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OPA APP AT A GLANCE

STEP 1: SETUP — ACCOUNTS, TEAMS, AND USERS.
1. IEE creates organization’s Account and assigns Account Admin.
2. Account Admin creates Campaign Admins, or performs #3 themselves.
3. Account Admin/Campaign Admins create Teams and Users.

STEP 2: ASSESSMENT — CAMPAIGNS
A Campaign is an assessment of individual Team members, on a specific OPA Topic, for a specific Performance Period—by both a team member and their Evaluator (mentor/coach/manager/leader).
1. Campaign Admin/Account Admin/Evaluator creates and runs a campaign by selecting
   • Team (or individual members on a team),
   • OPA Topic,
   • Performance Period, and
   • Campaign Start/End Dates.
2. Each Team Member receives email with invitation url and completes their self-evaluation.
3. Each Evaluator receives email notification, logs in into the system, and completes evaluation of each team member listed on the Evaluations tab.
4. Evaluator reviews and prints a report for each team member.

STEP 3: FEEDBACK — REFLECTION AND DEVELOPMENT
Evaluator (Mentor/Coach/Manager/Leader) meets with their mentees to review the results, make a plan for performance improvement, and schedule follow up steps.
OPA APP OVERVIEW

Optimal Performance Assessment Online Data Collection and Feedback System (OPA App) is comprised of 1) OPA Library, 2) Users, 3) Teams, and 4) Campaigns.

IEE acts as the App Host and creates organizational accounts, sets up the account administrator for each organizational account, and creates an OPA Library for each account.

1) OPA LIBRARY is a collection of Optimal Performance Assessment instruments, or OPA Topics, developed by IEE.

The OPA Topics available to your organization are listed on the OPA Library tab on the Navigation bar at the top of the screen. Administrators and Evaluators can preview the assessment instruments by clicking on the View button.

2) USERS include four types of roles—Account Administrator (Admin for short), Campaign Administrator, Evaluator, and Team Member.

An individual can have only 1 user account/role within a single organizational account: unique user accounts are created by assigning a unique email address—no duplicate emails are permitted.

Account Administrator is a user role that allows individual to log in into the App with their email and password to perform the following actions:

- create users,
- create teams,
- view OPA topics on the OPA library,
- create and run assessment campaigns,
- act as an evaluator on a team or several teams, and
- view and print reports.

If desired, Account Admin can delegate some of the above functions by creating users with a Campaign Admin role. Campaign Admins can create users and teams, and they can create and run assessment campaigns; however, Campaign Admins cannot act as evaluators and they cannot view reports.

Evaluator is a general label for the user role for those who will be submitting evaluations of others, such as managers, supervisors, coaches, professors, or mentors. An organizational account can be set up with a specific label instead of ‘Evaluator’: Manager, Mentor, Coach, Professor, and so on.

When a user is added as an Evaluator, they will be able to log in into the App with their email and password allowing them to perform the following functions:

- view OPA topics in the OPA library,
- create and run assessment campaigns,
- submit evaluations of individual Team Members participating in a campaign, and
- view and print assessment reports for individual Team Members.

Team Member is a general label for the user role for those who will be submitting self-evaluations of their own performance and who will be receiving evaluations by the Evaluators on their Team for a 180- or 360-degree optimal performance assessment.
The organization account can be set up with a specific label instead of ‘Team Member’: Employee, Mentee, Athlete, and so on.

Team members do not have logins for the OPA App. Instead, they are invited to submit self-evaluations of their own performance by following individualized web links sent to them via campaign invitation emails generated by the App during assessment campaigns.

The full assessment report, combining a team member’s self-evaluation with performance evaluation(s) by the evaluator(s), can be viewed and printed by the evaluator(s) to be reviewed in a face-to-face meeting, or in another way as determined by the evaluator(s).

3) TEAMS are groups of users with the role of Team Members plus an Evaluator (or several Evaluators) who will be typically submitting evaluations of each individual team member included in the team.

OPA App Teams can correspond to existing units within an organization (such as departments, classes, or teams), or they can be created by the Admin for specific groups of users as needed.

4) CAMPAIGN is a series of actions performed within the OPA App to collect assessments from Team Members and Evaluators.

An Admin, or an Evaluator, initiates a campaign of performance assessments for a single Team, on a specific OPA Topic, for a specific Performance Period, which will remain ‘live’ during a period of time between Start and End dates.

After an Admin/Evaluator creates a campaign with the above parameters within the App, on the Start date the App will send invitation emails to the Team Members asking them to submit self-evaluations and to the Evaluators asking them to log in into the App and submit evaluations of the Team Members.

The App will also send an automatic reminder 24 hours before the End date of the campaign. Admins/Evaluators can monitor the status of submissions of team member self-evaluations and of evaluations by evaluators on a View campaign status screen; they can resend invitations if needed.

When all self-evaluations and evaluations have been submitted, or when the campaign is over, Admin/Evaluator(s) can view and print out reports for each Team Member included in the campaign.

APP NAVIGATION

Navigation bar at the top of the screen is the primary means of accessing the various components of the App. When you need to perform a new action, or review existing information, click on the appropriate tab, such as OPA Library, Users, Teams, Campaigns, or Evaluations.

Note that when you are entering new information, clicking on the Back button of your browser will discard the information you have just entered on the current screen.

Similarly, clicking on the Back button at the bottom of the App screen will discard the information you have just entered, or cancel the changes you might have made.

Remember to always click the Save button at the bottom of the App screen when you have entered new information or made changes before you move to a different tab. If you do not click on the Save button before you move to a different tab in the App, the information/changes will be discarded.
ADMINISTRATOR INSTRUCTIONS

These instructions apply to both Account Administrator (Admin) and Campaign Admins, with a couple of exceptions that are noted below.

STEP 1: ADMIN ACCESS

After the host (IEE) has created an organizational account and assigned you to act as Account Admin, (or Account Admin added you as a Campaign Admin) you will receive a Welcome email:

Click on the link and follow instructions on the screen to create a password that will allow you access into the OPA App. Remember to use the email address to which this email was sent as your login name. After the initial password setup, you can access the App directly at: www.ieeopa.org.

After you log in, select the account to work with. If your organization has more than one account, you can select one of them from the drop-down list. If you only have access to one account, you will only see that account as an option. Note that if you need to work with a different account, you will need to log out, and then log in again, and select the different account on this screen.

After you select the account, you will see the name of the account in the far left corner of the navigation bar and your login name in the far right corner of the navigation bar.
STEP 2: CREATE TEAMS

1. Go to the Teams tab on the navigation bar.
2. Click on the + New Team button:

```
Teams List

<table>
<thead>
<tr>
<th>Title</th>
<th>Count</th>
<th>+ New Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting 101 October 2016</td>
<td>9</td>
<td></td>
</tr>
</tbody>
</table>
```

3. Enter the title/name of the team in the Title box:

```
New Team

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>My team</td>
</tr>
</tbody>
</table>
```

4. Click the Save button:

```
New Team

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>My team</td>
</tr>
</tbody>
</table>
```

5. Continue adding Teams as needed.

You can view all Teams that have been created by going to the Teams tab on the navigation bar. After users have been added to the teams in Step 3, you will see the count of members for each team on this screen. You can also review the list of Evaluators and Team members assigned to each team by clicking on the name of the team.
STEP 3: ADD USERS

1. Prepare a list of users that need to be added. Most importantly, make sure you have a valid email for each individual. Also note that email is the primary identification of individuals in the App, so emails need to be entered without errors. If an email is invalid or entered with typos, emails will not be delivered to the users. At this time, the App cannot notify you about undelivered emails.

2. Review the roles that can be assigned to each user in the Overview above. Each user you add can only have one role:
   - Team Member,
   - Evaluator,
   - Campaign Admin,
   - Admin, or Account Admin—this role can only be added by an Account Admin or the host (IEE).

3. Go to the Users tab on the navigation bar.

4. Click on the + New User button:

   ![Available Users](image)

   5. Select the appropriate Role for this user in the drop-down box, enter First Name and Last Name, and enter Email—**verify that the email has no typos!**

   Then, check a checkbox below to assign this user to a specific Team. If an Evaluator is expected to submit evaluations for more than one team, select all appropriate Team checkboxes.

   ![New User](image)
6. Click the Save button.
7. Repeat the process and add all the users. Go to the Users tab on the navigation bar to review the users in the account. You can Edit or Delete users on this screen as needed.

**STEP 4: VIEW OPA TOPICS**

1. Go to the OPA Library tab on the navigation toolbar. Click on the View button to review the assessment instrument.

2. Depending on the topic, timeline, and context of the performance you are focusing on when you run a specific campaign (see more below), you may want to note additional instructions or questions that you will be able to include in the invitation email for Team Members and/or Evaluators.

3. Contact IEE to discuss additional OPA Topics or with any other questions related to the content of the assessment instruments.

**STEP 5: RUN CAMPAIGNS**

1. Go to the Campaigns tab on the navigation bar.

2. Click on the + New Campaign button:

3. Use the first drop-down menu to select the Team for which you intend to run this assessment.

4. Use the second drop-down menu to select the OPA Topic you want to use for this assessment.

5. In the box Performance Period, type in the performance time you want the assessment participants to reflect on (such as Last Month, This Season, etc.). What
you enter here will show on the assessment screen when the team members and evaluators will be completing their assessments.

Note that this is not the time during which the assessment campaign will be live—you will specify the dates to start and end data collection for the campaign on the next screen.

6. After you have made all three selections on this screen, click the Save button to continue to the next screen where you will select participants and enter the Start/End dates for this campaign.

7. Select assessment participants. You can click Select All button to include all members of the team, or you can select individual participants by clicking the checkbox next to their name.

8. Next, review the text of the campaign invitation emails. Evaluator email will be sent to the evaluators you have selected for this campaign. Self-evaluation email will be sent to the Team Members you have selected to participate in this campaign.

You can leave the texts unchanged from the default provided by the App. You can also add additional information for the particular campaign you are creating.
9. Enter Campaign Start Date and Campaign End Date. On the Start Date, the participants included in the campaign will receive invitation emails. The App will also send out an automatic reminder email 24 hours before the End Date of the campaign to those who have not yet completed their evaluations. Participants will not be able to submit evaluations after the End Date.

10. Click the Save button to make sure that the campaign has been created.

   Do not click the browser back button or the Back button on this screen: if you go back, the information you have entered will be discarded.

   Use the Back button if you do want to cancel changes or entries you have made on this screen.
11. You can review existing campaigns on the Campaigns tab. Use one of the three icons to View campaign status, Edit campaign, or Delete Campaign.

<table>
<thead>
<tr>
<th>Team</th>
<th>Topic</th>
<th>Performance Period</th>
<th>Campaign Start</th>
<th>Campaign End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting 101</td>
<td>Employability Essentials - Communication</td>
<td>1st Qtr Fall Semester 2016</td>
<td>2016-10-06</td>
<td>2016-10-13</td>
</tr>
</tbody>
</table>

12. When you click on the View campaign status button, you will see information for each Team Member included in the campaign: whether Team Member’s self-evaluation is complete, and whether the evaluation(s) by the Evaluator(s) is/are complete. You can click on the Resend Invitation button to resend the invitation email.

Account Admin only: After all evaluations have been submitted, you can click on the View Report button to view and print the report.

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Self Evaluation</th>
<th>Evaluation:</th>
<th>Resend Invitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maria Sanchez</td>
<td>Incomplete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ann Kimball</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Thomas Dunn</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Campaign Admins cannot view reports.

13. If you need to add users to the campaign that might have been left out previously or were added to the account after the campaign had been set up, or if you need to change the Start/End Dates of the campaign, click on the Edit campaign button and make the changes as needed.

Remember to click the Save button when you are done with the edits.
STEP 1: ACCOUNT ACCESS

After your organization’s Admin has created an organizational account and assigned you to act as Evaluator, you will receive a Welcome email:

Click on the link and follow instructions on the screen to create a password that will allow you access into the OPA App. Remember to use the email address to which this email was sent as your login name. After the initial password setup, you can access the App directly at: www.ieeopa.org.

After you log in, select the account to work with. If your organization has more than one account, you can select one of them from the drop-down list. If you only have access to one account, you will only see that account as an option. Note that if you need to work with a different account, you will need to log out, and then log in again, and select the different account on this screen.

After you select the account, you will see the name of the account in the far left corner of the navigation bar and your login name in the far right corner of the navigation bar.
STEP 2: SUBMIT EVALUATIONS

1. When an assessment campaign starts, you will receive a campaign invitation email with a link asking you to log in into the App. You can also log in directly at: www.ieeopa.org.

2. When you log in into the App, you will first be taken to the Evaluations tab. You will see a list with the names of the Team Members in the last column—these are individuals for whom you need to submit performance evaluations. Click on each name to fill out and submit the evaluation.

<table>
<thead>
<tr>
<th>Your Outstanding Evaluations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team</strong></td>
</tr>
<tr>
<td>Marketing Department</td>
</tr>
<tr>
<td>Marketing Department</td>
</tr>
<tr>
<td>Marketing Department</td>
</tr>
<tr>
<td>Marketing Department</td>
</tr>
</tbody>
</table>

3. Your browser may open a new tab for each Team Member’s evaluation. After you have completed your evaluation and clicked Submit, please close the data collection tab and return to the Evaluations tab to begin the next evaluation. Remember to refresh (F5) your screen each time you return: the Team Member for whom you have submitted the evaluation will no longer appear in the list, and you will only see the names of Team Members for whom you still need to submit evaluations.

4. When you have finished all evaluations, the list will be empty.

STEP 3: VIEW CAMPAIGN STATUS AND OPA REPORTS

1. Go to the Campaigns tab on the navigation bar.

<table>
<thead>
<tr>
<th>Campaigns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team</strong></td>
</tr>
<tr>
<td>Accounting 101 October 2016</td>
</tr>
</tbody>
</table>

2. When you click on the View campaign status button, you will see information for each Team Member included in the campaign: whether Team Member’s self-evaluation is complete, and whether the evaluation(s) by the Evaluator(s) is/are complete. You can click on the Resend Invitation button to send out a reminder email.

After all evaluations have been submitted, you can click on the View Report button to view and print the report.
Evaluators: If you need to create and run your own assessment campaigns, follow the steps below.

STEP 1: VIEW OPA TOPICS

1. Go to the OPA Library tab on the navigation toolbar. Click on the View button to review the assessment instrument.

2. Depending on the topic, timeline, and context of the performance you are focusing on when you run a specific campaign (see more below), you may want to note additional instructions or questions that you will be able to include in the invitation email for Team Members and/or Evaluators.

3. Contact the Administrator to discuss additional OPA Topics or with any other questions related to the content of the assessment instruments.
STEP 2: RUN CAMPAIGNS

1. Go to the Campaigns tab on the navigation bar.

2. Click on the + New Campaign button:

3. Use the first drop-down menu to select the Team for which you intend to run this assessment.

4. Use the second drop-down menu to select the OPA Topic you want to use for this assessment.

5. In the box Performance Period, type in the performance time you want the assessment participants to reflect on (such as Last Month, This Season, etc.). What you enter here will show on the assessment screen when the team members and evaluators will be completing their assessments.

   Note that this is not the time during which the assessment campaign will be live—you will specify the dates to start and end data collection for the campaign on the next screen.

6. After you have made all three selections on this screen, click the Save button to continue to the next screen where you will select participants and enter the Start/End dates for this campaign.

7. Select assessment participants. You can click Select All button to include all members of the team, or you can select individual participants by clicking the checkbox next to their name.
8. Next, review the text of the campaign invitation emails. **Evaluator email** will be sent to the evaluators you have selected for this campaign. **Self-evaluation email** will be sent to the Team Members you have selected to participate in this campaign.

You can leave the texts unchanged from the default provided by the App. You can also add additional information for the particular campaign you are creating.

*Make sure to leave the information generated by the system and enclosed in {{   }} brackets unchanged.*
9. Enter Campaign Start Date and Campaign End Date. On the Start Date, the participants included in the campaign will receive invitation emails. The App will also send out an automatic reminder email 24 hours before the End Date of the campaign to those who have not yet completed their evaluations. Participants will not be able to submit evaluations after the End Date.

![Campaign Start and End Dates](image)

10. Click the Save button to make sure that the campaign has been created. Do not click the browser back button or the Back button on this screen: if you go back, the information you have entered will be discarded. Use the Back button if you do want to cancel changes or entries you have made on this screen.

11. You can review existing campaigns on the Campaigns tab. Use one of the three icons to View campaign status, Edit campaign, or Delete Campaign.

![Campaigns Table](image)

12. When you click on the View campaign status button, you will see information for each Team Member included in the campaign: whether Team Member’s self-evaluation is complete, and whether the evaluation(s) by the Evaluator(s) is/are complete. You can click on the Resend Invitation button to resend the invitation email.

After all evaluations have been submitted, you can click on the View Report button to view and print the report.
13. If you need to add users to the campaign that might have been left out previously or were added to the account after the campaign had been set up, or if you need to change the Start/End Dates of the campaign, click on the Edit campaign button and make the changes as needed.

Remember to click the Save button when you are done with the edits.
FREQUENTLY ASKED QUESTIONS

1. Is Optimal Performance Assessment another survey?
   • Optimal Performance Assessment is NOT a survey! It is a system designed to assess
     the performance and help develop the competencies of individuals (individual
     employees, athletes, students, and so on).
   • OPA uses a 180-/360-degree assessment approach because it combines a self-
     assessment of an individual with one, or several, assessments of the same individual
     completed by another person, or several other individuals.

2. If OPA is not a survey, why does the App have teams?
   • In many cases, individuals who are being supervised, coached, or mentored are
     organized into groups or teams, therefore, the OPA App uses Teams to help organize
     and manage the assessment process. Yet, the results of the assessment are presented
     as separate reports for each individual team member, and not as one aggregate
     report for a team.

3. Can I use the OPA App to work with a single individual at a time?
   • Yes. Even though individuals are organized into Teams in the App, when you create a
     campaign, you can include only one Team Member and one Evaluator.

4. What do my users need to know before I start implementing the OPA App?
   • Since the OPA process has a distinct purpose and structure, it is critical that all
     participants are aware of what exactly is expected of them before they are added to
     the App.
   • Team Members need to understand that they are required to submit evaluations of
     their own performance.
   • Managers/mentors/coaches need to understand that they will need to submit
     individual assessments for each member in their team.
   • Both types of stake-holders need to understand that the resulting reports will
     combine their assessments together, and that the managers/mentors/coaches
     will work with those they supervise/mentor/coach one-on-one to support
     development of the competencies as required by the organization’s mission.
   • Campaign Administrators and Evaluators need to review instructions for the functions
     they are expected to perform within the OPA App before they are added to the App, because as soon as the Admin adds them into the system, they will receive emails
     asking them to set passwords for the App and they will have immediate access to the
     App.
   • All users may need to monitor their email Spam/Junk folders because sometimes
     emails sent out by the App in batches might be treated as spam. Invitation emails
     will have the email address of the individual who creates a campaign in the From:
     field; the detailed header of the email will show the address of the campaign initiator
     followed by “via mg.ieeopa.org” and will have “mailed-by: mg.ieeopa.org” and
     “signed-by: mg.ieeopa.org” fields.
5. Who needs a password to access the OPA App?

- In addition to the Account Admin, Campaign Admins and Evaluators need to create individual logins which will consist of (a) their email that is entered into the system by the Admin, and (b) a password that they will set themselves when they sign in for the first time (they can also reset passwords as needed in the future).
- Team Members do not need an individual login (password) because they will submit their self-evaluations via a campaign-specific and individual-specific url they will receive during an assessment campaign; they cannot access any other area of the App other than the data collection screen, which also means that they cannot view the Reports on their own.

6. Can Admins participate in assessment campaigns?

- Account Admins can be added to campaigns as Evaluators. Campaign Admins, on the other hand, cannot participate in assessment campaigns.

7. Who has access to the OPA Reports?

- Account Admin and the Evaluators have access to Reports. Campaign Admins and Team members cannot access Reports.

8. Are OPA evaluations anonymous? Are they confidential?

- Since OPA evaluations target specific individuals, they are not anonymous: the name of the individual who is the focus of the evaluation is shown on the data collection screens and on the Report.
- Since access to the OPA App is password-protected, only authorized individuals (those who have been invited by the Admin(s) to act as Evaluators) will be able to enter evaluations for others, and to view/print the reports.

9. What if I get an error message that says “email has already been taken”?

- If you get this error message, it means that this email address is already in the system for this Account. You can verify this by reviewing the users on the Users tab. Note that an email is used as a unique identifying information for the user in the OPA App, and an individual is not supposed to have more than one user role in the same organizational account. In other words, an individual should not be simultaneously an Evaluator and a Team Member, or a Campaign Admin and an Evaluator.
- If your organization has more than one account, the same email can be used to set up different roles in the different accounts. Contact IEE if you need additional information about multiple accounts (Suzanne Davidson via email at sdavidson@excellenceandethics.org).

10. What if I start a campaign and discover that I have users entered with a wrong email?

- First, go the Users tab on the navigation bar, find the user with incorrect email, and delete this user (we only recommend to use “Edit User” function if you need to edit the spelling of the user’s name).
- Then, perform the Add a New User step using the correct email.
- Finally, go to the Campaigns tab, locate this campaign and use the Edit Campaign function to add this new user to the campaign. This will generate an invitation email
that will be sent to the correct email. If you have multiple campaigns running at the same time, you will need to add the user to all of them to send new invitations.

11. What if a Team Member deleted, or did not receive, a campaign invitation email?
   • The individual running the campaign can resend an invitation from the View Campaign Status screen.

12. What if I get an error message I do not understand?
   • Please take a screen shot of the error message and contact Suzanne Davidson via email at sdavidson@excellenceandethics.org.