

Flight Evaluation/Form8/AF 3862 Process Guide

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1. Program Definition:

- 1.1. Flight evaluations ensure aircrew members are qualified to perform their duties. OGV is primarily responsible for interpreting and clarifying higher headquarters guidance. OGV also defines the processes for creating, obtaining, reviewing, routing and posting the AF Form 3862 (Flight Eval Worksheet) and Form 8 utilizing PEX. SQ/CCVs are primarily responsible for conducting and managing flight evaluations in accordance with published guidance.

2. OGV Responsibilities:

- 2.1. Conduct evaluations on all lower level evaluators and subordinate aircrew per AFI 11-202 Vol 2 Ch. 3 para 3.2.4.
- 2.2. Collect feedback and provide guidance to SQ/CCVs in regards to AF 3862 (Flight Eval Worksheet) and Form 8 procedures.
- 2.3. Create and maintain standardized AF 3862 (Flight Eval Worksheet) templates, as backup in the event PEX is unavailable, for each crew position IAW AFI 11-2MDS Vol 2 evaluation criteria.
 - 23.1. The templates will be available on the OGV Intelink page under the [AF 3862 \(Flight Eval Worksheet\)](#) button.

24. Manage and update 55 OG Evaluation Profile Letter (EPL). OGV will coordinate with SQ/CCVs for inputs to the EPL. The EPL will be reviewed semiannually and updated as required.
25. Review all Forms 8 prior to release for signatures. Check 55 OG/OGV org box daily to review Forms 8 and reply to CCV when review is complete with corrections to be made or to release for signatures.
 - 25.1. Review all AF Forms 8 for Q2 and Q3 evaluations IAW paragraph 6.7 and Attachments 1 and 2. Notify CCV when complete.
26. Consolidate unit inputs and post updated PEX process guides within 45 days of a PEX software update or as required to establish best procedures to be utilized across the group.
 - 26.1. The latest OGV PEX Form 8/AF 3862 “How-To” Guide is maintained on the OGV Intelink under the [OG Sup Process Guides button](#).

3. Squadron CCV Responsibilities:

- 3.1. Notify flyers (attached and assigned) when they enter their 6-month evaluation eligibility window.
- 3.2. Assign open and closed book examinations to the examinee no earlier than the start of their checkride window (unless waived by the SQ/CC), place waiver MFR in members FEF and annotate in PEX.
 - 3.2.1 Provide a CCV representative to proctor all requisite examinations. Proctor responsibilities:
 - Brief the type, purpose and length of exam to the examinee
 - Ensure no unauthorized materials are brought into the testing area
 - Ensure examinee does not leave the testing area before closed book exam completion
 - Verify examinee is not fatigued or ill to the point that it might affect test performance
 - Maintain suitable testing conditions within the testing area for all exams
 - Brief examinee that compromise of test material such as unauthorized possession of test materials, discussion of test content, or manipulating test dates on electronic exams, are violations of regulations which are punishable under the provisions of the UCMJ
 - Brief examinee of consequences of a failed examination (see Supervised Status Letter)
 - Answer any questions an examinee may have before testing begins.
- 3.3. Coordinate with DOS to schedule the checkride.
- 3.4. Verify that all requisites are complete prior to the evaluation.

- 3.5. Ensure, at a minimum, the following are available to the FE:
 - Squadron specific evaluation processing checklist
 - Examinee specific AF 3862 (Flight Evaluation Worksheet)
 - Form 1522
 - Form 4324 (if necessary)
- 3.6. Coordinate with FE and DOT to develop and track any additional training following a Q2 or Q3 evaluation. See Q2/Q3 process below in para 6.7.
- 3.7. Ensure an AF 3862 (Flight Eval Worksheet) is created in PEX by COB the duty day after the evaluation is complete. This serves as the Temporary Form 8 until the actual Form 8 is completed.
- 3.8. The 338th CTS/CCV will notify the student examinee's gaining squadron CCV office via email within 1 duty day of evaluation completion that the Temp Form 8 is available in PEX. The gaining squadron CCV or DOT will access the Temp Form 8 in PEX, then generate and deliver the Form 4324 to their SARM office.
- 3.9. Review each Form 8/AF 3862 (Flight Eval Worksheet) for errors to ensure flight/ground discrepancies are categorized IAW the grading volumes and reflect the qualification level assigned.
 - 3.9.1. If Form 8 corrections are required, notify evaluator to make correction and once corrections are complete, notify OGV for final review.
- 3.10. Notify OGV by email to the 55 OG/OGV org box when the Form 8 and AF 3862 have been created, the AF 3862 has been signed by the evaluator and both have been reviewed, but prior to being released for signatures. OGV will give the Form 8 a final review and notify the CCV when ready to release for signatures.
 - 3.10.1. Utilize the PEX pre-signature review notification process. Click "Notify" OGV to produce a standardized email and enter 55 OG/OGV in the "To" block.
- 3.11. For ANG/AFR crew member evaluations, notify the appropriate ANG or AFR squadron commander via email once the Form 8 is completed. It is no longer required to have an additional reviewer signature on the back of the Form 8.
- 3.12. Review current OGV Process Guide and provide recommendations to OGV within 30 duty days after PEX software update or as required to correct errors.

4. Flight Evaluator (FE) Responsibilities:

- 4.1. Conduct the evaluation in accordance with 11-2MDS Vol 2, 55 OG EPL, the 55OG Flight Examiner Checklist and other applicable guidance.

- 4.2 The evaluator is ultimately responsible for ensuring the evaluation is documented accurately IAW AFI 11-202 Vol 2 ACC Sup 1, Chapter 7, and 55 OG Sup 1 and input in PEX for processing.
- 4.3 Document the evaluation on an AF 3862 (Flight Eval Worksheet) and a Form 8 in PEX. “PEX Form 8/AF 3862 (Flight Eval Worksheet) How-To Guide” located on OGV Intelink under [OG Sup Process Guides](#). If PEX is unavailable, Crew Position Specific AF 3862 templates are available on the OGV Intelink under [AF 3862 \(Flight Eval Worksheet\)](#).
 - 43.1 If the evaluation is completed OCONUS and/or PEX access is not available, the paper template of the AF 3862 (Flight Eval Worksheet) will be filled out in dark ink (black or blue) and scanned/mailed or faxed to the appropriate stateside CCV, as soon as practical, preferably within 1 duty day of completion. This would serve as a Temporary Form 8 until the actual Form 8 can be completed.
 - 43.2 Complete Form 8 and submit to CCV for review prior to releasing for signatures.
- 4.4 Inform SQ/CC and/or SQ/DO NLT the next duty day following a Q2 or Q3 performance. Email OGV with notification of Q2 or Q3 and additional training plan. Coordinate with SQ/DOT for any required additional training. Make OGV the final approval authority for additional training. See process below in para. 6.7.

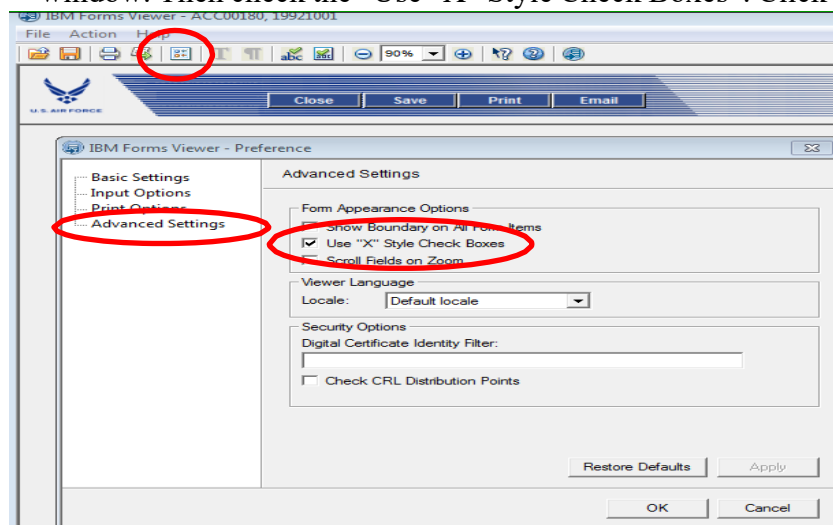
5. Examinee Responsibilities:

- 5.1. Coordinate with CCV and DOS to schedule the evaluation at the earliest possible date.
- 5.2. Complete all requisites within the eligibility period.
- 5.3. Complete any required additional training within the prescribed timeframe for any Q2 or Q3 evaluations.

6. General Form 8/AF 3862 (Flight Eval Worksheet) Procedures:

- 6.1. 55 OG units will use the AF 3862 (Flight Eval Worksheet) as a Flight Evaluation Worksheet and as a Temporary Form 8. This form is an official document representing an individual’s flight qualification and will present a clear description of the evaluation and any discrepancies, as well as the trends for that evaluation.
- 6.2. Complete the Form 8 and the AF 3862 (Flight Eval Worksheet) electronically in PEX (primary) or a paper AF 3862 (Flight Eval Worksheet) template in dark ink (black or blue) (secondary in the case where PEX is not accessible).
 - 62.1. For guidance refer to paragraph 7 below and “PEX Form 8/AF 3862 (Flight Eval Worksheet) How-To” power point located on the OGV Intelink under [OG Sup Process Guides](#).
- 6.3. Document all MFRs pertaining to the evaluation (three month extensions, non-current evaluations, evaluations accomplished in the ATD, etc.) and incorporate in the additional comments section of Form 8. See Attachments 3-9 for examples.

64. If the evaluation is a requalification evaluation, the reason for requalification will be annotated in the additional comments section of the Form 8/AF 3862 (Flight Eval Worksheet).
65. Offutt based units (and OLS when the PEX functionality becomes available) will use PEX for electronic signatures on Forms 8/AF 3862.
- 65.1. If there is a lack of PEX access, lock Form 8 for email, export Form 8 and email to applicable individuals for digital signatures. Once returned, import the Form 8 back into PEX and release for remaining digital signatures.
- 65.2. There is no longer a need for “wet” signatures with the ability to route digital forms for signature. ANG/AFR Forms 8 no longer require an Additional Reviewer comment on the back. Notify ANG/AFR squadron commander by email that one of their personnel have a Form 8 for review. As for Q3 evaluations, the OG/CC will mark the review via an MFR in PEX (see para. 6.7 for details).
66. If you need to print either the AF 3862 or the Form 8 follow instructions below to ensure “X”s are populating the forms.
- 66.1. Click on the Icon shown below. Click “Advanced Settings” in the Pop-up window. Then check the “Use “X” Style Check Boxes”. Click “OK”.



- 66.2. Then save and/or print your AF 3862/Form8.
67. **Q2/Q3 Processing (also see Attachment 1 and 2):**
- 67.1. **Q2 Processing:** The unit will notify OGV by email when the Form 8 is ready for review in PEX before the signature process is started. OGV will provide corrections on the Form 8 or recommend releasing for signatures.

- 6.72. **Q3 Processing:** The unit will notify OGV by email when the Form 8 is ready for review in PEX before the signature process is started. The email will include an MFR detailing the discrepancies and proposed additional training, to include the resources required to complete the training. e.g. simulator, flight.

- 6.7.2.1 An example Q3 MFR is below in Attachment 9.
- 6.7.2.2 OGV will review the recommended additional training and MFR, and provide any necessary feedback to CCV. Following the review and feedback, the follow-on training events may be completed.
- 6.7.2.3 After follow-on training events have been completed, CCV will have the SQ/CC sign the MFR, and send it to the Chief of OGV.
- 6.7.2.4 The Chief of OGV, or designated representative, will sign the MFR, and forward a copy to OG/CCE and the CCV.
- 6.7.2.5 CCV will file the SQ/CC and the Chief of OGV-signed MFR in the eFEF.
- 6.7.2.6 When the previous steps are completed, and the signature process for the Q3 Form 8 is completed, the subsequent evaluation may be scheduled.

7. AF Form 8 and Temp Form 8 Creation in PEX using the AF 3862 (Flight Eval Worksheet)

- 7.1. Use “PEX Form 8/AF 3862 (Flight Eval Worksheet) Guide” Power Point to create a Form 8 and AF 3862 in PEX. The most current version can be found on the OGV Intelink under the [OG Sup Process Guides](#) button.
- 7.2. The primary form used for the Temporary Form 8 is the AF 3862 (Flight Eval Worksheet).
- 7.3. Upon completion of the evaluation, the FE will use the AF 3862 (Flight Eval Worksheet) Template to fill out a worksheet in PEX. This will generate a Form 8 and AF 3862 in PEX.
 - 73.1. For evaluations that were only partially completed, and require a second flight (i.e. no air refueling), a worksheet will still be created and AF 3862 signed for that portion of the evaluation and all applicable areas and overall grades graded. A worksheet will be created for all subsequent flights in the same manner until evaluation is complete. This will allow PEX to automatically populate the Mission Description with all sorties, examiners (if different) signature blocks and the ability for sorties with multiple examiners to digitally sign for their respective sortie. See example below.

Signatures

AFI MANDATED SIGNATURES

Signer	Name and Grade	Organization	Concur	Not Concur	Remarks	Date
Evaluator/Flight Examiner	Michael J. House, MSgt	1 ACCS/DOFE	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30 Aug 2016 15
Evaluator/Flight Examiner	Robert D. Marks, TSgt	1 ACCS/CCV	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30 Aug 2016 15
Reviewing Officer	Derek L. Ligon, Lt Col	1 ACCS/DO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30 Aug 2016 15
Final Approving Officer	Anthony T. Shafer, Lt Col	1 ACCS/CC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30 Aug 2016 15
Examinee	Gregory V. Jeffries, TSgt	1 ACCS/DOFE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	30 Aug 2016 15

Sign

Notify

POST SIGNATURE REVIEWER

Reviewer	Status

U.S. AIR FORCE

Save Signatures Export Print << Previous

CLICK HERE TO SIGN SORTIE 1

AF FORM 8 CONTINUATION SHEET

IV. COMMENTS

EXAMINER'S REMARKS:

A. Mission Description.

First Sortie: This was an Initial Flight Engineer Qualification and Mission evaluation flown IAW AFI 11-202V2/ACCSUP1/55OGSUP1, AFI 11-2E-4V2, and the 55 OG Evaluation Profile Letter. This evaluation is incomplete due to tanker cancellation. Examinee must complete Area 14 - Air Refueling.

MICHAEL J. HOUSE, MSgt, USAF
1 ACCS/DOFE

Second Sortie: This was an Initial Flight Engineer Qualification and Mission evaluation flown IAW AFI 11-202V2/ACCSUP1/55OGSUP1, AFI 11-2E-4V2, and the 55 OG Evaluation Profile Letter. Area 14 - Air Refueling was completed by the examinee.

B. Discrepancies. None.

C. Recommended Additional Training. None.

D. Additional Comments. Requisites and flight satisfy the requirements for the Flight Engineer position on the E-4B aircraft.

REVIEWING OFFICER'S REMARKS: None.

APPROVING OFFICER'S REMARKS: None.

ADDITIONAL REVIEWS: None.

Note: For evaluations that require multiple sorties, the final examiner must transcribe grades and comments from previous examiners AF 3862s on to their AF 3862 (the final worksheet created will not automatically mark the areas graded by the previous examiners on the final AF 3862).

Note: It is possible due to lengthy or large number of discrepancies, the Additional Training Recommendations and/or Additional Comments can be

“pushed” off the AF 3862. If this happens, prior to signing, highlight the discrepancies and delete them from under the “Discrepancies” section. Then type “See Remarks on Reverse Side” in the “Discrepancies section”. This should create enough space to display any Additional Training Recommendations and/or Additional Comments.

74. Once all requisites, flight phases and additional training (if applicable) have been completed, the final FE will complete the Form 8 in PEX, click the “Primary Eval Set Complete” button, open the pre-signature review window and click “notify” next to the SQ/CCV for review prior signing the Form 8.
75. Next the final examiner will sign the AF 3862 (see below) in PEX with all transcribed grades. This will automatically create a Temp Form 8 in the member’s eFEF. The Temp Form 8 will remain until all signatures on the Form 8 have been obtained. It will then automatically be removed.

Eval Worksheet

Jonathan A. Mingonet

Capt | RC-135V IE

Worksheet Type: **Evaluation**

Examiner: **(none selected)**

Mission Description: **(none selected)**

Eval Profile: **QUAL**

Worksheet Name:

QUAL/MSN (TC)

Examiner

Mission Description

Area Grades

Worksheet Grade

Weapon Events

Save

Print 3862

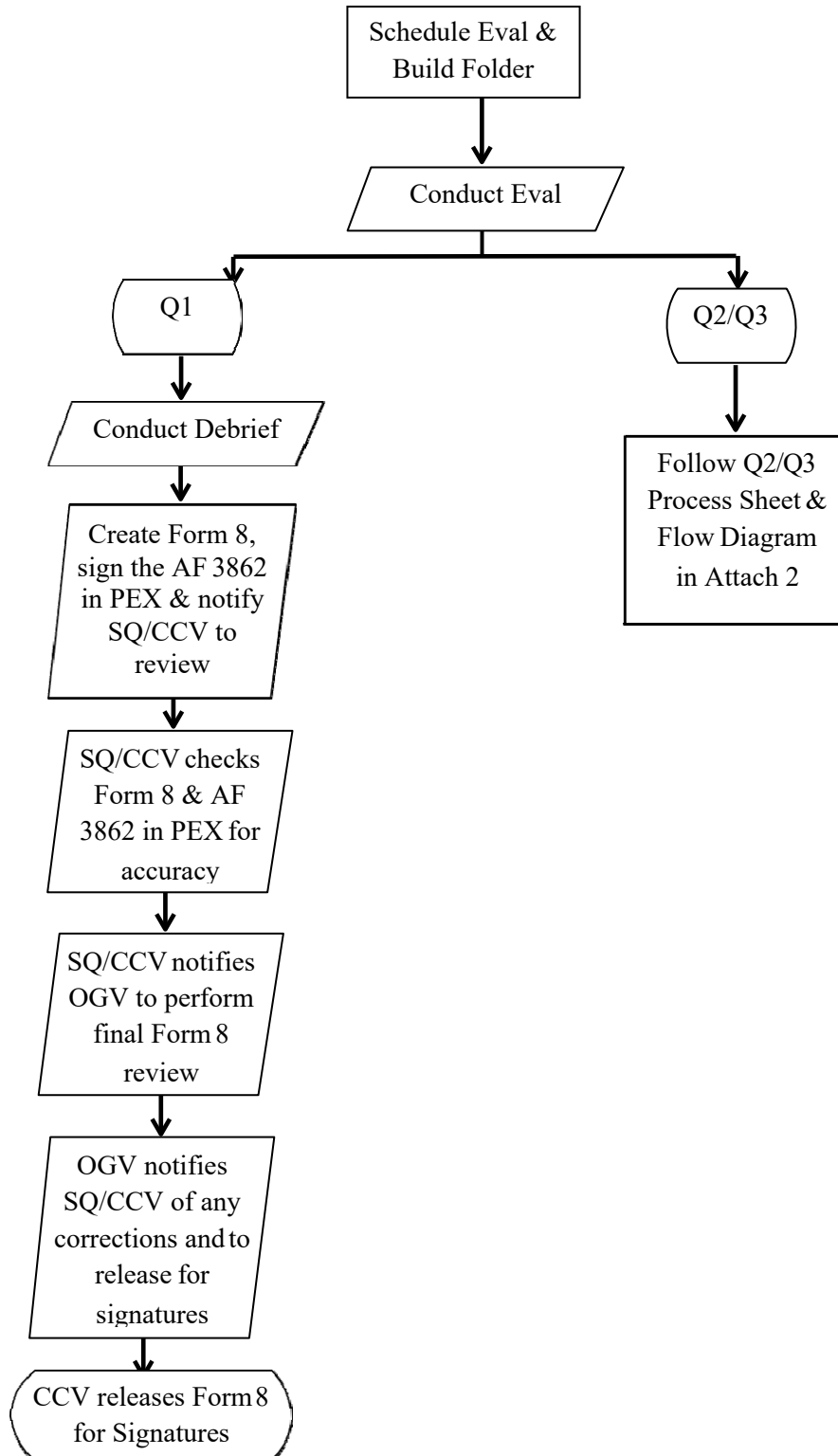
Area Name

I. QUALIFICATION

<input type="checkbox"/>	(Explain in Comments on Back)	<input type="checkbox"/>	(Explain in Comments on Back)
CERTIFICATION			
PRINT NAME/GRADE/ORGANIZATION		SIGNATURE/DATE	
FLIGHT EXAMINER			
		CLICK HERE TO SIGN	
REVIEWING OFFICER			

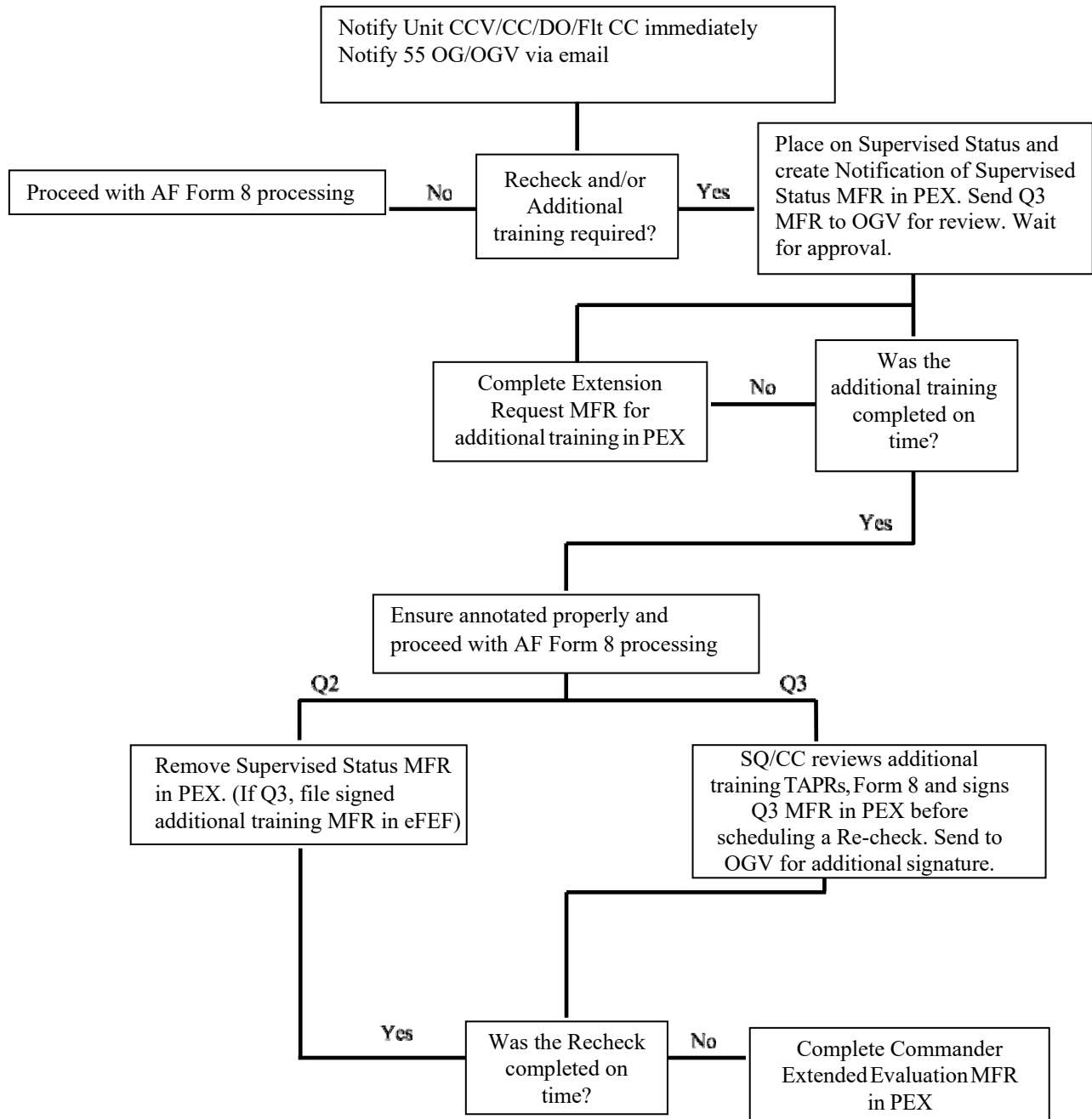
Attachment 1

Evaluation Processing Flow Diagram



Attachment 2

Q2/Q3 Processing Flow Diagram



Attachment 3

APPROVAL FOR EVALUATION AT DEPLOYED LOCATION MFR

DD Mmm YY

MEMORANDUM FOR SQ/CC

FROM: SQ/CCV

SUBJECT: Approval to Conduct [*Rank Last name*] [*initial/recurring*] Evaluation at a Deployed Location

1. Request approval to conduct [*Rank, First M. Last*]'s [*initial/recurring*] [*crew position*] evaluation in theater per AFI 11-202V2 ACC Sup1, 55th Operations Group Supplement paragraph 5.15.1. "(N/A for permanent party). SQ/CC approval is required for any evaluation accomplished OCONUS. Verbal and/or email approvals are authorized." [*Rank Last*]'s recurring qualification expires on DD MMMYY.
2. [*Rank, First Last*], is an evaluator [*crew position*] in the [*squadron*]. The evaluator [*did/did not*] provide 50% of the instruction, and [*did/did not*] recommend the evaluation. All evaluation requisites are complete. Coverage will be available for any future operational missions [*explain negative impact to mission accomplishment, if any*].
3. Please contact me for any questions or comments at DSN xxx-xxx-xxxx.

[*name*], [*Rank*], USAF
Chief, XX Squadron Stan/Eval

1st Ind, XX IS/CC

MEMORANDUM FOR XX IS/CCV

Approved/Disapproved

[*name*], [*Rank*], USAF
Commander, XX Squadron

Attachment 4

NOTIFICATION OF SUPERVISED STATUS LETTER

MEMORANDUM FOR Unit/DOT/SARM

FROM: Unit/CC

SUBJECT: Notification of Supervised Status

1. Effective [*date*], [*Rank, First M. Last*] [*type aircraft*] [*crew position*] is placed in supervised status for

- a. Type Test/Evaluation:
- b. Date Administered/Score:
- c. Recommended Additional Training:
- d. Additional Training Due Date:

2. Individual will not fly unless supervised by an instructor of like qualification. Reply by endorsement upon completion of additional training and a successful re-test/re-evaluation if applicable.

[*name*], Lt Col, USAF
Commander, XX Squadron

Attachment 5

NOTIFICATION OF REMOVAL FROM SUPERVISED STATUS LETTER

DD Mmm YY

MEMORANDUM FOR Unit/DOT/SARM

FROM: Unit/CC

SUBJECT: Removal of Supervised Status

1. Recommend removal from supervised status for [*Rank, First M. Last*] [*type aircraft*] [*crew position*]. The additional training specified was accomplished on [*date*] by [*Rank, First Last*]. Successful re-test/re-evaluation was accomplished on [*date*]. The evaluation reviewing officer should review completion of additional training and annotate the AF Form 8 as appropriate.

[*Name*], [*Rank*], USAF
Chief, SQ/DOT

2d Ind, SQ/CCV

MEMORANDUM FOR SQ/CC

The completion of additional training for [*Rank, First Last*] was reviewed on [*date*] and the AF Form 8 was annotated as appropriate.

[*Name*], [*Rank*], USAF
Chief, SQ/CCV

3d Ind, SQ/CC

MEMORANDUM FOR Unit/CCV/DOT/SARM

[*Rank, First Last*] [*is/is not*] removed from supervised status.

[*name*], Lt Col, USAF
Commander, XX Squadron

Attachment 6

SQUADRON COMMANDER EXTENDED EVALUATION MFR

DD Mmm YY

MEMORANDUM FOR Unit/CCV

FROM: Unit/CC

SUBJECT: Commander Extended Evaluation for [Rank, First M. Last, Last 4 SSN]

1. [Rank, First M. Last] was unable to complete [his/her] periodic evaluation due to [use reason specified in AFI 11-202 V2 ACC Sup 1, paragraph 5.8.3.2.3.]. IAW AFI11-202 V2 and 55th Operations Group Supplement, [Rank, Last]'s expiration date of [date] is hereby extended three months. [Rank, Last] will complete [his/her] evaluation at the earliest possibility.
2. Place this MFR in section II of the member's FEF until incorporated in a completed AF Form 8.

[name], Lt Col, USAF
Commander, XX Squadron

Attachment 7

EXTENSION REQUEST FOR ADDITIONAL TRAINING MFR

DD Mmm YY

MEMORANDUM FOR SQ/CC

FROM: SQ/CCV

SUBJECT: Extension Request for Additional Training (FOUO)

1. Request an extension of additional training IAW AFI 11-202 V2 paragraph. 7.8.3.2.2.2 for *[Rank, Name, last 4 SSN, Crew Position]*. *[Rank, Last]* received a *[flight/simulator]* evaluation on *[date]* and the individual's eligibility period *[is/was]* *[date]*. *[Rank, Last]* will complete all requirements by *[date]*.
2. Completion of additional training did not occur within the allotted time due to *[DNIF, operational commitments, lack of resources, etc.]*. **Attachment 1** shows *[Rank, Last]* activities since the evaluation. **Attachment 2** is a copy of the individual's AF Form 8.
3. This memorandum contains FOR OFFICIAL USE ONLY (FOUO) information, specifically the last 4 SSN that is protected under the Privacy Act of 1974 (see AFI 33-332). Do not release outside of DoD channels without the consent of the originator's office.

[Name], *[Rank]*, USAF
Chief, XX Squadron/CCV

Approve/Disapprove

[name], Lt Col, USAF
Commander, XX
Squadron

Attachments:

1. Post Evaluation Activities
2. Original AF Form 8

Attachment 8
EVALUATION PRIOR TO ELIGIBILITY PERIOD MFR

DD Mmm YY

MEMORANDUM FOR UNIT/CCV

FROM: UNIT/CC

SUBJECT: [*Rank, First M. Last*] Evaluation Prior to Eligibility Period

1. [*Rank, First Last*] is approved to receive a [*crew position*] flight evaluation prior to the eligibility period IAW AFI 11-202V2. [*Rank, First Last*]'s eligibility period is [*window dates*].
2. [*Explain circumstances causing the early evaluation, deployment, etc...*]
3. Place this MFR in section II of the member's FEF until incorporated in a completed AF Form 8.

[*Name*], Lt Col, USAF
Commander, XX Squadron

Attachment 9
55 OG/CC Q3 RE-EVALUATION APPROVAL MFR

DD Mmm YY

MEMORANDUM FOR 55 OG/CC

FROM: [Unit]/CC

SUBJECT: [Rank, First M. Last] Q3 Form 8 and Additional Training Review.

1. [Rank First Last] failed their evaluation on [XX Month 20XX]. [He/She] failed to [insert discrepancy as addressed in the Form 8]
2. The following additional training has been completed to a satisfactory level as follows: [insert additional training as addressed in the Form 8]
3. If there are any questions, comments, or concerns, please contact [Unit]/CCV at [insert contact information]

[name], Lt Col, USAF
Commander, XX Squadron

Approve/Disapprove

[name], Lt Col, USAF
Chief, 55 OG/OGV