# ARIZONA
P R O C U R E M E N T   P O R T A L

Creating Performance Assessments

This document is a quick-reference guide for supplier managers who need to create performance assessments in the Arizona Procurement Portal (APP.) If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO Website: https://spo.az.gov/.

Performance assessments measure the overall performance of a supplier, contract or order. These assessments are measured through the results of questionnaires. These questionnaires are based off templates that are created by SPO. Each question in the questionnaire can have a different weightage based off its level of importance. After creating a performance assessment questionnaire, you can assign it to evaluators who will complete the questionnaire.

Creating a Performance Assessment

1. From any page in APP, navigate to the **Suppliers** drop-down menu and select **Assess Suppliers**.
2. Select **Score Supplier** and choose the appropriate template for your assessment. For this example, we will be selecting the **Supplier Feedback** template, as it is the most common.
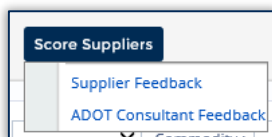

3. You will be redirected to the assessment page. The **Assessment Title** and **Creator** field will populate automatically. You can change the **Assessment Title**.
4. Update the **Assessment Period** (period of supplier performance being evaluated) and **Vendor** fields. Select the **Begin Date** and **End Date** you would like to run this questionnaire. The Begin Date is when the Performance Assessment is active and the End Date is when it will close.


5. Click **Save**.

Now, the general information for the questionnaire is populated and we will begin editing the information in the questionnaire. We will continue from this screen.

(continued on next page)

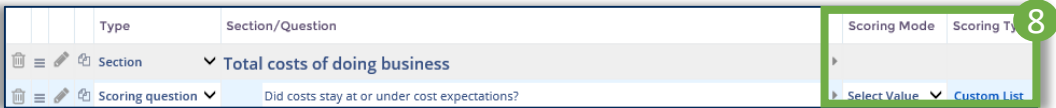## Editing the Questionnaire

6. Navigate to the Questionnaire tab on the left side of the screen. You will see the Supplier Feedback Template.
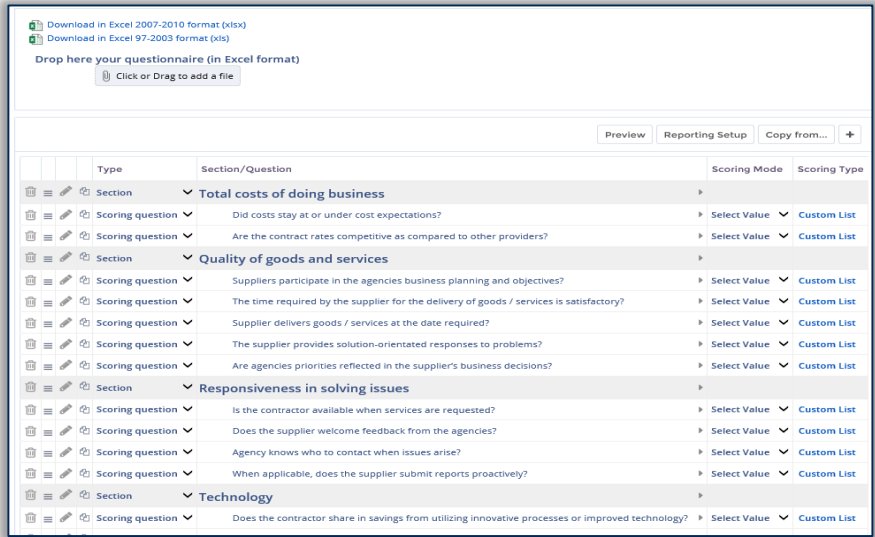

7. If you want to edit the questionnaire in the system, you can click each field to edit the title. You can use the buttons on the left to delete, move, edit or duplicate the question.
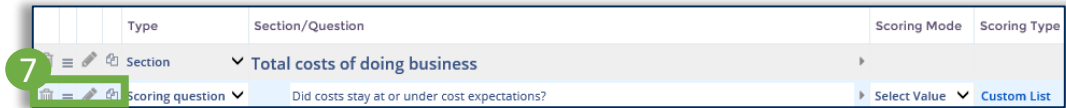
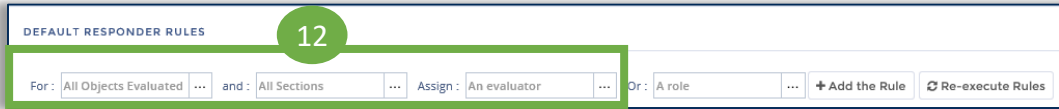8. Under **Scoring Module** and **Scoring Type,** you can customize how each question will be scored.

9. You have the ability to download the questionnaire in Excel, modify it, then upload it back to APP. The downloadable Excel format has detailed instructions on how to modify the questionnaire within Excel. Select the **Download in Excel** button and once you are finished, **Click or Drag to add a file**.
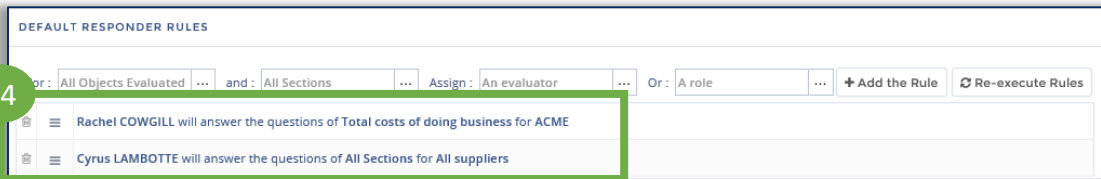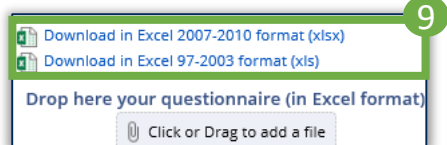

10. Select the **Preview** button to see what the questionnaire will look like. Once you have finalized the questionnaire, select **Save.** At this point, the questionnaire is complete and ready to go. Next, we will add Evaluators to take the questionnaire. We will continue from this screen.

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Assigning Evaluators

11. Navigate to the Evaluator tab on the left side of the screen.
12. Under Default Responder Rules, populate **For**, **And,** and **Assign.**

13. Select **Add the Rule**. Then repeat as needed.
14. You can add evaluators in many ways.
    - Assign a specific evaluator for a subsection by entering both into the rule bar and clicking add role
    - Add evaluator by role on a specific object
    - The grid beneath the rule bar will populate with evaluators selected per section so you are able to see what each evaluator is responsible for

15. Once complete, select **Open for Answers**.

Now, evaluators will be alerted that they need to complete the questionnaire. Once all questionnaires have been completed, the system will automatically calculate the performance score and close the questionnaire, by the designated end date.