

# P4P Form Instructions



## IMPORTANT TO NOTE

- The forms will ONLY function on Microsoft Word version 2002, 2003 or 2007.
- 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

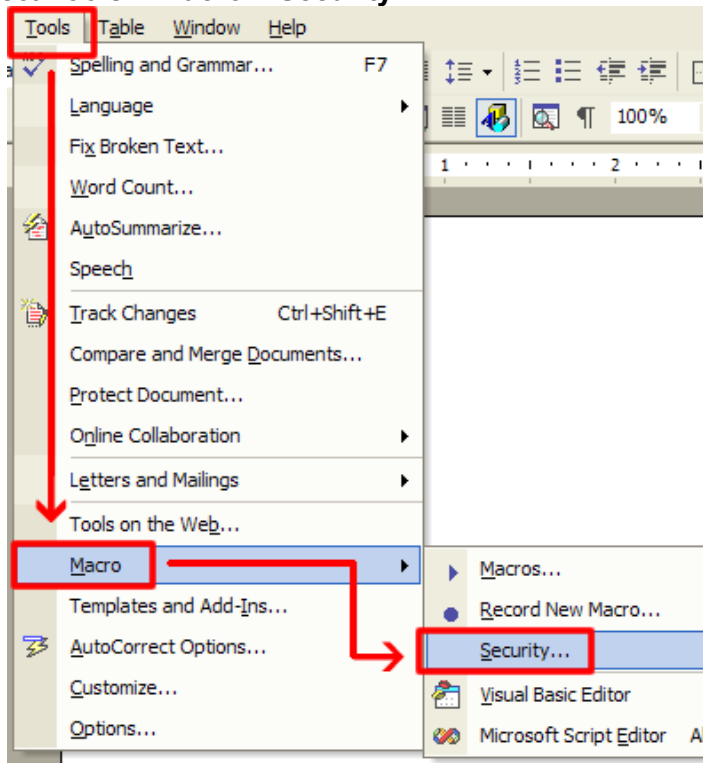


This is required one time only.

A) Open **Microsoft WORD**



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



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



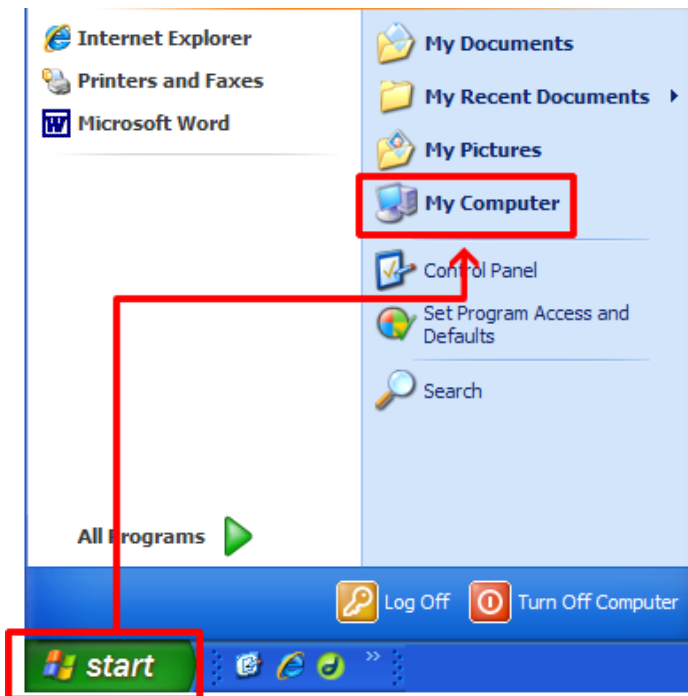
D) Exit out of **Microsoft WORD**

## File Download Settings

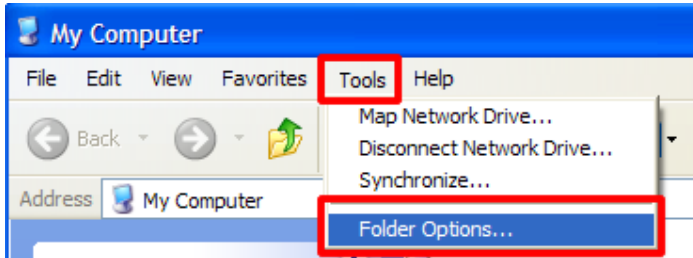


This is also required one time only.

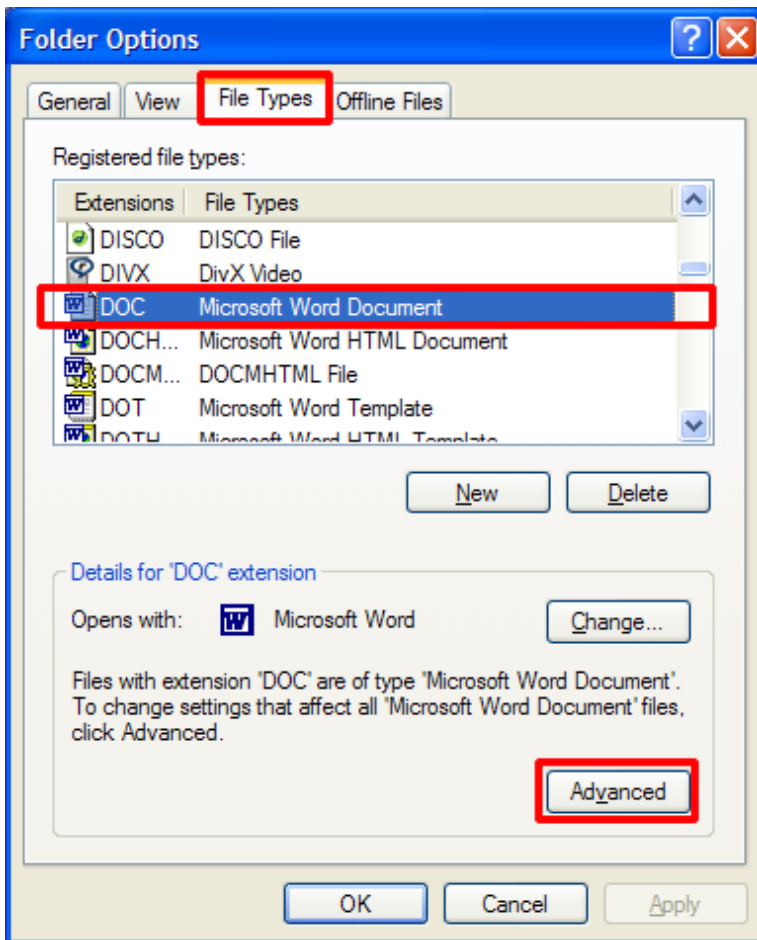
- A) Click on **Start** (located on the lower left area of your screen)  
→ Click on **My Computer**, located on the right side of the selections menu that appears



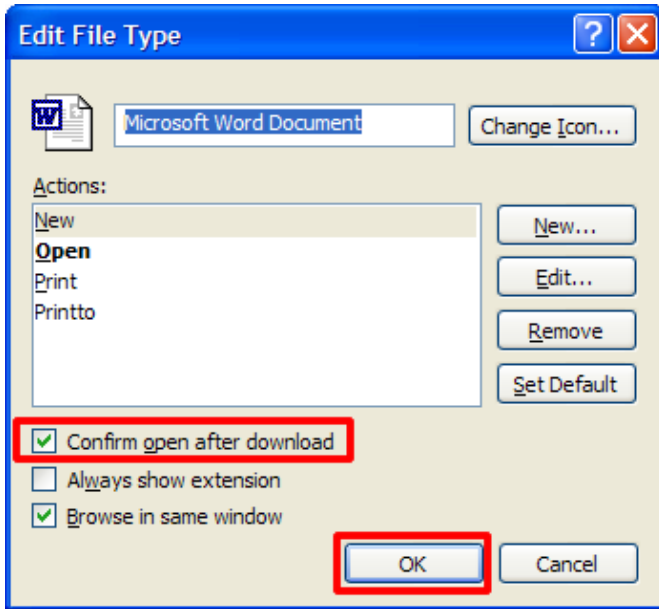
- B) Click on **Tools**, located on the toolbar at the top  
→ Select **Folder Options**



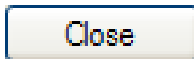
- C) Select the **File Types** tab  
→ Using the scroll bar, scroll down to select **DOC Microsoft Word Document**  
→ Click on the **Advanced** button



- 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

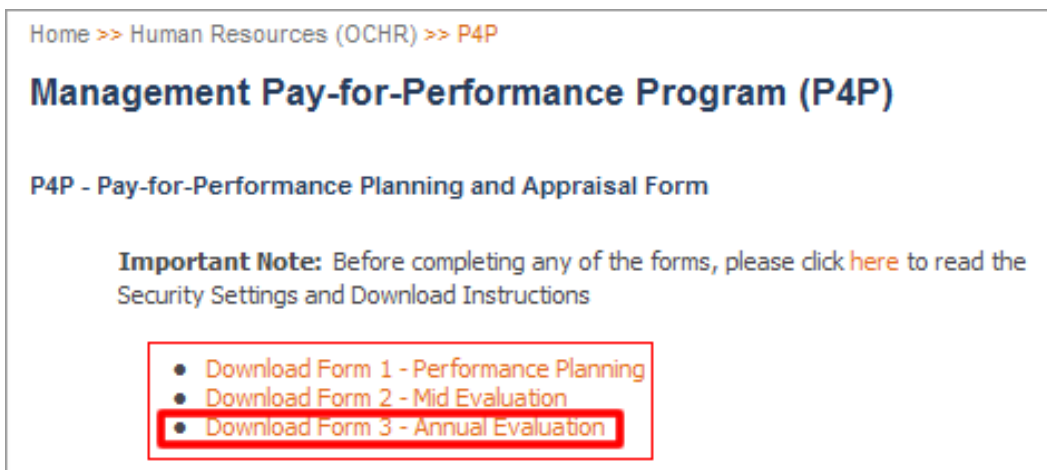


## Downloading the Template

A) Go to the **P4P website** on the *Internet* at [www.ocgov.com/p4p](http://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.

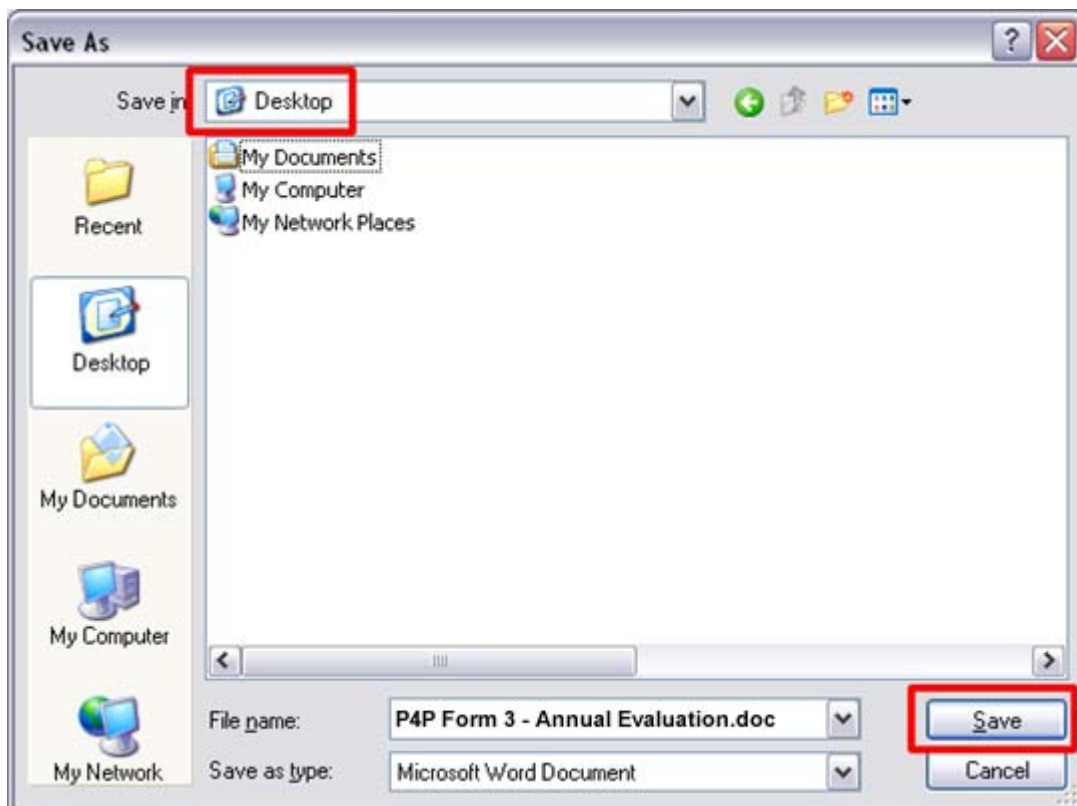
→ In this example, click on the **Download Form 3 – Annual Evaluation** link



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

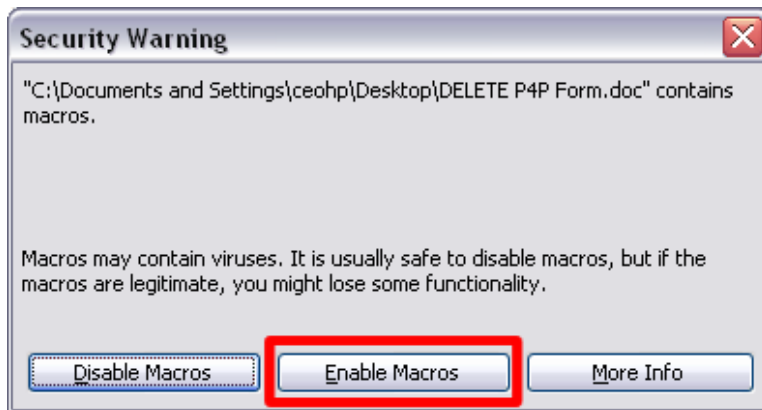


C) **SAVE** the **P4P Form 3 - Annual Evaluation.doc** to a desired location.  
(e.g., Desktop, My Documents)  
\* Rename the File Name if you like



## Completing the Form

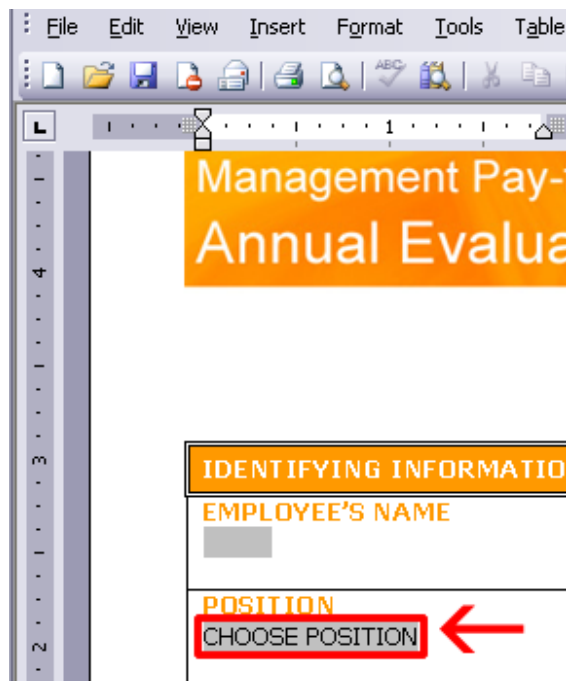
- A) Open the P4P Form document you just saved
- B) Select **ENABLE MACROS** in the Security Warning pop-up window



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



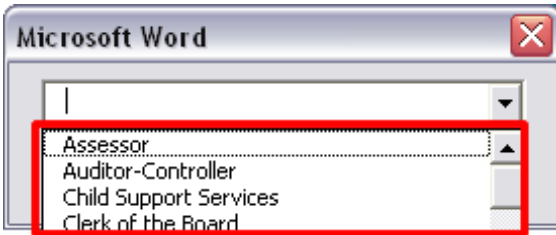
To bring up the list, click anywhere within the gray shaded area where CHOOSE POSITION is displayed.



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

IDENTIFYING INFORMATION	
EMPLOYEE'S NAME [ ]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [ ] to [ ]	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 [ ]	
POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [ ] to [ ]	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 <div style="border: 1px solid red; padding: 2px;">           CHOOSE EVALUATION TYPE            Annual Evaluation and Reward Determination         </div>

- 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%.

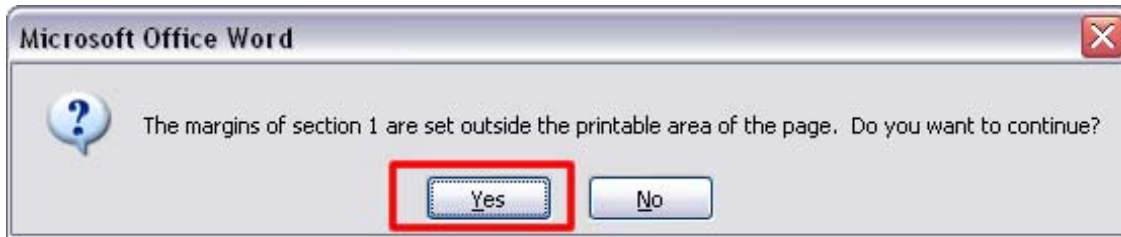
The screenshot shows a PDF viewer interface. A red box highlights the zoom level set to 130%. Below the viewer, there is a form section with an orange header that reads "ADDITIONAL COMMENTS (Optional)". Underneath the header, there is a note: "\* Please provide brief and concise information when completed." 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.

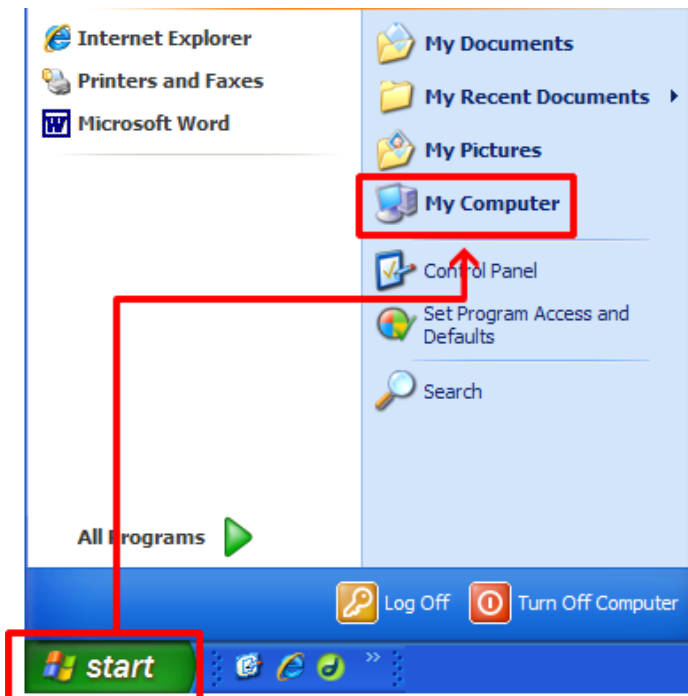


## Section 2 MS Word 2007

### File Download Settings

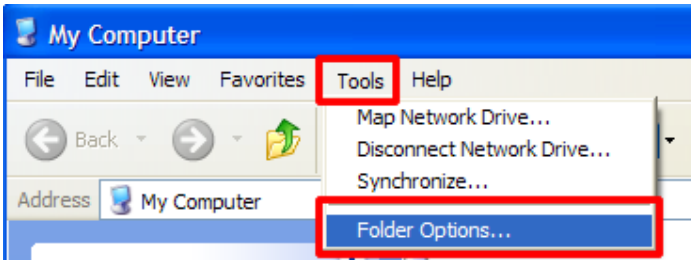
**NOTE** This is also required one time only.

- 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

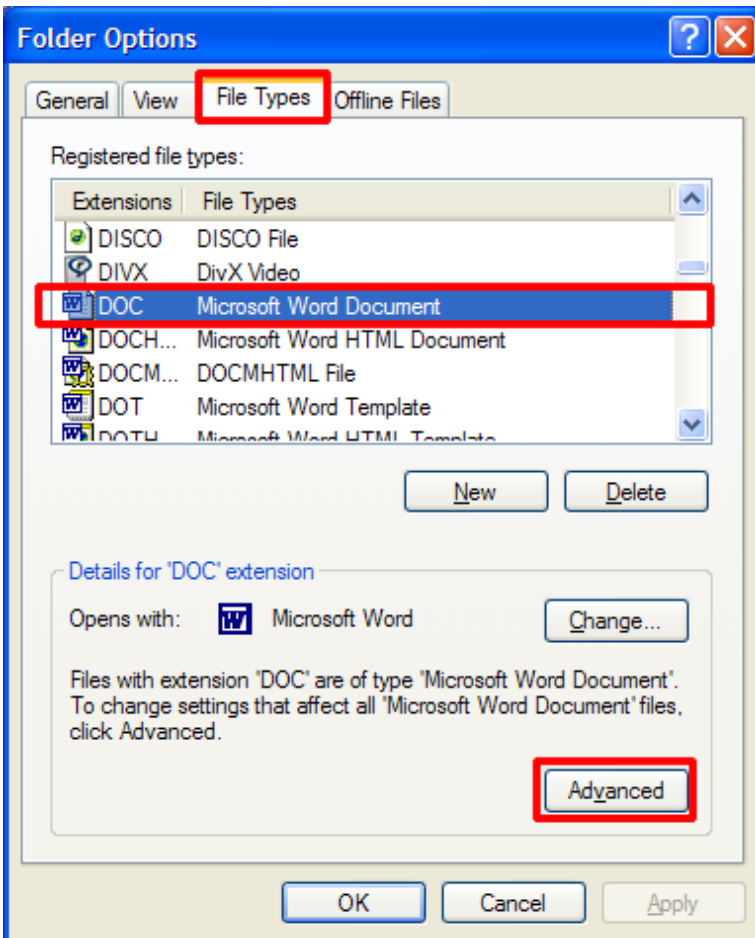
→ Select **Folder Options**



C) Select the **File Types** tab

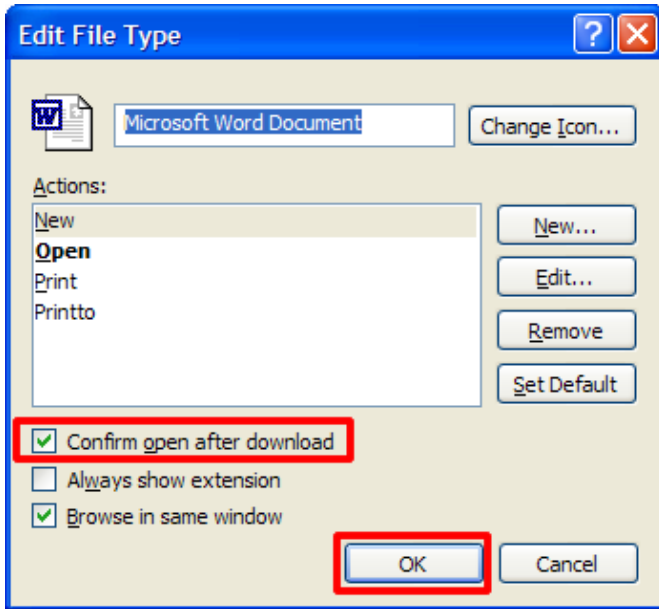
→ Using the scroll bar, scroll down to select **DOC Microsoft Word Document**

→ Click on the **Advanced** button

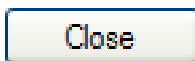


D) Make sure you have **Confirm open after download** selected with a checkbox

→ Click **OK**



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

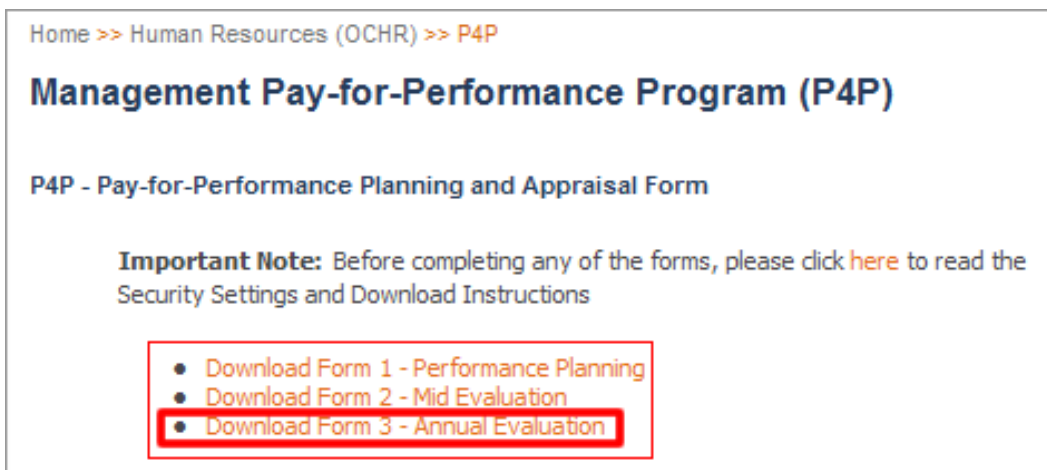


## Downloading the Template

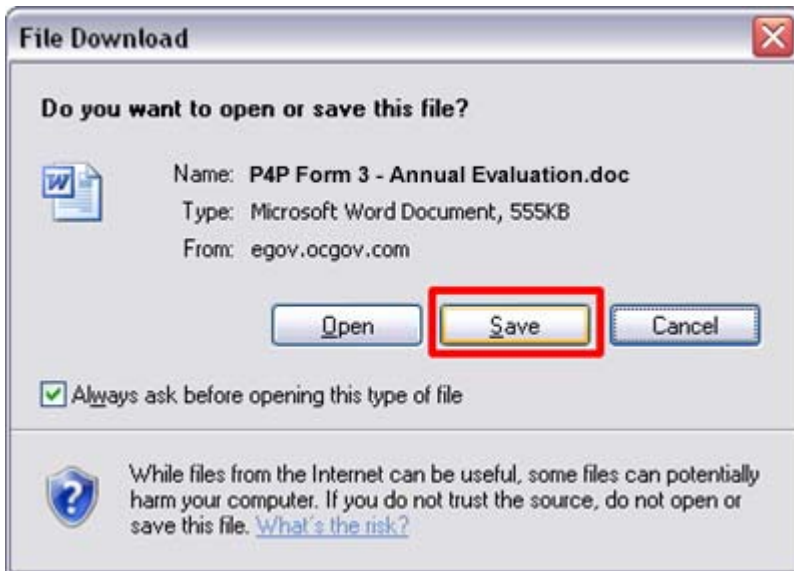
A) Go to the **P4P website** on the *Internet* at [www.ocgov.com/p4p](http://www.ocgov.com/p4p) or from the *OC Intranet* at <http://ocintranet.ocgov.com/> under the Performance Management Program section.

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

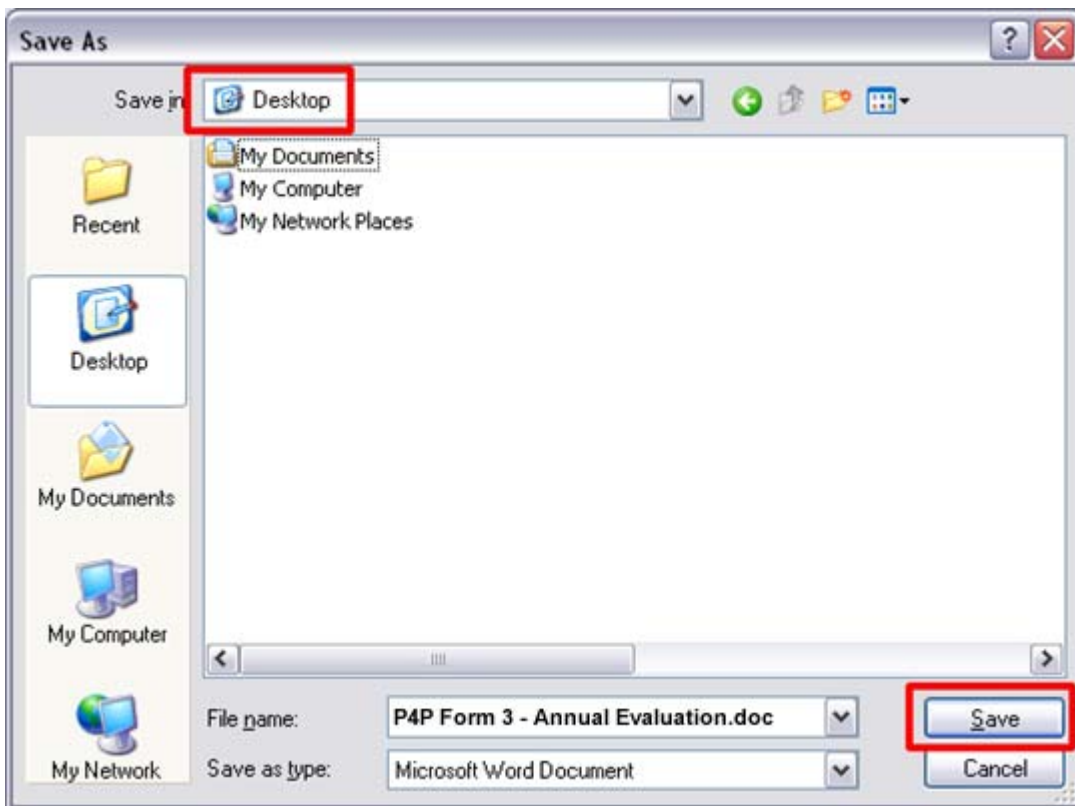
→ In this example, click on the **Download Form 3 – Annual Evaluation** link



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

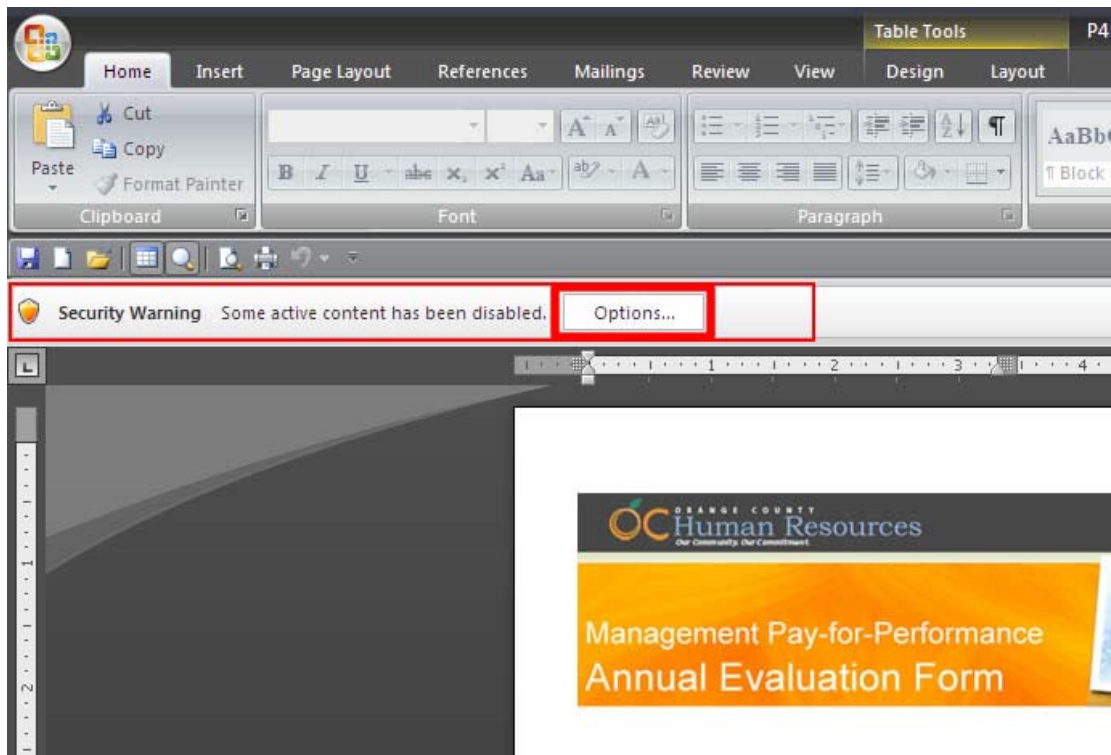


# Security Settings



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



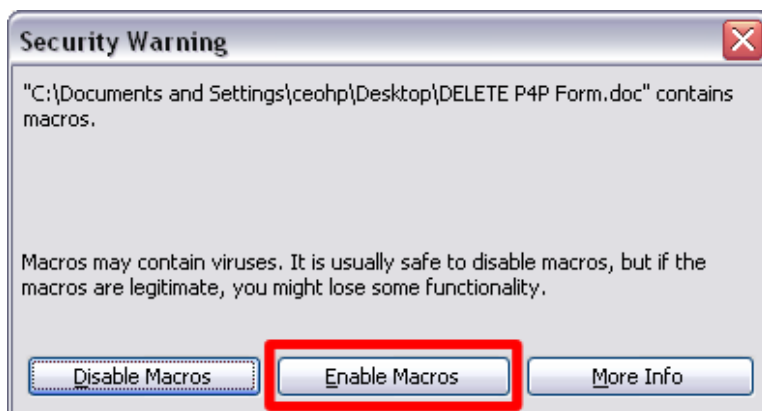
- C) In the Security Alert pop-up box, select the radio button for **Enable this Content**  
→ Click **OK**



D) Complete the form (next section below)

## Completing the Form

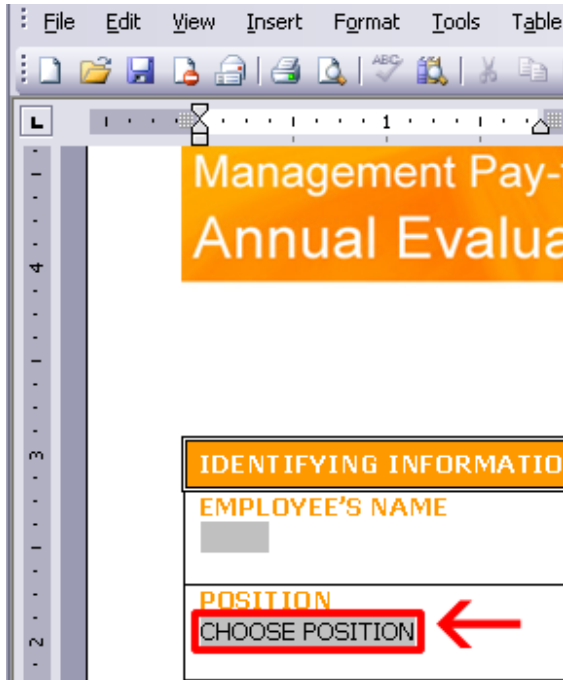
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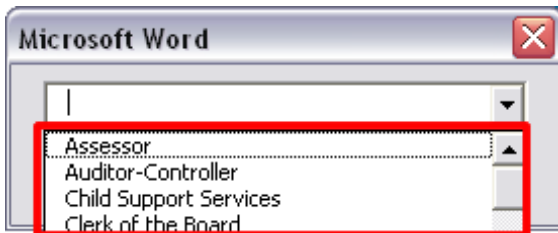
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POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT (highlighted with a red box and a red arrow)
PERIOD COVERED [Text Input] to [Text Input]	EVALUATION TYPE CHOOSE EVALUATION TYPE

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

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POSITION CHOOSE POSITION	DEPARTMENT CHOOSE DEPARTMENT
PERIOD COVERED [Gray shaded area] to [Gray shaded area]	EVALUATION TYPE CHOOSE EVALUATION TYPE
<div style="border: 1px solid gray; padding: 2px;">           CHOOSE EVALUATION TYPE            Annual Evaluation and Reward Determination         </div>	

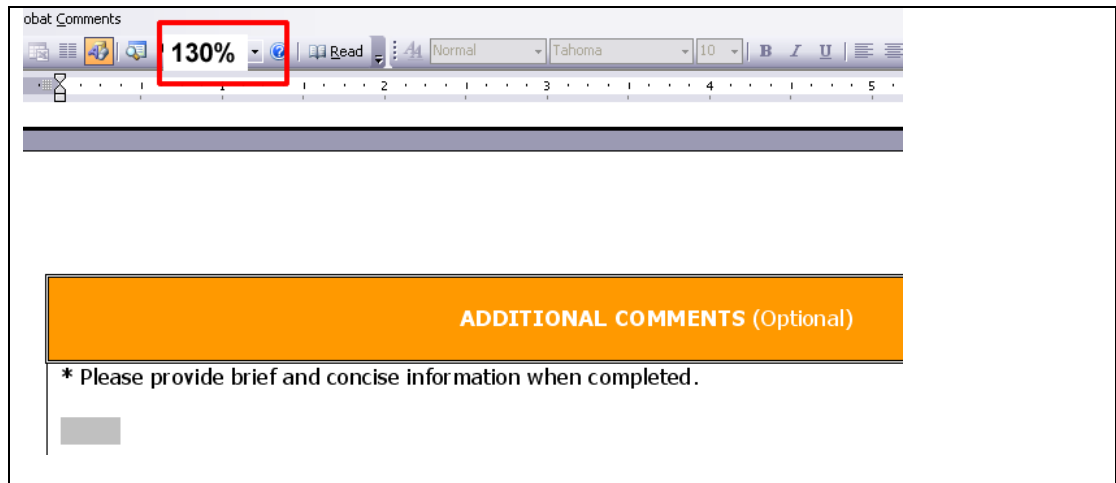
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