Process Guide for Creating/Changing Evaluation Criteria on PEX

1. Go to https://home.pexmain.com/staneval/management/resources and download the applicable Eval Criteria Shell.
2. In PEX under Stan Eval>Mangement>Eval Criteria, Select the Squadron+MDS+Crew Position.
3. Tab over to the Evaluation Criteria Tool, Select open and choose the location of where you saved the downloaded shell.
4. Find governing AFMAN/AFI with Grading/Form 8 criteria and copy/paste from source document directly into the appropriate fields. (Note:Be mindfull of the numbering of the areas/subareas, they can sometimes reset themselves giving duplicate numbered areas, save your work often.)
5. It's recommended at this point that you screen capture or preserve an image of the existing evaluation profile to make recreating it later easier, if you are not intending to change any profiles. Once the new evaluation criteria is applied all existing profiles will be deleted
6. If you are changing a small portion of the overall criteria and the shell has already been created for another posn type you have the option of opening that shell(resaved as an XML) in Excel and copying the appropriate fields into Evaluation Criterial you are trying to change on PEX.
7. If you adding to preexisting sections, areas or subsections be aware you can drag the fields up or down into the portions of the criteria you want add them to but be prepared for the numbering of all sections to be affected as you are moving things around.
8. After you have created the criteria shell and triple checked it for errors save it G:\55og_staff_ws\OGV\2.0 Programs\1.6 Eval Mgmt\PEX Eval Criteria and once you have verified the new shell forward it to Bob Olsen in order to get it uploaded to the pex website.
9. Next you will apply the changes and it will prompt you to save the shell again, no changes should have been made since the initial save so overwrite or rename as you see fit.
10. You will now have to recreate the profiles for all positions in the squadron(s) you want to apply the new criteria to. Do not forget to create INSTR and SEFE profiles as well. You can find the Reqs in the appropriate tables in the MDS Vol 2, 11-202 Vol 2 or applicable Sup.
11. Once the profiles are created verify the changes have been made by attempting to create an Eval for a member of the squadron(s) you have applied the new criteria for, of a type of evaluation that will give you the affected graded items.