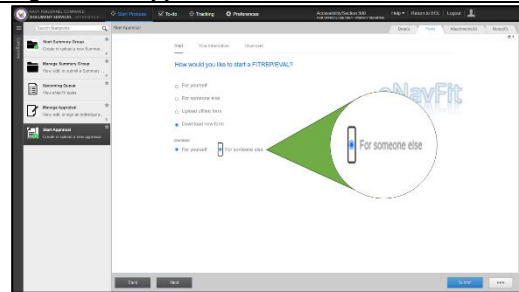
9.3 Route Appraisals (Offline Ops)

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 <u>left</u> side of the screen.	 *Figure 10-1: Manage Summary Group Menu*
Step 10.1.1.3:	**Select** the "*Active*" Tab	 *Figure 10-2: Manage Summary Group-Active Tab*
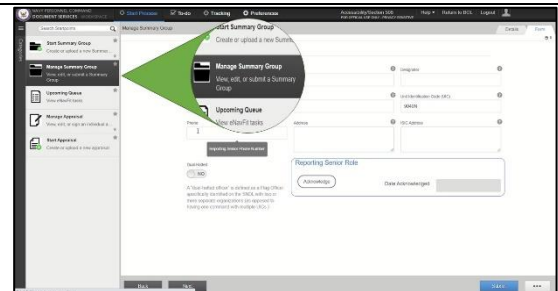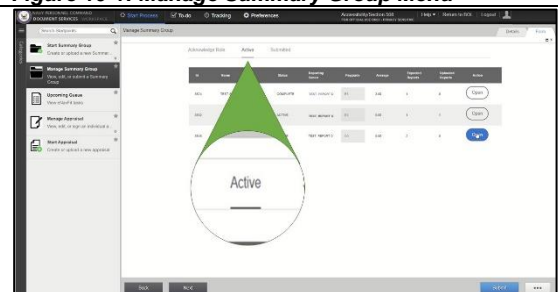
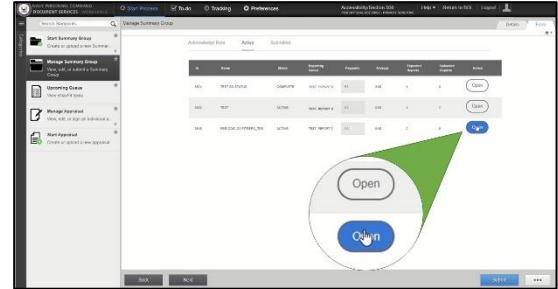| Step 10.1.1.4: | **Select** the "*Open*" button next to the Summary Group to be signed. |
Figure 10-3: Manage Summary Group-Open Report |
| Step 10.1.1.5: | **Select** "Sign" in the "Status" drop-down menu at the bottom of the screen next to the "Save" button. |
Figure 10-4: Status Change – Sign Status |
| Step 10.1.1.6: | **Select** the "OK" button on the dialogue box that appears. The appraisal will automatically save.
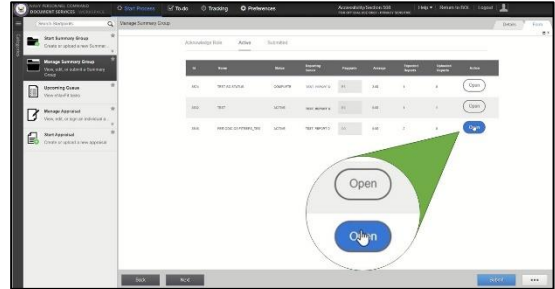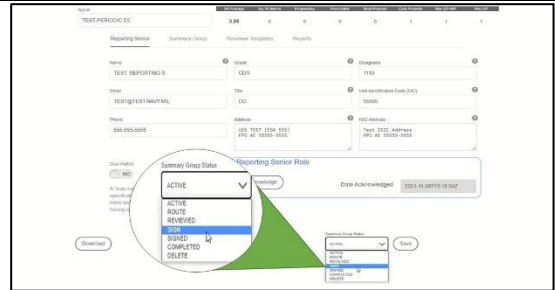
📋 Note

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". |
Figure 10-5: Status Change Acknowledgement |
| Step 10.1.1.7: | **Enter** eNavFit as the Reporting Senior (if status was changed by the Trusted Agent).
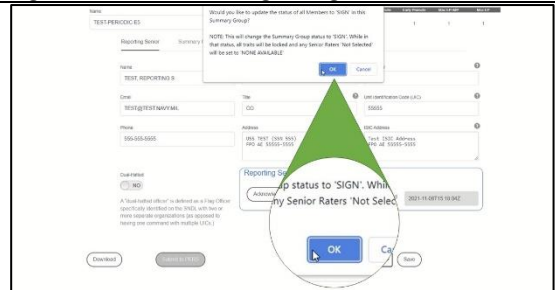
📋 Note

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. |
Figure 10-6: Manage Summary Group Menu |
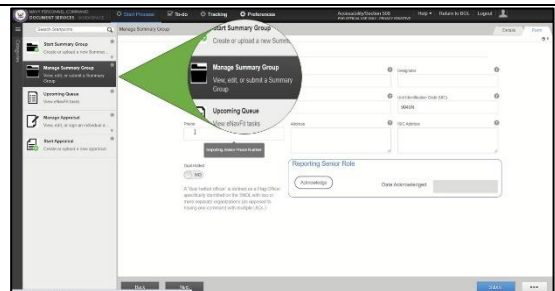
Step 10.11.9:	**Select** the "*Active*" Tab	*Figure 10-7: Manage Summary Group – Active Tab*
Step 10.1.1.10:	**Select** the "*Open*" button next to the Summary Group to be signed.	*Figure 10-8: Manage Summary Group-Open Report*
Step 10.1.1.11:	**Select** the "*Reports*" tab from the top menu.	*Figure 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*
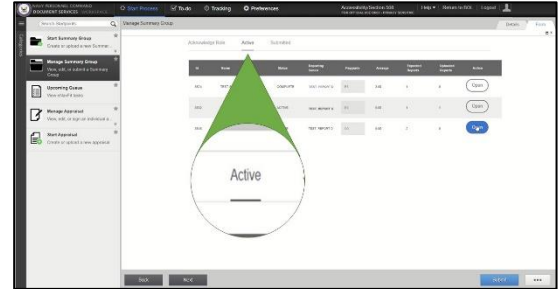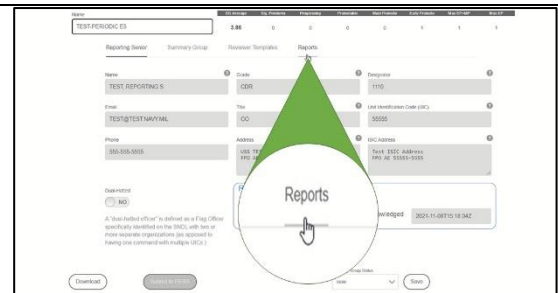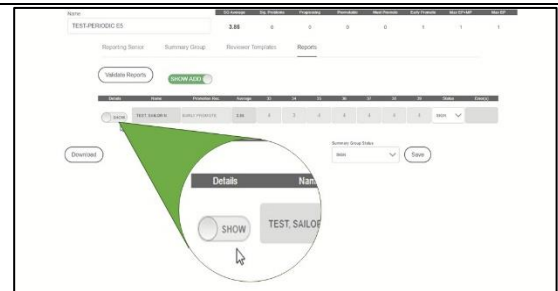
Step 10.1.1.14:	**Select** the "Signatures" tab in the newly opened browser window *"Appraisal Task"*. 📋 **Note** Appraisals cannot be signed from a Summary Group menu by a reporting senior. All reports must be individually signed by the Reporting Senior.	 *Figure 10-12: Appraisal-Signatures Tab*
Step 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.	
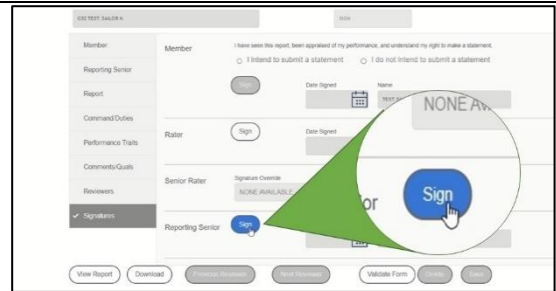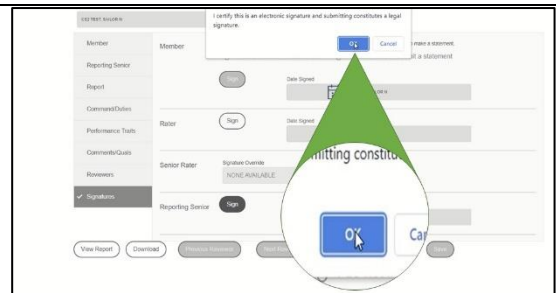
10.1.2 Applying Electronic Signatures as the Member/Reviewers

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*
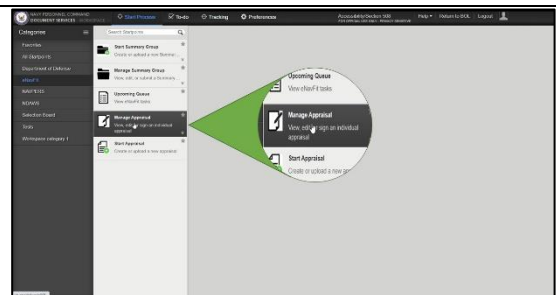
Step 10.1.2.3:	**Select** "Sign" button next to your Appraisal from the *My Appraisals* tab.

> **Note**
>
> Verify that the appraisal is in a "Sign" Status and that the button states "Sign" prior to selecting.
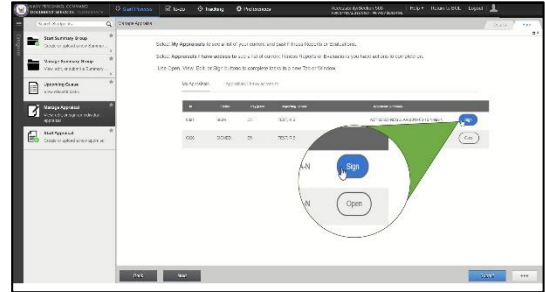
Figure 10-16: Manage Appraisals-Sign Button

Step 10.1.2.4:	**Select** the "Signatures" tab on the <u>right</u> 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."

> **Note**
>
> When "OK" is selected, the system automatically saves.
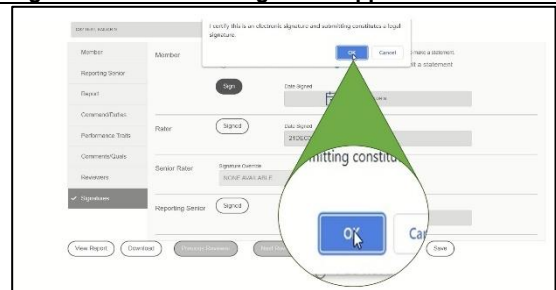
Figure 10-20: Member Signature Acknowledgement

Step 10.1.2.8:	**Select** the "View Report" button located on the <u>bottom left</u> 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.
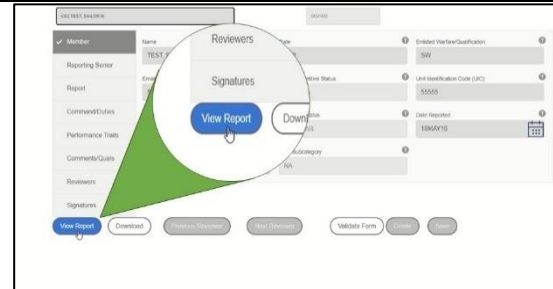
Figure 10-21: View Report Button

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 <u>left</u> 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*
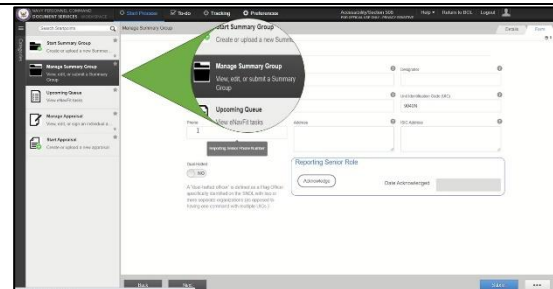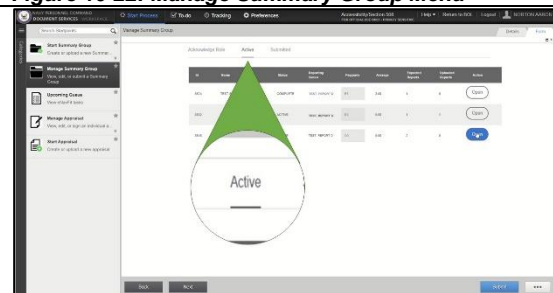
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Step 10.1.3.5:	**Select** the "*Open*" button next to the Summary Group to be signed.	 *Figure 10-24: Manage Summary Group-Open Button*
Step 10.1.3.6:	**Select** the "*Reports*" tab from the <u>top</u> menu.	 *Figure 10-25: Reports Tab*
Step 10.1.3.7:	**Select** the "*SHOW*" toggle next to the first member listed if <u>*not*</u> currently in expanded view.	 *Figure 10-26: Show/Hide Member Data*
Step 10.1.3.8:	**Select** the "Signatures" tab in the newly opened browser window *"Appraisal Task"*.	 *Figure 10-27: Signatures Tab*
Step 10.1.3.9:	**Select** the "ALT SIG" toggle switch to the <u>left</u> of the User Role where an alternate signature will be applied. 📋 Note An alternate signature cannot be applied to the Reporting Senior field.	 *Figure 10-28: Alternate Signature Override*
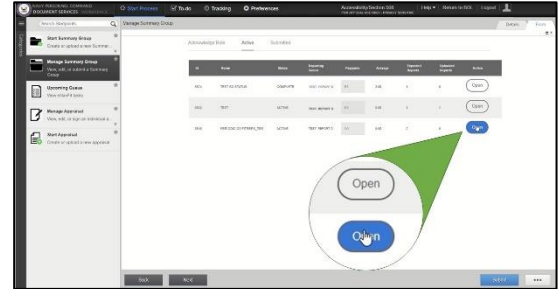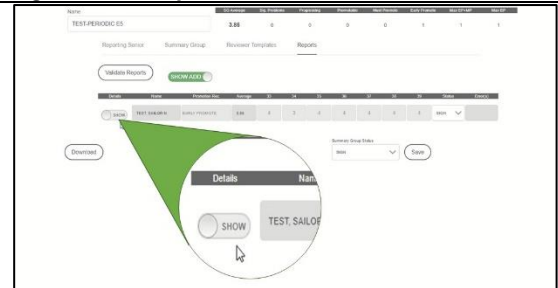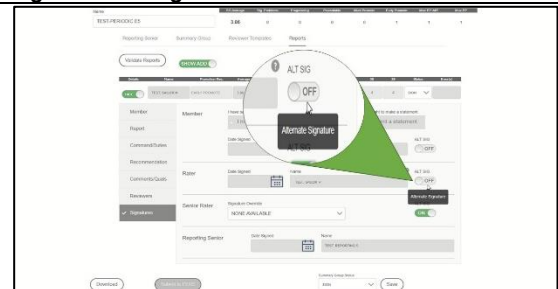
Step 10.1.3.10:	**Select** the alternate signature reason from the drop-down menu that most fits the circumstance.	
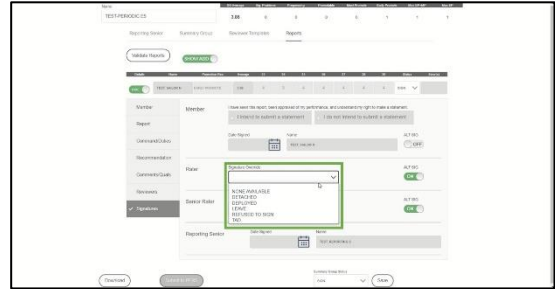
Figure 10-29: Alternate Signature Application Reasons

Step 10.1.3.11:	**Select** the "Save" button on the <u>bottom right</u> of the screen.	
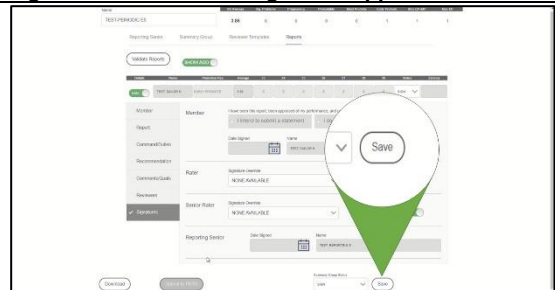
Figure 10-30: Save Button

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 <u>left</u> side of the screen.	
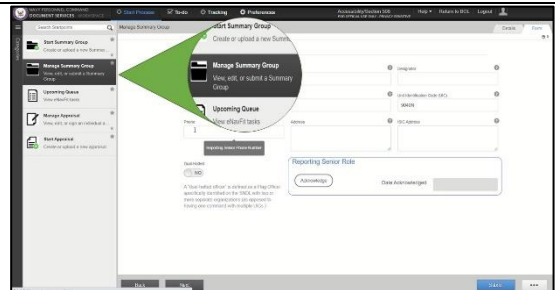
Figure 10-31: Manage Summary Group Tab
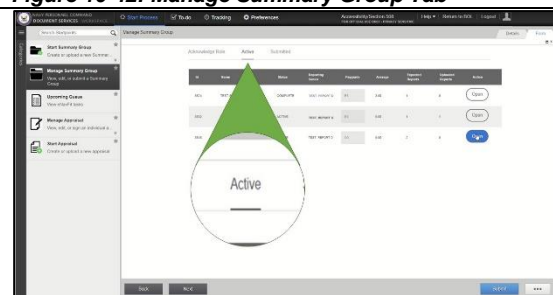
Step 10.2.3	**Select** the "*Active*" Tab	
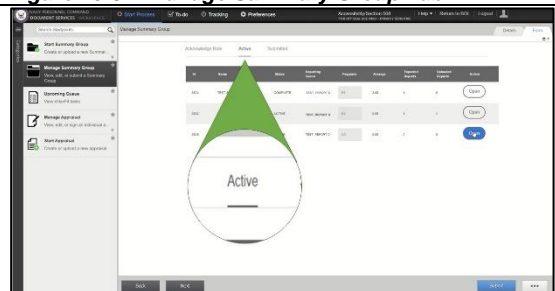
Figure 10-32: Manage Summary Group-Active Tab

| Step 10.2.4	**Select** the "*Open*" button next to the Summary Group to be downloaded.	
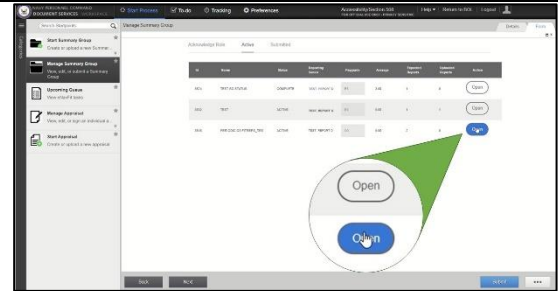
Figure 10-33: Manage Summary Group-Open Report

Step 10.2.5	**Select** the "*Reports*" tab.	
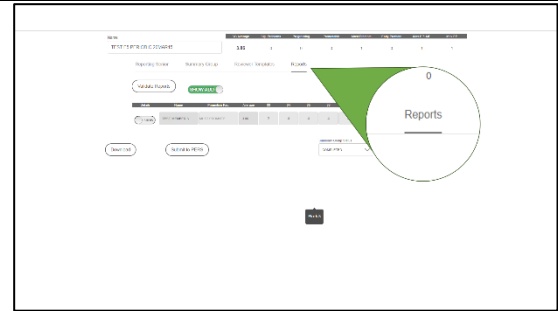
Figure 10-34: Manage Summary Group Reports Tab

Step 10.2.6	**Select** the "*Show*" toggle next to the members name to be displayed.	
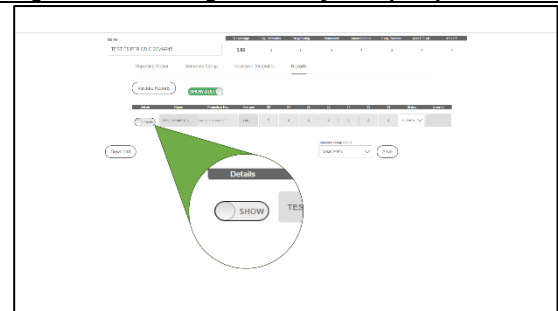
Figure 10-35: Manage Summary Group Show/Hide

Step 10.2.7	**Select** the "*Member*" tab from the left column.	
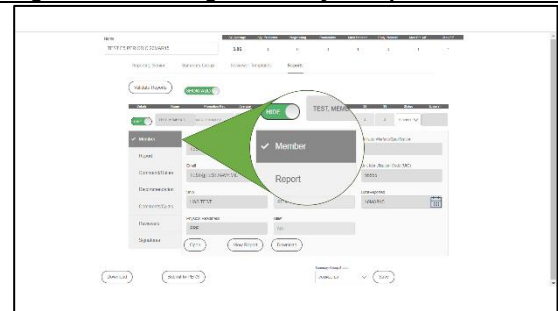
Figure 10-36: Manage Summary Group-Member Tab

| Step 10.2.8	**Select** the "Download" button in the middle of the display. **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.	
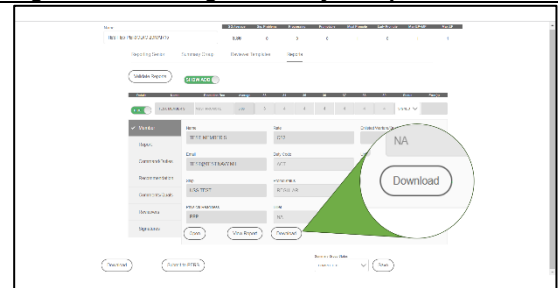
Figure 10-37: Download Appraisal

|		
Step 10.2.9	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 icon] **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 10.2.10	**Select** "Enable All Features" if the option displays across the top in a yellow bar of the opened Adobe file.	*Figure 10-38: Enable All Features*
Step 10.2.11	**Proceed** to page 2 of the appraisal.	*Figure 10-39: Page 2 of 16XX Report*
Step 10.2.12	**Select** the field for the signature to be applied. ![Note icon] **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 10-40: Signatory Fields on 16XX*
Step 10.2.13	**Select** "Yes" to acknowledge that you are authorized to sign and understand that a digital signature is being applied using your credentials. ![Note icon] **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 10-41: Signatory Acknowledgement*
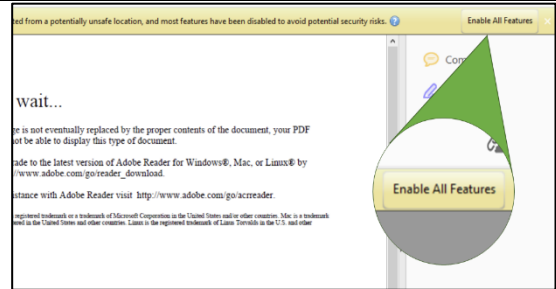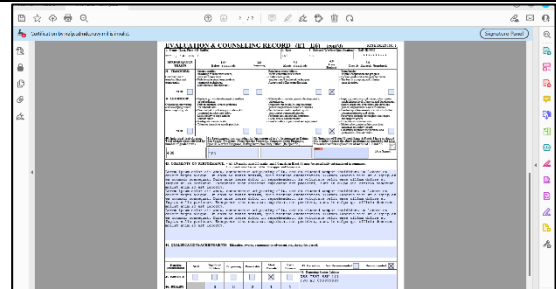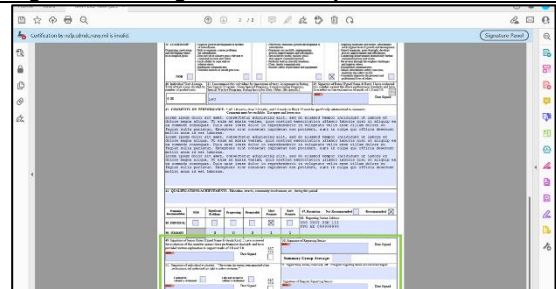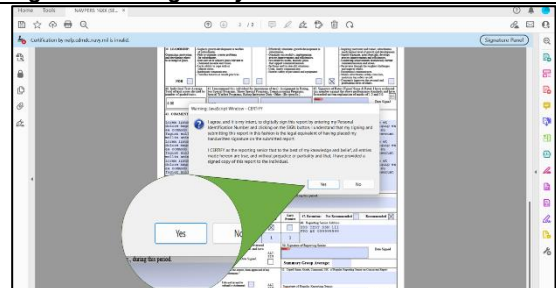
Step 10.2.14	**Select** the signature credentials to be applied.	
Step 10.2.15	**Repeat** the signature application process until all signatures are applied. 📋 **Note** The Mid-Term Counseling field signature is not required for online submissions. The signature of the Reporting senior (Blocks 45 or 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.

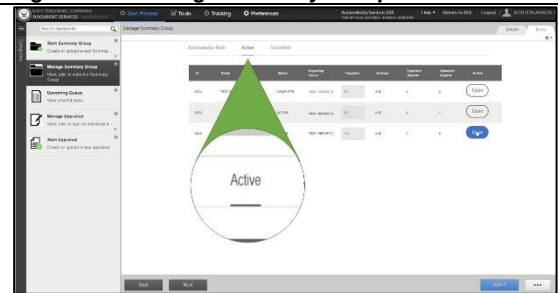| Step 10.3.1:	Follow the steps in Section 3.1 for Accessing the Interface.	
Step 10.3.2	**Select** the "*Manage Summary Group*" tab from the menu options on the <u>left</u> side of the screen.	*Figure 10-42: Manage Summary Group Tab*
Step 10.3.3	**Select** the "*Active*" Tab	*Figure 10-43: Manage Summary Group-Active Tab*
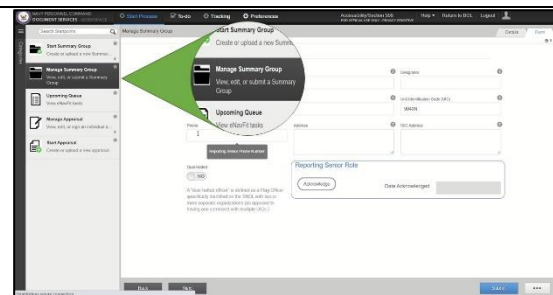
Step 10.3.4	**Select** the "*Open*" button next to the Summary Group to be downloaded.
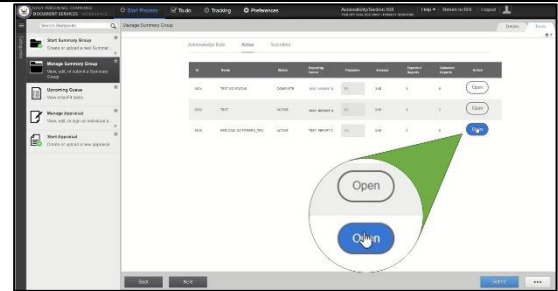
Figure 10-44: Manage Summary Group-Open Report

Step 10.3.5	**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.
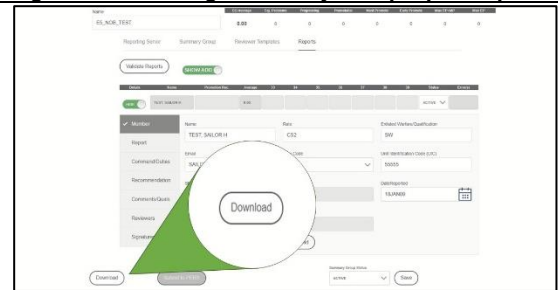
Figure 10-45: Download Appraisal

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.

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 10.3.7	**Select** "Enable All Features" if the option displays across the top in a yellow bar of the opened Adobe file.
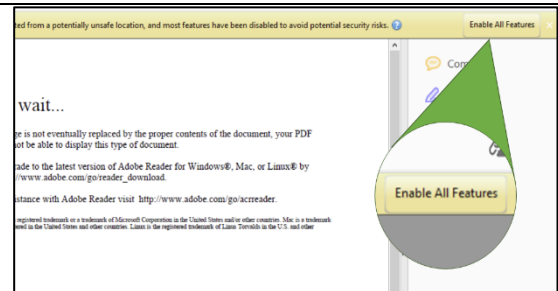
Figure 10-46: Enable All Features

Step 10.3.8	**Proceed** to page 2 of the appraisal.
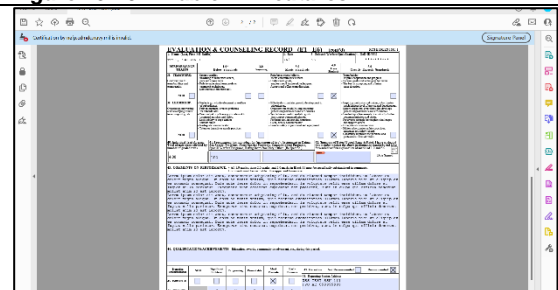
Figure 10-47: Page 2 of the Appraisal Form

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.
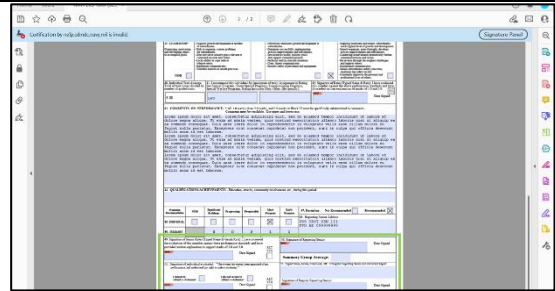
Figure 10-48: Appraisal Signature Fields

Step 10.3.10	**Select** the signature credentials to be applied.

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.
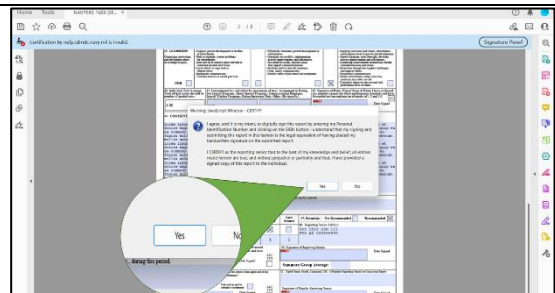
Figure 10-49: Signature Acknowledgement

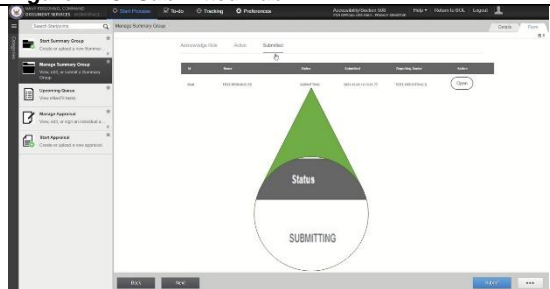| Step 10.3.12 | **Repeat** the signature application process until all signatures are applied and then print and prepare for mailing. |
| | **Note** |
| | The Mid-Term Counseling signature field is not required for online submissions. The signature of the Reporting senior (Blocks 45 or 50) and the Individual 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.

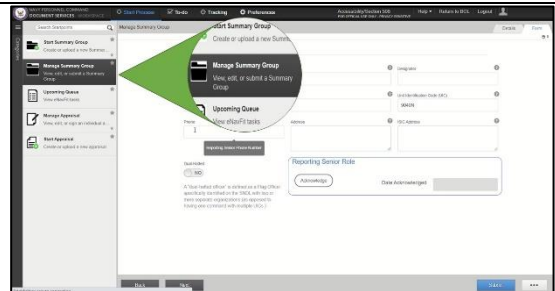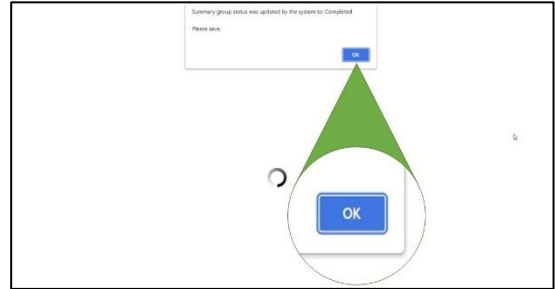|	
Step 11.1.1:	Follow the steps in Section 3.1 for Accessing the Interface.
Step 11.1.2:	**Select** the "*Manage Summary Group*" tab from the menu options on the <u>left</u> side of the screen. *Figure 11-1: Manage Summary Group Menu*
Step 11.1.3:	**Select** the "Active" Tab *Figure 11-2: Active Tab*
Step 11.1.4:	**Select** the "*Open*" button next to the Summary Group to be submitted. *Figure 11-3: Manage Summary Group-Open*
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. *Figure 11-4: Completed Button Acknowledgement*
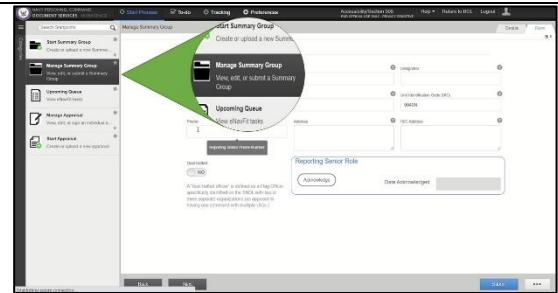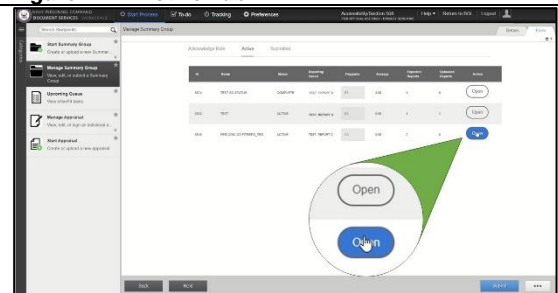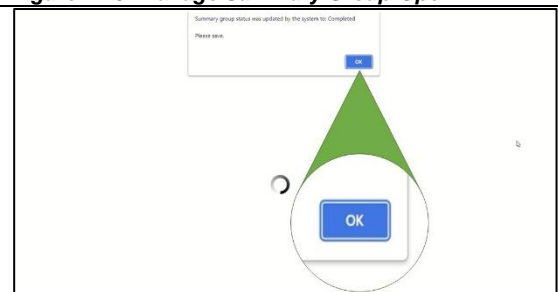
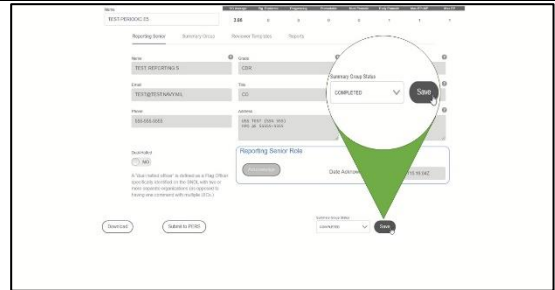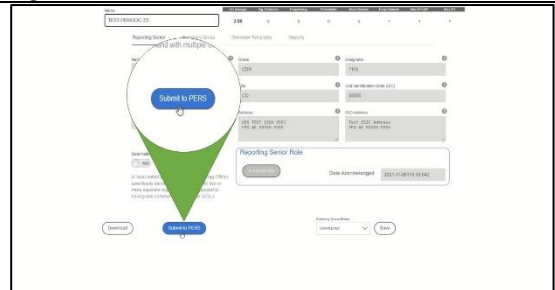| Step 11.1.6:	**Select** the "Save" button on the <u>bottom-right</u> side of the screen.	 *Figure 11-5: Save Button*
Step 11.1.7:	**Select** the "*Submit to PERS*" button at the <u>bottom</u> of the screen.	 *Figure 11-6: Submit to PERS Button*
Step 11.1.8:	**Select** "OK" on the pop-up dialogue box stating, "Please confirm submission to PERS for processing?"	 *Figure 11-7: Submit to PERS Acknowledgement*
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.	 *Figure 11-8: Submitted Tab*
Step 11.1.11:	**Verify** the summary group is in this list and has a status of "submitted" or "submitting" in the status column.	 *Figure 11-9: Submission Verification*
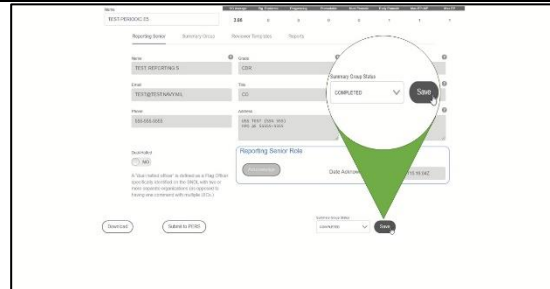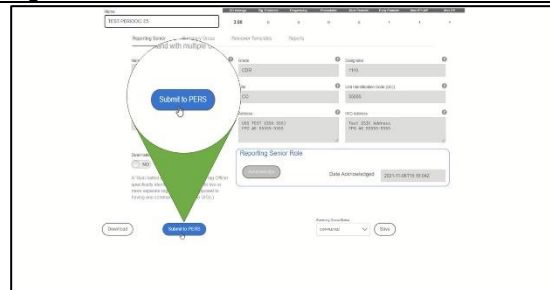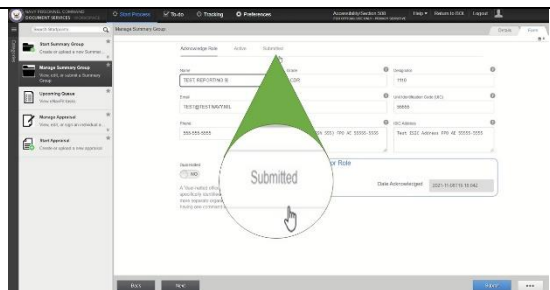
11.2 Submitting Reports to NPC (Intermittent Ops)

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.

Step 11.2.1.1:	Follow the steps in Section 3.1 for Accessing the Interface.	
Step 11.2.1.2:	**Select** the "*Manage Summary Group*" tab from the menu options on the <u>left</u> side of the screen.	*Figure 11-10: Manage Summary Group Menu*
Step 11.2.1.3:	**Select** the "Active" Tab	*Figure 11-11: Active Tab*
Step 11.2.1.4:	**Select** the "*Open*" button next to the Summary Group to be submitted.	*Figure 11-12: Manage Summary Group-Open*
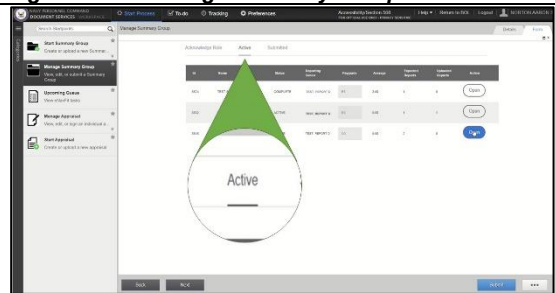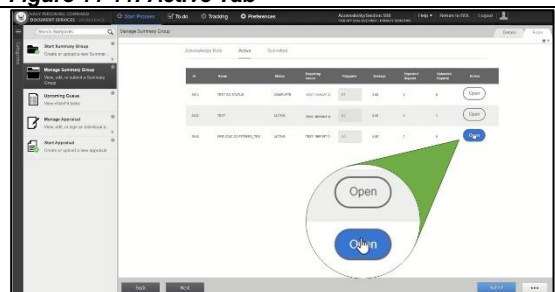
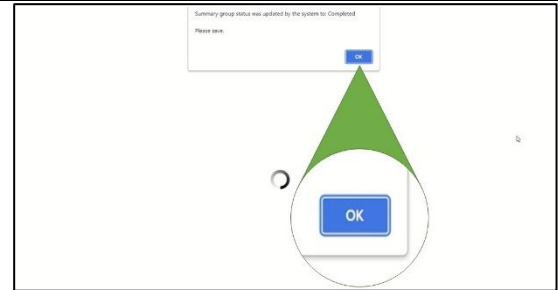| Step 11.2.1.5:	**Select** the "*OK*" button signifying that the reports have completed all reviews, zero validation errors, and all signatures have been applied. ![Note] Note *Completed* is an automatic status change if all pass requirements are met. The "Submit to PERS" button will not enable until this condition is met.	 *Figure 11-13: Completed Button Acknowledgement*
Step 11.2.1.6:	**Select** the "Save" button on the <u>bottom-right</u> side of the screen.	 *Figure 11-14: Save Button*
Step 11.2.1.7:	**Select** the "*Submit to PERS*" button at the <u>bottom</u> 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.	

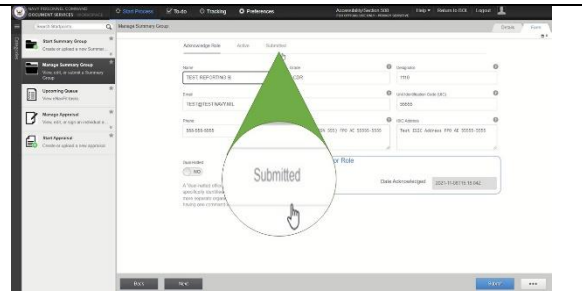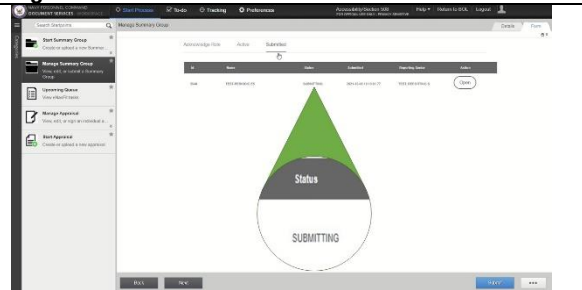| Step 11.2.1.10:	**Select** the "Submitted" Tab in the Manage Summary Group task window.	*Figure 11-17: Submitted Tab*
Step 11.2.1.11:	**Verify** the summary group is in this list and has a status of "submitted" or "submitting" in the status column.	*Figure 11-18: Submission Verification*
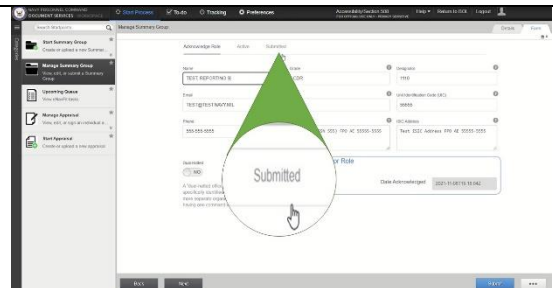
11.2.2 Submitting Uploaded and Digitally Signed Reports to NPC

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 <u>left</u> 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*
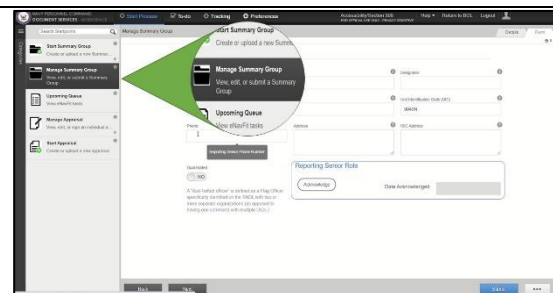
Step 11.2.2.4:	**Select** the "*Open*" button next to the Summary Group to be submitted.	*Figure 11-21: Manage Summary Group-Open*
Step 11.2.2.5:	**Select** the "*OK*" button signifying that the reports have completed all reviews, zero validation errors, and all signatures have been applied. 📋 **Note** *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.	*Figure 11-22: Completed Button Acknowledgement*
Step 11.2.2.6:	**Select** the "Save" button on the <u>bottom-right</u> side of the screen.	*Figure 11-23: Save Button*
Step 11.2.2.7:	**Select** the "*Submit to PERS*" button at the <u>bottom</u> of the screen.	*Figure 11-24: Submit to PERS Button*
Step 11.2.2.8:	**Select** "OK" on the pop-up dialogue box stating, "Please confirm submission to PERS for processing?"	*Figure 11-25: Submit to PERS Acknowledgement*
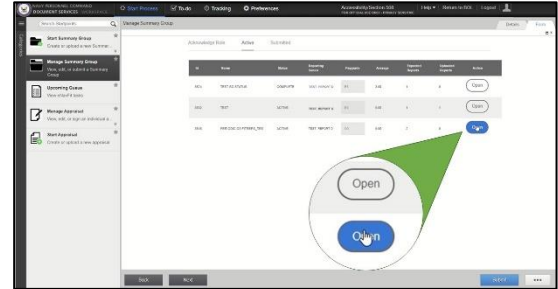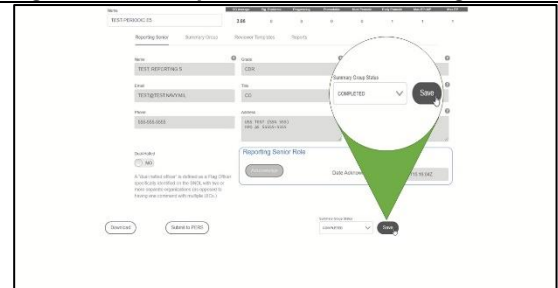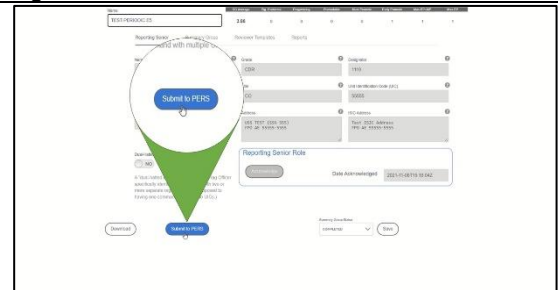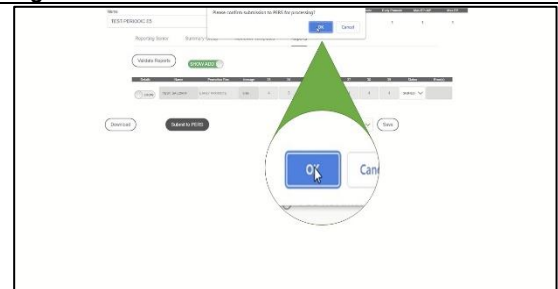
Step 11.2.2.9:	**Close** the Appraisal Task browser window and refresh the "Manage Summary Group" tab by selecting the "Manage Summary Group" tab.	
Step 11.2.2.10:	**Select** the "Submitted" Tab in the Manage Summary Group task window.	*Figure 11-26: Submitted Tab*
Step 11.2.2.11:	**Verify** the summary group is in this list and has a status of "submitted" or "submitting" in the status column.	*Figure 11-27: Submission Verification*

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)

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.

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.	
		Figure 11-28: Start Summary Group Menu
Step 11.3.1.3	**Select** "Download New Form".	
		Figure 11-29: Download New Form Button
Step 11.3.1.4	**Select** the *Download* tab	
		Figure 11-30: Download Tab
Step 11.3.1.5	**Select** "Use this link to download a blank Summary Letter".	
	⬛ 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 11-31: Download Blank Summary Letter
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.	
	⬛ 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.	
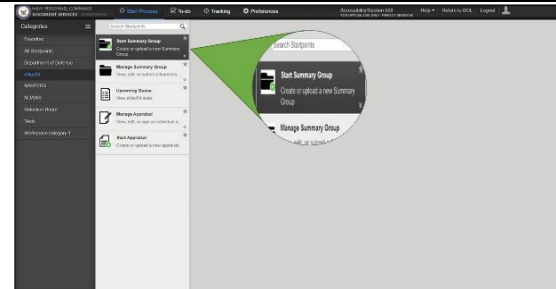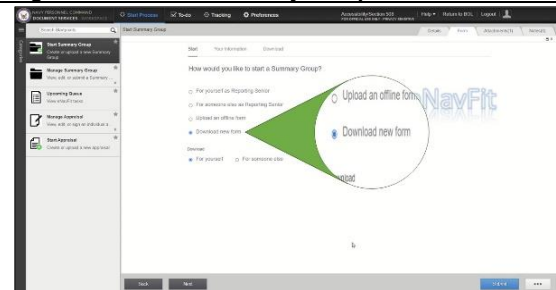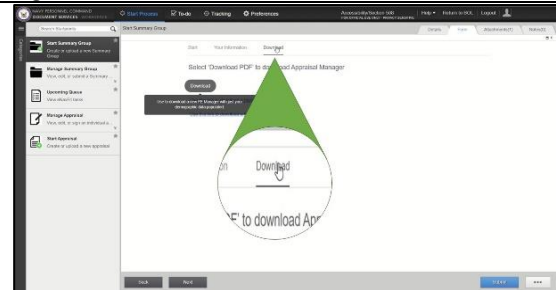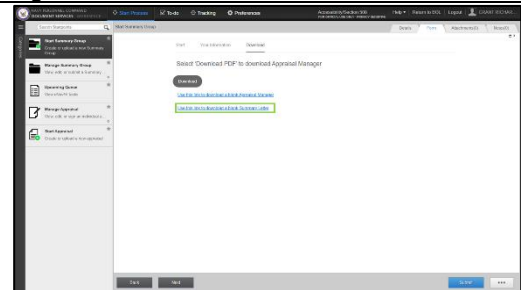
Step 11.3.1.7	**Select** "Enable All Features" if the option displays across the top in a yellow bar of the opened Adobe file.	 *Figure 11-32: Enable All Features*
Step 11.3.1.8	**Input** summary group data into all applicable fields. **Note** The Blank Summary Letter is a manual entry form. Ensure all 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*
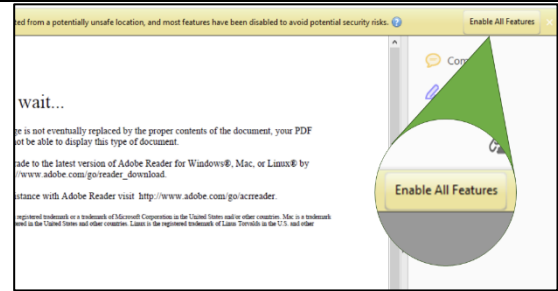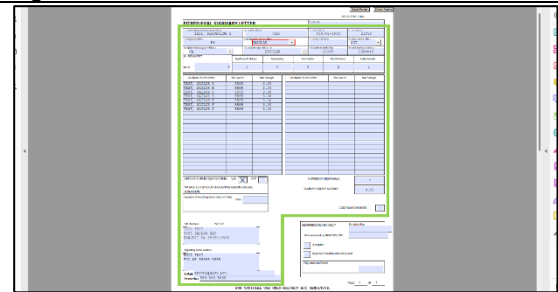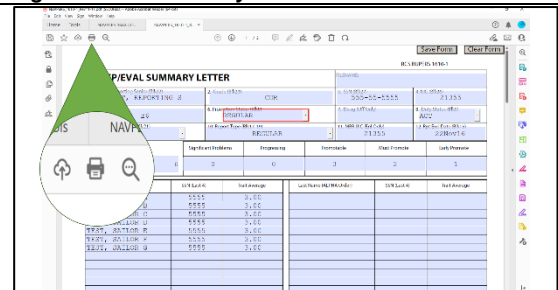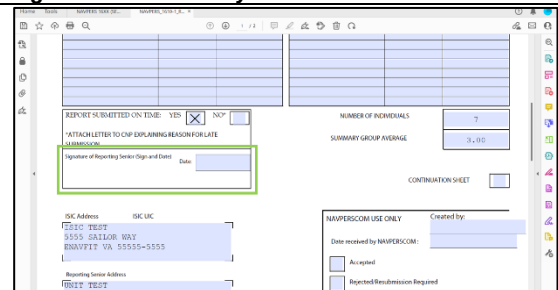
11.3.2 Download Summary Group Letter for Record Purposes (Online Ops)

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.	*Figure 11-36: Manage Summary Group Menu*
Step 11.3.2.3:	**Select** the "Active" or "Submitted" Tab	*Figure 11-37: Summary Letter – Active or Submitted*
Step 11.3.2.3:	**Select** the "Summary Letter" button	*Figure 11-38: Summary Letter Button*
Step 11.3.2.4	**Select** a location to save the downloaded file and open it in Adobe Reader to view. 🗐 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.	
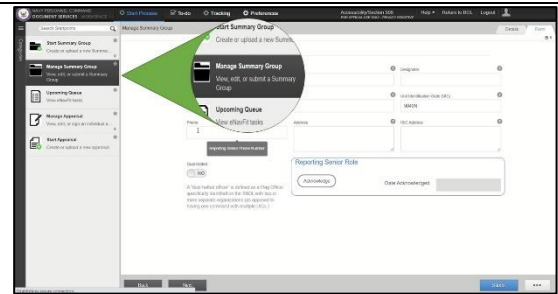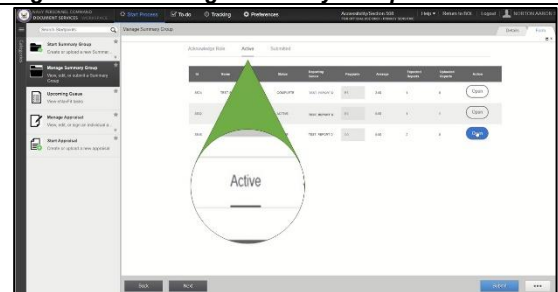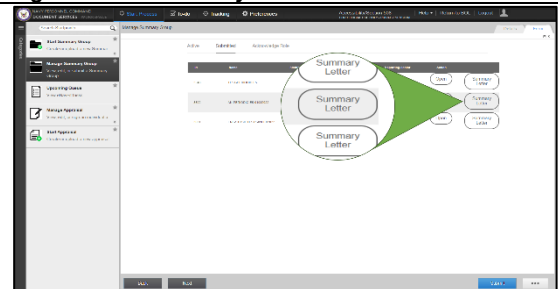
12 Field Format & Constraints

12.1 NAVPERS 1616/26 (E1-E6)

Block	Title	Description	Format/Constraint
NAVPERS 1616/26 - Evaluation Report & Counseling Record (E1-E6)			
1	Name (Last, First MI Suffix)	Text Box	Up to 27 alpha characters
2	Rate	Text Box	Up to 5 characters, must end in "1" or "2" or "3" or "A" or "R" or "N".
3	Enlisted Warfare/Qualification	Text Box	Up to 7 characters
4	SSN	Text Box	9 digits with a hyphen (-) after the 3rd and 5th digit
5	Duty / Competitive Status	Check Boxes	Choose one option: ACT, FTS, INACT, and AT/ADSW/265
6	UIC	Text Box	Up to 5 characters
7	Ship/Station	Text Box	Up to 18 characters
8	Promotion Status	Pull Down Menu	Select one option: REGULAR, FROCKED, SELECTED, and SPOT.
9	Date Reported	Text Box (Date)	7-character date
10-13	Occasion for Report	Check Boxes	Choose between options: Periodic, Detachment of Individual, Promotion/Frocking, Special
14	Period of Report (From) Date	Text Box (Date)	7-character date
15	Period of Report (To) Date	Text Box (Date)	7-character date
16	Not Observed Report	Check Box	A single check box
17-18	Type of Report	Check Boxes	Choose: Regular, Regular/Concurrent, Concurrent
19			
20	Physical Readiness	Four Pull Down Menus	Four separate Pull Down Menus for PFA codes with options P, B, F, M, W, and N.
21	Billet Subcategory (if any)	Pull Down Menu	Select from options: 'NA', 'BASIC', 'APPROVED', 'CO AFLOAT', 'CO ASHORE', 'OIC', 'INDIV AUG', 'SEA COMP', 'CRF', 'CANVASSER', 'RESIDENT', 'INTERN', 'INSTRUCTOR', 'STUDENT', 'RESAC1', 'RESAC 6', 'SPECIAL01' through 'SPECIAL100'
22	Reporting Senior (Last, FI MI)	Text Box	Up to 18 alpha characters
23	Grade (Reporting Senior)	Text Box	Up to 5 characters
24	Desig (Reporting Senior)	Text Box	Up to 4 characters
25	Title (Reporting Senior)	Text Box	Up to 14 characters
26	UIC (Reporting Senior)	Text Box	Up to 5 characters
27	SSN (Reporting Senior)	Text Box	9 digits with a hyphen (-) after the 3rd and 5th digit

NAVPERS 1616/26 - Evaluation Report & Counseling Record (E1-E6)

Block	Title	Description	Format/Constraint
28	Command employment and command achievements	Text Block	Up to 276 characters OR up to 3 lines
b29	Primary / Collateral / Watchstanding duties / PFA (Enter primary duty abbreviation in box)	Text Box	Up to 14 characters
		Text Block	Up to 334 characters OR up to 4 lines
30	Date Counseled	Text Box (Date)	7-character date
31	Counselor	Text Box	Up to 20 alpha characters
32	Signature of Individual Counseled	Digital Signature	
33-39	Performance Traits: (Professional Knowledge, Quality of Work, Command or Organizational Climate / Equal Opportunity, Military Bearing / Character, Personal Job Accomplishment / Initiative, Teamwork, Leadership)	Check Boxes	Choose one option: 'NOB', '1.0', '2.0', '3.0', '4.0', '5.0'
40	Individual Trait Average	Text Box	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.
41	Career Recommendations	Two Text Boxes	Up to 20 alpha characters per text box
42	Signature of Rater	Digital Signature	
		Text Box (Date)	7-character date
43	Comments on Performance	Text Block	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).
44	Qualifications/Achievements	Text Block	Up to 180 characters OR up to 2 lines
45	Individual Promotion Recommendation	Check Boxes	Choose between:' NOB', 'Significant Problems', 'Progressing', 'Promotable', 'Must Promote', and 'Early Promote'.
46	Summary Promotion Recommendation	Text Boxes	Auto calculated, (limited to that Summary Gorup): Text Boxes for the number of Significant Problems, Progressing, Promotable, Must Promote, and Early Promote in a Summary Group
47	Retention	Check Boxes	2 Check Box options: Not Recommended OR Recommended
48	Reporting Senior Address	Text Block	Up to 87 characters
49	Signature of Senior Rater Date	Digital Signature	
		Text Box (Date)	7-character date

NAVPERS 1616/26 - Evaluation Report & Counseling Record (E1-E6)			
Block	Title	Description	Format/Constraint
50	Signature of Reporting Senior Summary Group Average Date	Digital Signature	
		Text Box	Summary Group Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).
		Text Box (Date)	7-character date
51	Signature of Individual Evaluated Submit a Statement Date	Digital Signature	
		Check Box	Select from "I intend to submit a statement" OR "I do not intend to submit a statement"
		Text Box (Date)	7-character date
52	Signature of Regular Reporting Senior on Concurrent Report Date	Digital Signature	
		Text Box (Date)	7-character date

12.2 NAVPERS 1616/27 (E7-E9)

NAVPERS 1616/27 - Evaluation Report & Counseling Record (E7-E9)			
Block	Title	Description	Format/Constraint
1	Name (Last, First MI Suffix)	Text Box	Up to 27 alpha characters
2	Grade/Rate	Text Box	Up to 5 characters.
3	Officer/Enlisted Warfare/Qualification	Text Box	Up to 7 characters
4	SSN	Text Box	9 digits with a hyphen (-) after the 3rd and 5th digit
5	Duty / Competitive Status	Check Boxes	Choose one option: ACT, FTS, INACT, and AT/ADSW/265.
6	UIC	Text Box	Up to 5 characters
7	Ship/Station	Text Box	Up to 18 characters
8	Promotion Status	Pull Down Menu	Choose one option: REGULAR, FROCKED, SELECTED, and SPOT.
9	Date Reported	Text Box (Date)	7-character date
10-13	Occasion for Report	Check Boxes	Choose options: Periodic, Detachment of Individual, Detachment of Reporting Senior, Special
14	Period of Report (From) Date	Text Box (Date)	7-character date
15	Period of Report (To) Date	Text Box (Date)	7-character date
16	Not Observed Report	Check Box	A single check box
17-19	Type of Report	Check Boxes	Regular, Regular/Concurrent, Concurrent, Ops Cdr
20	Physical Readiness	Four Pull Down Menus	Four separate Pull Down Menus for PFA Codes with options P, B, F, M, W, and N.

NAVPERS 1616/27 - Evaluation Report & Counseling Record (E7-E9)			
Block	**Title**	**Description**	**Format/Constraint**
21	Billet Subcategory (if any)	Pull Down Menu	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'
22	Reporting Senior (Last,FI MI)	Text Box	Up to 18 alpha characters
23	Grade (Reporting Senior)	Text Box	Up to 5 characters
24	Desig (Reporting Senior)	Text Box	Up to 4 characters
25	Title (Reporting Senior)	Text Box	Up to 14 characters
26	UIC (Reporting Senior)	Text Box	Up to 5 characters
27	SSN (Reporting Senior)	Text Box	9 digits with a hyphen (-) after the 3rd and 5th digit
28	Command employment and command achievements	Text Block	Up to 276 characters OR up to 3 lines
29	Primary / Collateral / Watchstanding Duties / PFA (Enter primary duty abbreviation in box)	Text Box	Up to 14 characters
		Text Block	Up to 334 characters OR up to 4 lines
30	Date Counseled	Text Box (Date)	7-character date
31	Counselor	Text Box	Up to 20 alpha characters
32	Signature of Individual Counseled	Digital Signature	
33-39	Performance Traits (Deckplate Leadership, Institutional and Technical Expertise, Professionalism, Loyalty, Character, Active Communication, Sense of Heritage)	Check Boxes	Choose one option: 'NOB', '1.0', '2.0', '3.0', '4.0', '5.0'
40	Career Recommendations	Two Text Boxes	Up to 20 alpha characters per text box
41	Comments on Performance	Text Block	Up to 1336 (if 10 pt) or 1216 (if 12 pt) alpha-numeric characters OR up to 18 lines. (18 lines will complete all white space).
42	Individual Promotion Recommendation	Check Boxes	Choose between: NOB, Significant Problems, Progressing, Promotable, Must Promote, and Early Promote
43	Summary Promotion Recommendation	Text Boxes	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
44	Reporting Senior Address	Text Block	Up to 87 characters
45	Signature of Reporting Senior	Digital Signature	

NAVPERS 1616/27 - Evaluation Report & Counseling Record (E7-E9)			
Block	Title	Description	Format/Constraint
	Summary Group Average Date	Text Box	Individual Trait Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).
		Text Box	Summary Group Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).
		Text Box (Date)	7-character date
46	Signature of Individual Evaluated Submit a Statement Date	Digital Signature	
		Check Box	Select from "I intend to submit a statement" OR "I do not intend to submit a statement"
		Text Box (Date)	7-character date
47	Signature of Regular Reporting Senior on Concurrent Report Date	Digital Signature	
		Text Box (Date)	7-character date

12.3 NAVPERS 1610/2 (W1-O6)

NAVPERS 1610/2 - Fitness Report & Counseling Record (W1-O6)			
Block	Title	Description	Format/Constraint
1	Name (Last, First MI Suffix)	Text Box	Up to 27 alpha characters
2	Grade/Rate	Pull Down Menu	May select from 'ENS', 'LT', 'LTJG', 'LCDR', 'CDR', 'CAPT', 'CW02', 'CW03', 'CW04', and 'CW05'.
3	Officer Designator	Text Box	Up to 4 characters.
4	SSN	Text Box	9 digits with a hyphen (-) after the 3rd and 5th digit
5	Duty / Competitive Status	Check Boxes	Choose one option: ACT, FTS, INACT, and AT/ADSW/265.
6	UIC	Text Box	Up to 5 characters
7	Ship/Station	Text Box	Up to 18 characters
8	Promotion Status	Pull Down Menu	Select from options: REGULAR, FROCKED, SELECTED, and SPOT.
9	Date Reported	Text Box (Date)	7-character date
10	Occasion for Report (Periodic)	Check Boxes	Choose options: Periodic, Detachment of Individual, Detachment of Reporting Senior, Special
14	Period of Report (From) Date	Text Box (Date)	7-character date
15	Period of Report (To) Date	Text Box (Date)	7-character date
16	Not Observed Report	Check Box	A single check box
17-19	Type of Report	Check Boxes	Regular, Regular/Concurrent, Concurrent, Ops Cdr

NAVPERS 1610/2 - Fitness Report & Counseling Record (W1-O6)			
Block	**Title**	**Description**	**Format/Constraint**
20	Physical Readiness	Four Pull Down Menus	Four separate Pull Down Menus for PFA Codes with options P, B, F, M, W, and N.
21	Billet Subcategory (if any)	Pull Down Menu	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'
22	Reporting Senior (Last, FI MI)	Text Box	Up to 18 alpha characters
23	Grade (Reporting Senior)	Text Box	Up to 5 characters
24	Desig (Reporting Senior)	Text Box	Up to 4 characters
25	Title (Reporting Senior)	Text Box	Up to 14 characters
26	UIC (Reporting Senior)	Text Box	Up to 5 characters
27	SSN (Reporting Senior)	Text Box	9 digits with a hyphen (-) after the 3rd and 5th digit
28	Command employment and command achievements	Text Block	Up to 276 characters OR up to 3 lines
29	Primary / Collateral / Watchstanding Duties / PFA (Enter primary duty abbreviation in box)	Text Box	Up to 14 characters
		Text Block	Up to 334 characters OR up to 4 lines
30	Date Counseled	Text Box (Date)	7-character date
31	Counselor	Text Box	Up to 20 alpha characters
32	Signature of Individual Counseled	Digital Signature	
33-39	Performance Traits (Professional Expertise, Command or Organizational Climate / Equal Opportunity, Military Bearing / Character, Teamwork, Mission Accomplishment and Initiative, Leadership, Tactical Performance)	Check Boxes	Choose one option: 'NOB', '1.0', '2.0', '3.0', '4.0', '5.0'
40	Career Recommendations	Two Text Boxes	Up to 20 alpha characters per text box
41	Comments on Performance	Text Block	Up to 1336 (if 10 pt) or 1216 (if 12 pt) alpha-numeric characters OR up to 18 lines
42	Individual Promotion Recommendation	Check Boxes	Choose between:' NOB', 'Significant Problems', 'Progressing', 'Promotable', 'Must Promote', and 'Early Promote'.
43	Summary Promotion Recommendation	Text Boxes	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

NAVPERS 1610/2 - Fitness Report & Counseling Record (W1-O6)			
Block	**Title**	**Description**	**Format/Constraint**
44	Reporting Senior Address	Text Block	Up to 87 characters
45	Signature of Reporting Senior Summary Group Average Date	Digital Signature	
		Text Box	Summary Group Average auto-calculated by system. Must contain 2 decimal places. Allows numeric characters only (e.g., 3.74).
		Text Box (Date)	7-character date
46	Signature of Individual Evaluated Submit a Statement Date	Digital Signature	
		Check Box	Select from "I intend to submit a statement" OR "I do not intend to submit a statement"
		Text Box (Date)	7-character date
47	Signature of Regular Reporting Senior on Concurrent Report Date	Digital Signature	
		Text Box (Date)	7-character date

13 Key Terms, Acronyms, and Abbreviations

Disconnected	No internet. Appraisals will be printed, wet-signed, and paper copy will be mailed via preferred handler.
Intermittent	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.
Online	The ability to draft and complete an appraisal in an online state using browser.
NAVPERS 16XX	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).
Appraisal Manager	
Evaluation	NAVPERS 1616/26 Evaluation Report and Counseling Record (E1-E6) (EVAL)
Chief Evaluation	NAVPERS 1616/27 Evaluation Report and Counseling Record (E7-E9)(CHIEFEVAL)
Fitness Report	NAVPERS 1610/2 Fitness Report and Counseling Record (W1-O6) (FITREP)

List of Figures