



DEPARTMENT OF THE ARMY
7th U.S. ARMY JOINT MULTINATIONAL TRAINING
COMMAND
APO AE 09114

REPLY TO
ATTENTION OF:

AETT-AG

30 January 2007

MEMORANDUM FOR All units assigned to Joint Multinational Training Command (JMTC)

SUBJECT: Standard Operating Procedures for Processing Enlisted Personnel Evaluations

1. References

- A. AR 623-3 , Evaluation Reporting System, dated 15 May 2006
- B. DA PAM 623-3 , Evaluation Reporting System, dated 15 May 2006
- C. <https://www.usapa.army.mil> "Search Forms"

2. Purpose To establish procedures to process personnel evaluations using the following:

- a. DA Form 2166-8-1, NCO Counseling and Support Form dated March 2006
- b. DA 2166-8, NCO Evaluation Report Form dated March 2006
- c. My Forms Content from AKO <https://www.us.army.mil/>

3. Responsibilities.

a. The Commander, Command Sergeant Major (Senior Enlisted Advisor), Sergeant Major, 1SG, Personnel Sergeant, Rater, Senior Rater, Reviewer and rated NCOs are responsible for ensuring that NCOERs are processed in a timely manner following the procedures outlined in this SOP.

b. S1 will maintain an NCOER log that will track all annual NCOERs for timely submission to Soldier Record Data Center (SRDC).

c. Subordinate units' administration offices are responsible for notifying their respective S1 of all other NCOER requirements (i.e. Change of Rater, Complete the record and others).

4. Timeliness. All NCOERs are due to S1 NLT the 15th of the month after the thru date. If the 15th falls on a weekend, the report is due the next duty date. (i.e. if thru date is 2006 08 10, due date is 15 September 2006).

AETT-G1

SUBJECT: Standard Operating Procedures for Processing Enlisted Personnel Evaluations

5. **Requirements.** Computer, Internet Access and an AKO account to log in My Forms Content from AKO <https://www.us.army.mil/>

6. **Submission to SRDC.** In order to maintain proper accountability and timeliness of all NCOERs the JMTC S1 with the exception of JMRC will be the **only authorized** office to submit reports to SRDC.

7. **Procedures.** In accordance with AR 623-3 all NCOERs will be processed using the AKO Forms Content Management Program.

8. **Processing Steps.**

- a. Rater initiates NCOER by logging in to My Forms Contents Page thru AKO.
- b. Rater prepares initial draft of NCOER and digitally signs using CAC card.
- c. Rater sends report to Senior Rater for his/her comments and review (**see paragraph 9b**)
- d. Senior Rater digitally signs and sends report to the Reviewer
- e. Reviewer signs and forwards NCOER to the Rated NCO. (send a courtesy copy to rater and senior rater as a notification that the report has been sent to the rated NCO)
- f. Rated NCO signs NCOER and forward to Senior Rated. (send a courtesy to rater as a notification that the report has been sent to the Senior Rater)
- g. The Senior Rater will forward NCOER to S1 for processing
- h. The S1 will submit NCOER to SRDC and forward a copy of the complete report to the Rater, the Senior Rater, the Reviewer, Rated NCO and appropriate admin office.

9. **Fundamentals**

a. Commanders of subordinate units will establish their own SOP for routing NCOERs within their unit, ensuring the SEA reviews all reports.

b. When routing through the JMTC Command Group follow enclosure 1.

AETT-G1

SUBJECT: Standard Operating Procedures for Processing Enlisted Personnel Evaluations

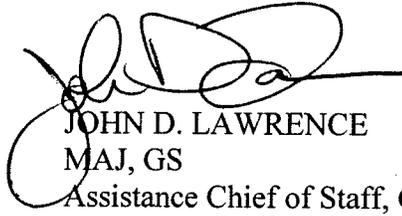
c. Subordinate units' administration office although not a requirement will maintain on file a copy of NCOERs for a period of 12 months.

d. Compliance with the above steps (a-h) is required.

10. Forms Content Management Procedures to create and route NCOERs between all the required individuals. (Refer enclosure 2).

11. Point of contact for this memorandum is MSG Robinson at DSN 475-8301.

2 Enclosures
as

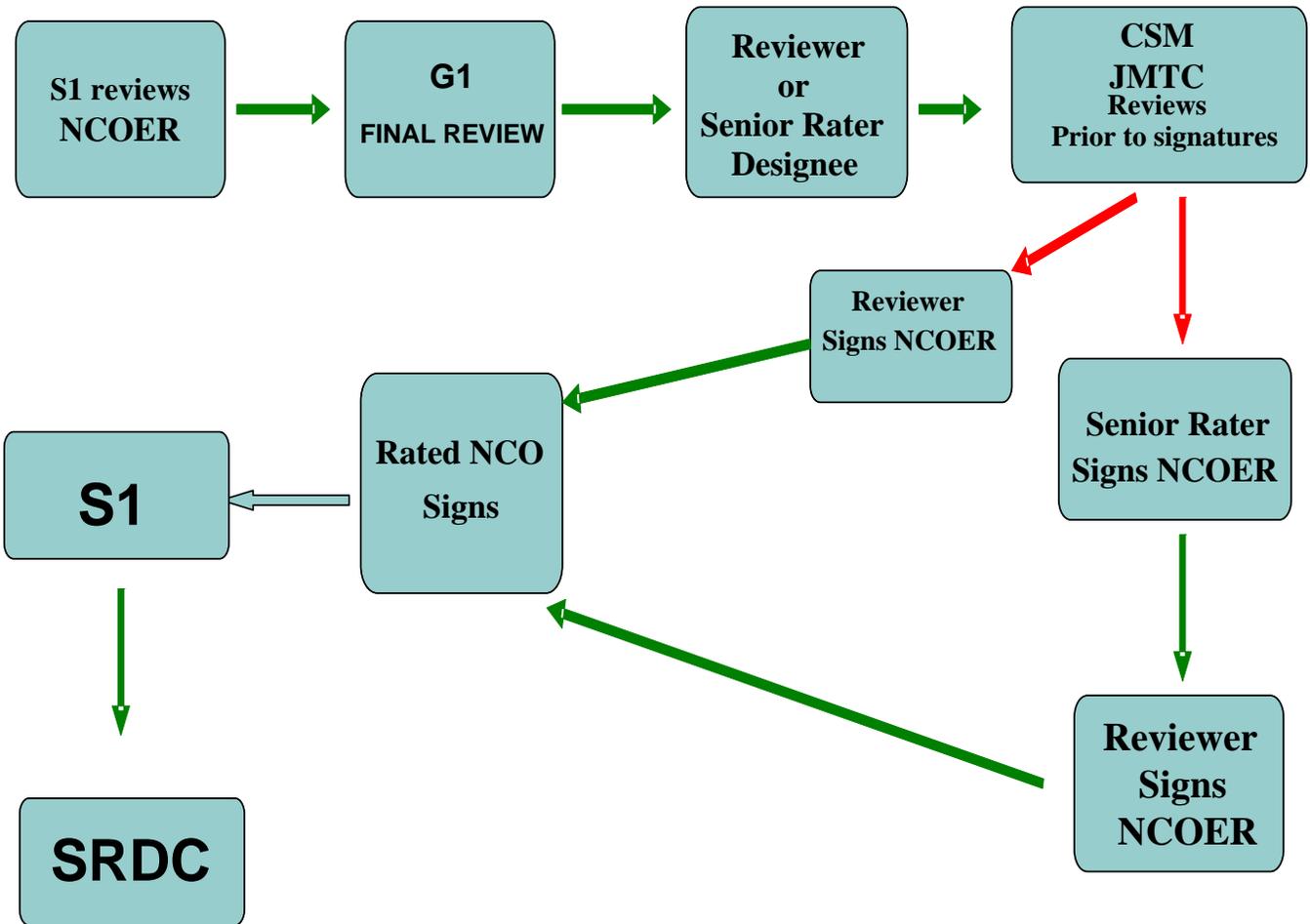


JOHN D. LAWRENCE
MAJ, GS
Assistance Chief of Staff, G1



7TH ARMY JMTC

Command Group Routing Guideline



UNCLASSIFIED
Enclosure 1

UNCLASSIFIED

Enclosure 2

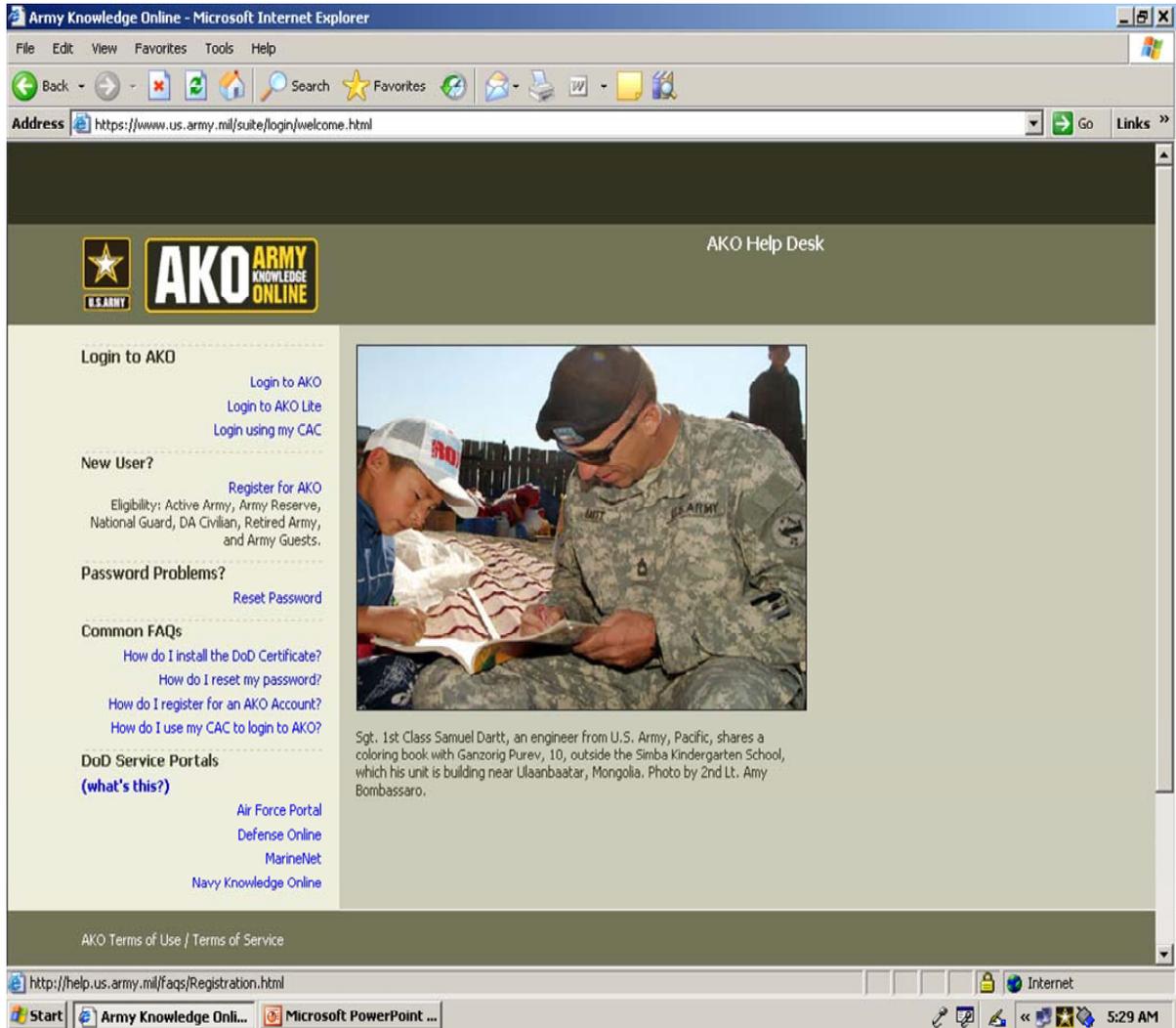


Figure 1

Go to AKO (www.us.army.mil)

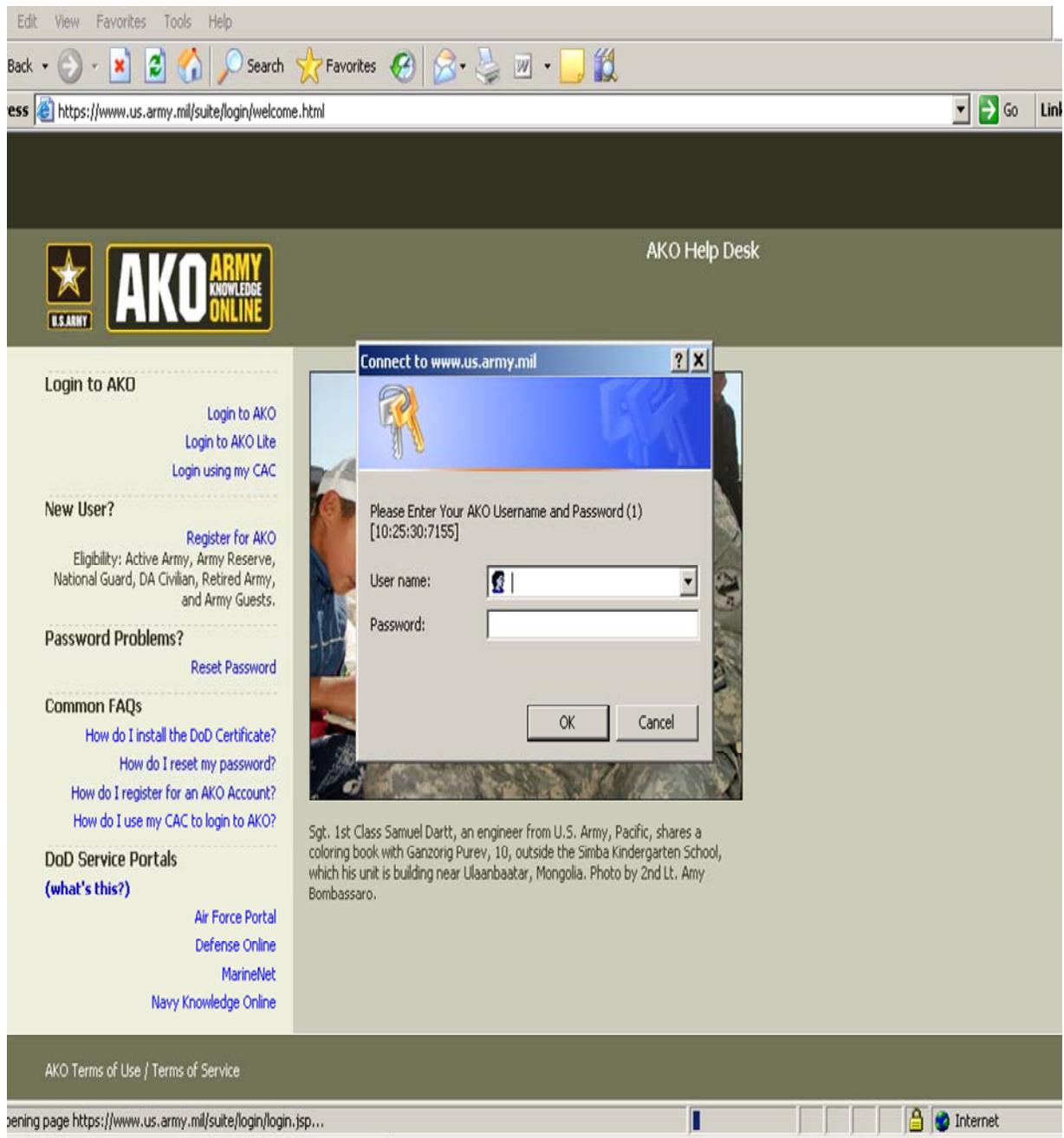


Figure 2

Login to AKO

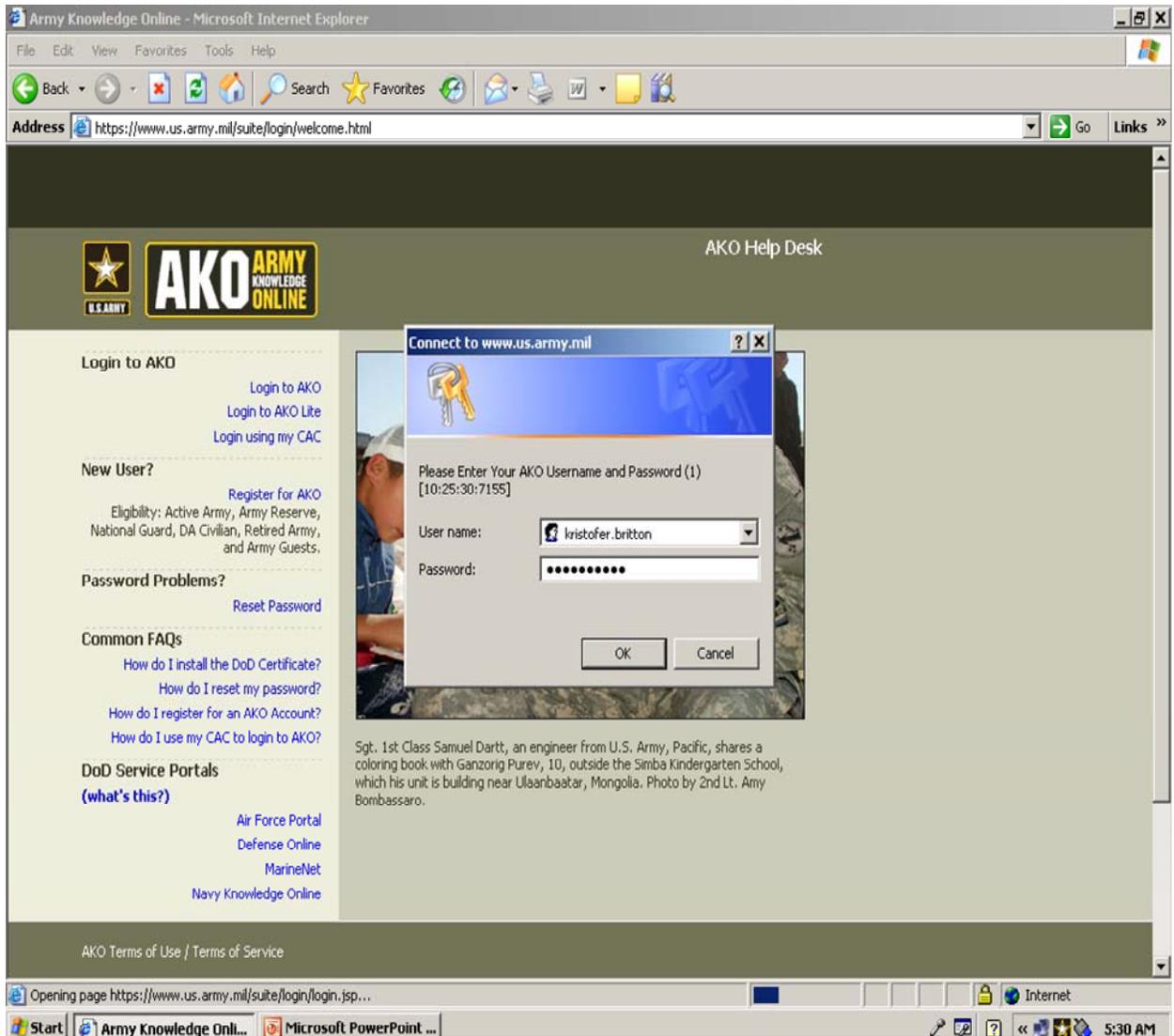


Figure 3

Login to using CAC only if approved

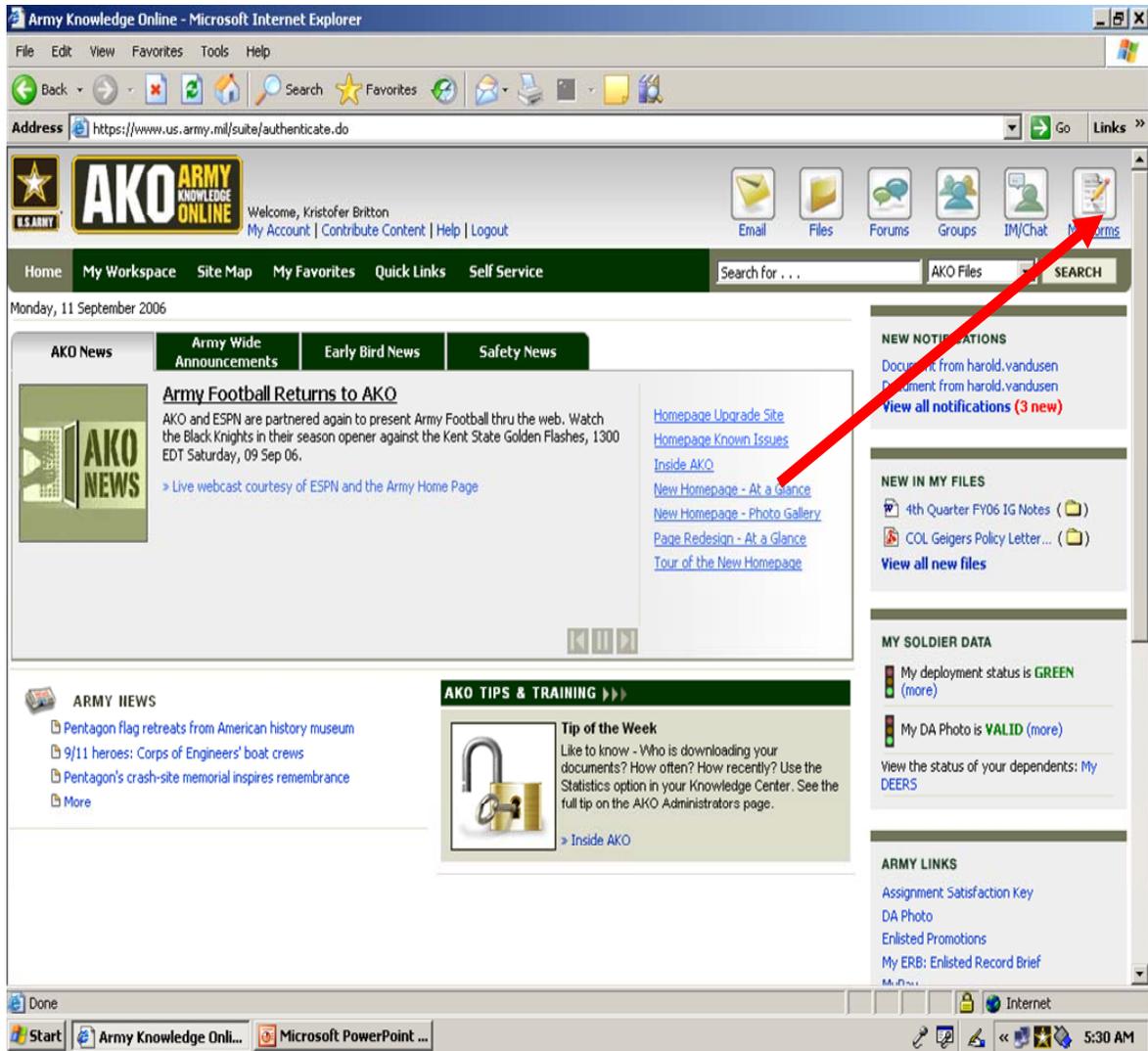


Figure 4

Click on “My Forms”

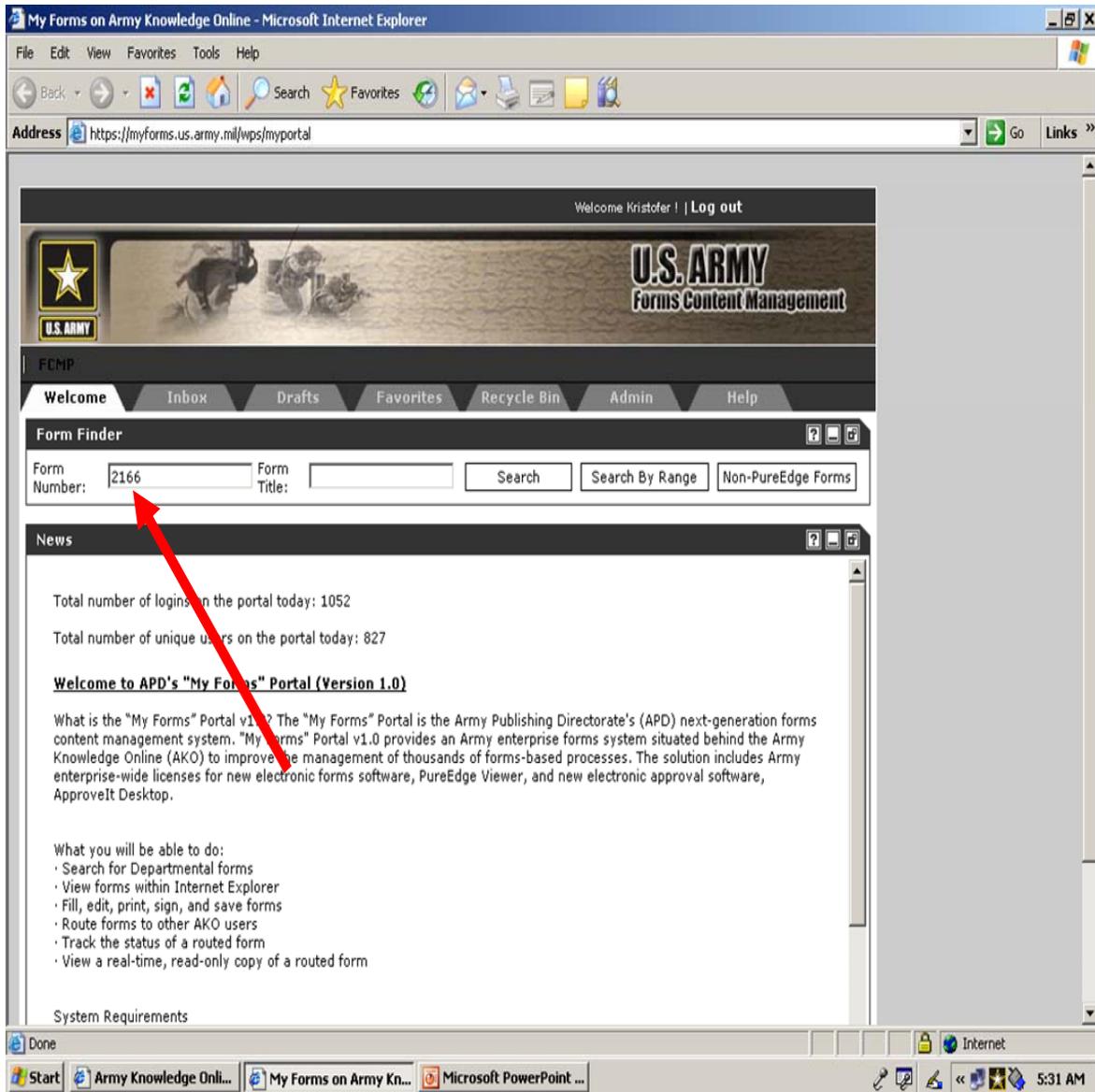


Figure 5

Type in 2166, do not put DA; click "Search"

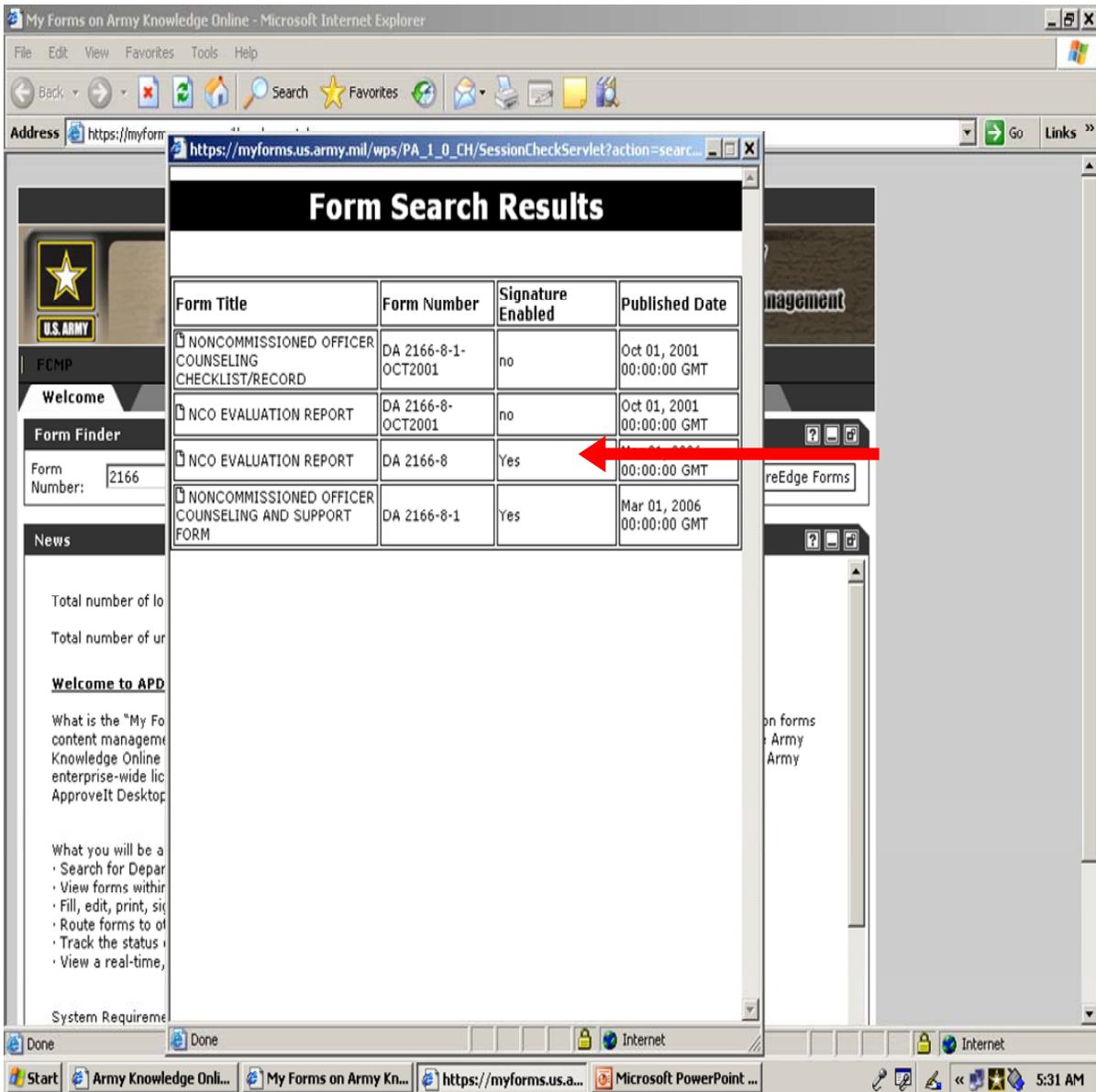


Figure 6

Select the NCO Evaluation Report that is signature enable

Noted: System will ask if you wish to use "Wizard Format". Yes response requires you to know the SSN of all Rating Officials. No response; click on Branch Component i.e., RA (Regular Army); USAR (Army Reserve).

https://myforms.us.army.mil/wps/PA_1_0_CH/DownloadFormServlet?field.formtype=DA%202166-8&field. - Microsoft Internet Explorer

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+ NCO EVALUATION REPORT				FOR OFFICIAL USE ONLY (FOUO) SEE PRIVACY ACT STATEMENT IN AR 623-3. +	
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.					
PART I - ADMINISTRATIVE DATA					
a. NAME (Last, First, Middle Initial)		b. SSN	c. RANK	d. DATE OF RANK	e. PMOSC
f.1. UNIT		ORG.	STATION	ZIP CODE OR APO	MAJOR COMMAND
f.2. STATUS CODE		g. REASON FOR SUBMISSION			
h. PERIOD COVERED		i. RATED MONTHS	j. NON-RATED CODES	k. NO. OF ENCL	l. RATED NCO'S EMAIL ADDRESS
FROM	THRU				(gov. or .mil)
YEAR MONTH DAY	YEAR MONTH DAY				
				m. UIC	n. CMD CODE
					o. PSB CODE
PART II - AUTHENTICATION					
a. NAME OF RATER (Last, First, Middle Initial)		SSN	SIGNATURE		DATE (YYYYMMDD)
RANK	PMOSC/BRANCH	ORGANIZATION	DUTY ASSIGNMENT		RATER'S AKO EMAIL ADDRESS (gov. or .mil)
b. NAME OF SENIOR RATER (Last, First, Middle Initial)		SSN	SIGNATURE		DATE (YYYYMMDD)
RANK	PMOSC/BRANCH	ORGANIZATION	DUTY ASSIGNMENT		SENIOR RATER'S AKO EMAIL ADDRESS (gov. or .mil)
c. NAME OF REVIEWER (Last, First, Middle Initial)		SSN	SIGNATURE		DATE (YYYYMMDD)
RANK	PMOSC/BRANCH	ORGANIZATION	DUTY ASSIGNMENT		REVIEWER'S AKO EMAIL ADDRESS (gov. or .mil)
d. <input type="checkbox"/> CONCUR WITH RATER AND SENIOR RATER EVALUATIONS <input type="checkbox"/> NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL. (See attached comments)					
e. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating				SIGNATURE	DATE (YYYYMMDD)

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Figure 7

New DA Form 2166-8, Note: Use drop down menu for rank on Rated NCO (If rated NCO is frocked to 1SG, SGM, CSM, enter the rank, date of rank and PMOSC held prior to the frocking action). Enter Date of Rank (YYYYMMDD).

Period Covered: The Thru date is the end date of the event causing the report and the from date is the date that the report begins. Enter Period Covered (YYYYDDMM).

Rated NCO's AKO address will be used

Refer to DA PAM 623-3, Chapter 3, (3-4) Part I Administrative Data, Table 3-1 and Reasons Codes, Table 3-6 & Table 3-7

https://myforms.us.army.mil/wps/PA_1_0_CH/DownloadFormServlet?field.formtype=DA%202166-88:field. - Microsoft Internet Explorer

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NCO EVALUATION REPORT					FOR OFFICIAL USE ONLY (FOUO) SEE PRIVACY ACT STATEMENT IN AR 623-3.	
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.						
PART I - ADMINISTRATIVE DATA						
a. NAME (Last, First, Middle Initial) BRITTON, KRISTOFER J			b. SSN 123-45-6789	c. RANK SSG	d. DATE OF RANK 20020501	e. PMOSC 42A44
f1. UNIT ORG STATION ZIP CODE OR APO, MAJOR COMMAND HHD, 97TH MP BATTALION, FORT RILEY, KS 66442 FORSCOM			f2. STATUS CODE		g. REASON FOR SUBMISSION 03 CHANGE OF RATER	
h. PERIOD COVERED		i. RATED MONTHS	j. NON-RATED CODES	k. NO. OF ENCL	l. RATED NCO'S EMAIL ADDRESS (gov.or.mil) kristofer.britton@us.army.mil	m. UIC WFNUAA
FROM YEAR MONTH DAY 20051030	THRU YEAR MONTH DAY 20060830	10	I			n. CMD CODE FC
						o. PSB CODE FS25
PART II - AUTHENTICATION						
a. NAME OF RATER (Last, First, Middle Initial) PAMPUCH, JENNIFER S.		SSN 987-65-4321	SIGNATURE /s/		DATE (YYYYMMDD)	
RANK CPT	PMOSC/BRANCH MP	ORGANIZATION HHD, 97TH MP BATTALION	DUTY ASSIGNMENT ADJUTANT	RATER'S AKO EMAIL ADDRESS (gov.or.mil) jennifer.pampuch@us.army.mil		
b. NAME OF SENIOR RATER (Last, First, Middle Initial) FOLLANSBEE, JAMES S		SSN 345-67-8912	SIGNATURE /s/		DATE (YYYYMMDD)	
RANK MAJ	PMOSC/BRANCH MP	ORGANIZATION	DUTY ASSIGNMENT	SENIOR RATER'S AKO EMAIL ADDRESS (gov.or.mil)		
c. NAME OF REVIEWER (Last, First, Middle Initial)		SSN	SIGNATURE		DATE (YYYYMMDD)	
RANK	PMOSC/BRANCH	ORGANIZATION	DUTY ASSIGNMENT	REVIEWER'S AKO EMAIL ADDRESS (gov.or.mil)		
d. <input type="checkbox"/> CONCUR WITH RATER AND SENIOR RATER EVALUATIONS		<input type="checkbox"/> NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL (See attached comments)				
e. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating				SIGNATURE	DATE (YYYYMMDD)	

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Figure 8

Use drop down menu for rank of Rater

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NCO EVALUATION REPORT
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.

FOR OFFICIAL USE ONLY (FOUO)
SEE PRIVACY ACT STATEMENT
IN AR 623-3.

PART I - ADMINISTRATIVE DATA

a. RANK	b. SSN	c. RANK	d. DATE OF RANK	e. PMOSC
Corporal	123-45-6789	SSG ()	20020501	42A44
f. STATION	ZIP CODE OR APO, MAJOR COMMAND	f.1. STATUS CODE	g. REASON FOR SUBMISSION	
STATION, FORT RILEY, KS 66442	FORSKOM	03	CHANGE OF RATER	
i. RATED MONTHS	j. NON-RATED CODES	k. NO. OF ENCL	l. RATED NCO'S EMAIL ADDRESS (.gov or .mil)	m. UIC
10	I		kristofer.britton@us.army.mil	WFNUAA
n. CMD CODE	o. PSB CODE			
FC	FS25			

PART II - AUTHENTICATION

a. RATER	SSN	SIGNATURE	DATE (YYYYMMDD)
Second Lieutenant	987-65-4321	/	
H. ORGANIZATION	DUTY ASSIGNMENT	RATER'S AKO EMAIL ADDRESS (.gov or .mil)	
HHD, 97TH MP BATTALION	ADJUTANT	jennifer.pampuch@us.army.mil	
b. SENIOR RATER	SSN	SIGNATURE	DATE (YYYYMMDD)
Lieutenant Colonel	345-67-8912	/	
H. ORGANIZATION	DUTY ASSIGNMENT	SENIOR RATER'S AKO EMAIL ADDRESS (.gov or .mil)	
HHD, 97TH MP BATTALION	EXECUTIVE OFF	james.follansbee@us.army.mil	
c. REVIEWER	SSN	SIGNATURE	DATE (YYYYMMDD)
LTC	765-43-2198	/	
H. ORGANIZATION	DUTY ASSIGNMENT	REVIEWER'S AKO EMAIL ADDRESS (.gov or .mil)	

d. CONCUR WITH RATER AND SENIOR RATER EVALUATIONS NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL (See attached comments)

e. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating

SIGNATURE DATE (YYYYMMDD)

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Figure 9

Select the Rank, civilians rank must be typed in.

Refer to DA PAM 623-3, Chapter 3, (3-5) Part II, Authentication, Table 3-2 for additional report instructions.

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d. CONCUR WITH RATER AND SENIOR RATER EVALUATIONS NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL (See attached comments)

e. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating officials in Part II, the duty description to include the counseling dates in Part III, and the APFT and height/weight entries in Part IVc are correct. I have seen the completed report. I am aware of the appeals process of AR 623-3.

SIGNATURE DATE (YYYYMMDD)

PART III - DUTY DESCRIPTION (Rater)

a. PRINCIPAL DUTY TITLE
SENIOR HUMAN RESOURCES SERGEANT

b. DUTY MOSC
42A40

c. DAILY DUTIES AND SCOPE (To include, as appropriate, people, equipment, facilities and dollars)
Responsible for the operation of the Battalion Personnel Administrative Center providing personnel support and guidance to three Military Police Companies and one Headquarters and Headquarters Detachment; responsible for all areas of personnel support to include strength management, enlisted and officer promotions, personnel actions, awards, evaluations, unit status reporting and soldier readiness; charged with the welfare, training and performance of four soldiers; responsible for over \$500,000 in MTO&E and Office Automation Equipment.

d. AREAS OF SPECIAL EMPHASIS
PERSTEMPO; eMILPO; deployments of soldiers in support of OIF 06-08

e. APPOINTED DUTIES
Alternate EOR, Publications Officer, Unit Postal Officer, Alternate Classified Documents Custodian, Records Manager,

f. COUNSELING DATES

INITIAL	LATER	LATER	LATER
20051105	20060209	20060503	20060811

PART IV - ARMY VALUES/ATTRIBUTES/SKILLS/ACTIONS (Rater)

a. ARMY VALUES. Check either "YES" or "NO". (Bullet Comments are mandatory. Substantive bullet comments are required for "NO" entries.)

	YES	NO
V Loyalty	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Duty	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Respect	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SELFLESS SERVICE: Put the welfare of the nation, the Army, and subordinates before their own	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Figure 10

Key Notes: Enter Duty MOSC at least five characters but no more than nine. Areas of Special Emphasis are separated by semicolons and ending with a period.

Refer to DA PAM 623-3, Chapter 3, (3-6) Part III, Duty Description, Table 3-3 for additional report instructions.

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Equipment:

d. AREAS OF SPECIAL EMPHASIS
PERSTEMPO; eMILPO; deployments of soldiers in support of OIF 06-08

e. APPOINTED DUTIES
Alternate EOR; Publications Officer; Unit Postal Officer; Alternate Classified Documents Custodian, Records Manager,

f. COUNSELING DATES

INITIAL	LATER	LATER	LATER
20051105	20060209	20060503	20060811

PART IV - ARMY VALUES/ATTRIBUTES/SKILLS/ACTIONS (Rater)

a. ARMY VALUES. Check either "YES" or "NO". (Bullet Comments are mandatory. Substantive bullet comments are required for "NO" entries.)

	YES	NO
1. LOYALTY: Bears true faith and allegiance to the U. S. Constitution, the Army, the unit, and other soldiers.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. DUTY: Fulfills their obligations.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. RESPECT/EO/EEO: Treats people as they should be treated.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. SELFLESS-SERVICE: Puts the welfare of the nation, the Army, and subordinates before their own.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. HONOR: Lives up to all the Army values.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. INTEGRITY: Does what is right - legally and morally.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. PERSONAL COURAGE: Faces fear, danger, or adversity (physical and moral).	<input checked="" type="checkbox"/>	<input type="checkbox"/>

VALUES

Loyalty
Duty
Respect
Selfless-Service

Honor
Integrity
Personal Courage

Bullet comments
o bullet comments based off of the "Army Values"
o no entries must be fully explained
o at least two bullets no more than three

DA FORM 2166-8, MAR 2006 PREVIOUS EDITIONS ARE OBSOLETE. Page 1 of 2 APD PE v4.00ES

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Figure 11

Key Notes: Bullet comments are mandatory regardless of the rating given.

Refer to DA PAM 623-3, Chapter 3, (3-7) Part II Army Values/Noncommissioned Responsibilities, Table 3-2 for additional report instructions.

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RATED NCO'S NAME (Last, First, Middle Initial) SSN THRU DATE
 + BRITTON, KRISTOFER J 123-45-6789 20060830 +

PART IV (Rater) - VALUES/NCO RESPONSIBILITIES *Bullet comments are mandatory. Substantive bullet comments are required for "EXCELLENCE" or "NEEDS IMPROVEMENT."*

b. COMPETENCE
 o Duty proficiency, MOS competency
 o Technical & tactical; knowledge, skills, and abilities
 o Sound judgment
 o Seeking self-improvement; always learning
 o Accomplishing tasks to the fullest capacity; committed to excellence

o all excellence bullets must be fully justified
 o no bullets are required for success markings, but it sends a clear message to anyone reading the report on the soldiers abilities
 o bullets can not be longer then two lines

EXCELLENCE (Exceeds std) SUCCESS (Meets std) NEEDS IMPROVEMENT (Some) (Much)

c. PHYSICAL FITNESS & MILITARY BEARING
 o Mental and physical toughness
 o Endurance and stamina to go the distance
 o Displaying confidence and enthusiasm; looks like a soldier

APFT PASS 20060531 HEIGHTWEIGHT 71 / 190

EXCELLENCE (Exceeds std) SUCCESS (Meets std) NEEDS IMPROVEMENT (Some) (Much)

d. LEADERSHIP
 o Mission first
 o Genuine concern for soldiers
 o Instilling the spirit to achieve and win
 o Setting the example; Be, Know, Do

EXCELLENCE (Exceeds std) SUCCESS (Meets std) NEEDS IMPROVEMENT (Some) (Much)

YES NO

Figure 12

Enter APFT entries as “PASS” or “Fail” and the date (YYYYMMDD). If no APFT is taken due to profile, the entry will be: “PROFILE” and the year and month the profile was awarded within a 12 months period.

Key Notes: Permanent profiles not cleared to take an alternate PT test, the following statement will be annotated; **“profile does or does not hinder duty performance.”** Pregnant NCOs not tested within the last 12 months, the following statement will be annotated; **“Exempt from APFT requirement in accordance with AR 40-501.”**

Select drop down menu for Yes or No for Height/Weight

Key Notes: “Yes” will be enter for those NCOs who meet the weight for height screening table or are in compliance with the body fat standards of AR 600-9. **The statement “within body fat standards of AR 600-9” will no longer be used.** Specific bullet comments are mandatory to explain the absence of the height and weight data and to explain any entry of “NO”. Unless a valid Profile for the current rating period is in effect, the HT/WT standards of AR 600-9.

Refer to DA PAM 623-3, Chapter 3, (3-4) Part IVc APFT & HT/WT, Table 3-4 for additional report instructions; Reference: AR 350-1; AR 40-501; AR 600-9

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<p>(Exceeds std) (Meets std) (Some) (Much)</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p>e. TRAINING</p> <ul style="list-style-type: none"> o Individual and team o Mission focused; performance oriented o Teaching soldiers how; common tasks, duty-related skills o Sharing knowledge and experience to fight, survive and win <p>EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>	
<p>f. RESPONSIBILITY & ACCOUNTABILITY</p> <ul style="list-style-type: none"> o Care and maintenance of equipment/facilities o Soldier and equipment safety o Conservation of supplies and funds o Encouraging soldiers to learn and grow o Responsible for good, bad, right & wrong <p>EXCELLENCE SUCCESS NEEDS IMPROVEMENT (Exceeds std) (Meets std) (Some) (Much)</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>	o if report is a Relief for Cause then it will be annotated in Responsibility (The rated NCO has been notified of the reason of the relief)
PART V - OVERALL PERFORMANCE AND POTENTIAL	
<p>a. RATER. Overall potential for promotion and/or service in positions of greater responsibility.</p> <p>AMONG THE BEST FULLY CAPABLE MARGINAL</p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p>	e. SENIOR RATER BULLET COMMENTS
<p>b. RATER. List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade.</p>	

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Figure 13

Key Points: Rating official directing the relief will clearly explain the reason for relief in part IV. If relief is directed by an official other than someone in the rating chain, the official will describe the reasons for the relief in an enclosure (not to exceed one page) to the report.

Note relief for cause statement in the report above.

[Refer to DA PAM 623-3, Chapter 3, \(3-9\) Part V, Relief for cause Noncommissioned Officer Evaluation Report Instructions.](#)

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o Care and maintenance of equipment/facilities
o Soldier and equipment safety
o Conservation of supplies and funds
o Encouraging soldiers to learn and grow
o Responsible for good, bad, right & wrong

NCO has been notified of the reason of the relief)

1. Promo
2. School
3. potential/assignment
4. Performance

EXCELLENCE (Exceeds std) SUCCESS (Meets std) NEEDS IMPROVEMENT (Some) (Much)

PART V - OVERALL PERFORMANCE AND POTENTIAL

a. RATER. Overall potential for promotion and/or service in positions of greater responsibility.

AMONG THE BEST FULLY CAPABLE MARGINAL

b. RATER. List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade.

c. SENIOR RATER. Overall performance

1 2 3 4 5
Successful Fair Poor

d. SENIOR RATER. Overall potential for promotion and/or service in positions of greater responsibility.

1 2 3 4 5
Superior Fair Poor

DA FORM 2166-8, MAR 2006

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APD PE v4.00ES

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Figure 14

Senior Rater bullets comments must address Promotion, School, Potential/Assignments and Performance in that order.

Refer to DA PAM 623-3, Chapter 3, (3-8) Part V, Overall performance and potential, Table 3-5 for additional report instructions.

Click check block for “Spell Check”

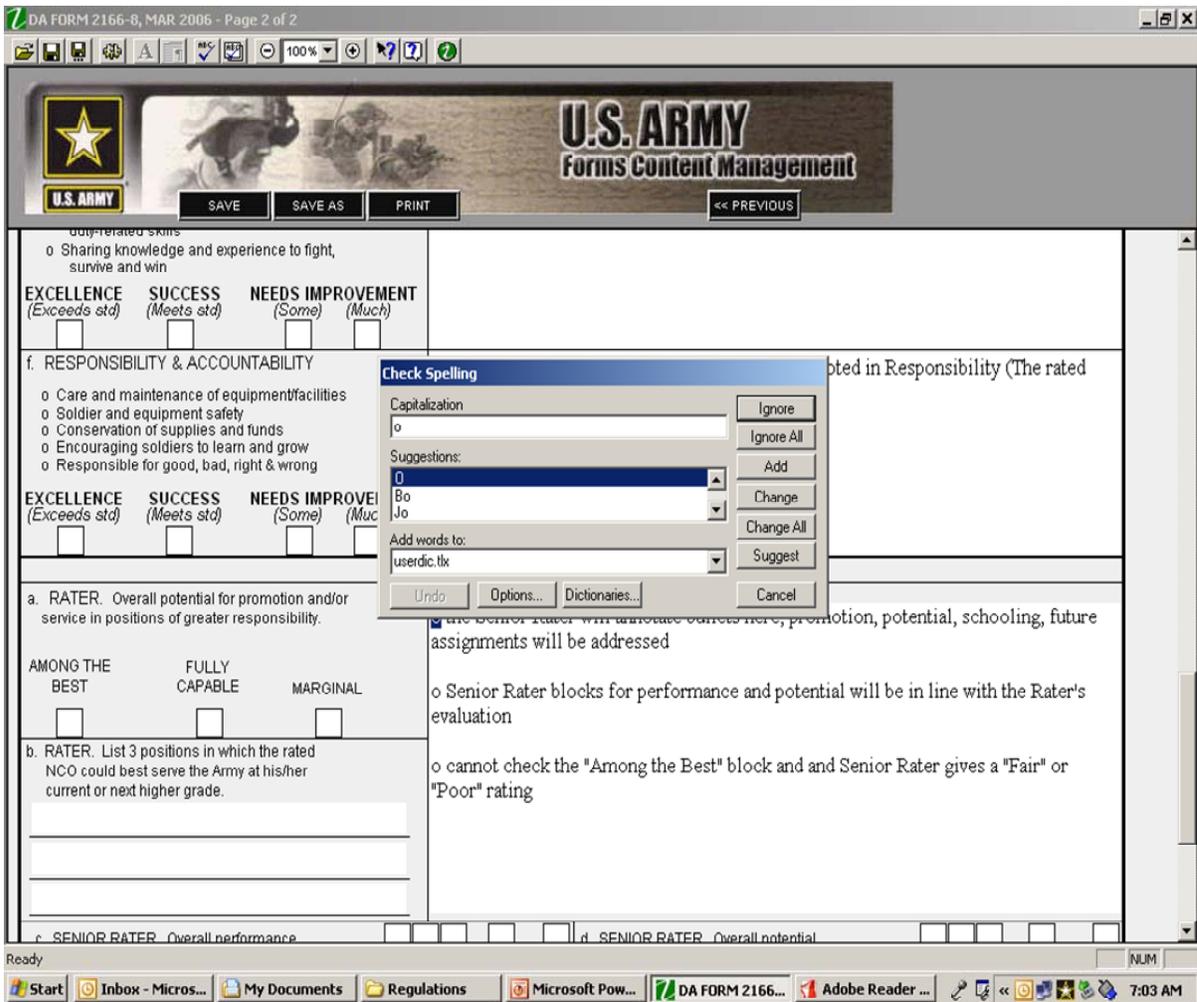


Figure 15

Rating Official must perform a spell check of the report.

Key Note: Spell Check will go through the entire report to check for errors and grammar usage.

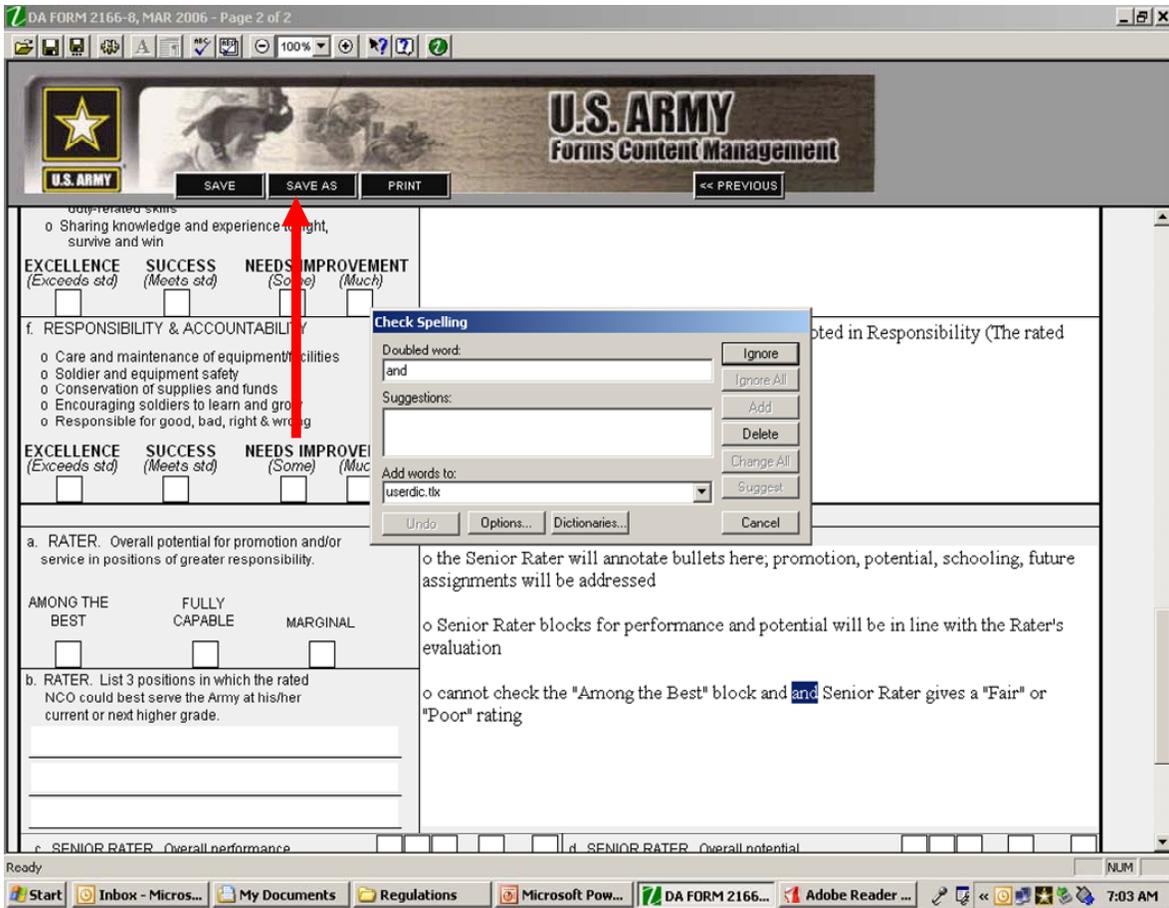


Figure 16

Excess words can be deleted, however you must click on each box to spell check that box. Once spell check is completed, click on the "Save As."

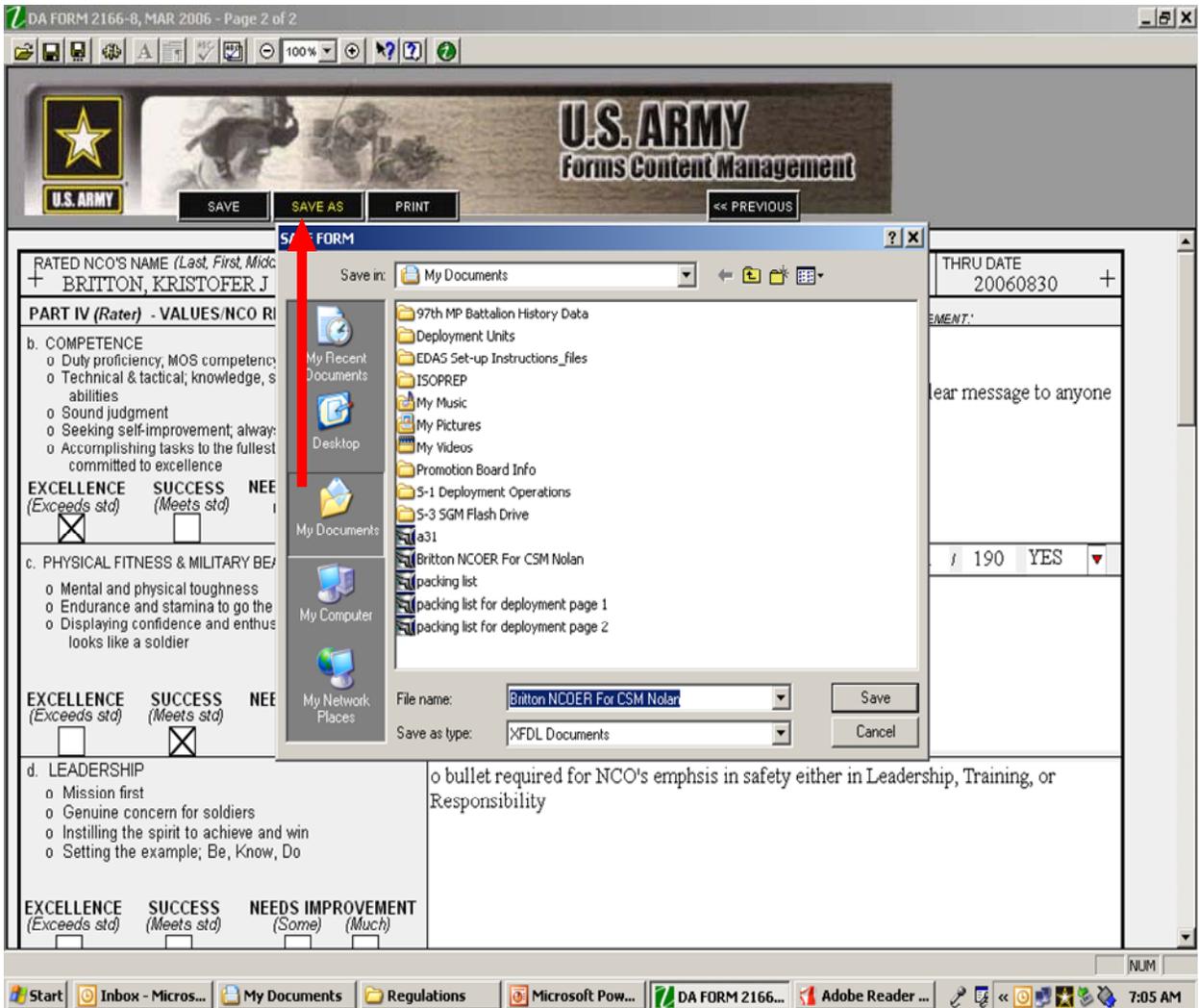


Figure 17

Save report on hard drive in "My Documents" folder.

Key Note: Ensure NCOER is given a name i.e., "Britton NCOER for CSM Molan".

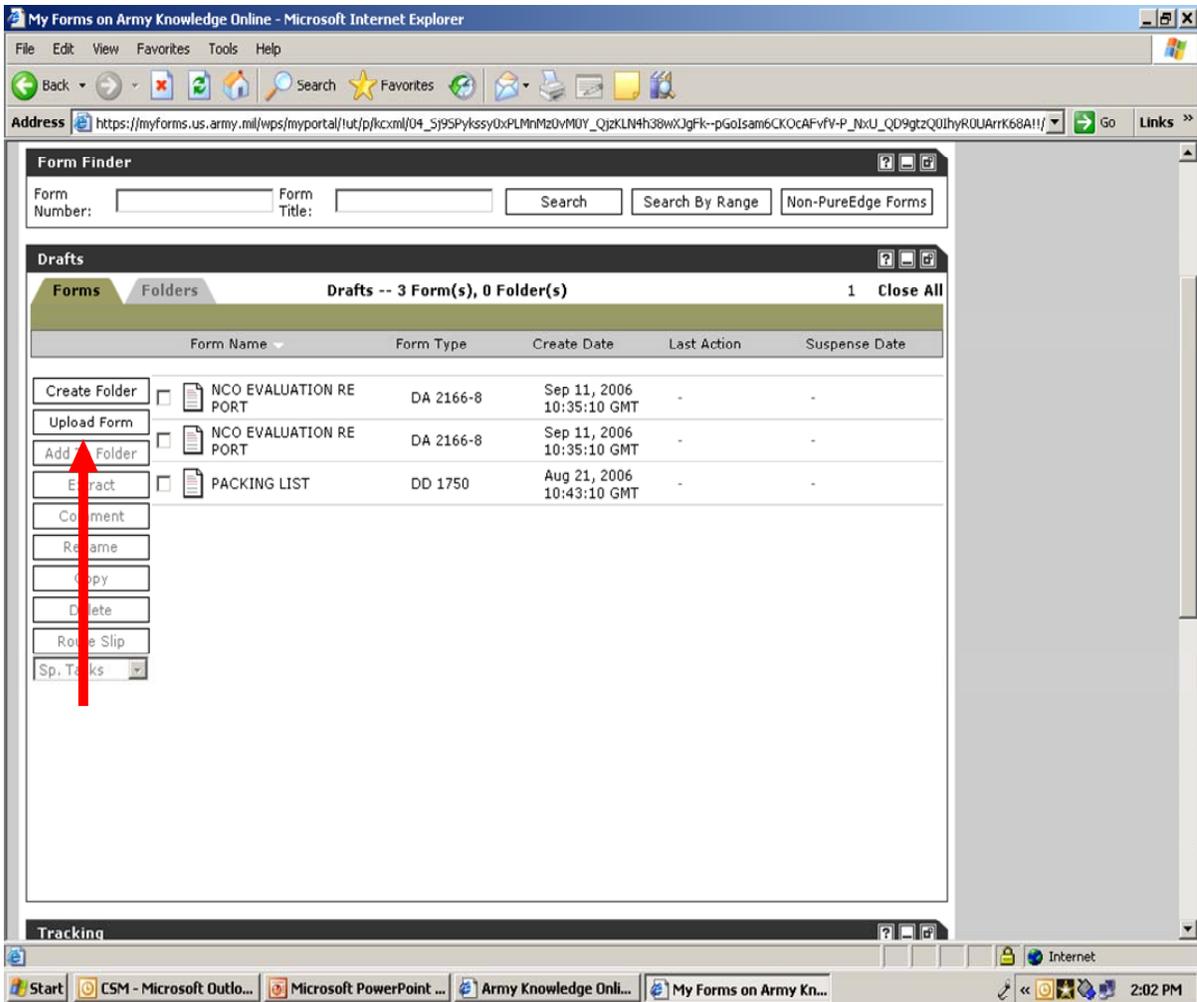


Figure 18

Log back into AKO, My forms, select “Drafts” and the select upload form.

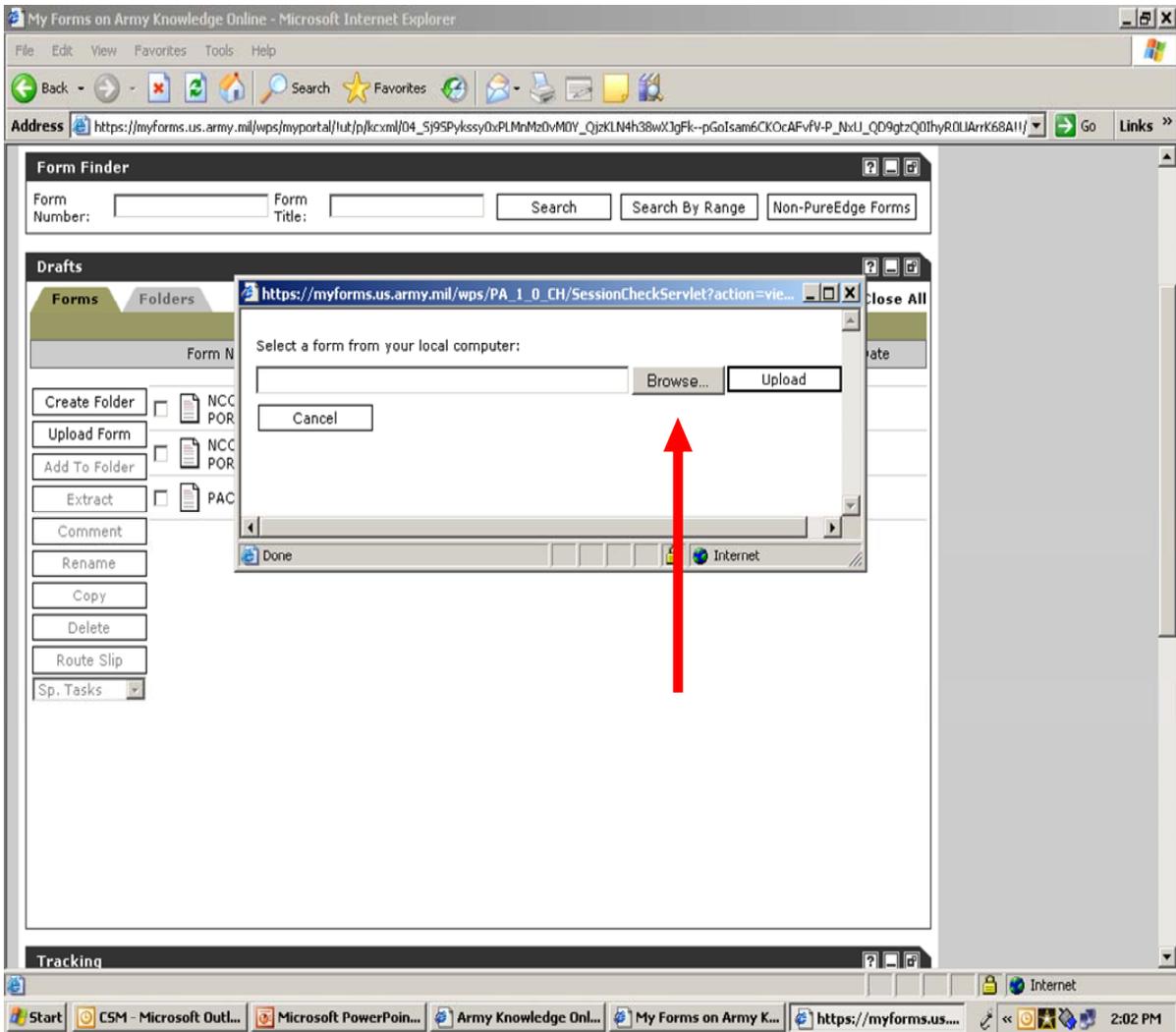


Figure 19

Click on browse; go to "My Document" to locate the NCOER.

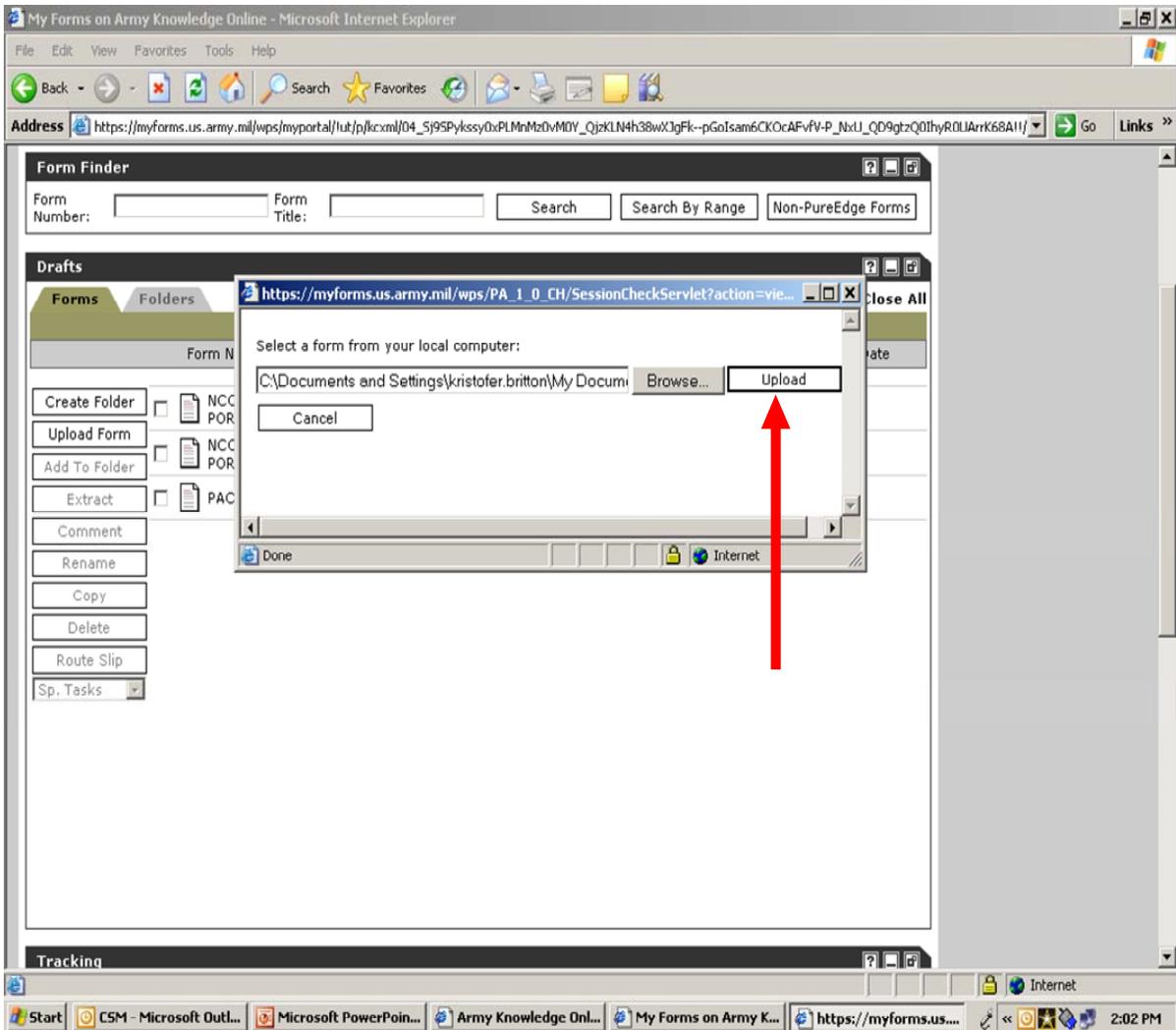


Figure 20

Upload the NCOER

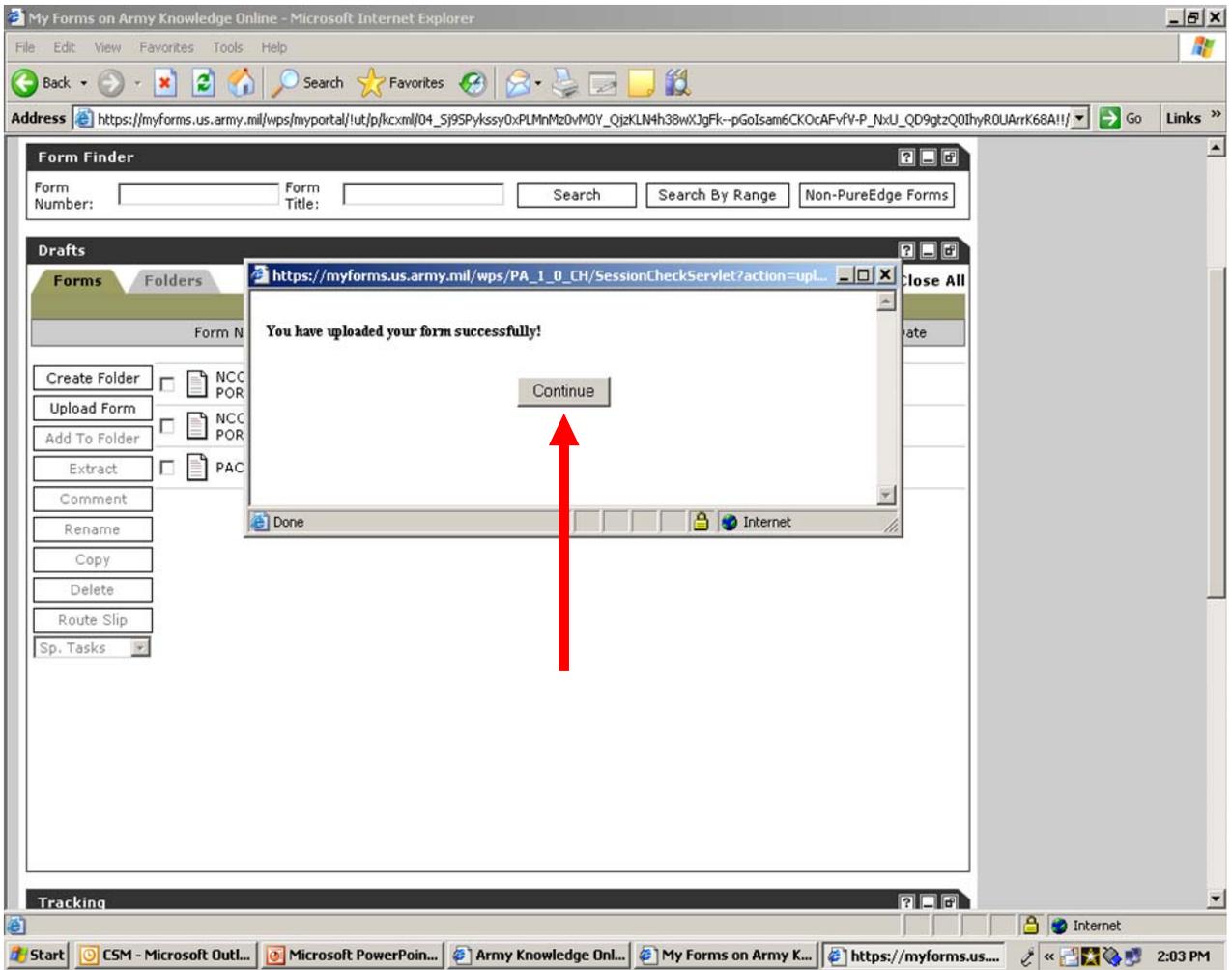


Figure 21

NCOER uploaded successfully into AKO; click continue.

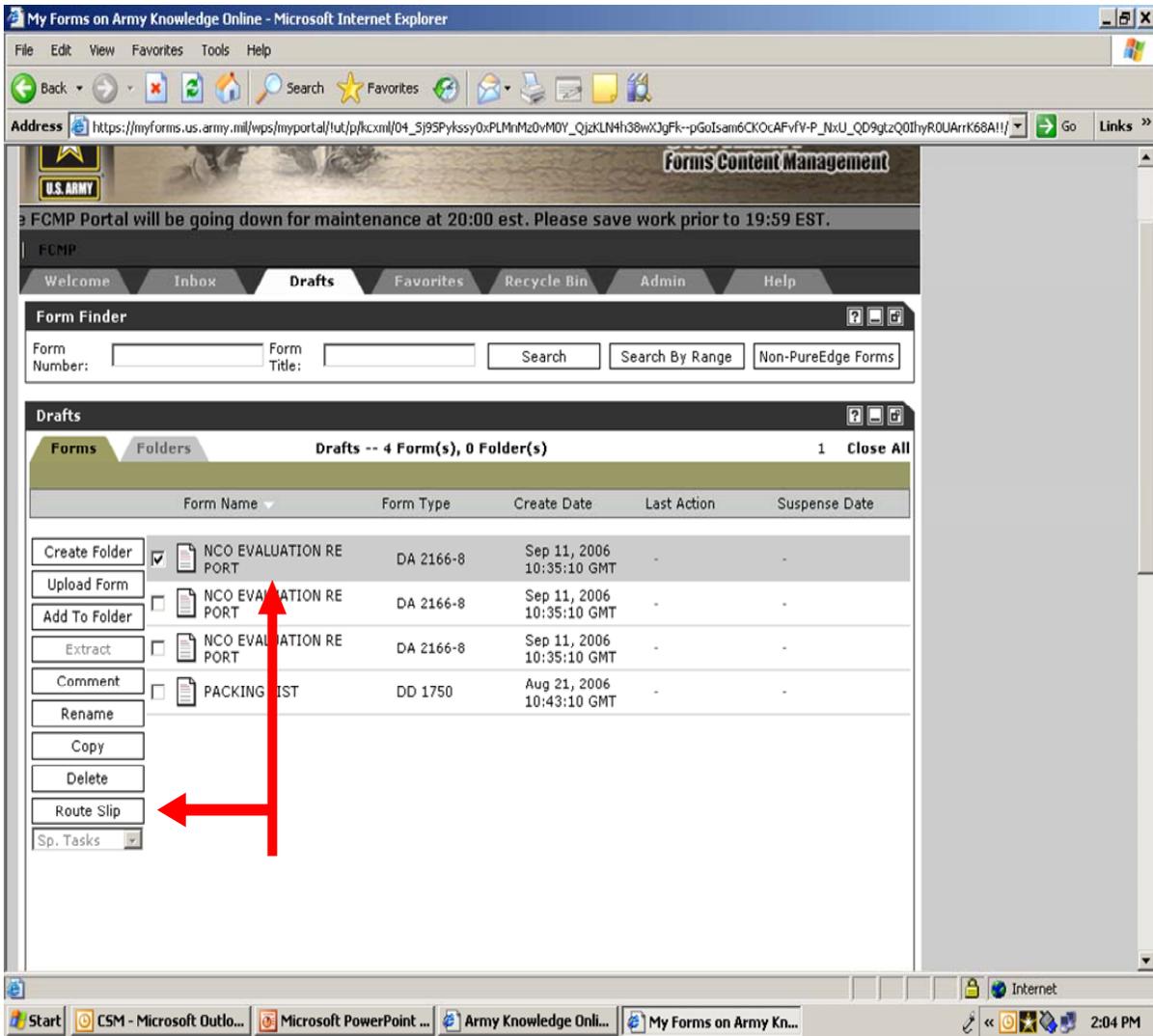


Figure 22

Select report and then select “Route Slip”

Key Note: NCOER will be saved in the orders that the report itself was last modified, not when it was last uploaded.

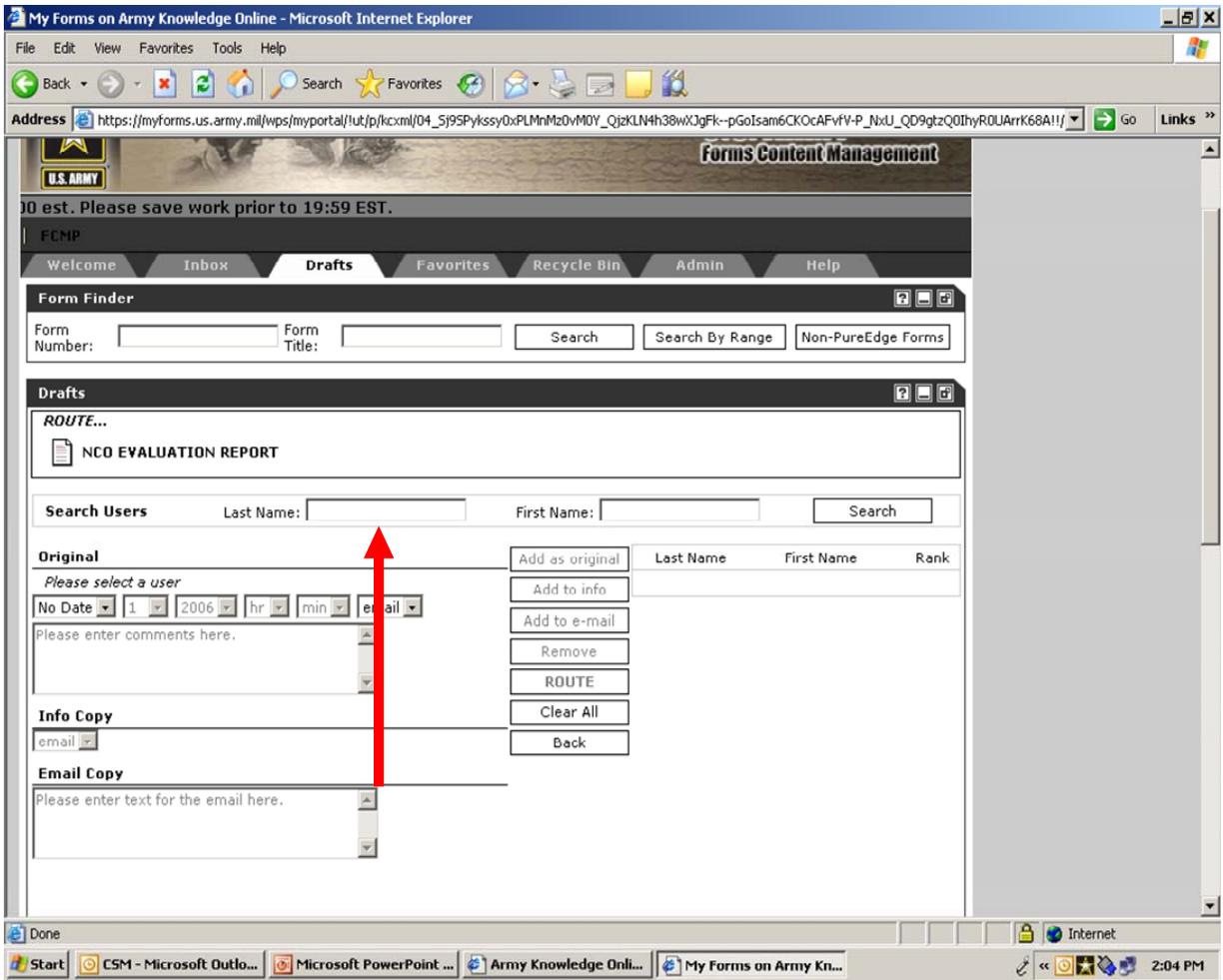


Figure 23

Type in the last name of the person the report will go to; then click search.

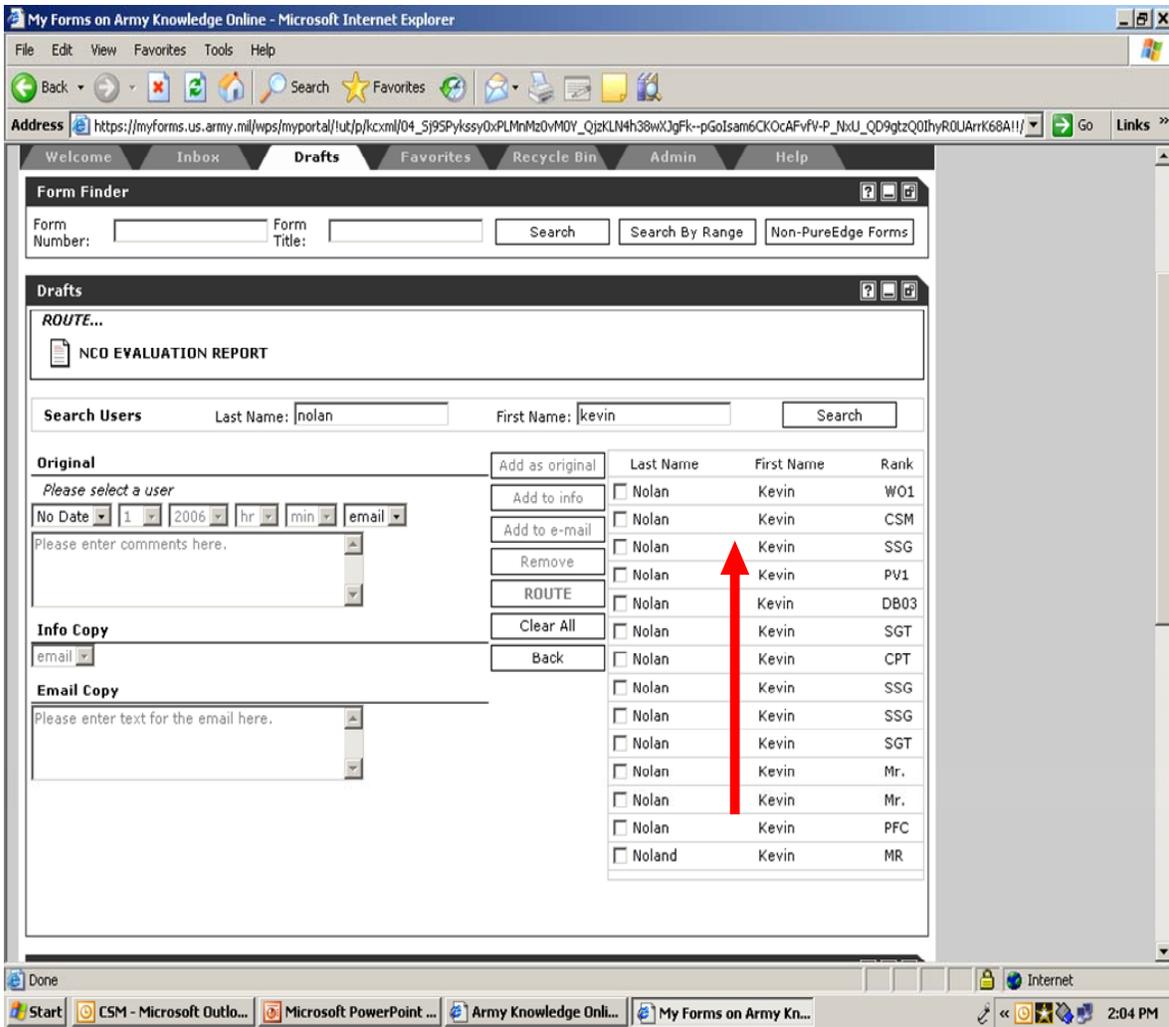


Figure 24

Locate and select the individuals

Key Note: There can be a multiple individuals with the same name; to verify correct person open their profile for duty location and telephone number.

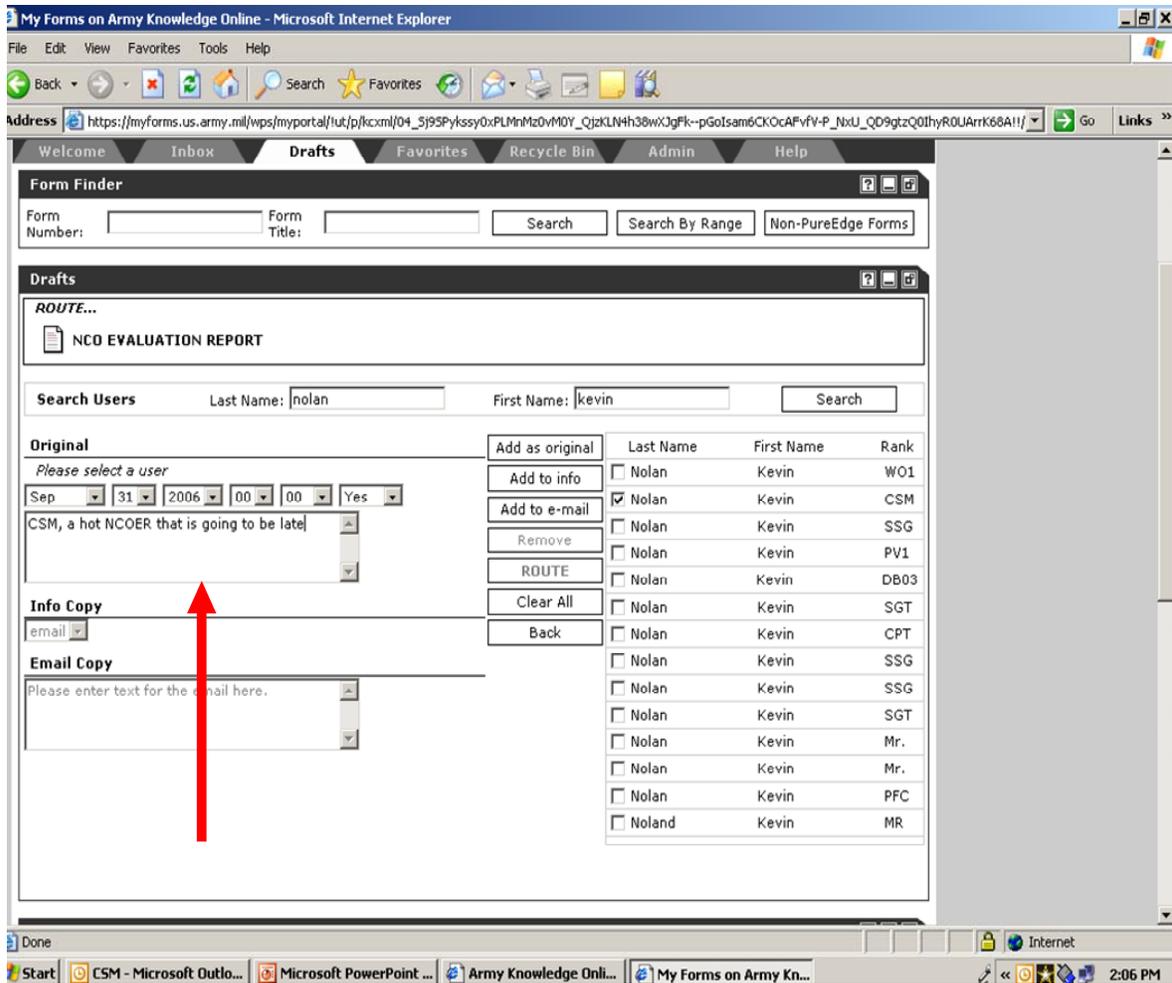


Figure 25

Select individual; type in any remarks and if applicable select a suspense date.

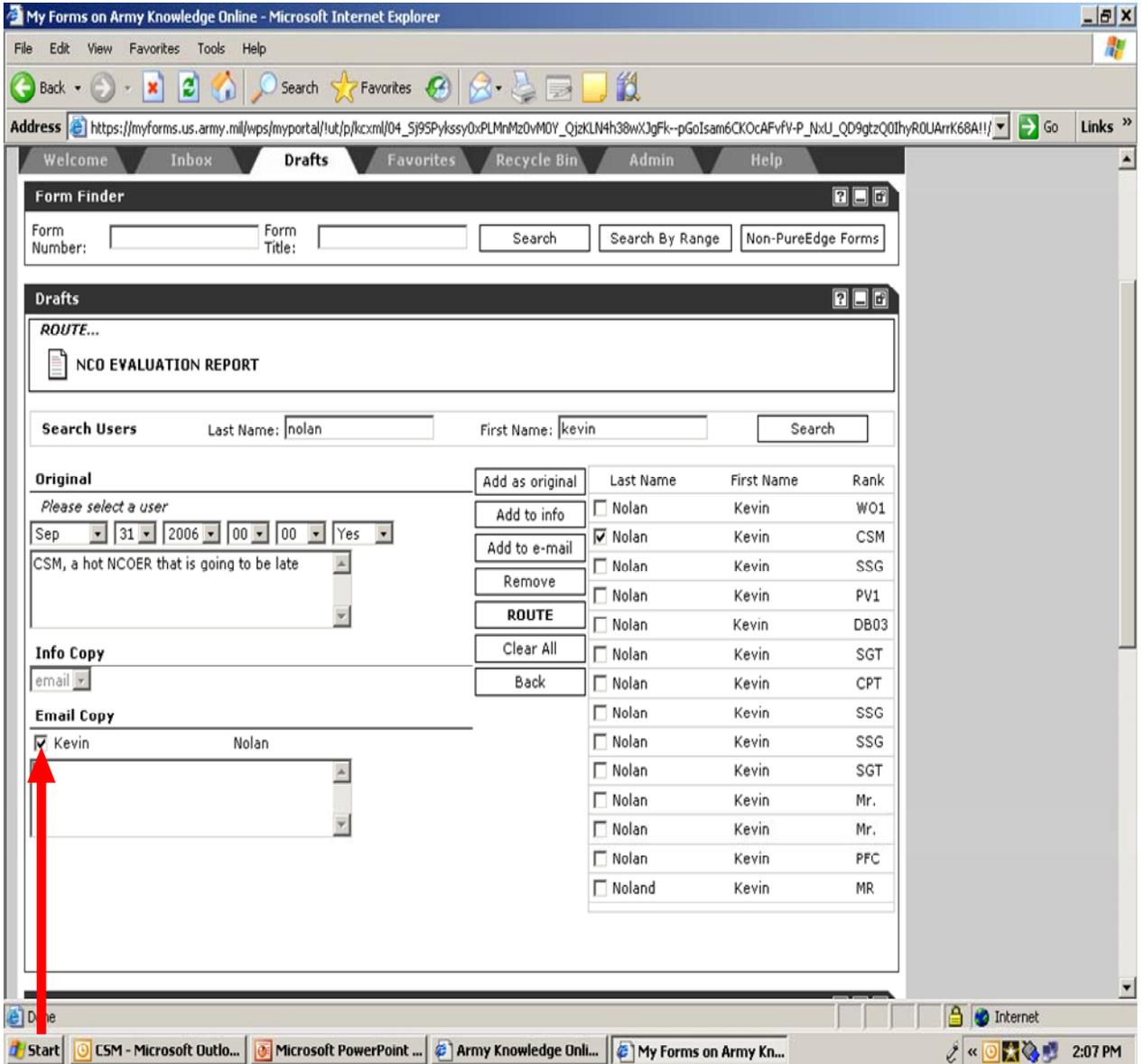


Figure 26

Select “add as original” ; click “route”

Noted: Emailing the report is an option; if one elect to route as original, the individual must log into AKO, “My Form” at access the report.

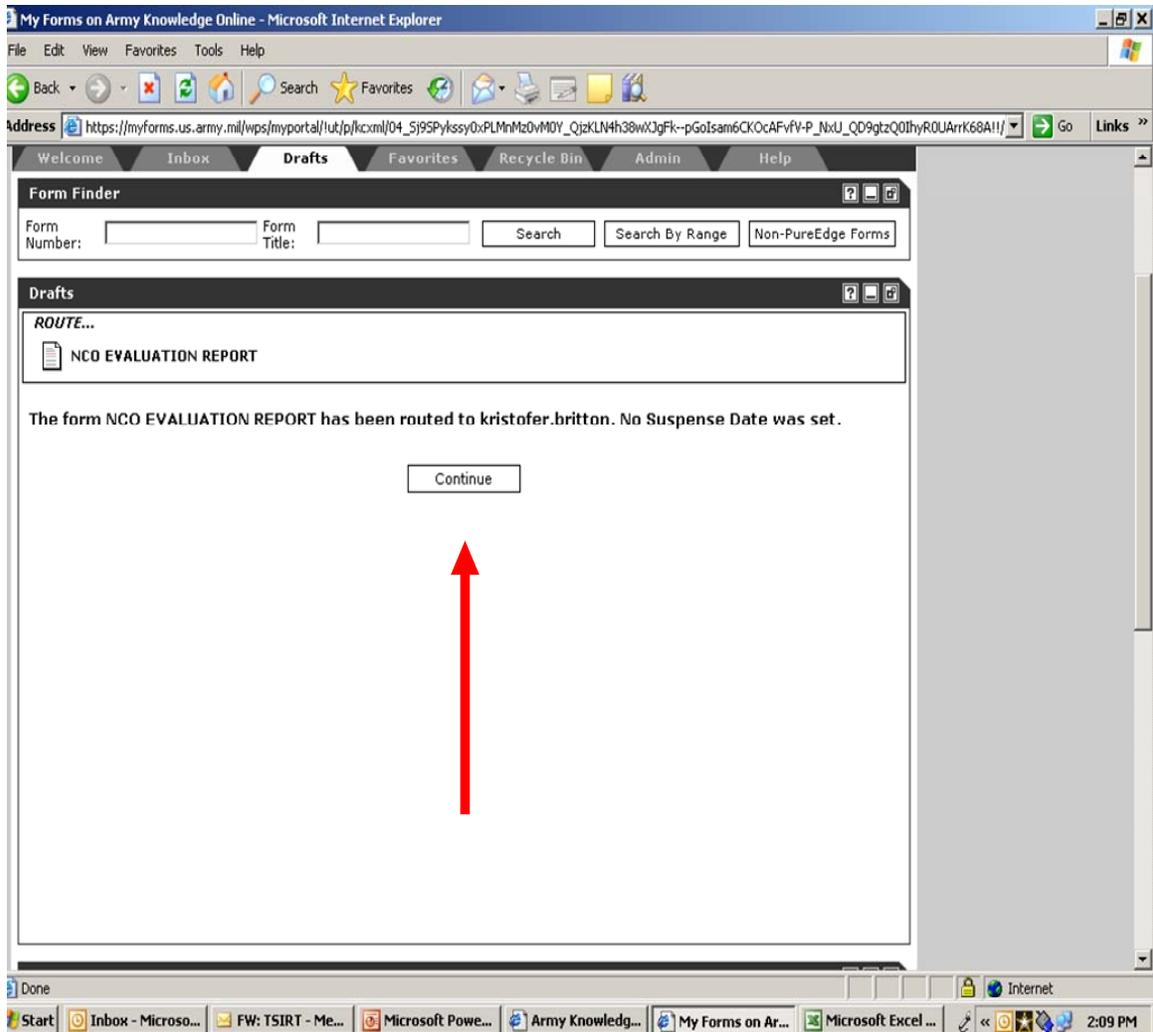


Figure 27

Confirm the report was routed

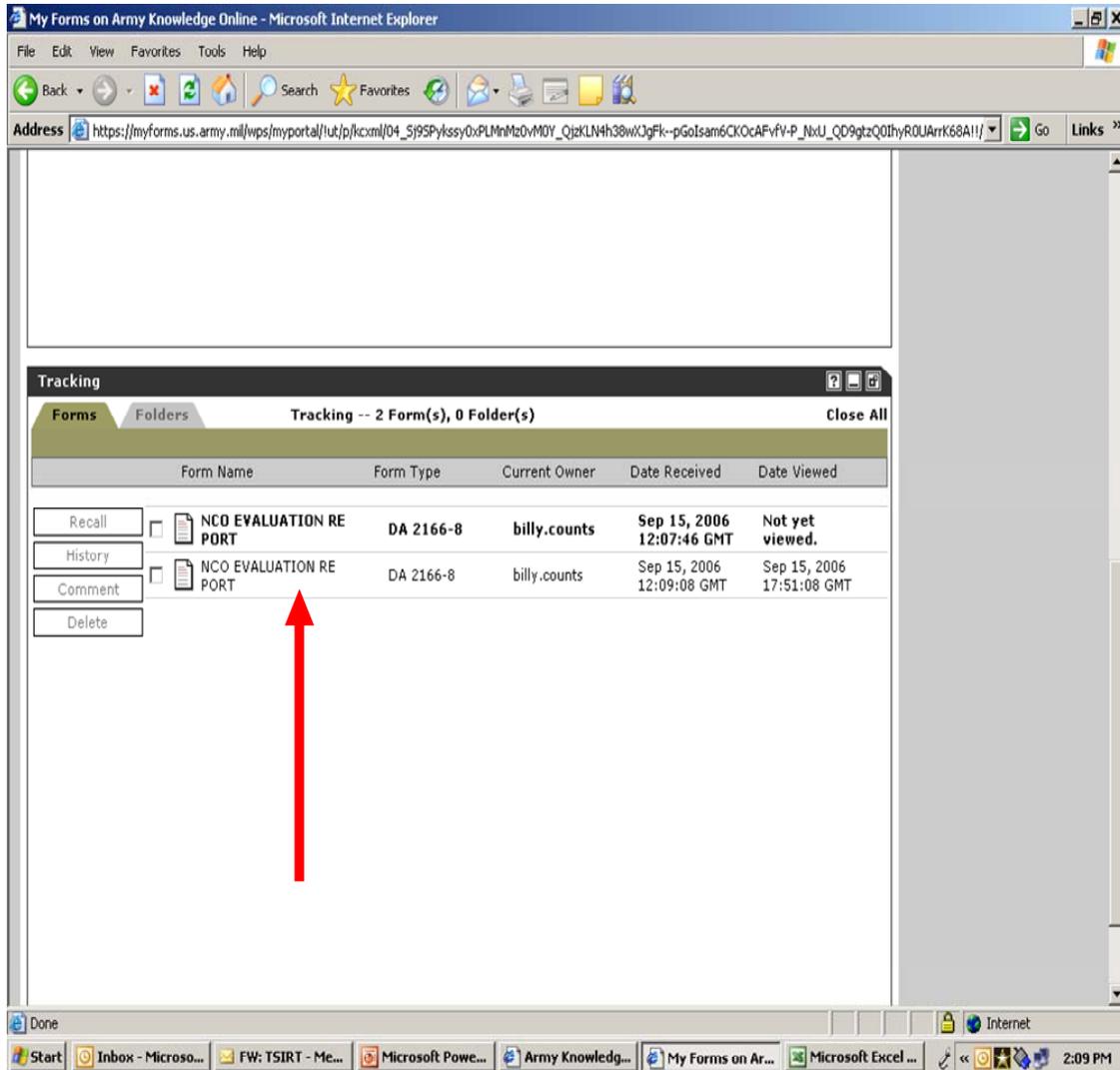


Figure 28

Report will be tracked until reviewed by all in the rating chain and anyone added to the routing slip.

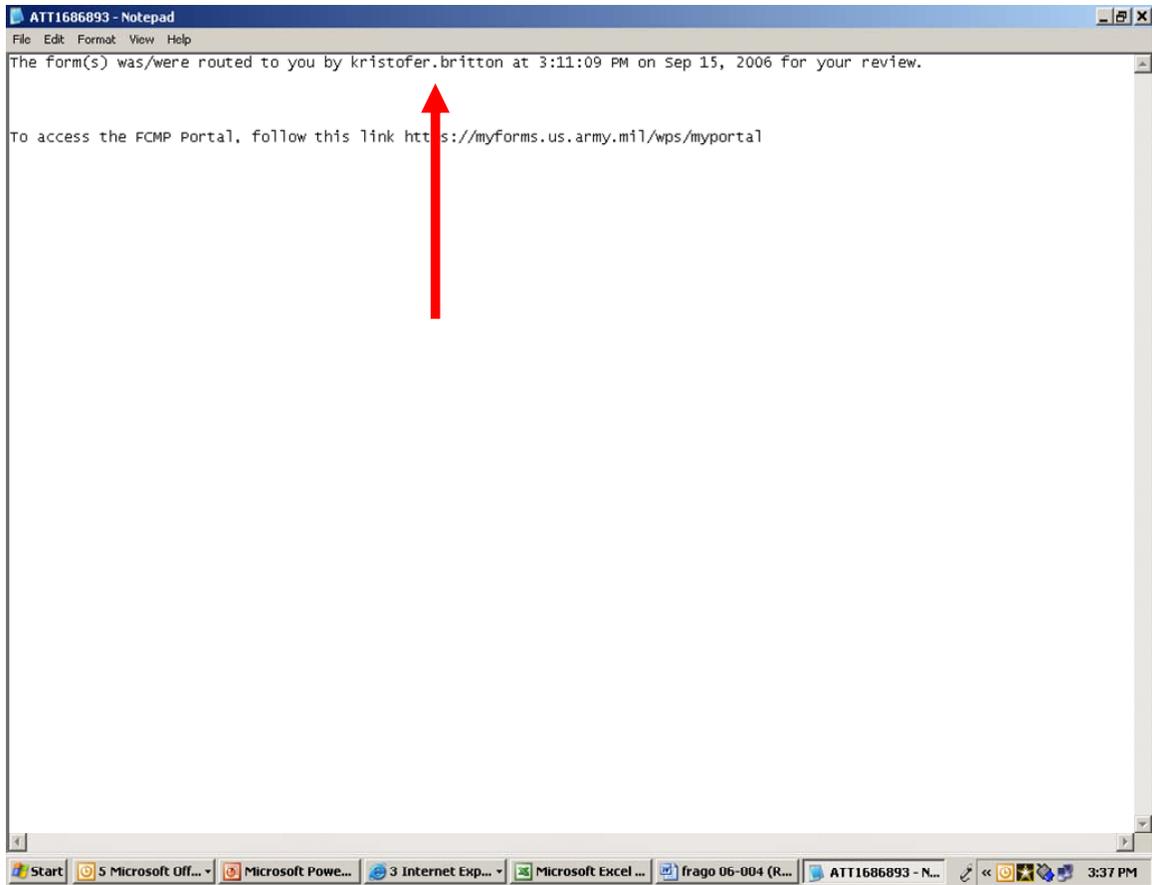


Figure 29

Notification sent to email account when NCOER routed for your action or review.

Routing Procedures

Inbox – Route Function

This screen appears when the user clicks 'Route.' Clicking "Route" on the Inbox page allows the user to view the history of the form or folder.

Original, allows the user to send the original form to an AKO email address. The user can only send one original to an addressee because a form can only have one owner. The original is tracked until the process is complete. The creator can reclaim the original until the addressee has opened it. The original remains in the repository.

The Info Copy is a read-only copy that allows the user to view changes as they are made to the form as long as the form remains in the repository. The user views the changes by clicking on the "Tracking" page.

The Email Copy is a read-only copy that is emailed to an AKO address. The email copy is not placed in tracking and the email recipient cannot view changes as they are

The user clicks "Back" to return to the Inbox.

Figure 1 Routing Slip

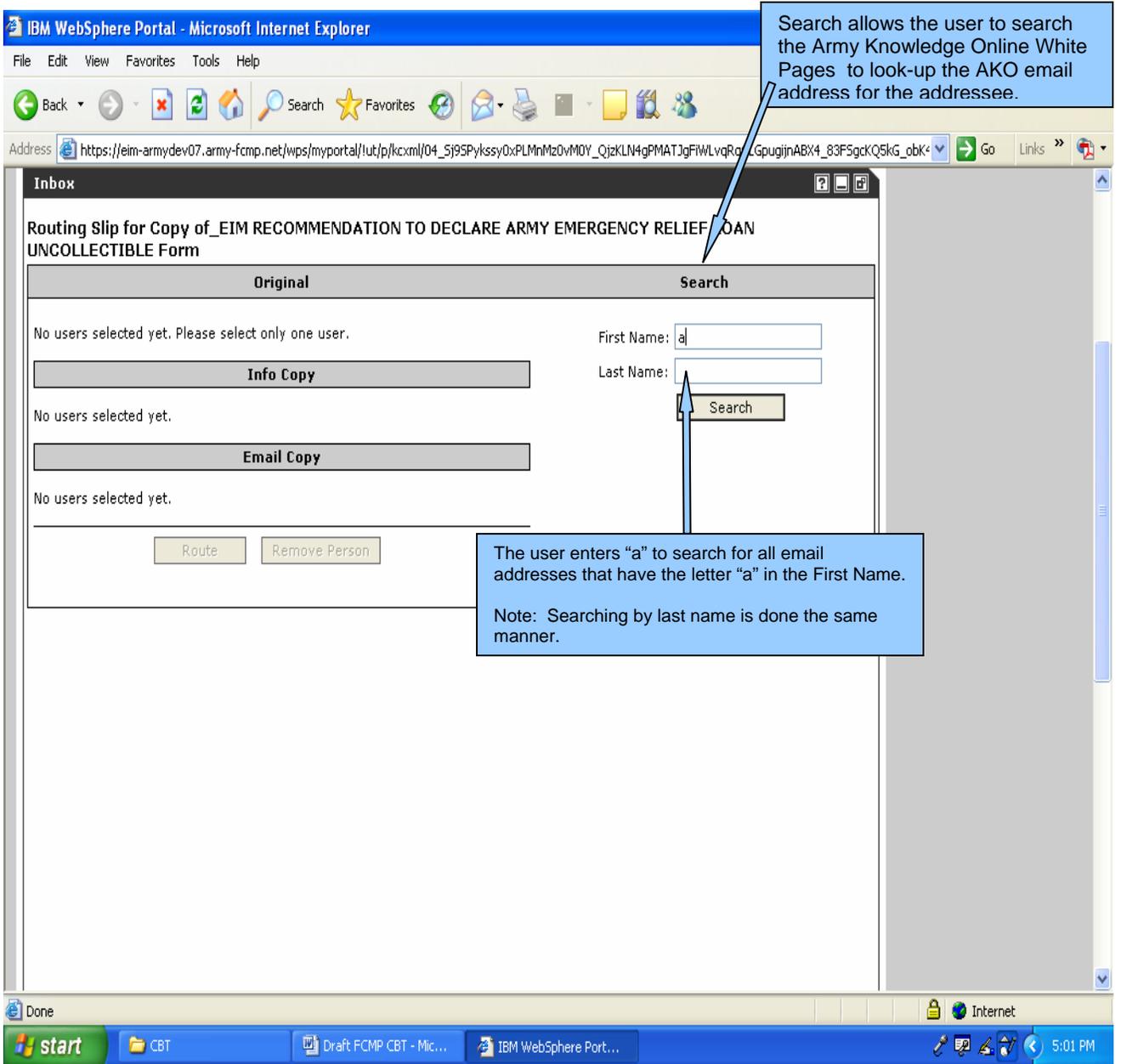


Figure 2 Search by Firstname

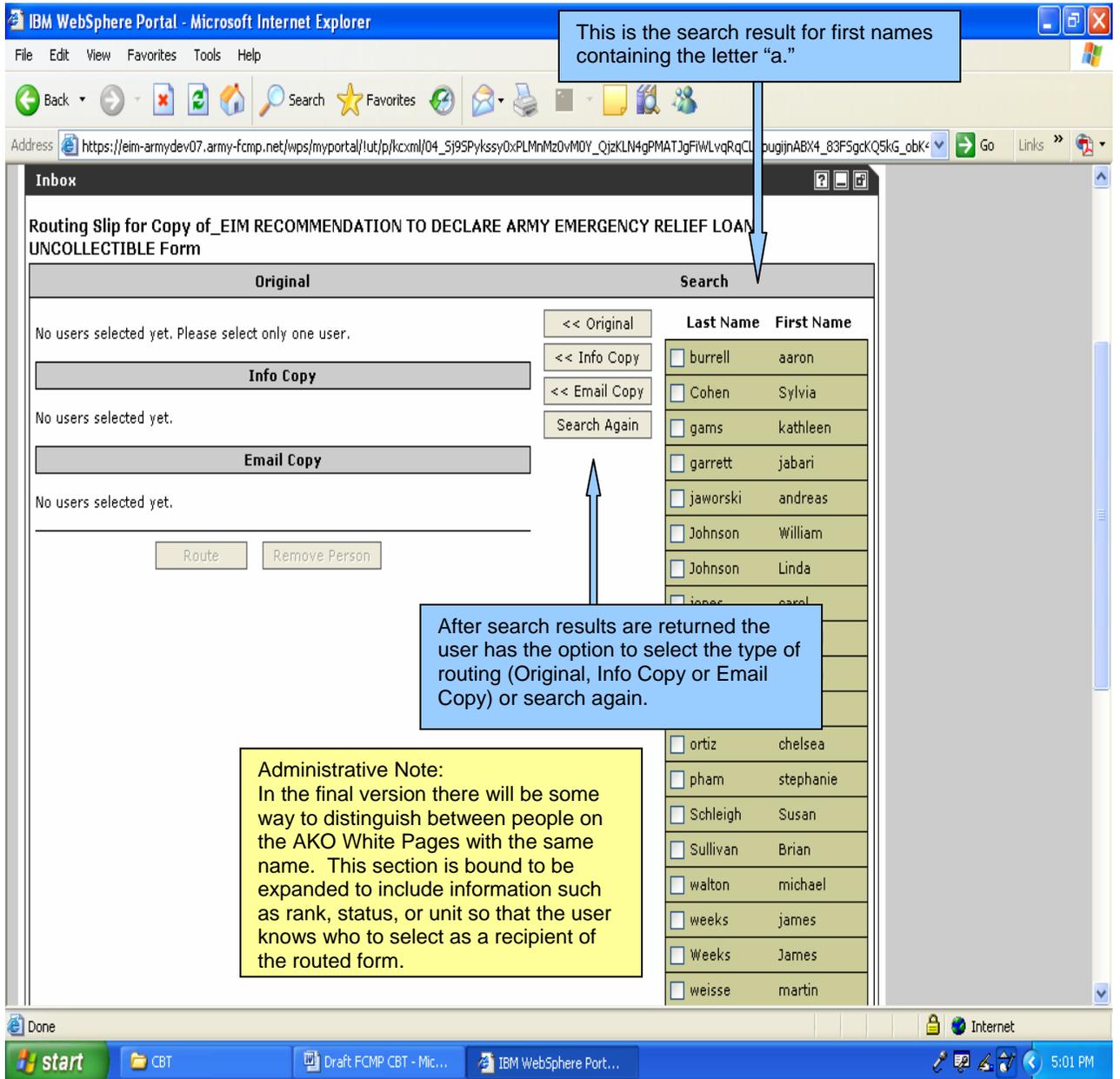


Figure 3 Search Results for Firstname

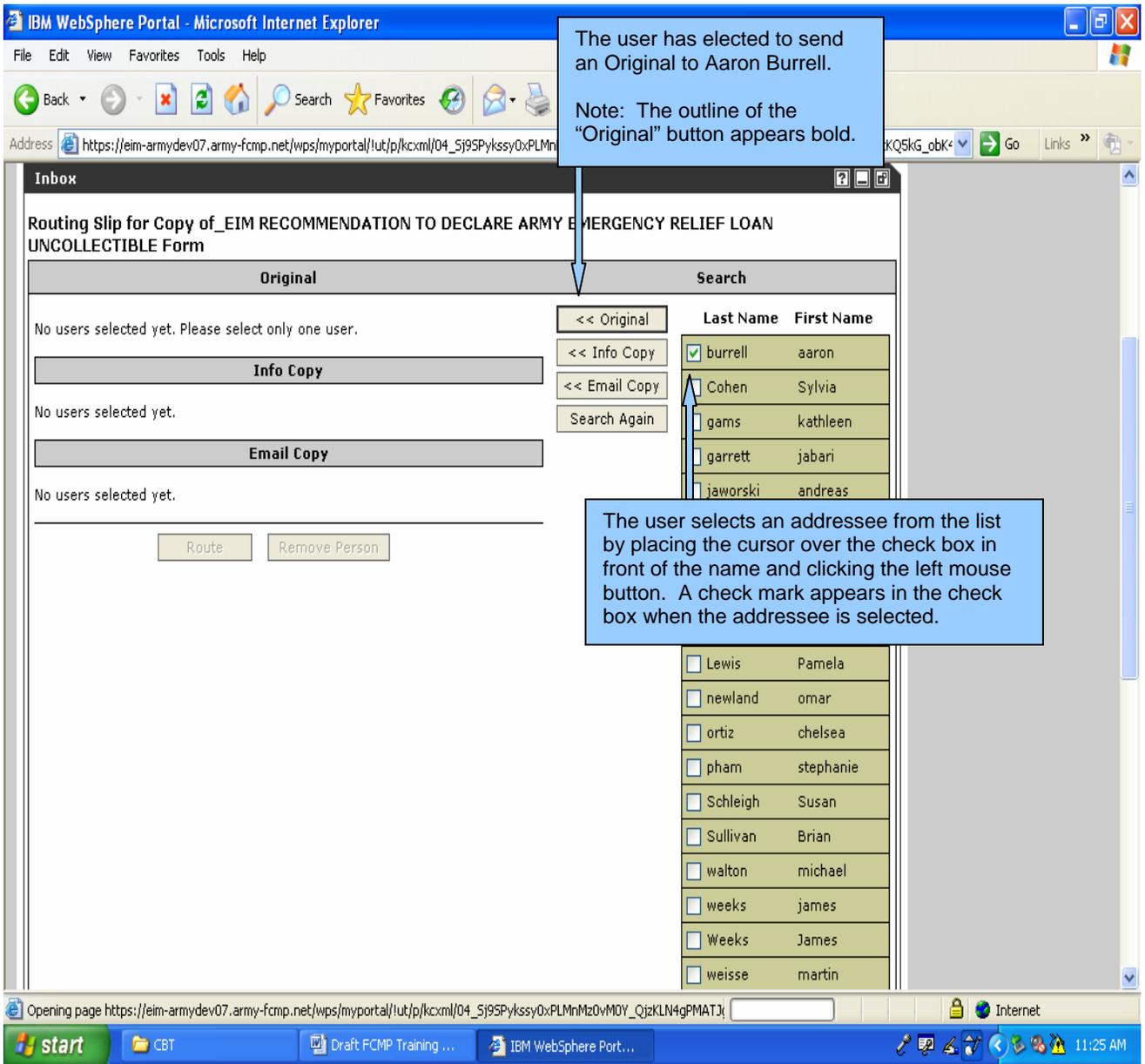


Figure 4 Select Original Addressee

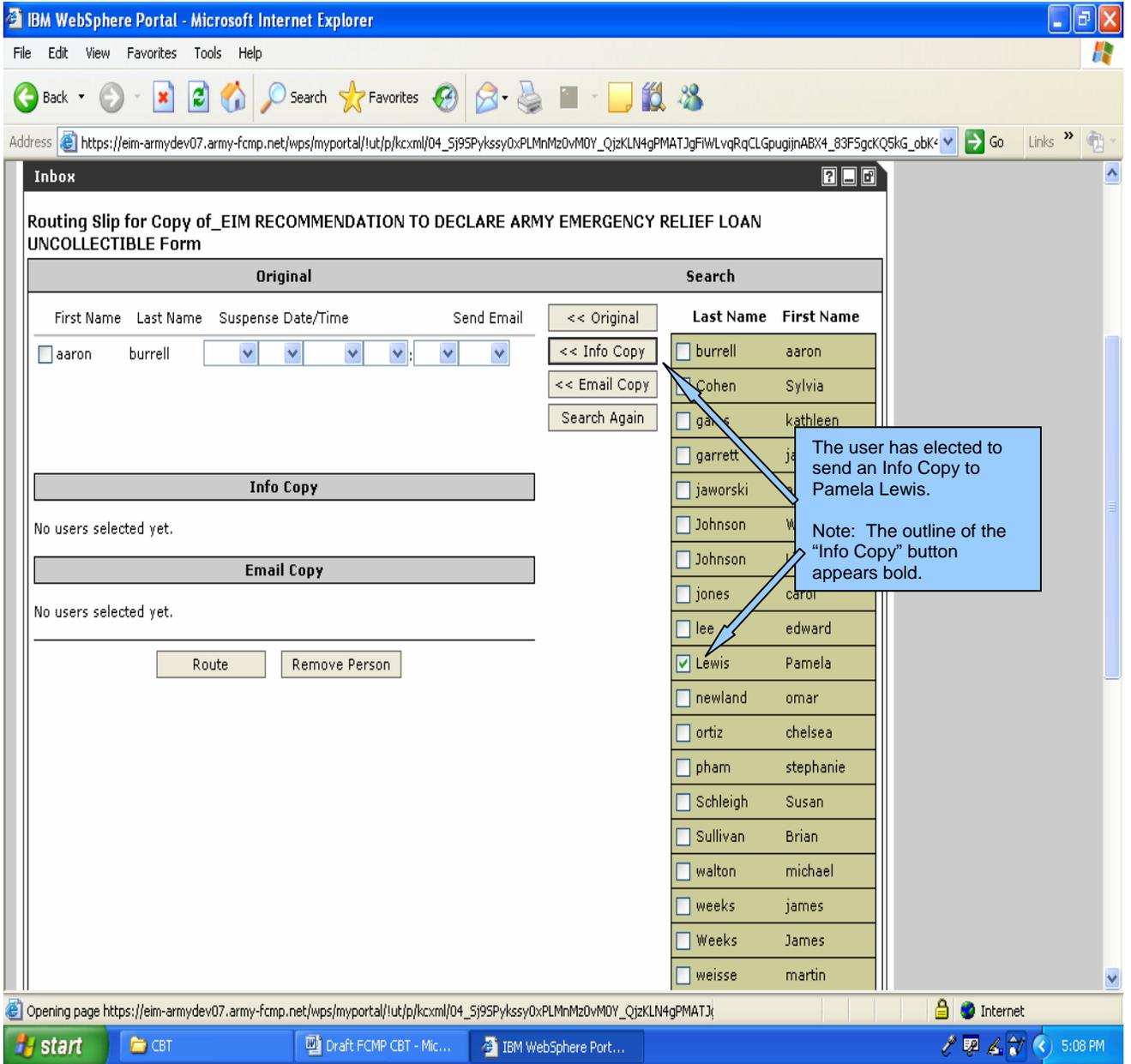


Figure 5 Select Information Copy Addressee

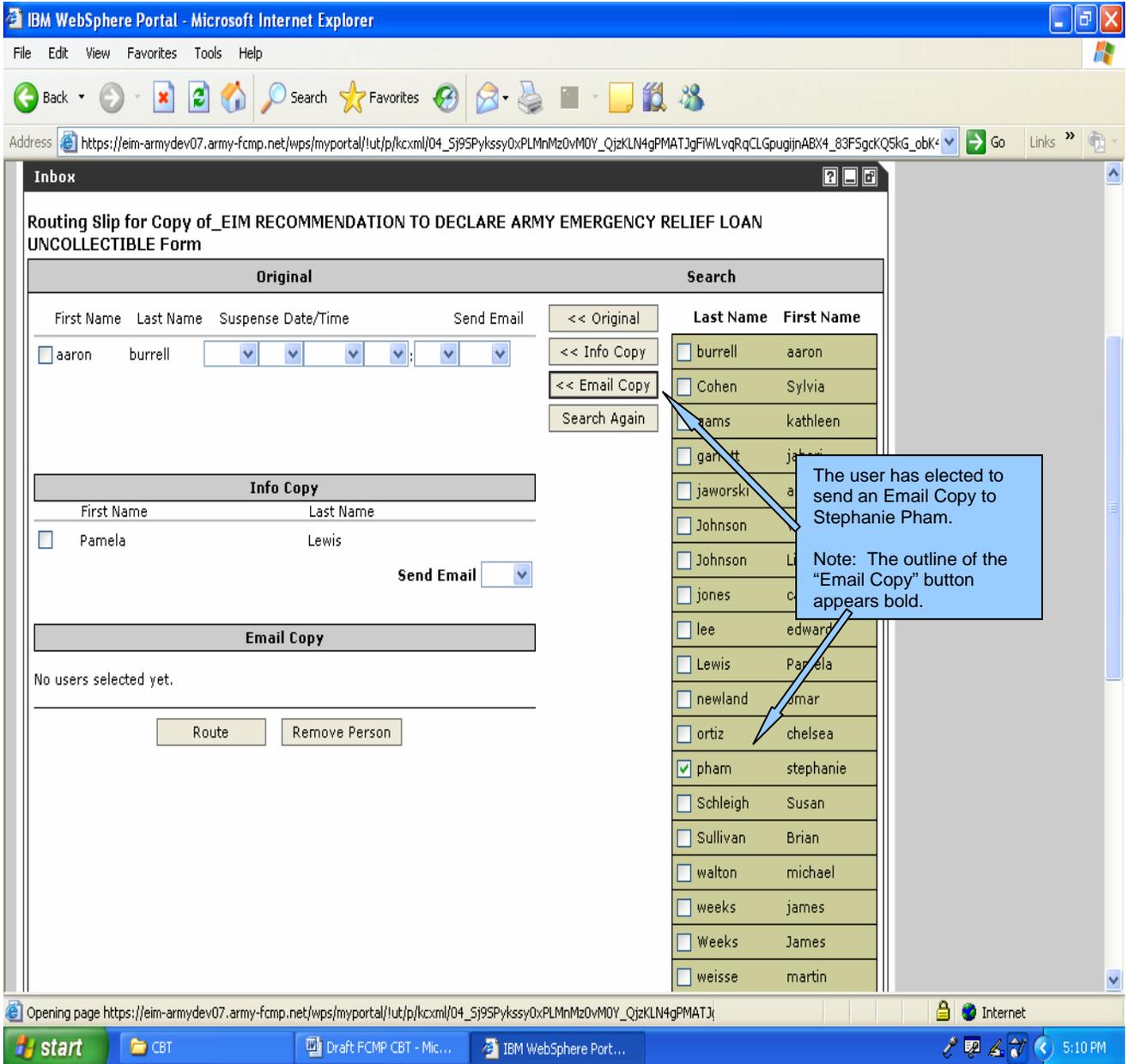


Figure 6 Select Info Email Address

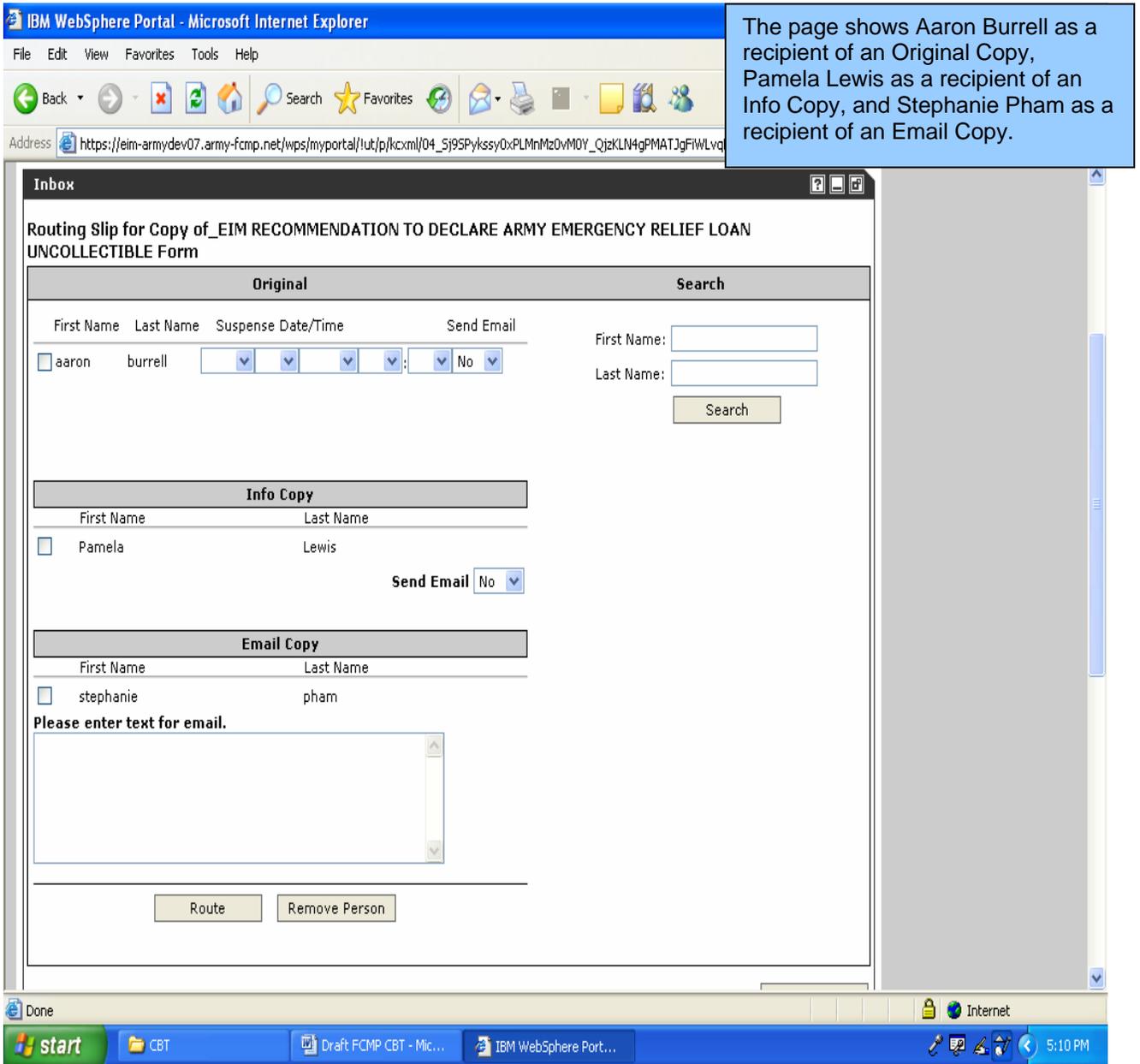


Figure 7 Completed Route Slip

The user can set a Suspend Date using drop-down menus.

Note: The user can also include a time with that Suspend Date.

Administrative note: When a suspense is missed - the item changes colors in the tracking section.

Inbox

Routing Slip for Copy of_E M RECOMMENDATION TO DECLARE ARMY EMERGENCY RELIEF LOAN UNCOLLECTIBLE Form

Original **Search**

First Name	Last Name	Suspend Date/Time	Send Email
<input type="checkbox"/> aaron	burrell	Jan 04 2006 03:00	No

First Name:
Last Name:

Info Copy

First Name	Last Name	Send Email
<input type="checkbox"/> Pamela	Lewis	No

Email Copy

First Name	Last Name
<input type="checkbox"/> stephanie	pham

Please enter text for email.

Figure 8 Set a Suspend Date

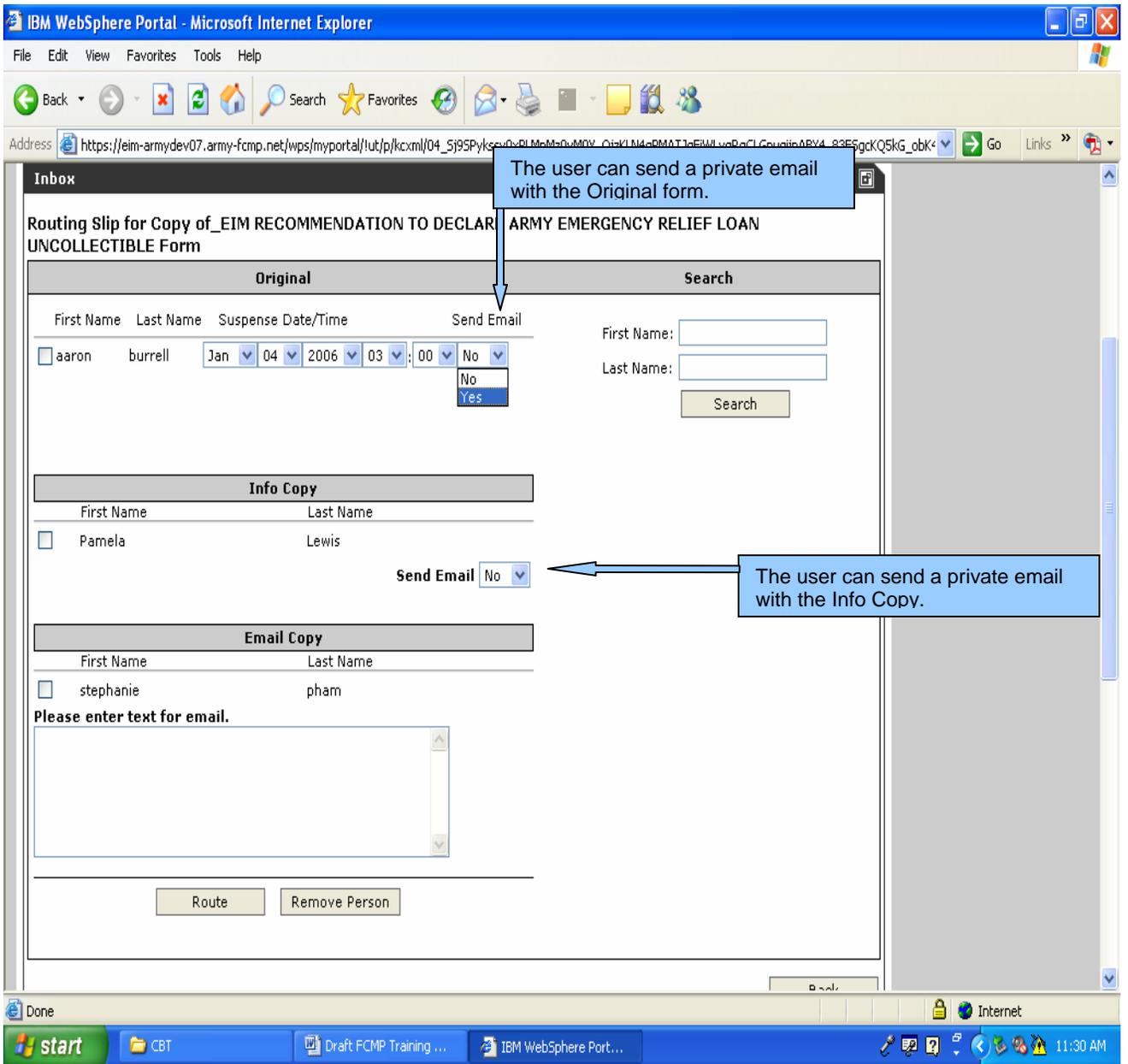


Figure 9 Send Private Email with Form

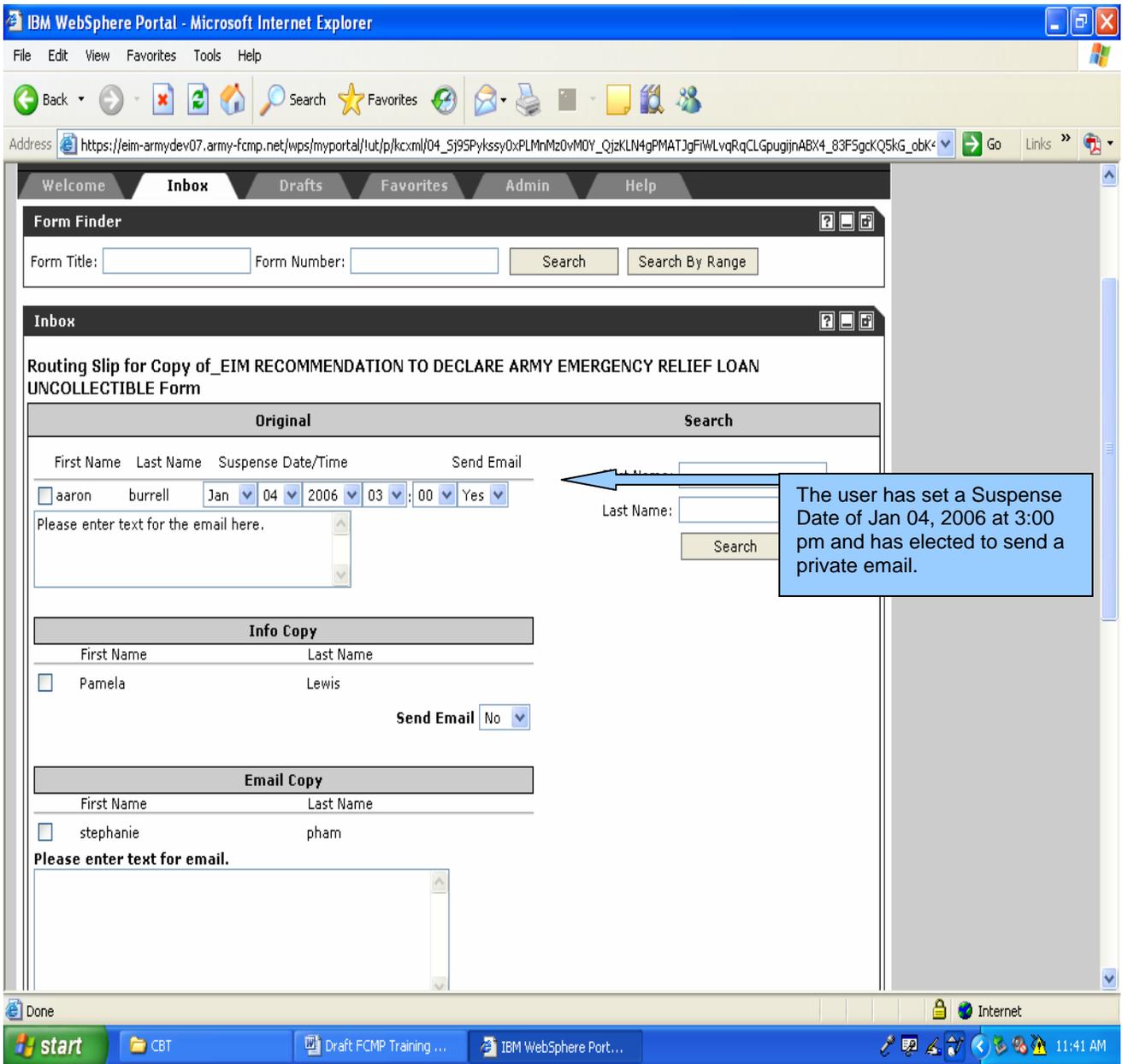


Figure 10 Selected Suspense Date and Email

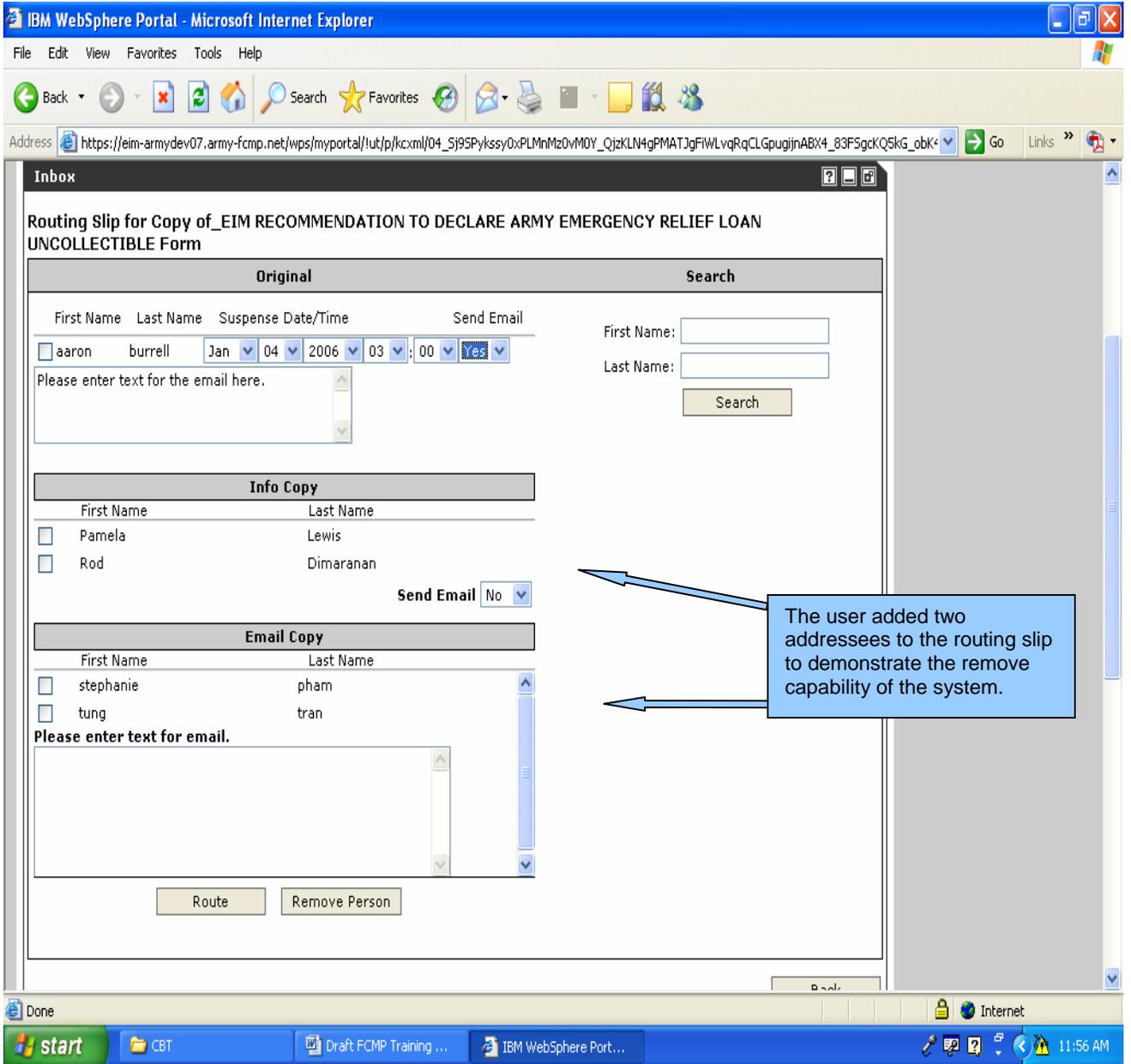


Figure 11 Added Addressees

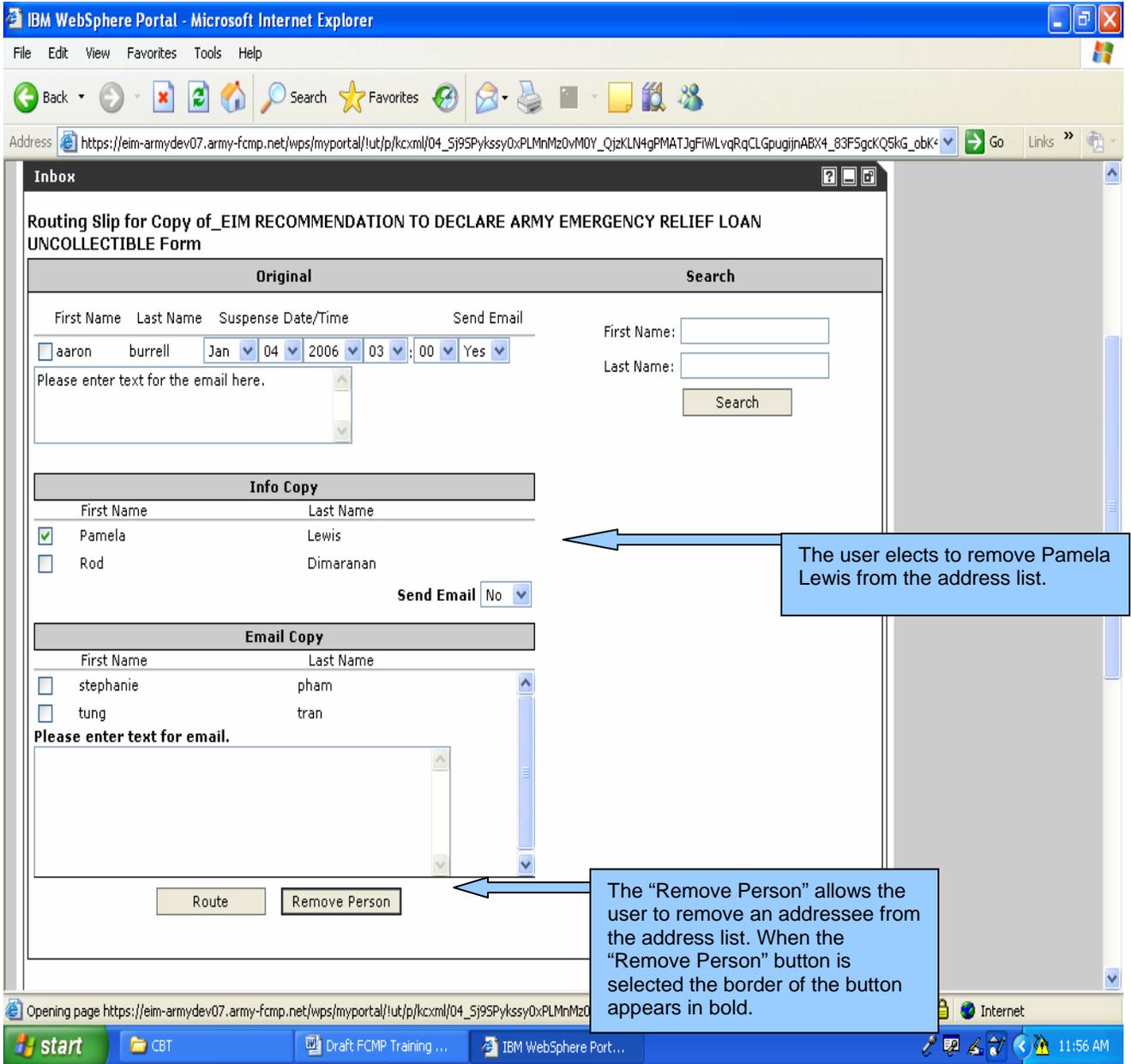


Figure 12 Remove Function

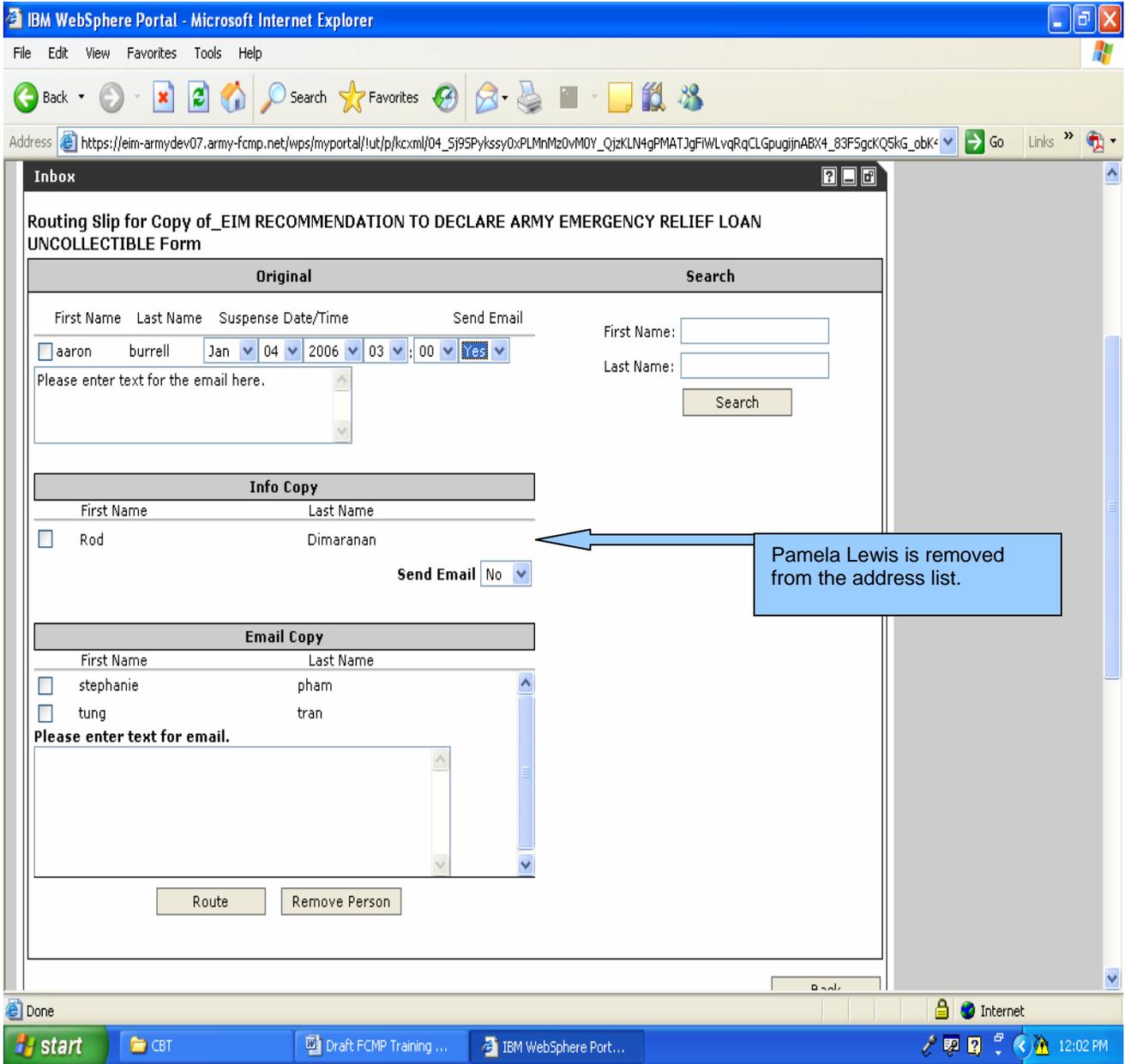


Figure 13 Addressee Removed

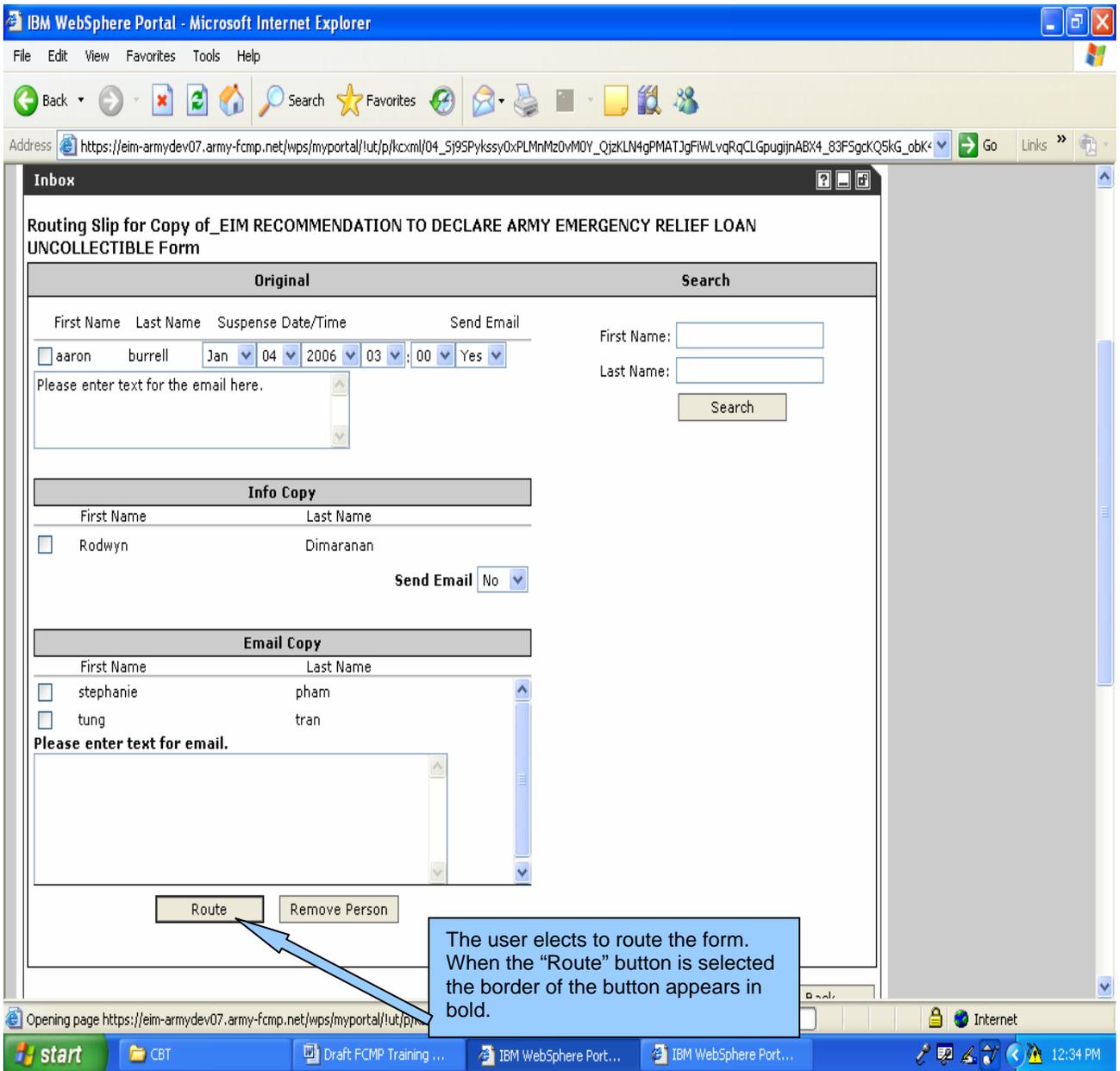


Figure 14 Completed Routing Slip

The form was routed successfully; however, the system did not display a routing confirmation. The system displayed a failed routing confirmation.

Insert screen shot representing successful routing for the routing slip above.