

# **Online Organizational Self-Assessment User's Guide**

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## Using the Assessment

### *How the Assessment Works*

The Online Organizational Performance Assessment is designed to work with a standard web browser — such as *Internet Explorer* or *Netscape* — on the Internet or your organization's intranet. The assessment is designed to be easy and intuitive. If you've ever used the Internet, you'll find it simple to use. If you are new to the Internet or have questions about using a web browser, please see your Assessment Administrator.

There are five basic steps to completing the Online Organizational Self-Assessment.

1. Open Your Web Browser
2. Go to the Address
3. Log In
4. Enter Demographic Data
5. Enter Your Answers to the Assessment Category Questions

### *Open Your Web Browser*

Select the appropriate browser icon from Windows. A browser is an application that allows you to view the Internet in a window. The most commonly used browsers are *Netscape* or *Internet Explorer*.

### *Go to the Address*

Once your browser is open, enter the address given to you by your Assessment Administrator in your browser's *Address* or *Location* field. The Online Organizational Self-Assessment **Login** page will display in your browser.

**Note:** If your Assessment Administrator has e-mailed you an address for the Organizational Self-Assessment, you can just click on the address and your standard browser should open automatically at the **Login** page.

**Lotus Notes** users need to open their browser first and type-in or copy the URL Address to access the site. Clicking on the link directly from Lotus Notes may not open the assessment or the accessibility may not be guaranteed.

## *Log In*

The **Login** page ensures that only you enter data on your assessment. You will receive a username and password via e-mail. See your Assessment Administrator if you are unsure of your username or password.

Enter your username in the *User ID* field.

Enter your password in the *Password* field.

To eliminate errors of entering the wrong username or password, highlight your username and click Ctrl + c (to copy). At the website login page, click in the username field and click Ctrl + v (to paste). Repeat the same steps for the password.

## *Change Password*

You are strongly encouraged to change your password. When you receive your username and password, your password will be random. In order for you to remember it more easily, we suggest that you change it to something meaningful to you that will be easy to remember.

To change your password, enter your current username and assigned password and click the *Change password* check box. Then click **Assessment Login** button. On the Change Password page, enter your new password twice in the two fields provided and click the **Save new password** button.

## *Enter Demographic Data*

The Demographic page will be completed first before starting the assessment. The information you enter here describes your position in the organization. It is vital to complete demographic information correctly for the overall assessment feedback results to be meaningful. There may be several demographic categories that will help describe who you are (such as position in the organization, physical location and job function). Each different demographic category will appear on separate pages. For each demographic category, click the radio button that best describes you. Click 'Next' to save your selection and advance to the next page. You must make an entry in each category. The assessment team will protect the anonymity of the assessment participants. The feedback report will not reveal the individual who commented on the questions.

When you have completed the demographics, you will be redirected to the **Assessment Status** page.

## *Assessment Status Page*

This page shows what parts of the assessment you have completed, and what parts are incomplete. It is the page from which you click on the links to enter each of the assessment pages

such as Demographics and Categories. All sections must say “Completed” in order for your data to be valid and submitted.

### *Enter Your Answers to the Assessment Category Questions*

You must enter all categories of actual assessment information. To enter data for a category, click its name.

#### *Different Assessment Versions Available:*

1) Individual Assessment Questions or 2) Grouped Assessment Questions (see instructions below for each)

#### *1) Individual Assessment Questions*

For each category, click the radio button that best describes the level of development in your organization. Mouse over the levels to view the descriptors of each level. To view a list of all of the descriptions, click on ‘Full Descriptions’. Note that all of the elements of a statement must be true before you can select that level. If one or more is not true, you must go to a lower level.

***Accuracy Tip:*** *The rating scale involves your assessment about the extent of use of the required management processes. The following definitions should help you rate this consistently:*

- Few \_\_\_\_\_ less than 15%
- Some \_\_\_\_\_ 15% to less than 30%
- Many \_\_\_\_\_ 30% to less than 50%
- Most \_\_\_\_\_ 50% to less than 80%
- Nearly All \_\_\_\_\_ 80% to less than 99%
- All \_\_\_\_\_ 100%

***Time Saving Tip:*** *Start reading at the Basically Effective Level. If all parts of the statement are true, go to the Mature Level, if not, drop back to read the Beginning Level. After a few answers, save even more time by starting at the level you select most often. Don’t waste time by reading from the Not Evident Level each time (unless most of your answers are 1).*

Some assessments will have the option to select N/A if you do not know an answer, (Not Applicable/Does Not Apply) or ? (Don’t Know).

Some assessments will have the option to type free text comments in the **Comment** box(es) for every question. Other assessments will have comments at the end of each category.

After all themes in each category have been rated, you will be directed to identify one area you believe is the most important to improve now. Mouse over the statement to view the question. To view a list of all of the descriptions, click on ‘Full Descriptions’. Check the box next to the theme. Click the **Next** button to be redirected back to the status page to select your next category.

## *2) Grouped Assessment Questions*

For each category, click the radio button to the right of each theme that best describes the level of development in your organization. To see a list of all of the descriptions, click on 'Full Descriptions' below. Then, identify 1 theme you believe is the most important to improve now. Check the box on the left of the theme under the MNI (Most Needing Improvement) column.

Save your responses at any time by clicking 'Save Your Work' below. After clicking 'Save Your Work', you can stop in the middle of your assessment and log back in at any time during the assessment timeline.

When you click 'Next', a comment page will appear on the theme you selected that needs the most improvement. Type your comments in the **Comment** boxes.

Click the **Next** button to be redirected back to the status page to select your next category until all Categories and Demographics say 'Completed'.

Some assessments will have the option to select N/A if you do not know an answer, (Not Applicable/Does Not Apply) or ? (Don't Know).

### *Submit*

When you have entered answers to the demographics and every question for each category, your responses will automatically be submitted and a **Congratulations** page will appear.

You may go back and make changes to any part of the assessment by clicking on **Back to Assessment**. You will be redirected to the assessment status page to access the categories you want to review or change.