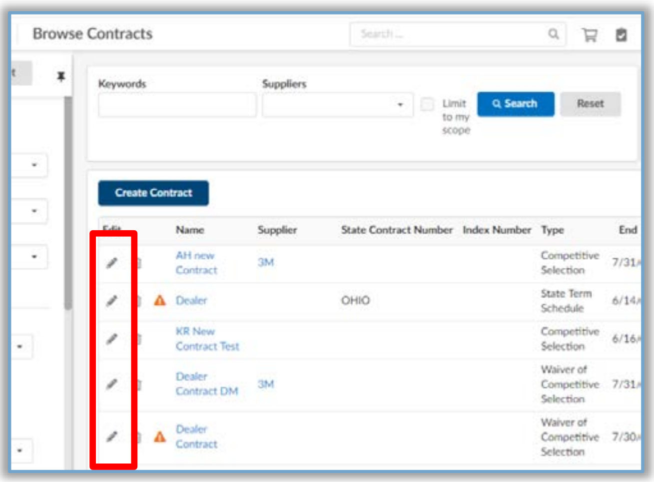
Ohio | Buys

How to Create and Finalize a Performance Evaluation (PE)

Step-by-Step Instructions for Creating a Performance Evaluation

1 Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.

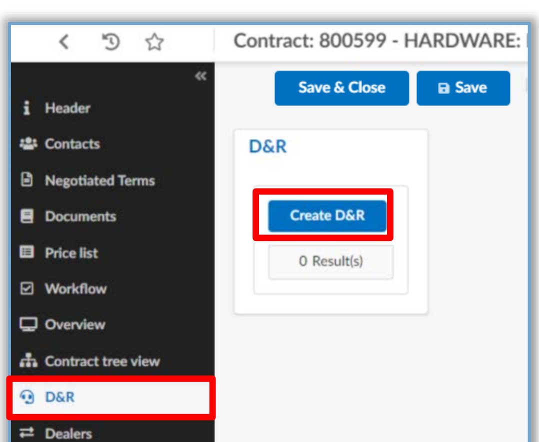
2 Performance Evaluations (PE) are initiated by Contract Analysts and can be created from a Determination & Recommendation (D&R) or Supplier Performance template. In this example, we will create a D&R since it is the most common type of PE. A D&R is comprised of questions used to determine whether or not to renew a contract with a Supplier. Since a D&R is created from a contract, find the relevant contract and click the **Pencil** ( ) icon next to it.



⚠ A Supplier Performance template is comprised of questions regarding a Supplier's delivery performance, invoicing, and personnel. If you would like to create a Supplier Performance PE, click **Suppliers** from the Main Navigation Menu Bar and select **Performance Evaluation.** Then, click **Supplier Performance** to create a Supplier Performance PE.

3 From the Header page of the contract, navigate to the **D&R Tab** and then click **Create D&R** to create a new D&R.

⚠ If a D&R was previously created for this specific contract, it would be listed on this page.



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a) Review the pre-populated fields (e.g., Type, Campaign, Owner, Begin Date, Suppliers, Contract) for accuracy and edit them as necessary.

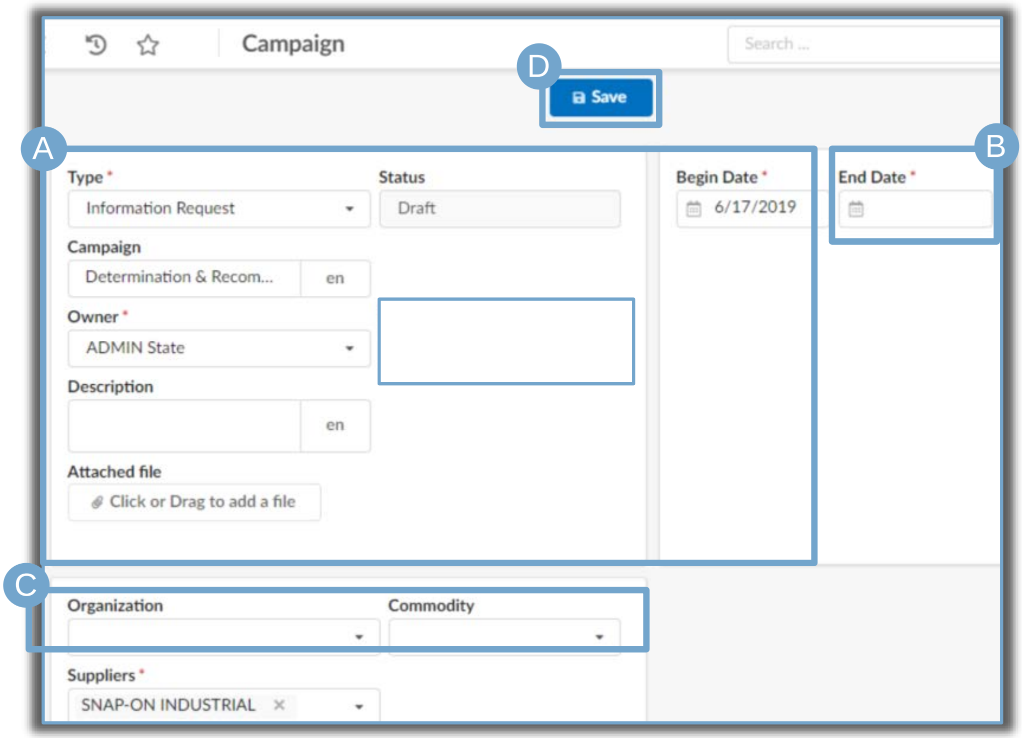
- Begin Date: This automatically populates to the date the D&R was created.

b) Populate the mandatory **End Date** field:

- End Date: The date the D&R will close for evaluation.

c) Populate the non-mandatory fields (e.g., Organization, Commodity) as necessary.

d) Click **Save.**



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Now, after clicking Save, multiple tabs appear on the left side of the page:

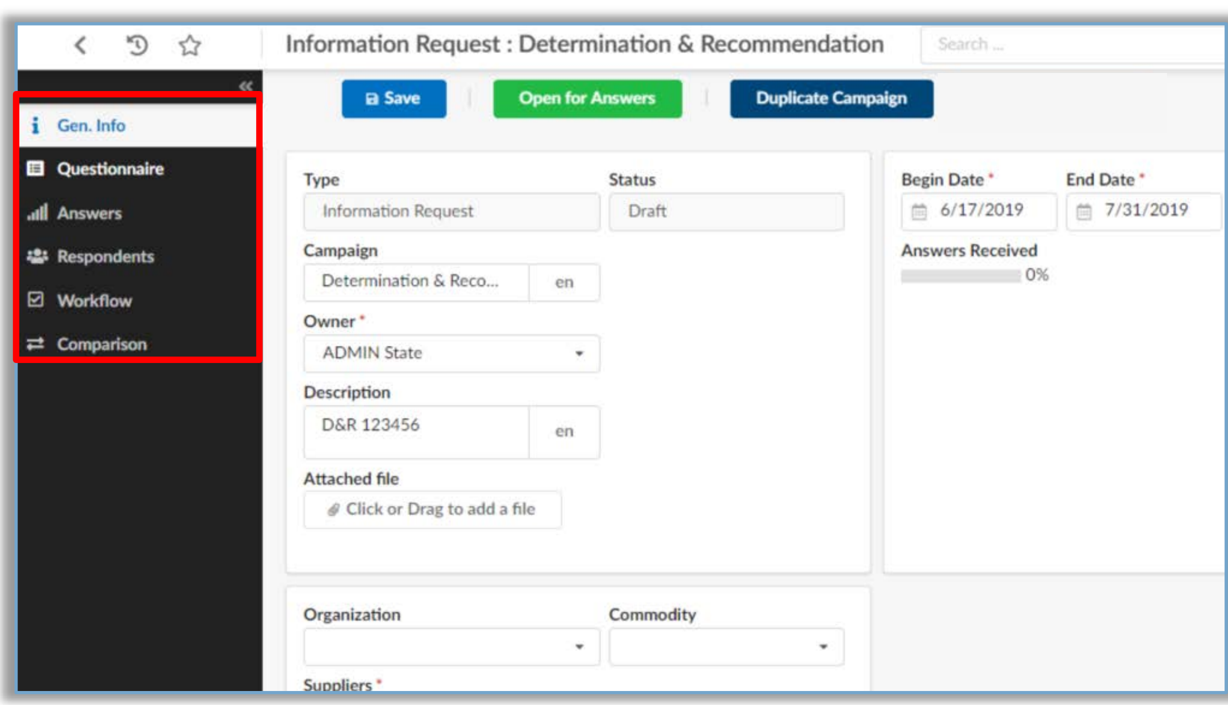
a) General Information tab: Review and edit as necessary (e.g., the Begin Date, End Date, Owner, Description, Organization, Commodity, Supplier). Scroll down to view the status and information on when the D&R was modified and the type of modification.

b) Questionnaire tab: The sections and sub-sections of questions associated with the Performance Evaluation are visible and editable. Within the D&R, there are sections for Annual Expenditure, Recommendations, Terms of Contract, Strategic Sourcing, Vendor Performance, Contract Needs, and Agency's Recommendation.

c) Answers tab: You can search for a list of respondents and the status of their responses.

d) Respondents tab: This is where you indicate the respondents for each section(s) of the questionnaire. Specific steps for this tab are included in Step 6.

e) Workflow tab: Displays where the D&R is in the process workflow. Once a D&R has been initiated, it is sent to the selected respondents that have used the contract. Once the D&R is closed, the primary Contract Analyst provides their recommendation (i.e., to renew or not renew a particular contract) and their Procurement Manager finalizes the D&R.



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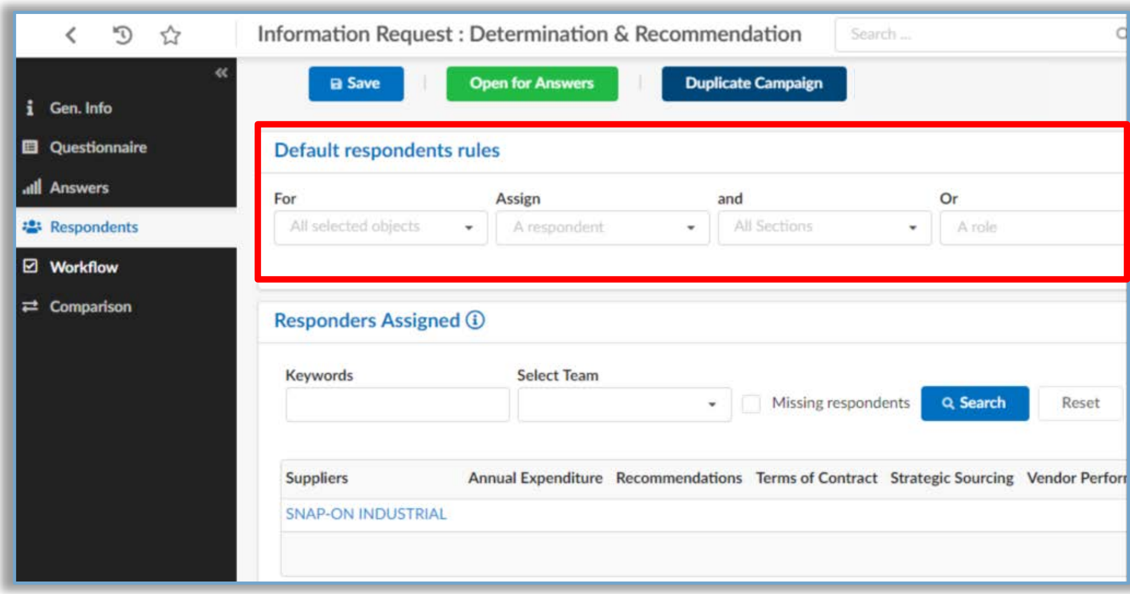
a) Within the Respondents tab, complete the **For**, **Assign**, **And**, and **Or** fields. Indicate the respondent and the questionnaire section(s) they should complete:

- For: Select the associated Supplier from the drop-down menu.
- Assign: Select the respondents you would like to complete the questionnaire section(s).
- And: Select the section(s) from the drop-down menu you want the respondent to complete.
- Or: Select a specific role if you do not want to assign a questionnaire section(s) to a specific individual. In most scenarios, you will use the **Assign** field instead of this field.



b) Click **Add the Rule**.

⚠ Once you click Add the Rule, your selections are saved and you can see who will complete which questionnaire section(s) and for which contract or Supplier.

⚠ If you would like to add additional respondents, complete the same process for each respondent.

⚠ Within the Responders Assigned box, you can determine if each D&R questionnaire section has been assigned a respondent as well as which respondents have been assigned to which section(s).

c) Click **Save**.

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Once you complete the pre-populated and mandatory fields within each tab, click **Open for Answers.**

⚠ An email will be sent to each respondent to complete their questionnaire section(s).

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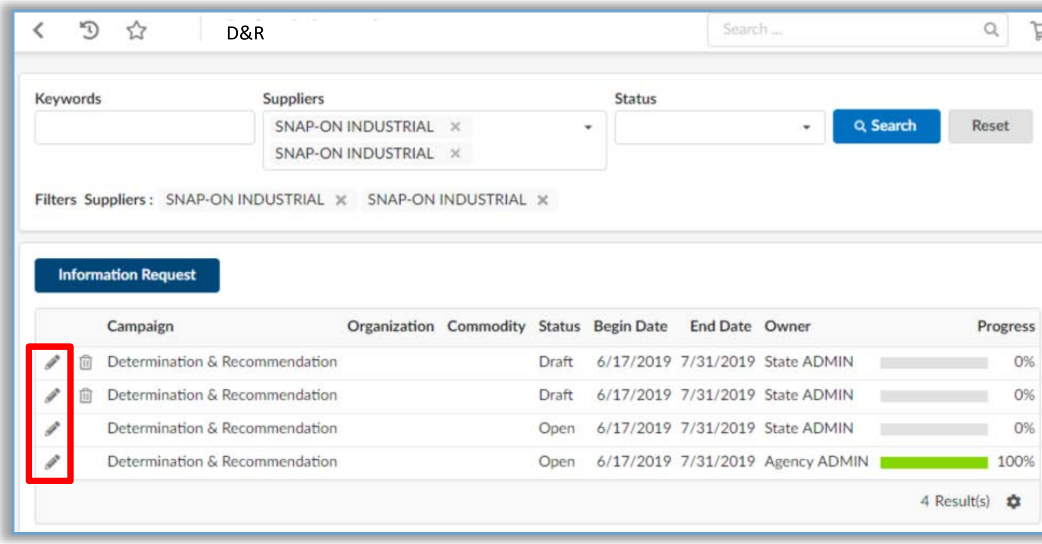
Log in to Ohio Buys. From the Main Menu Navigation Bar, click **Suppliers** and then select **D&R** from the drop-down menu.

2

Find the relevant Determination & Recommendation (D&R) by searching for the applicable Supplier. From the Results Page, click the **Pencil** ( ) icon next to the relevant D&R.



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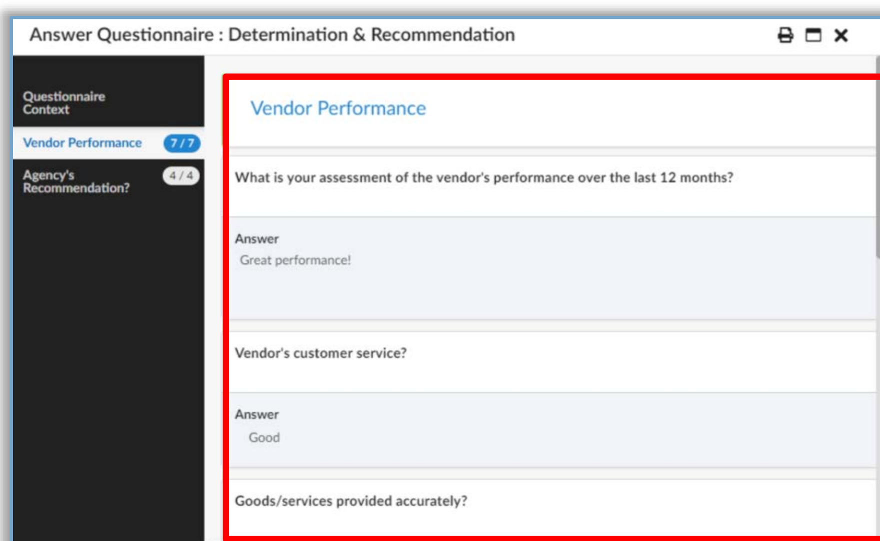
a) Click on the **Answers** tab. A list of respondents assigned to complete the questionnaire section(s), their completion progress, and the status of their responses is visible. Ensure each respondent's progress shows 100% completed and their status shows as **Approved**.

b) To review a respondent's specific responses, click the **Pencil** ( ) icon next to their name to navigate between the tabs on the left and scroll through their responses on the right. Once reviewed as necessary, click the **X** ( ) icon.



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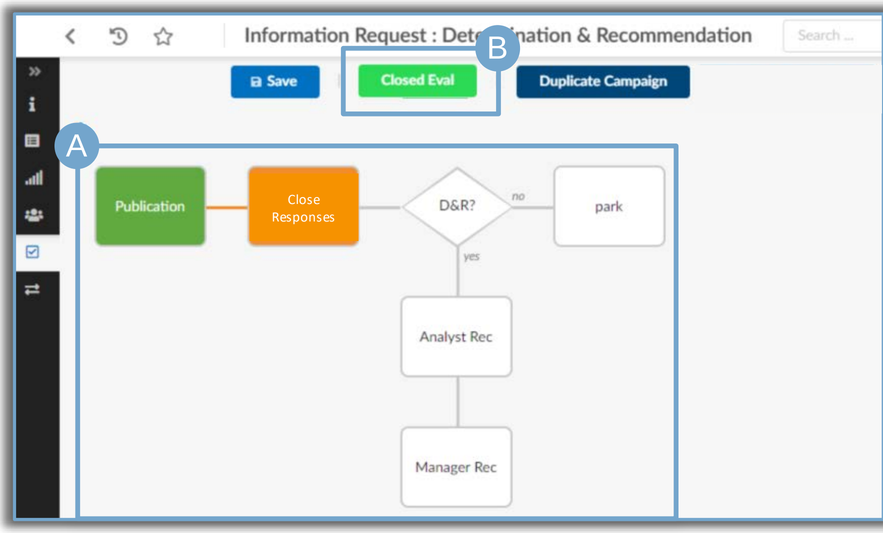
a) After reviewing the respondents' responses, click on the **Workflow** tab to review the workflow as necessary.

b) Click **Closed Eval** after you complete your review.

c) In the subsequent pop-up, click **Ok** to confirm your submission.



- Once the individual responsible for creating and opening the D&R clicks Closed Eval, an email notification is sent to the applicable Contract Analyst to either approve or reject the D&R (i.e., either recommend or not recommend the contract for renewal).
- Once the applicable Contract Analyst approves or rejects the D&R, an email notification is sent to the applicable Procurement Manager for a final review in which they approve or reject the D&R.
- Once the applicable Procurement Manager confirms their final decision, the D&R will be visible on the D&R page.