How to Create and Finalize a Performance Evaluation (PE)

Step-by-Step Instructions for Creating a Determination & Recommendation (D&R)

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

   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 from the Browse Contracts page 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.

2. 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.
Step-by-Step Instructions for Creating a Determination & Recommendation (D&R)

a) Review the pre-populated fields (e.g., Type, Project, Owner, Contract ID, State Contract Number) for accuracy and edit them as necessary.
   - If required, update the Supplier field.

b) Populate the mandatory Date fields:
   - Begin Date: The date the D&R opens. Note that this will automatically populate with the date that the D&R was created.
   - End Date: The date the D&R should close for evaluation.

c) If required, add Agency Approver(s) as appropriate. Any user who is part of the participating organizations of the contract can be selected.

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

e) Click Save.
Multiple tabs appear on the left side of the page:

a) **Gen. Info 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 assigned Agency Approver (if applicable). Once approved, it is then 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.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

Step 6

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**.

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

▲ If an **Agency Approver** was assigned, they will receive an email to review the contents of the D&R. If no Agency Approver was assigned, an email will be sent to each respondent to complete their questionnaire section(s).
If you are assigned as an Agency Approver on a D&R, you will receive a notification via email as well as a task in the **My Pending Validations** section of your homepage in Ohio|Buys.

![My Pending Validations](image)

Click the **Object** hyperlink to open the D&R assigned to your review.

Review the contents of the D&R, including the general info and the assigned respondents on the **Respondents** tab. If you are satisfied with the setup of the D&R, click **Approve**.

▲ Upon clicking **Approve**, an email will be sent to each respondent to complete their questionnaire section(s).

▲ For more details on the different components of the D&R, please consult the first section of this Job Aid.

If the owner of the D&R needs to make updates to the questionnaire or respondent list, click **Reject**. Note that you will be asked to provide an explanation for rejecting the D&R in the comment box that appears. When you have finished writing your explanation, click **Confirm**.
**Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase**

**Step-by-Step Instructions for Reviewing D&R Answers**

1. If you are assigned as an owner of a PE, you will receive a notification via email as well as a task in the **My Pending Validations** section of your homepage in Ohio|Buys when answers have been provided.

   ![My pending validations screenshot](image)

   Click the **Object** hyperlink to open the performance evaluation assigned to your review.

2. Review the questionnaire answers by clicking on the various tabs on the left side of the page.

   ![Answer Questionnaire screenshot](image)

   If you are satisfied with the completeness of the answers, click **Approve**.

   If the user who responded to the questionnaire needs to make updates, click **Send back to Respondent**.
Step-by-Step Instructions for Closing a D&R

1. Log in to Ohio Buys. From the Main Menu Navigation Bar, click Suppliers and then select Questionnaires 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.

3. 
   a) Navigate to 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.
   
   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. If the answers are still pending approval, click Approve and then click the X (✗) icon.
Step-by-Step Instructions for Closing a D&R

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

b) Click Close Evaluation after you complete your review.

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

▲ Once the owner of the D&R clicks Close Evaluation, an email notification is sent to the applicable Contract Analyst to complete their recommendation (i.e., either recommend or not recommend the contract for renewal).

▲ Once the applicable Contract Analyst completes their recommendation, an email notification is sent to the applicable Procurement Manager for a final review in which they approve or reject the recommendation.

▲ Once the applicable Procurement Manager confirms their final decision, the D&R will be visible on the D&R page.

▲ Both the user responsible for creating the D&R and the Procurement Manager can choose to cancel the D&R.
1. If you are assigned as an owner of a contract, you will receive a notification via email as well as a task in the **My Pending Validations** section of your homepage in Ohio|Buys when a D&R has been closed. Click the **Object** hyperlink to open the D&R assigned to you.

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Activity</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questionnaire</td>
<td>Analyst Recommendation</td>
<td>Determination &amp; Recommendation</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>Manager Recommendation</td>
<td>Determination &amp; Recommendation</td>
</tr>
</tbody>
</table>

2. a) Navigate to 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.

   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. After you have reviewed the responses, click the **X** (❌) icon.
Step-by-Step Instructions for Completing an Analyst Recommendation

Navigate to the Gen. Info tab and complete the Analyst Recommendation field (e.g., Issue Notice of Expiration-Allow to Expire, 3-Month Renewal, etc.). Then click Recommendation Approval.

▲ If there are issues with the D&R, click the Recommendation Rejected button to send the D&R back to the Owner.

▲ If the D&R needs to be canceled, click the Cancel button.

▲ Once you have completed your recommendation, an email notification is sent to the applicable Procurement Manager for a final review in which they approve or reject the recommendation.
Once a recommendation has been provided for a D&R, Procurement Managers will receive a notification via email as well as a task in the My Pending Validations section of their homepage in Ohio|Buys.

Click the Object hyperlink to open the D&R.

<table>
<thead>
<tr>
<th>Workflow</th>
<th>Activity</th>
<th>Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Questionnaire</td>
<td>Analyst Recommendation</td>
<td>Determination &amp; Recommendation</td>
</tr>
<tr>
<td>Questionnaire</td>
<td>Manager Recommendation</td>
<td>Determination &amp; Recommendation</td>
</tr>
</tbody>
</table>

a) Navigate to 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.

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. After you have reviewed the responses, click the X (❌) icon.
Navigate to the Gen. Info tab and review the Analyst Recommendation field. Complete the Final Determination field (e.g., Issue Notice of Expiration-Allow to Expire, 3-Month Renewal, etc.) and then click Approve to finalize the D&R.

▲ If there are issues with the D&R, click the Reject button to send the D&R back to the assigned contract analyst.
▲ If the D&R needs to be canceled, click the Cancel button.
▲ Procurement Managers have optional ability to forward the D&R to additional approvers prior to final approval. To do this, click Forward, enter and select the name of the user who should be forwarded the D&R, and then click Forward.