

P4P Form Instructions



IMPORTANT NOTES

- The forms will **ONLY** function on Microsoft Word version 2002, 2003 , 2007 or 2010.
- Please read the **SECURITY SETTINGS** and **DOWNLOAD INSTRUCTIONS** below.
- Complete Security Setting selection **BEFORE** document review or use.
- You must select your **POSITION TITLE** prior to completing the form.
- The Macros **WILL NOT** respond if the Security Setting and Position Title are not selected.

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Based on which version of Microsoft Word you have installed on your computer, refer to the appropriate section below.

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Section 1 MS Word 2002 or 2003

Security Settings

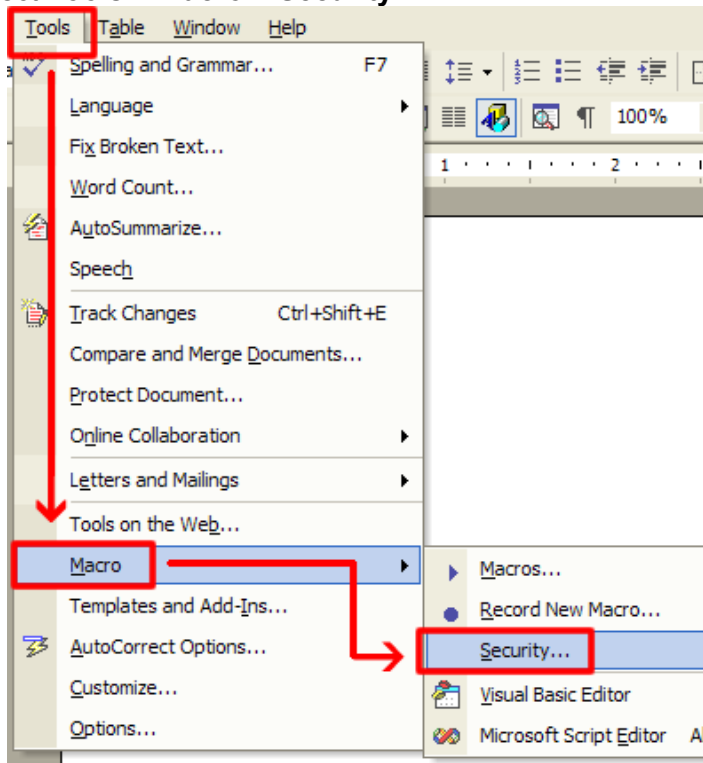


This is required one time only.

A) Open **Microsoft WORD**



B) Select **Tools > Macro > Security**



C) Select **Medium** Security Level in the pop-up window
→ Click **OK**



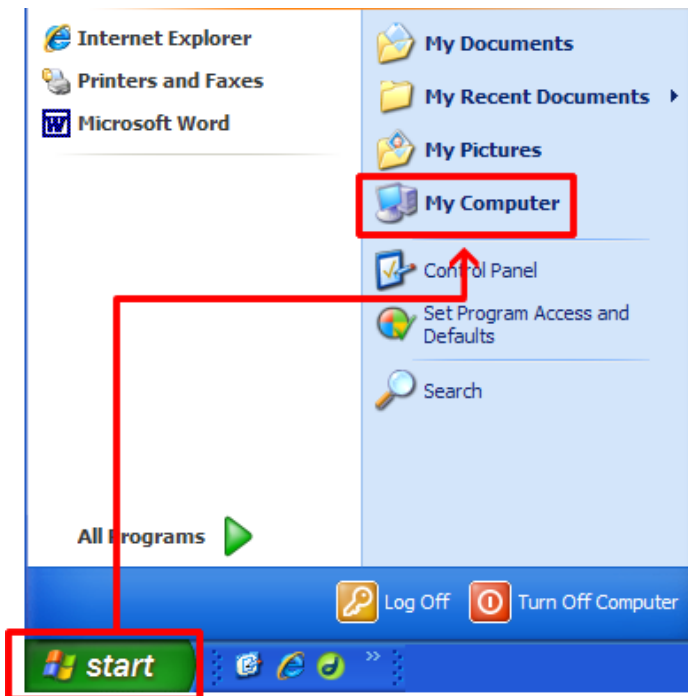
D) Exit out of **Microsoft WORD**

File Download Settings

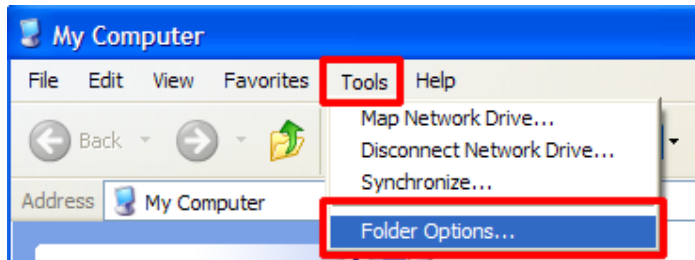


This is also required one time only.

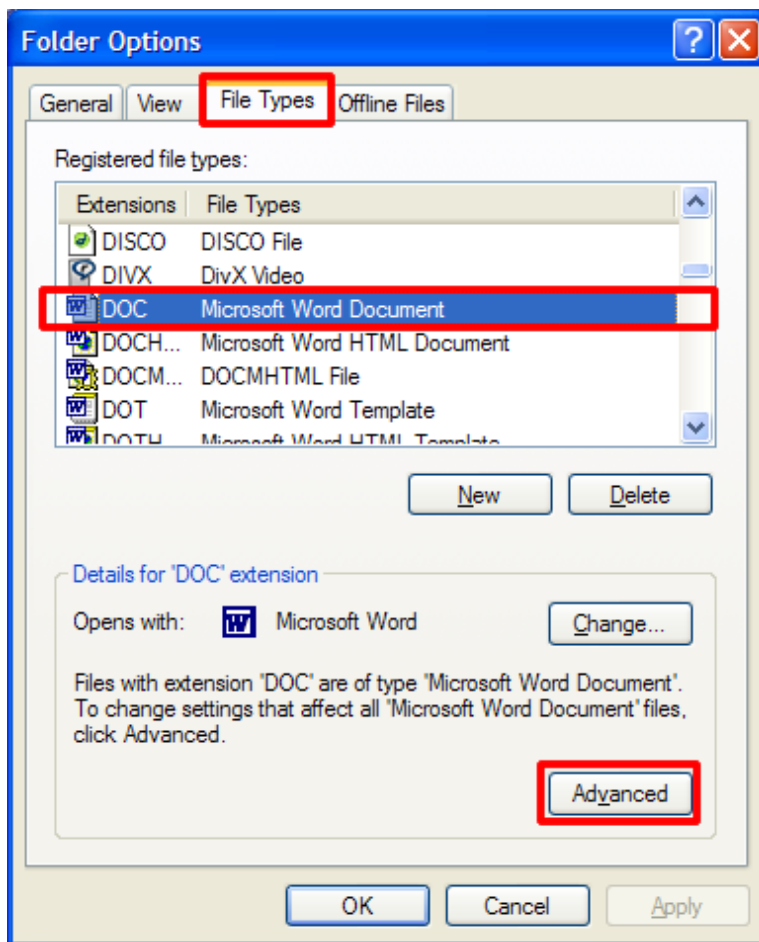
- A) Click on **Start** (located on the lower left area of your screen)
→ Click on **My Computer**, located on the right side of the selections menu that appears



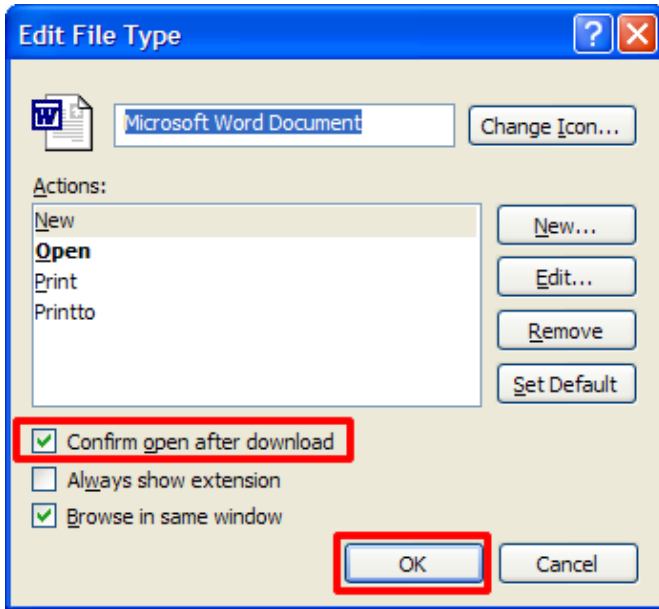
- B) Click on **Tools**, located on the toolbar at the top
→ Select **Folder Options**



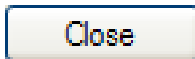
- C) Select the **File Types** tab
→ Using the scroll bar, scroll down to select **DOC Microsoft Word Document**
→ Click on the **Advanced** button



- D) Make sure you have **Confirm open after download** selected with a checkbox
→ Click **OK**



E) In the Folder Options window, click on the **Close** button

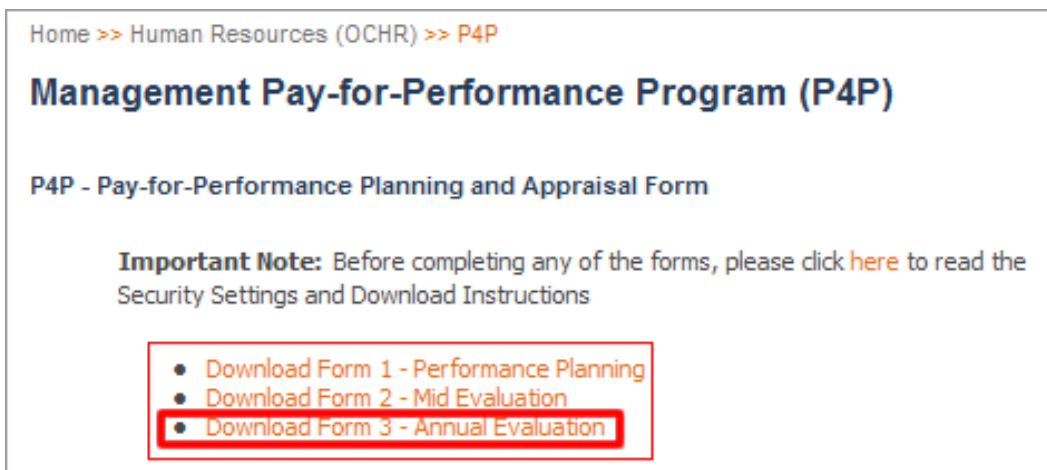


Downloading the Template

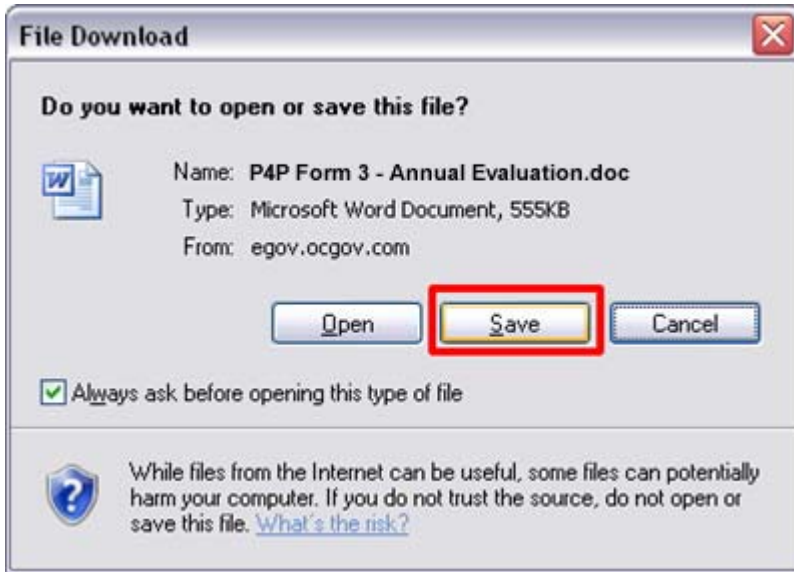
A) Go to the **P4P website** on the *Internet* at www.ocgov.com/p4p or from the *OC Intranet* at <http://ocintranet.ocgov.com> under the Performance Management Program section.

Choose one of the 3 form types that you would like to download.

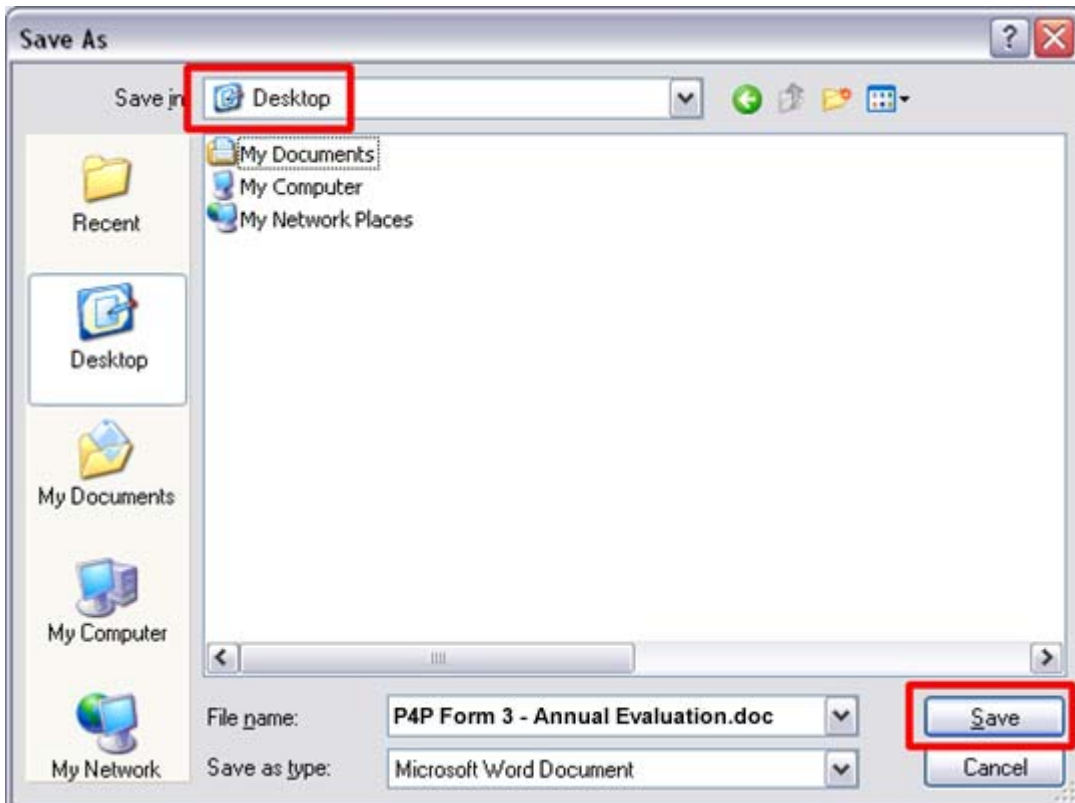
→ In this example, click on the **Download Form 3 – Annual Evaluation** link



B) Select **SAVE** in the File Download pop-up box

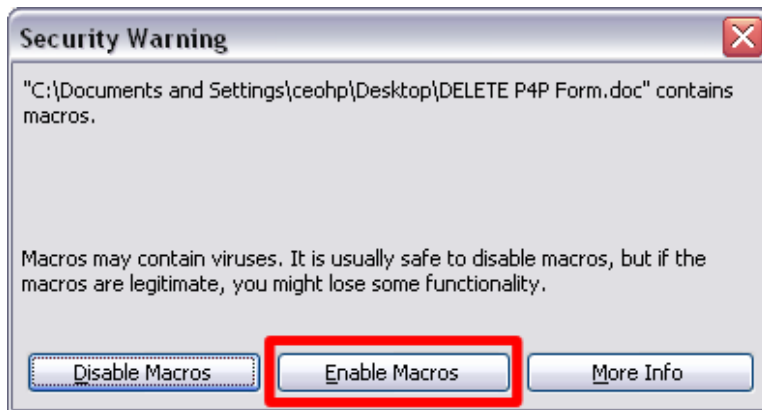


C) **SAVE** the **P4P Form 3 - Annual Evaluation.doc** to a desired location.
(e.g., Desktop, My Documents)
* Rename the File Name if you like



Completing the Form

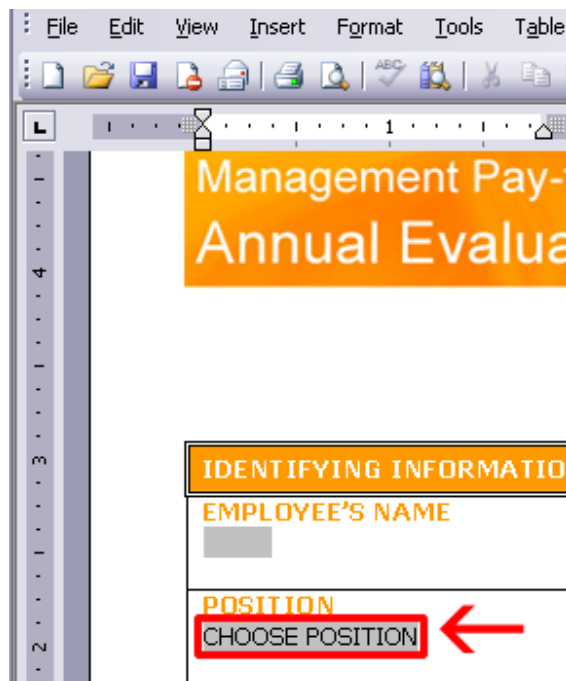
- A) Open the P4P Form document you just saved
- B) Select **ENABLE MACROS** in the Security Warning pop-up window



- C) In order for the form options to function correctly, you must first **select one (1) of the four positions listed below.**



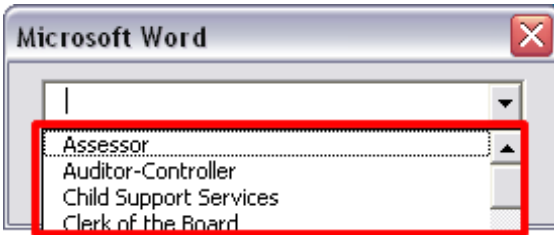
To bring up the list, click anywhere within the gray shaded area where CHOOSE POSITION is displayed.



- D) Under the Departments section, click within the gray shaded area to bring up the list of departments

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [REDACTED]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [REDACTED] to [REDACTED]	EVALUATION TYPE CHOOSE EVALUATION TYPE

E) Select one (1) of the **Departments** listed below from the pop-up window



F) After selecting a Department, click on the **Close** button



G) Click within the gray shaded area to bring up the list of evaluation types

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [REDACTED]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [REDACTED] to [REDACTED]	EVALUATION TYPE CHOOSE EVALUATION TYPE

H) Select one (1) of the **Evaluation Types** listed below



Depending on the form type you're filling out, more than one (1) option may be listed.

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [REDACTED]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [REDACTED] to [REDACTED]	EVALUATION TYPE CHOOSE EVALUATION TYPE
	CHOOSE EVALUATION TYPE Annual Evaluation and Reward Determination

- I) Continue to fill out and complete the form.
 → The buttons and macros should work as intended



Flickering

Page 5 of the forms tends to flicker. To reduce the flickering, you can zoom into the document to about 130%.

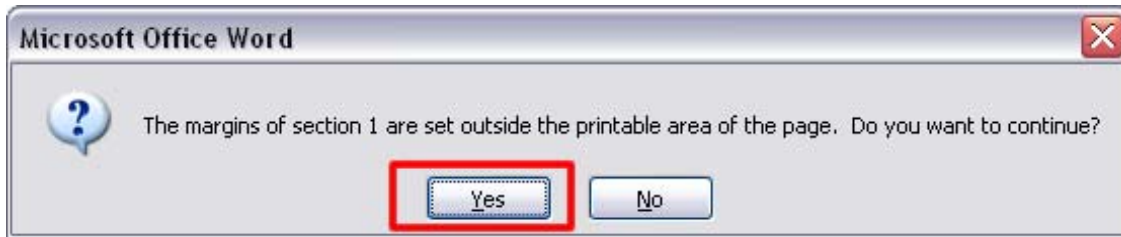
The screenshot shows a PDF viewer interface with a zoom level of 130% highlighted in a red box. Below the viewer, there is a form section with an orange header that reads "ADDITIONAL COMMENTS (Optional)". Below the header, there is a note: "* Please provide brief and concise information when completed." followed by a small grey rectangular box for input.

- J) Save the form to a desired location on your computer

Printing the Form

When printing the form, you may receive several pop-up messages (one for each page of the form) similar to the following image below.

Click **YES** for all of them that you may receive. It's letting you know the margins are outside of the printable area.

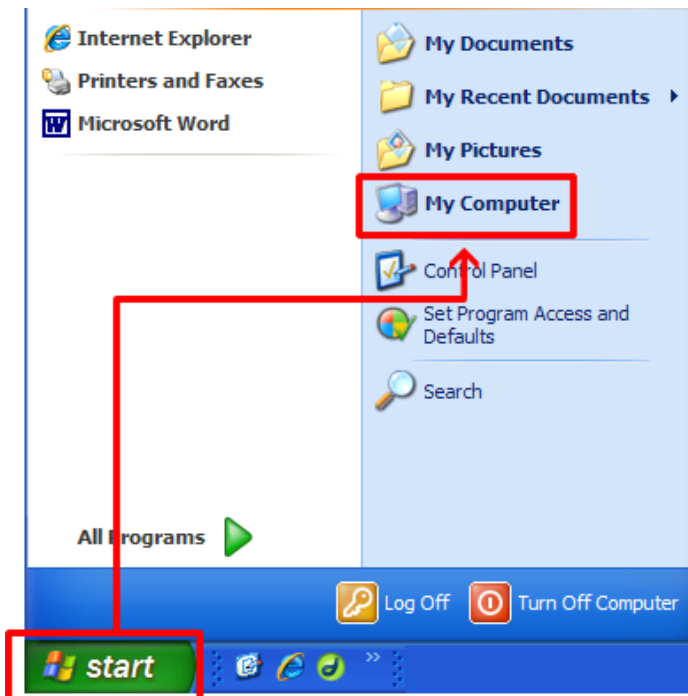


Section 2 MS Word 2007

File Download Settings

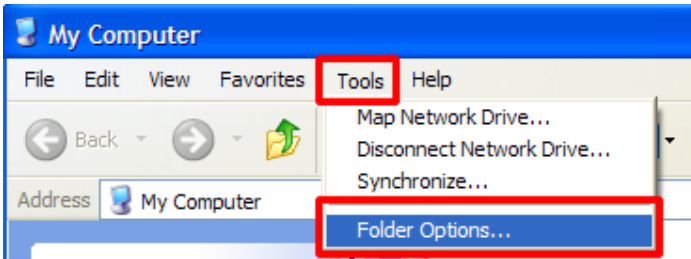
NOTE This is also required one time only.

- A) Click on **Start** (located on the lower left area of your screen)
→ Click on **My Computer**, located on the right side of the selections menu that appears



- B) Click on **Tools**, located on the toolbar at the top

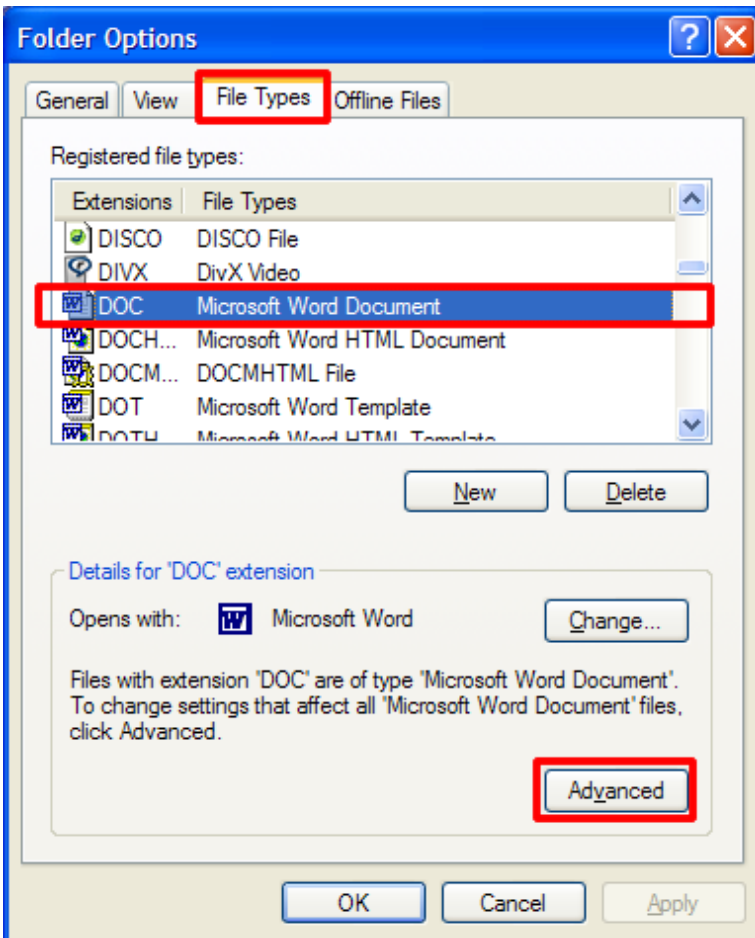
→ Select **Folder Options**



C) Select the **File Types** tab

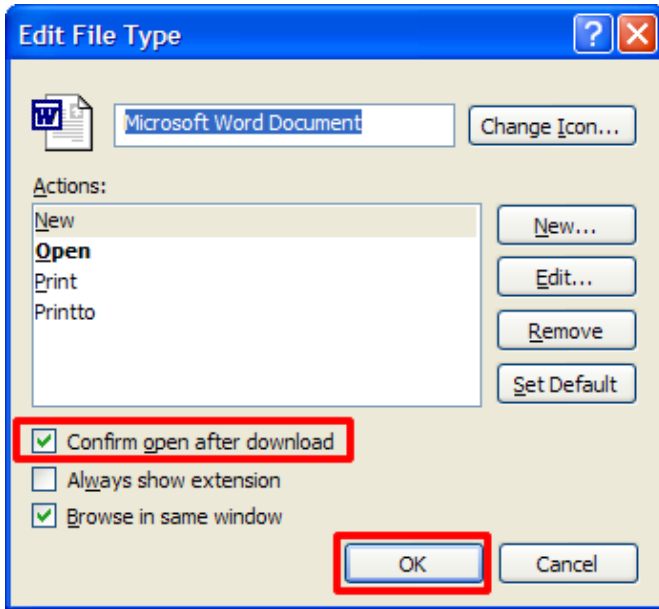
→ Using the scroll bar, scroll down to select **DOC Microsoft Word Document**

→ Click on the **Advanced** button

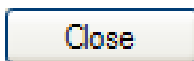


D) Make sure you have **Confirm open after download** selected with a checkbox

→ Click **OK**



E) In the Folder Options window, click on the **Close** button

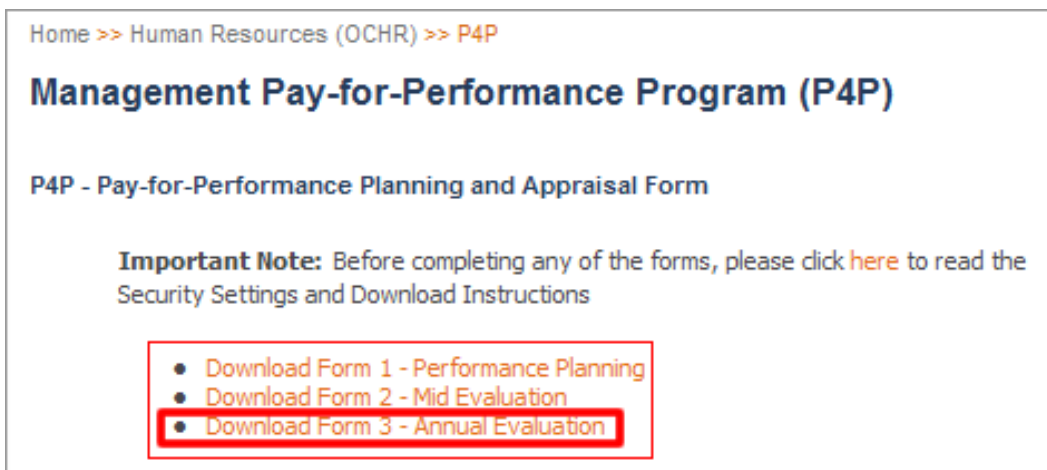


Downloading the Template

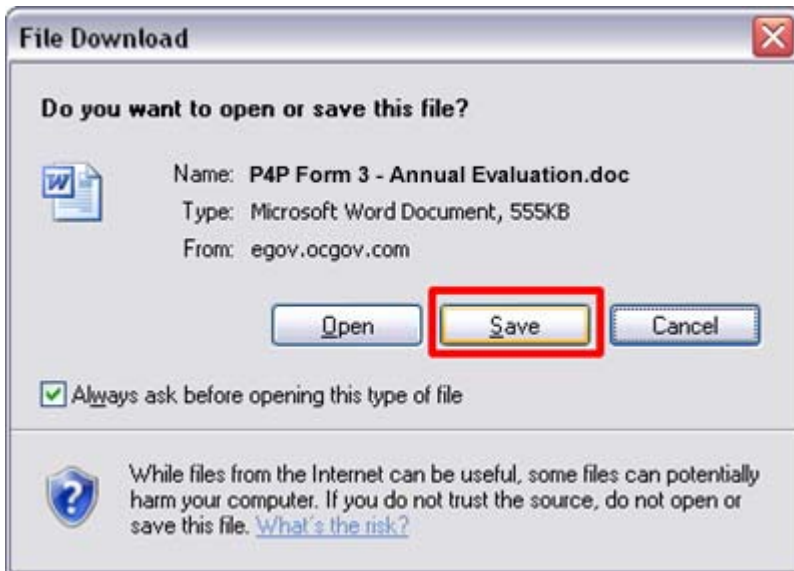
A) Go to the **P4P website** on the *Internet* at www.ocgov.com/p4p or from the *OC Intranet* at <http://ocintranet.ocgov.com/> under the Performance Management Program section.

Choose one of the 3 form types that you would like to download.

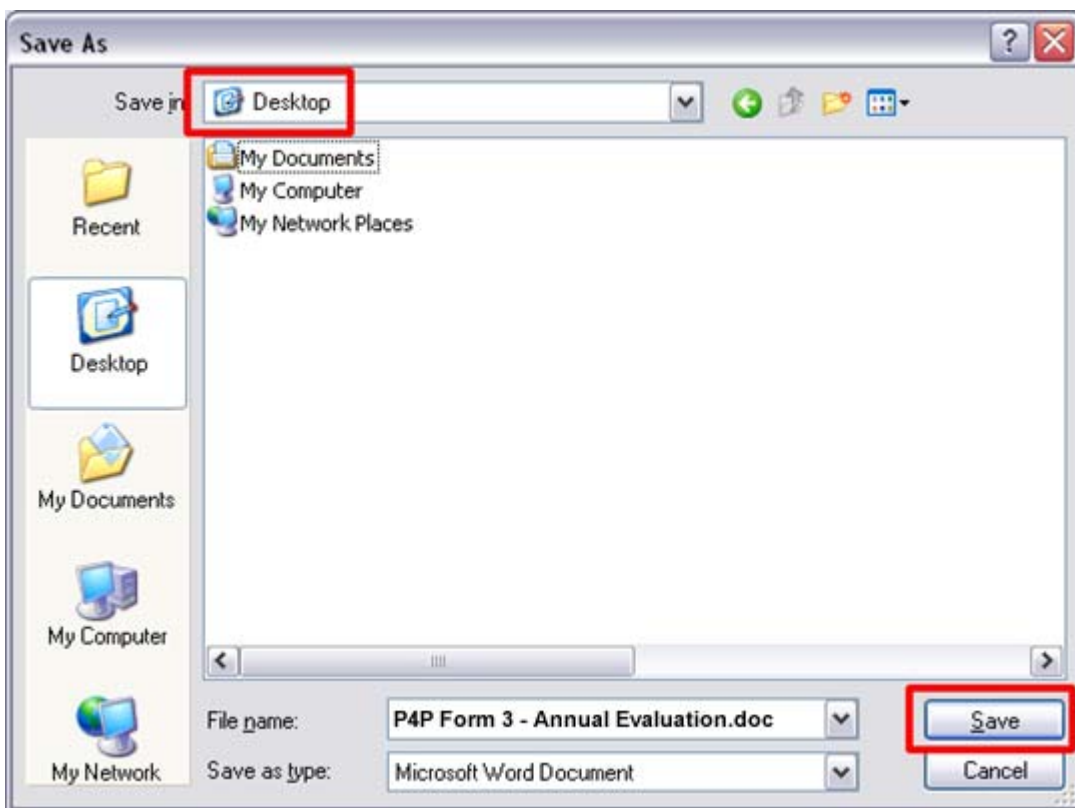
→ In this example, click on the **Download Form 3 – Annual Evaluation** link



B) Select **SAVE** in the File Download pop-up box



- C) **SAVE** the **P4P Form 3 - Annual Evaluation.doc** to a desired location.
(e.g., Desktop, My Documents)
* Rename the File Name if you like



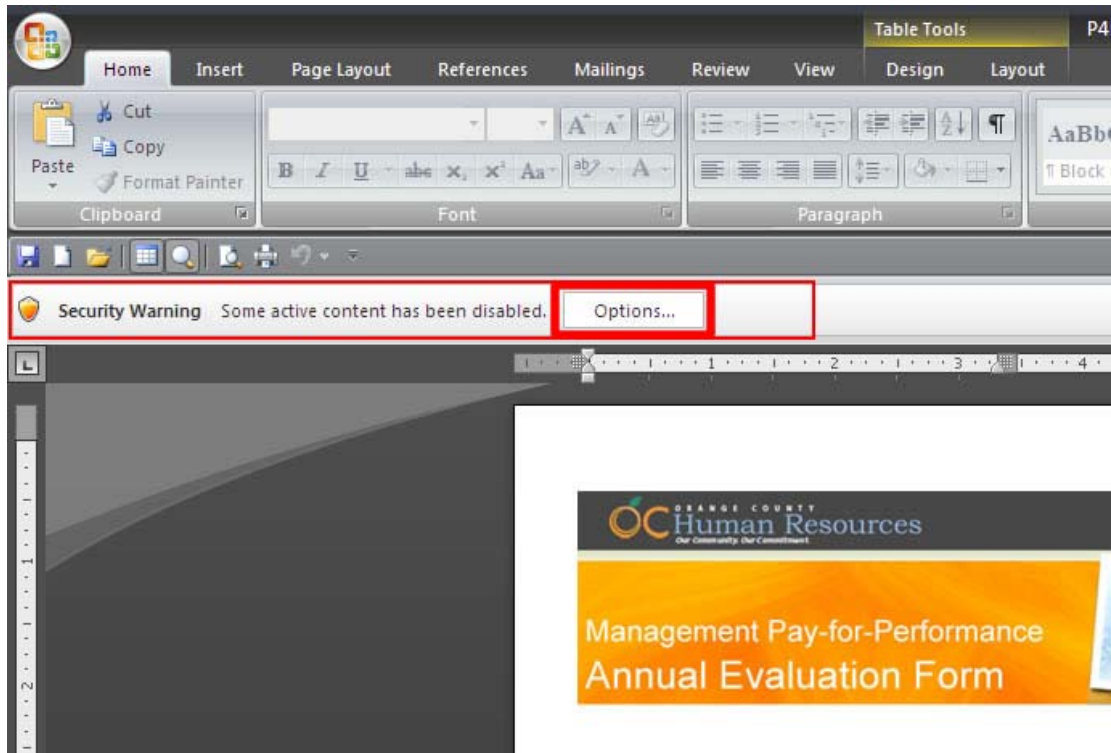
Security Settings



This step is required for *each* time you open any of the three P4P forms.

- A) **Open the P4P form** in WORD 2007
(In this example it's the Annual Evaluation Form)

- B) Click the **Options** button that's within the Security Settings area



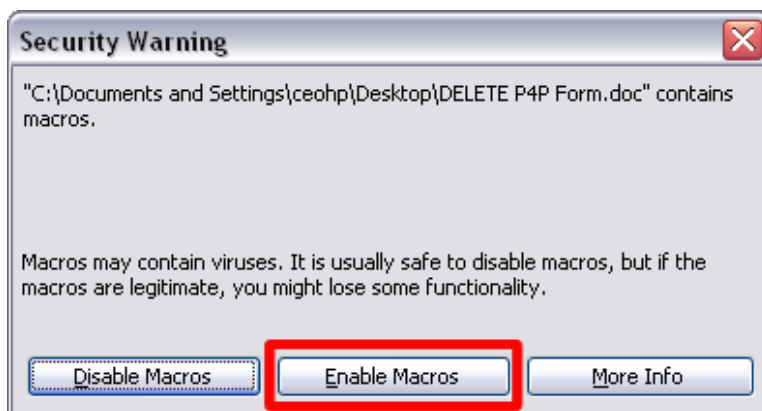
- C) In the Security Alert pop-up box, select the radio button for **Enable this Content**
→ Click **OK**



D) Complete the form (next section below)

Completing the Form

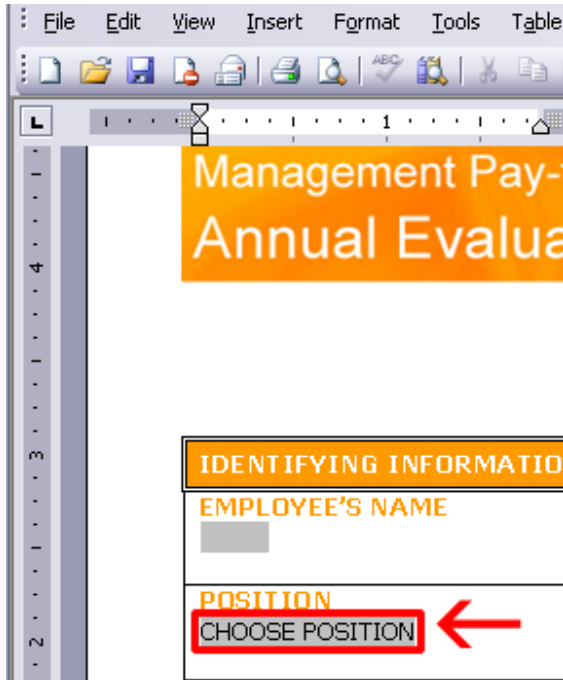
- A) Open the P4P Form document you just saved
- B) Select **ENABLE MACROS** in the Security Warning pop-up window



- C) In order for the form options to function correctly, you must first **select one (1) of the four positions listed below.**



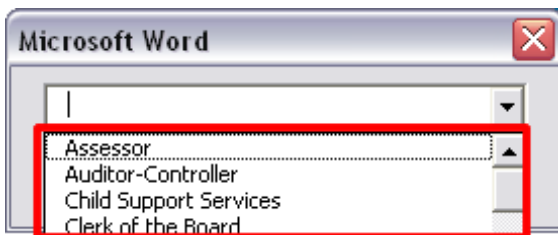
To bring up the list, click anywhere within the gray shaded area where CHOOSE POSITION is displayed.



D) Under the Departments section, click within the gray shaded area to bring up the list of departments

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [Text Input]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [Text Input] to [Text Input]	EVALUATION TYPE CHOOSE EVALUATION TYPE

E) Select one (1) of the **Departments** listed below from the pop-up window



F) After selecting a Department, click on the **Close** button



G) Click within the gray shaded area to bring up the list of evaluation types

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [Gray shaded area]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [Gray shaded area] to [Gray shaded area]	EVALUATION TYPE CHOOSE EVALUATION TYPE

H) Select one (1) of the **Evaluation Types** listed below



Depending on the form type you're filling out, more than one (1) option may be listed.

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [Gray shaded area]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [Gray shaded area] to [Gray shaded area]	EVALUATION TYPE CHOOSE EVALUATION TYPE

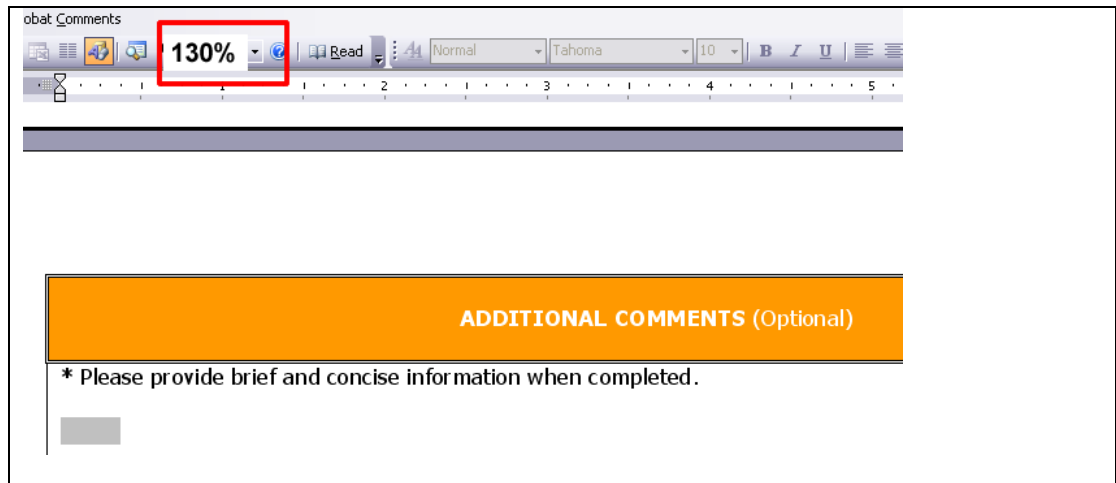
CHOOSE EVALUATION TYPE
Annual Evaluation and Reward Determination

I) Continue to fill out and complete the form.
→ The buttons and macros should work as intended



Flickering

Page 5 of the forms tends to flicker. To reduce the flickering, you can zoom into the document to about 130%.

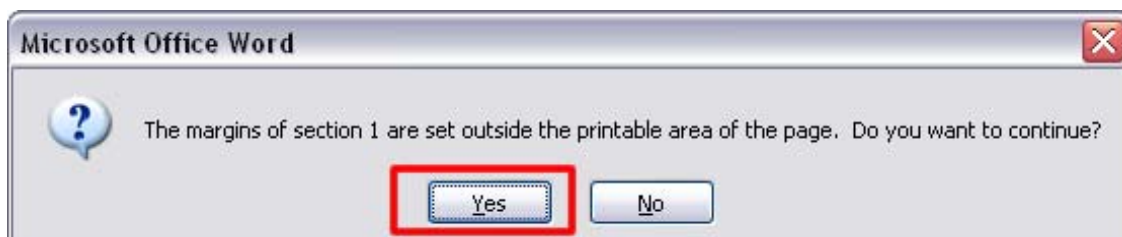


J) Save the form to a desired location on your computer

Printing the Form

When printing the form, you may receive several pop-up messages (one for each page of the form) similar to the following image below.

Click **YES** for all of them that you may receive. It's letting you know the margins are outside of the printable area.



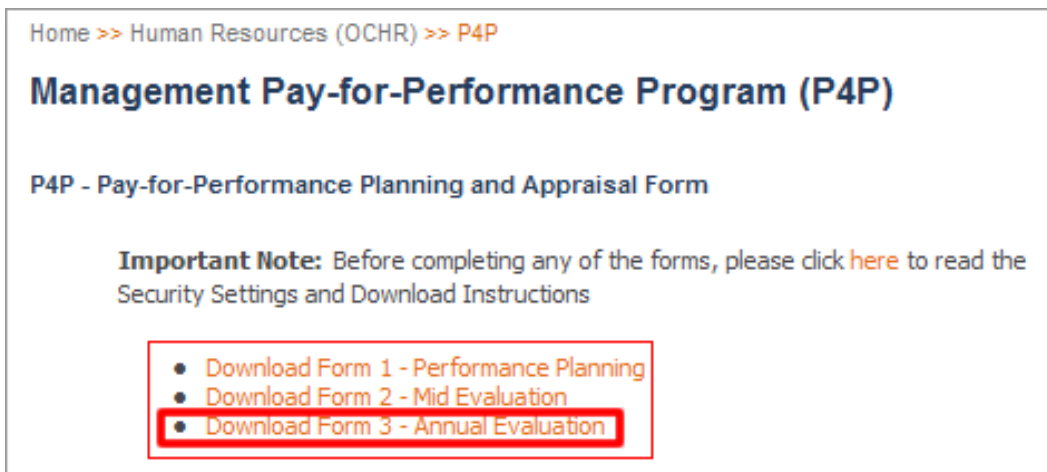
Section 3 MS Word 2010

Downloading the Template

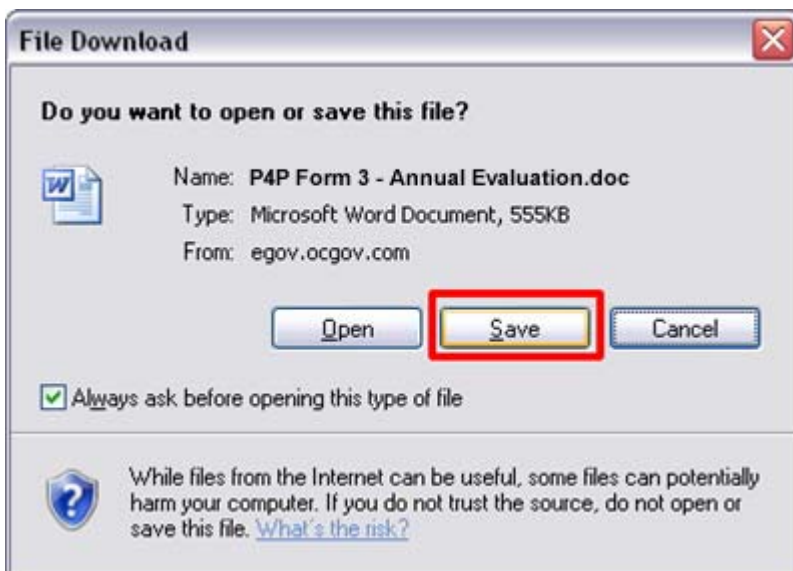
- A) Go to the **P4P website** on the *Internet* at www.ocgov.com/p4p or from the *OC Intranet* at <http://ocintranet.ocgov.com/> under the Performance Management Program section.

Choose one of the 3 form types that you would like to download.

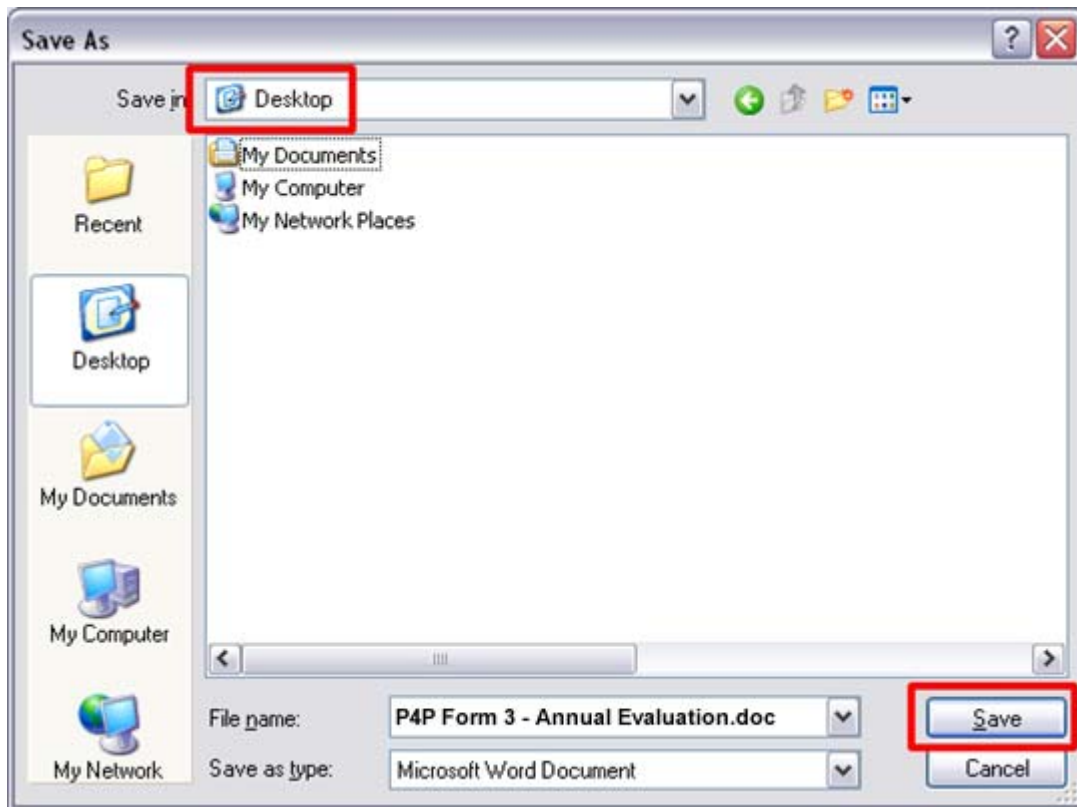
→ In this example, click on the **Download Form 3 – Annual Evaluation** link



- B) If you get the File Download pop-up box, select **Save**



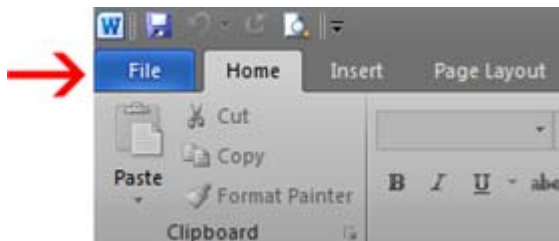
- C) **SAVE** the **P4P Form 3 - Annual Evaluation.doc** to a desired location.
(e.g., Desktop, My Documents)
* Rename the File Name if you like



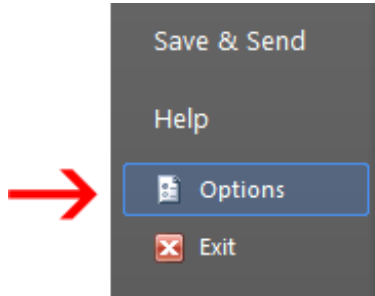
Security Settings

NOTE This step is required for *each* time you open any of the three P4P forms.

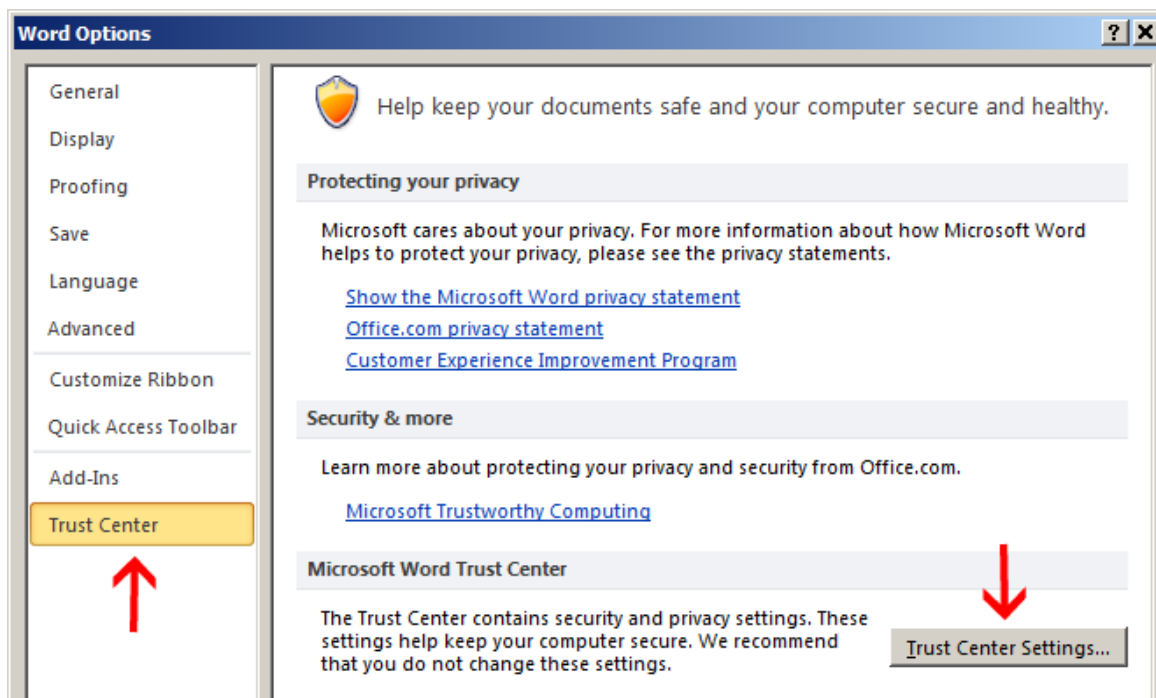
- A) **Open the P4P form** in WORD 2010
(In this example it's the Annual Evaluation Form)
- B) Click on **File**



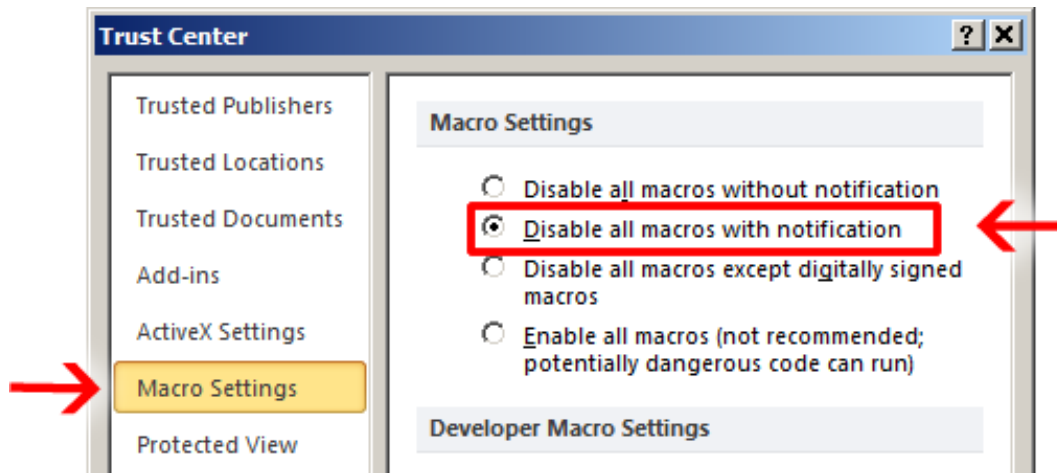
C) On the left navigation, click on **Options**



D) In the Pop-up window, click on **Trust Center** on the left navigation and then click on the button **Trust Center Settings**



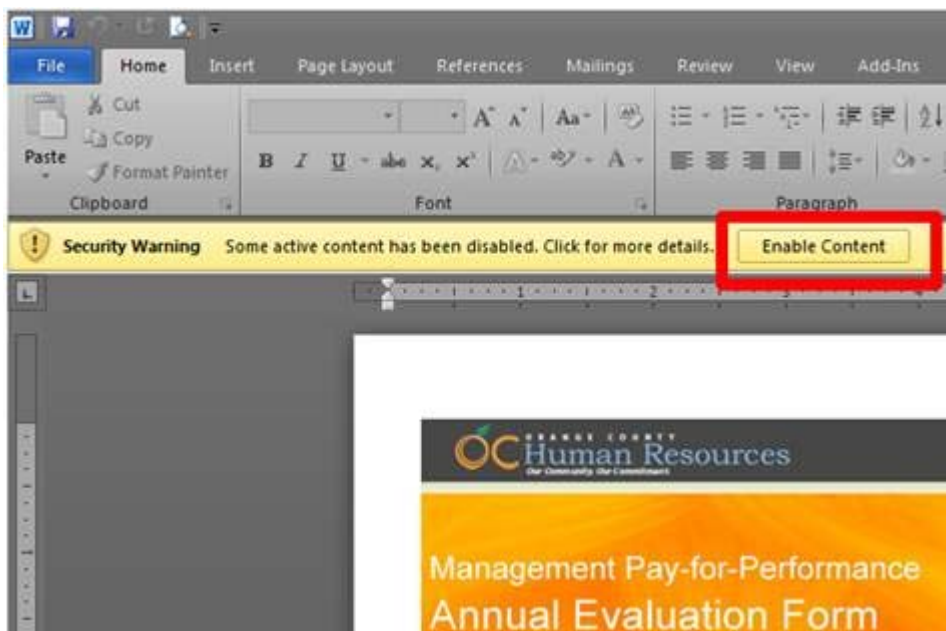
E) On the left navigation, select **Macro Settings** and also select **Disable all macros with notification**



Completing the Form

The first time you open the form, you'll see a security warning at the top to Enable Content.

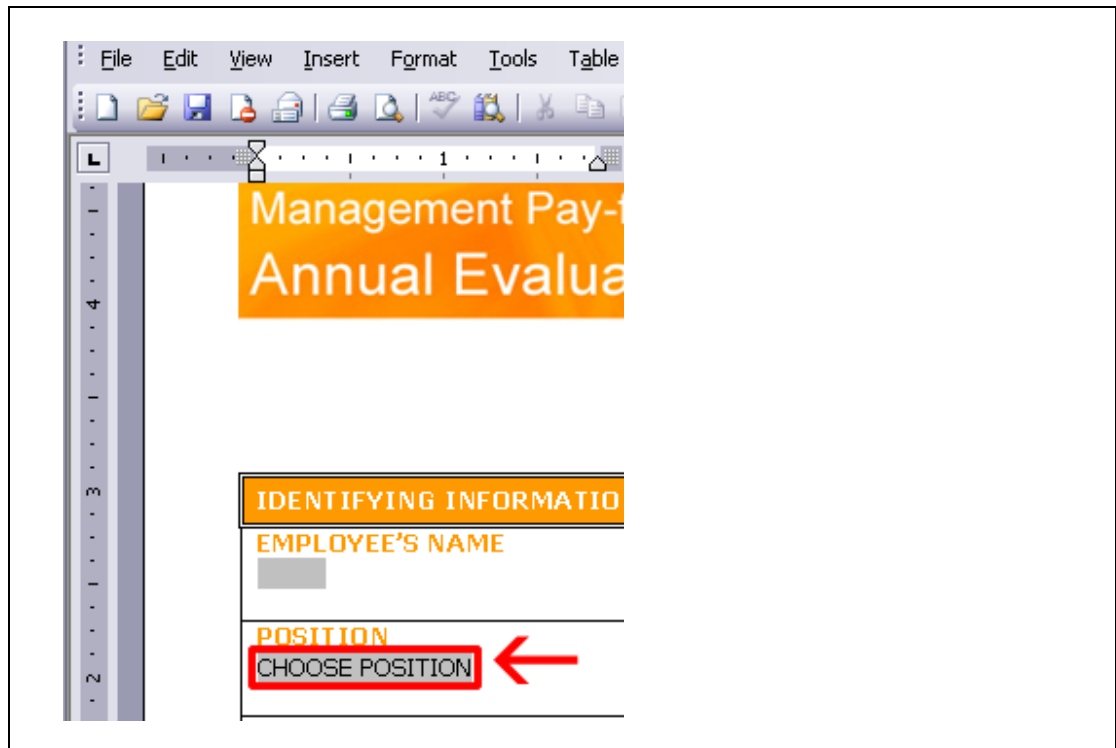
A) Select **Enable Content**



B) In order for the form options to function correctly, you must first **select one (1) of the four positions listed below.**



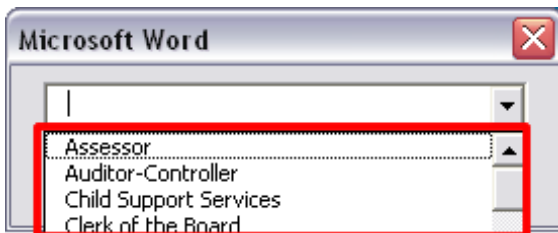
To bring up the list, click anywhere within the gray shaded area where CHOOSE POSITION is displayed.



C) Under the Departments section, click within the gray shaded area to bring up the list of departments

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME <input type="text"/>	
POSITION <input type="text" value="CHOOSE POSITION"/>	DEPARTMENT <input type="text" value="CHOOSE DEPARTMENT"/>
PERIOD COVERED <input type="text"/> to <input type="text"/>	EVALUATION TYPE <input type="text" value="CHOOSE EVALUATION TYPE"/>

D) Select one (1) of the **Departments** listed below from the pop-up window



E) After selecting a Department, click on the **Close** button



F) Click within the gray shaded area to bring up the list of evaluation types

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [Gray shaded area]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [Gray shaded area] to [Gray shaded area]	EVALUATION TYPE CHOOSE EVALUATION TYPE

G) Select one (1) of the **Evaluation Types** listed below



Depending on the form type you're filling out, more than one (1) option may be listed.

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [Gray shaded area]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [Gray shaded area] to [Gray shaded area]	EVALUATION TYPE CHOOSE EVALUATION TYPE

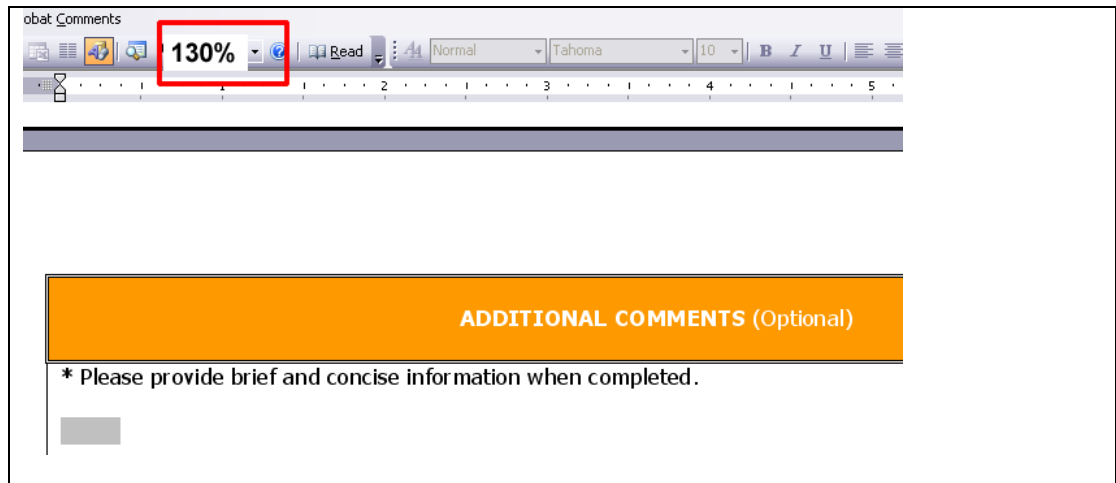
CHOOSE EVALUATION TYPE
Annual Evaluation and Reward Determination

H) Continue to fill out and complete the form.
→ The buttons and macros should work as intended



Flickering

Page 5 of the forms tends to flicker. To reduce the flickering, you can zoom into the document to about 130%.



l) Save the form to a desired location on your computer

Printing the Form

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Click **YES** for all of them that you may receive. It's letting you know the margins are outside of the printable area.

