# Job Aid:

# Creating Appraisals in Course Manager

| August 2014 – original publish date |
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| August 2019  -- updated Assessment Set Edit page to replace dropdowns with radio buttons where useful; added an OPCV My Status Show/Hide setting; removed Figure numbers in documentation |
| March 2020 – added detail about Appraisal scoring and triggers |

# Table of Contents

# Section 1: Overview

Appraisals represent a type of test in the OnPoint LMS. They are created by Administrators via the Course Manager ("OPCM") application. The Performance Manager ("OPPM") application allows a Performance Manager to perform an appraisal on any user that reports to him/her. Appraisals can be set up to be:

1) performed by the user only (a self-appraisal)

2) performed and viewed by the manager only

3) performed and viewed by both the manager and user

4) performed by the manager only, but viewable by both the manager and the user (in the My Status area).

Regardless of which way the appraisal is set up, it is always stored in the user's record for review by the manager or an administrator. Common uses for Appraisals include self-assessments, periodic performance reviews, on-the-job evaluations, and exit interviews.

The feature works as follows:

### Admin Functions:

- A test is created in the Course Manager application by a Systems Administrator.

- The test is set up as an "Appraisal"-style test which will differentiate the test as one that will display for a Manager to access inside OPPM.

- The Administrator creates an Assessment Set and assigns the test to it.

- The Administrator marks the Assessment Set as accessible to the user, manager, or both, by establishing its "visibility".

- The Administrator sets whether the user should see results in their My Status area.

- The Administrator sets whether the Assessment Set can be assigned by a manager in OPPM.

### PM Functions:

- Performance Managers, via the Appraisals tab in OPPM, select the appraisal they wish to use, then select the associate they wish to evaluate.

- Once the manager has completed the Appraisal, it is saved in the user's record so that it can be viewed by a manager or administrator later as desired.

# Section 2: Creating an Appraisal-Style Test

## Create Test

1.  Log into Portal, go to Course Manager, select 'Tests' under the Assessments tab and select the Add Test button.

2.  Enter all required fields of information on the Test Edit page.

3.  Remember to add a Test Message if you'd like to share instructions with the Manager before they start marking the appraisal answers.  The message will display at the top of the appraisal.

4.  Select "**Appraisal**" in the Assessment Type drop-down field on the Test Edit page.



5.  Enter all other desired data in the appropriate fields or allow the defaults to stay resident.  Click Save.

**Tips:**

✓  You may ignore the Passing Score field, as an Appraisal will not be graded [the system defaults that field to '0']

✓  The Results Display field should be 'No Results-Submitted Message Only"

## Create/Assign Questions

1. Once you have created the Appraisal-style test, you may add or assign questions to the test using the Test Assignments tab.  Follow the standard question creation process to add/assign all desired questions to the test.



> **Note:**  Non-graded question types include Essay and Likert. All other question types used should be specifically marked as non-graded.*
> See Figure 2 above.
>
> For more information on how to create test questions, select the Help button  on the Question Edit page.

* An Appraisal *can* include graded questions, but since technically an appraisal-style test is not "scored", the test will calculate based on the *percentage* of total possible points earned.  For example, an appraisal has 5 non-graded questions and 1 graded question.  Earnable points will equal the maximum point value of the associated question answer weight of the one graded test question.  Let's say it is a Multiple Choice/Single Answer question type, where Answer #1 = 2 points and Answer #2 = 1 point.  The maximum earnable point value is 2, against a total "score" of 100 percent, means the user can achieve a 50 as the minimum or a 100 as the maximum.  Trigger ranges can then be set to fire based on achieving a 51-100, or a 0-50, allowing remedial training to be assigned based on a lower score for example.  [Both answers should be marked correct so that the points are earned to support scoring.]

## Create Assessment Set

1. Once the test has been created, it must be assigned to an Assessment Set.  Create the Assessment Set in OPCM by going to the Assessments tab, selecting 'Assessment Sets', then selecting the Add Assessment Set button.

2. Enter all required fields of information on the Assessment Set Edit page.

3. Even though Appraisals are typically not set up to show "In OPCV catalog" or "In OPEC Catalog," the Catalog Description field *will* display to Performance Managers in the list of available appraisals in OPPM, so be sure you have entered an appropriate description.

4. Remember to include an appropriate Category selection, as the Appraisals listing for Performance Managers is organized by Category.

   Note: in OPPM, Managers only see categories in the list that have an active Appraisal within that category.

5. Require Approval will typically be set to "No" in the drop-down field.

An exception would be for situations where the Appraisal will be set up for Users only (OPCV) and the Appraisal will reside in a catalog for users to self-assign, and you want the users to get approval from their managers before proceeding.

6.  Set the Visibility for the Assessment Set.

    a.  If you would like the User *or* the Manager to be able to see and complete the appraisal, set the Visibility to All.

    b.  If you would like *only* a Manager to be able to conduct this appraisal on a managed user, set the Visibility to Managers – OPPM.

    c.  If you would like *only* the User to be able to see and complete the appraisal as a self-appraisal under their Assignments tab, select the Visibility radio button to Users - OPCV.



7.  Set the OPCV My Status field to Show or Hide, depending on whether you want users to be able to view the results of an Appraisal via their My Status area of OPCV (transcript page).

8.  Appraisals are typically not set up to show In General Catalog or In OPEC Catalog, so allow those fields to default to No.

9.  Set OPPM Assignable to Yes if you want Performance Managers to be able to assign this particular Appraisal to their direct reports.

## Assign Test to Assessment Set

From the Assignments sub-tab, assign the Appraisal-style Test you previously created to the Assessment Set and then publish it.

# Section 3: Visibility Overview Chart

The following table details the configurations at the Test and Assessment Set levels that need to be set to support the various display choices you have for managers and users.

| Visibility (Assessment Set Setting) | User Outcome | Manager Outcome | OPCV My Status | Allow User Review (Test Setting) |
|---|---|---|---|---|
| All – OPCV, OPPM | User can see and perform a self-appraisal from the Assignments area of OPCV.<br><br>Completion results display under 'My Status.' | Manager can see and perform the Appraisal from the 'Evaluations' tab in OPPM.<br><br>Results display to the Manager in the User's 'Test Results' and 'User Details' tabs. | YES, if you select Show from the OPCV My Status field | YES, if you want the user to see the test question and answer detail they, or their manager, provided. |
| Managers – OPPM | Users cannot see the appraisal in their 'Assignments' tab in OPCV.<br><br>Completion results do not display under their 'My Status' tab in OPCV. | Manager can see and perform the Appraisal from the 'Evaluations' tab in OPPM.<br><br>Results display to the Manager in the User's 'Test Results' and 'User Details' tabs. | NO, if you select Hide from the OPCV My Status | NO |
| Users – OPCV | User can see and perform a self-appraisal from the Assignments area of OPCV.<br><br>Completion results display under 'My Status.' | Manager cannot perform the appraisal on behalf of the User.<br><br>Results display to the Manager in the User's 'Test Results' and 'User Details' tabs. | YES, if you select Show from the OPCV My Status field | YES, if you want the user to see the test question and answer detail they provided. |
| Managers - OPPM | User cannot see or perform a self-appraisal.<br><br>Once an appraisal has been completed on the user's behalf, the user can review the appraisal completion results under the 'My Status' tab in OPCV. | Manager can see and perform the Appraisal from the 'Evaluations' tab in OPPM.<br><br>Results display to the Manager in the User's 'Test Results' and 'User Details' tabs. | YES, if you select Show from the OPCV My Status field | YES, if you want the user to see the test question and answer detail their manager provided. |