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 the sourcing strategy for expiring contracts. 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.

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 Submitting a Hosted Catalog Pcard Purchase

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

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. Make sure to give the respondents adequate time to provide feedback. The D&R creator can proceed with the D&R recommendation prior to this end date if responses are received before this end date.

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.
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**.

c) For a standard D&R, assign the Annual Expenditures, Recommendations, Terms of Contract, and Strategic Sourcing sections to the associated Contract Analyst. Assign the Vendor Performance, Contract Needs, and Agency’s Recommendation sections to the appropriate agency contact for this contract.

▲ 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).
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

1. 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 OhioBuys.

   ![My Pending Validations](image)

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

2. Review the contents of the D&R, including the general info and the assigned respondents on the **Respondents** tab.

   ▲ If you would like to make updates to the assigned D&R respondents, refer to the previous page of this Job Aid for details on how to update the respondent rules.

   Once 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 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 OhioBuys when answers have been provided.

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

Review the questionnaire answers by clicking on the various tabs on the left side of the page. 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 Submitting a D&R for Approval

1. Log in to OhioBuys. 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 Submitting a D&R for Approval

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 add their recommendation (i.e., renew, rebid, allow to expire, etc.) on the Analyst Recommendation field of the D&R.

▲ Once the applicable Contract Analyst completes their recommendation and submits the D&R for approval, 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 and the applicable Contract Analyst will be notified via email.

▲ Both the user responsible for creating the D&R and the Procurement Manager can choose to cancel the D&R.
Step-by-Step Instructions for Completing an Analyst Recommendation

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 OhioBuys when a D&R has been closed.

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

1. **Workflow** | **Activity** | **Object**
   - Questionnaire | Analyst Recommendation | Determination & Recommendation
   - Questionnaire | Manager Recommendation | Determination & Recommendation

   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 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.
Step-by-Step Instructions for Completing a Manager Recommendation

1. 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 OhioBuys.

   ![My pending validations table]
   - Workflow: Questionnaire, Activity: Analyst Recommendation, Object: Determination & Recommendation
   - Questionnaire, Manager Recommendation, Determination & Recommendation

   Click the Object hyperlink to open the D&R.

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.

   ![Answer Questionnaire: Determination & Recommendation]
   - Vendor Performance:
     - What is your assessment of the vendor's performance over the last 12 months?
       - Answer: Great performance!
     - Vendor's customer service?
       - Answer: Good
     - Goods/services provided accurately?
Step-by-Step Instructions for Completing a Manager Recommendation

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.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).