

17 January 2008

(U) Subject : AKO My Forms training 17 January 2008. Discussion: HRC conducted a train the trainer course on My Forms at the OCAR G2/G6 conference room. The AKO My Forms portal has about 140 forms currently available. Common use forms such as the OER and NCOER have a built in wizard to help complete the form. There is no mandatory date to have to use the My Forms portal to track evaluations. Online training is available at

[https://www.hrc.army.mil/site/Active/TAGD/MSD/ESO/FCMP\\_Webpage.htm](https://www.hrc.army.mil/site/Active/TAGD/MSD/ESO/FCMP_Webpage.htm). I would suggest looking at Section 1 Overview and Section 9 Eval Processing Basics at a minimum.

### Things to remember

- Start with a new form from the repository or your favorites, not a form already on your desktop that you have used before. This will ensure you have the newest form available and it can be transmitted electronically to HQDA. If you save the form to your favorites, that will pull the most current form from the repository each time you use it.
- When completing an OER or NCOER, fill out the support form first. You can create the OER and NCOER from the completed support form by using the Sp. Task button.
- When routing a form in My Forms, do not use the email copy as this creates a read only copy of the form which can lead to confusion.
- When adding comments to a form, these will be seen by anyone that has access to the form.

### Known Issues

- When creating an OER from an OER Support Form, the date of the APFT will be scrambled.
- When creating an OER from an OER Support Form, the Status Code drops out and you will have to re-enter the Status Code.
- There is a problem in the Wizard when spanning over 29 Feb 08. There will be changes made to the electronic versions of the forms before the end of Feb 08. If you need to create a report that spans those dates before the new form is available, do not use the wizard for this portion.

- You can not use the wizard to create an extended report, or a relief for cause if the time period has been less than 30 days.
- When uploading a form, the form name will change. Go ahead and rename the form after it is uploaded. They are working on a fix to keep the original file name.
- There is not a way to see if a form has comments unless you check the comments block and look. They are working on a fix for this.
- When routing a form, you need to search AKO by first name and last name. They are creating a search for AKO user id.
- When a form is routed to HQDA and someone is also sent an Info copy, if the info copy is opened, it will change the Date Viewed which may make it appear to have been viewed at HQDA. Use the history function to check for sure.

#### Helpful hints

- To create a template, put the data in a form and then choose copy. Save it to your Favorites to create a template. Saving it to drafts creates a one time use only form.
- If you want to send suggested comments to the next person in the rating chain, you can either enter them on the form, or you can add them to the comments field when routing the form. This is not the same comments field that everyone has visibility too. Just make sure you are routing it to the correct person. When in doubt, call them make sure.
- Use the wizard when available to avoid common mistakes.
- If you want an email to be sent to someone letting them know they have a form to sign in My Forms, choose the Yes drop down under email which is located on the same line as the suspense information. If you do not enter Yes, you can not enter comments on the email.

### **Instructions for digitally signing and routing evaluations on AKO**

1. Log into AKO (I like using the CAC login)
2. Select "My Forms" in the upper right corner
3. Select "Inbox" tab
4. Select the report name (only need to click one time)
5. Expand the form completely (easier to work in)
6. Select "View Form" (located in the bottom left corner)
7. Review all data on the form-especially admin data

8. Click in the signature block
9. Click sign and follow the remaining prompts (be sure to wait for everything to populate on the last screen-it takes a while. Then hit the appropriate button)
10. Digital signature will appear
11. Select "Save" in the upper left of the form
12. Will say it's been successfully saved to the repository-click OK
13. Close down the form by hitting the red X in the upper right corner
14. You will be directed back to the inbox
15. Check-mark the small box next to the form name
15. Select "Route Slip"
16. Search for "Last Name," "First Name" and hit search
17. Check-mark the box next to the person you want to send the form too
18. Select "Add as Original" (located near the center of the screen)
19. Select "Route" (also near the center of the screen)

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