

Job Aid: Conducting an Appraisal in OPPM



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Section 1: Preparation in OPCM

The Performance Manager (“OPDM”) application includes functionality that enables Performance Managers (both Reporting Manager and Group Manager roles) to perform appraisals on any of their managed Users. Appraisals are a type of test created in Course Manager. Test results are stored in the system as part of the users record, just as with any other test type, but an appraisal can be set up to allow the results to be viewable by the user, the manager, or both.

Create the Appraisal

Before Managers can begin the appraisal process, an appraisal- type test must first have been created in Course Manager. [Please refer to the system documentation on Assessment Set and Test creation for additional details.] As a quick summary: create a Test that has the Assessment Type = Appraisal.

The screenshot shows the 'ASSESSMENTS: ASSESSMENT EDIT' interface. At the top, there is a navigation bar with tabs: Users & Groups, Content, Assessments, Skills & Games, Events & Activities, Messaging, and Administration. Below the navigation bar, the form contains the following fields and options:

- Test Name:** Performance 2020
- Test Message:** From the user list, you choose the user you manage that you would like to perform this appraisal for and then proceed. Results of this appraisal will be kept in the user's record, but not made viewable by the user.
- Category:** General
- Assessment Type:** Appraisal (highlighted with a red box)
- Passing Score:** 0
- Allow Retake:** None (click to edit)
- Allow Restart:** None (click to edit)
- Require Answers:** Yes No
- Random Questions:** Yes No
- Results Display:**
 - No Results - Submitted message only
 - Score Only
 - Score, Full test with correct and incorrect answers
 - Score, Full test with incorrect answers
 - No Score, Full test with correct and incorrect answers
 - No Score, Full test with incorrect answers
- Status:** Active Inactive Request Delete

At the bottom of the form, there are buttons for 'Save', 'Cancel', and 'Tips'.

Complete the test set-up following normal protocols for your organization (e.g. standard use of Test Message, select Category, and choose whether to Require Answers). Click **Save**, then add the test questions under the Assignments tab. Keep in mind that test questions for appraisal-style tests will not be graded.

Once the test has been fully created, assign it to an Assessment Set. When creating the assessment set, be sure to include a **Catalog Description** as this is included in the list that Performance Managers see when making their selection; also, mark the Visibility field to either **All**, **Managers - OPPM**, or **Users - OPCV** to ensure the appraisal results are viewable as desired, and set the OPCV My Status field to **Show** if the results should display to the user.

The screenshot shows the 'ASSESSMENTS: ASSESSMENT SET EDIT' interface in OnPoint Digital. The form is titled 'ASSESSMENTS: ASSESSMENT SET EDIT' and includes the following fields and options:

- Assessment Set Name:** Quality and Patient Safety
- Catalog Description:** This assessment will provide...
- Category:** Compliance
- Estimated Duration:** Hours 0, Minutes 4
- Welcome Message:** (empty text area)
- Finish Message:** (empty text area)
- Require Approval:** Yes No
- Visibility:** All Managers - OPPM Users - OPCV
- OPCV My Status:** Show Hide
- In General Catalog:** Yes No
- In OPEC Catalog:** Yes No
- OPPM Assignable:** Yes No

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a 'Tips' link.

Once the Assessment Set is published, it can be directly assigned to users or groups, or selected by the Performance Manager during the appraisal process if the “OPPM Assignable” field has been set to **Yes**, which allows the assessment to be assigned to the user at the time of the appraisal.

Enable Appraisals Tab

Before Managers can perform appraisals, the Appraisals Tab must be enabled in the Performance Manager application interface. As with all OPPM tabs, the text label is governed by a language file, so it can be renamed as desired and also can support translation.

Section 2: Performing an Appraisal

Performance Managers (both Reporting Manager and Group Manager roles) can conduct appraisals on any user that is a member of a group they manage.

Appraisal Selection

First, select the Appraisals / Evaluations tab in OPDM.



A list of available assessments will display. The list is organized by Category, and a Category Filter is available at the right.

Simply click on the Assessment name to select the appraisal desired.

User Selection

Once an assessment has been selected, a list of managed users will display who are currently assigned to that assessment. If the user to be appraised is not in the list (i.e. he/she has not yet been assigned the assessment), the manager can change the view to show all managed users who are not assigned to the assessment. Click the dropdown at the top right to change the view from Assigned to Not Assigned, then select the user to appraise from the resulting list of unassigned users. This process assigns the assessment to the user in the background, allowing the manager to begin conducting the appraisal.

If the manager has an extensive list of managed users to choose from, they can use the User/Learner Last Name filter and click the first letter of the last name of the user from the A-Z letters across the top. To further narrow the search, click the **Filter** button and enter the user's last name. Then select the user from the resulting list.

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Appraisals : Performance Evaluation Show Users/Learners not assigned to appraisal

Select User/Learner Last Name : All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Filter

Name (click to select)	Login	Status
Associate 1, GC-Call Center	callcenter01	Not assigned
Banner, Bruce	bbanner@onpointlearning.com	Not assigned
Boyette, Alan	aboyette@onpointlearning.com	Not assigned
Gadd, Robert	rgadd	Not assigned
Galloway, Alex	agalloway@onpointlearning.com	Not assigned
Saltsman, Paul	p.saltsman	Not assigned
Smith, Will	wsmith	Not assigned
User, Test	test	Not assigned
User, Test	test@test.com	Not assigned
Westphal, Peter	peter	Not assigned

Begin the Evaluation

Once the user is selected, a page will display confirming the Assessment Set Name and the User/Learner being appraised. Click the **Start** button to begin the evaluation, and complete it just as a normal test would be taken in the system.

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Assessment Set List

Assessment Set Information

Assessment Set Name: Performance Evaluation
 User/Learner: Banner, Bruce
 Status: Not attempted
 Catalog Description: This is a performance evaluation
 Actions: Start Decline

Click on an action button to access the assessment set .

Assessment Set Progress & Bookmarks

Assessment	Completed	Bookmark	Status / Score
Introduction			
courseappraisal - Performance Review			

Click the **Finish Test** button at the bottom when finished with the appraisal.

System Record

The completed Assessment Set is recorded within OPCM, similarly to regular tests (see below).

The screenshot displays the OnPoint Digital interface for a user named Bruce Banner. The interface includes a navigation menu with options like Home, Help, Logout, Users & Groups, Content, Assessments, Skills, Events & Activities, Notifications, and Administration. The main content area is titled 'USERS & GROUPS: USER' and has several sub-tabs: User Information, Assignments, Memberships, Test Scores, History, Notes, Performance, Mobile Profile, and E-Commerce. The 'Test Scores' tab is active, showing a table of test results. The table is divided into three sections: Course Test Scores, Assessment Set Test Scores, and Nugget Test Scores. The Assessment Set Test Scores section contains the following data:

Assessment Set/Test	Date	Attempt	Score	Status	Assessment
Performance Evaluation					
Performance Review	02/24/2010	1	100.00	Completed	View
Quarterly Review					
Stupid Test	03/01/2007	1	100.00	Passed	View

Depending on how the assessment was created, the test results may or may not be visible to the User, but completion details will be accessible to the Manager in OPDM (under the User Details tab) so they can be reviewed at a later date as desired.