OnCourse 360
Overview for Users

Hello and welcome to the OnCourse 360 Assessment!

This document describes OnCourse 360 (OC360), the responsibilities of a User, and what to expect throughout the OC360 process.

OC360 is a universal 360 assessment "engine" that supports virtually any 360 assessment. The OC360 team has created several public assessments for different uses (e.g., Holistic Living Attributes, Core Leadership Skills in Any Organization, Family Dynamics). These public assessments may be accessed by anyone.

Some organizations want a customized assessment, with categories and statements customized for the organization. These customized, or private, assessments are managed by a Group Administrator, typically from the organization. Both public and private assessments are described in more detail below.

The *Self-Assessment* OC360 survey allows a user to evaluate himself or herself across several categories, with several statements in each category.

A user may invite any number of third parties (or raters) to evaluate himself or herself. The self-assessment and the combination of these *Rater Assessments* create the 360 aspect of the survey.

For each statement in the survey the user will evaluate himself or herself—or the rater will evaluate the user—across the range from: *Significant Growth Area* to *Significant Strength*. In addition both the user and the rater may add narrative comments for each statement. An example of the user interface for a single statement is shown below:

Holistic Living Self-Assessment

I... I am... I have...	Significant growth area	Growth area	Strength	Significant strength	Add Optional Commentary
1. An innate sense of gratitude	○ ○	○ ○	○	○ ○	Comment

Inviting Third Party Raters:

- Once a user identifies whom he/she would like to participate in their assessment as raters, the user must notify/ask permission of these third parties. Third parties can be anyone the user feels would provide constructive, honest feedback:
    o Typically, managers, coworkers, direct reports, other work associates, family members, friends and small group members are the categories of raters who may be invited to evaluate a user.
    o A minimum of four raters is recommended to give a 360 perspective on how the user interacts with others. The more people and the more variety in the categories of relationships included, the more comprehensive the generated report.
    o Below is an example of an introductory email to a rater, inviting the rater to evaluate the user:

Dear *ThirdParty*,

UserName is using an online assessment to evaluate his or her life across several dimensions.

As part of this process, please go to the web link shown below where you will be asked to evaluate *UserName*.

UserName will be able to review a summary report of all third parties, like yourself, who complete this evaluation. Your individual statement responses will be averaged into all third party responses, and your narrative comments will be included in the summary, without attribution to you. As such, you are encouraged to be forthright in your assessment of *UserName*.

After you complete your assessment of UserName, you will be able to generate a summary report of your own evaluation, but you will not see any other evaluations (by UserName or by other third parties).

<div align="center">

Name-of-Specific-360-Assessment - **Instructions**

</div>

Steps:

1. Please ensure you have allocated 10-15 minutes of uninterrupted time to complete the Assessment of *UserName*.

2. Then, go to the Assessment Welcome page:

    Assess UserName

... and follow the instructions.

The Welcome screen provides more detail on the goals of the assessment.

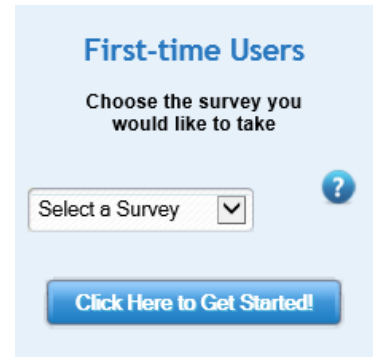Thank you for taking the time to complete this assessment of *UserName*.

Please contact me at ***GroupAdminEmailAddress*** if you have any questions on how to use the assessment.

Best Regards,

GroupAdminName

The Process:

- Public 360 assessments may be used by anyone and are accessed on the OC360 home page (www.oncourse360.com) by selecting the name of the specific public assessment from the "Select a Survey" pull-down menu. Once a public assessment is chosen, the first-time user is prompted to enter his or her contact information, an email address (which will be the ID for using the assessment), and an initial password.

- A typical screen for creating a new user for a public assessment is shown below.

Setting Up Access to the Holistic Living 360 Survey ❓

First Name: Robert

Last Name: Jones

Gender: ● Male   ○ Female

Email Address: rj@companyname.com
(This will be your ID for accessing the survey)

Age: 47

City: Lancaster

State / Province: PA

Country: United States of America ▾

Choose an Initial Password: •••••••••

Confirm Password: •••••••• ☁

Submit

- Once the unique user ID (i.e., the user's email) and password have been confirmed, the new user may immediately log-in and take the referenced survey—in this case, the Holistic Living 360 public assessment.

- For private groups (i.e., special surveys established for an organization) a Group Administrator (G.A.) from the organization coordinates invitations of both users and raters to use the OC360 for the specific survey. The G.A. may be an associate on the OC360 team, or someone in the user's organization.

- For public groups and some private groups the user may request that third party raters be sent an invitation email to evaluate the user. To invite third parties the user clicks on the Manage Third Parties button in the top menu and follows the instructions for entering one or more third party raters.
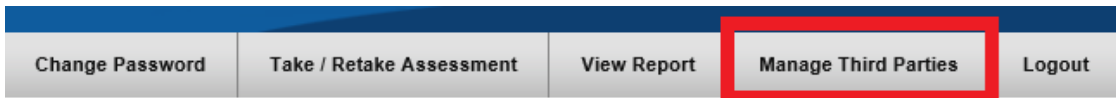
- For other private groups, where the user is not allowed to invite his or her own raters, only the G.A. may invite raters to evaluate the user. For such private groups the user needs to send a list of his or her third parties' information to the G.A. The email *must* include the following information:
  a) User's email address
  b) Third party's email address
  c) Third party's first name
  d) Third party's last name
  e) The type of relationship between the user and third party choosing from the following: (1) Manager; (2) Coworker or Colleague; (3) Direct Report; (4) Other work associate; (5) Family member; (6) Friend; (7) Other.
  o Upon receipt of this information, the G.A. will send a "Welcome" email to each of the third parties (see the example at the top of this document).
  o The G.A. may send a reminder email to those third parties who have not completed their assessments in a timely manner.
  o Assessment completion date and the frequency of these reminder emails will be determined by the G.A.
  o Throughout the process the user may be asked to be involved in reminding their third parties to complete the assessments.
  o Users may access their reports at any time with their group name, user name and password login information and through the "View Report" menu item in the upper menu.

What to Expect as a User:

1. Once you have set yourself up as a user of a public assessment, or have been invited to use OC360 as a user within a private assessment, you will receive an email that looks similar to the following:

Dear *UserName*,

The **SurveyName** Assessment lets you evaluate your strengths and growth areas across several dimensions.

After you evaluate yourself, you have the option to invite others to evaluate you. At any time after you complete the self-assessment you can request a customized report that compares your self-assessment with others' assessments of you.

You will be part of the *GroupName* group.

Access to the system requires a Group name, Email ID and Password.

1. Your Group Name is: *GroupName*, and cannot be changed

2. Your Email ID is your email address: *emailaddressofuser*, and cannot be changed

3. Your Password is: *initialpassword*, which you will have the opportunity to change if you choose.

You may access the **SurveyName** Assessment by going to the URL:

Self-Assessment Login Page.

Please contact me at **GroupAdminEmailAddress** if you have any questions on how to use the assessment.

As noted above you have the option to invite others (called "raters" or "third parties") to evaluate you. You can send third party invitations by using the **Manage Third Parties** tab in the top menu bar.

Best Regards,

GroupAdminName
Group Administrator Email Address

2. When you click on the survey URL you will see the following screen, where you will enter the information provided in your invitation email, your Group Name, Email ID and password.

Welcome to the OnCourse360 Self-Assessment

3. Upon entering your information and selecting "Login" you will be directed to a Welcome screen, which introduces the survey. Here you have the option to select your user identity, for example: Whole-Life, Personal-Life-Only, Professional-Life-Only.

   Since you may behave or "show up" differently in various environments (e.g., your behavior in your personal life may be different than your behavior in your professional environment), the Identity feature allows you to choose which environment you wish to consider while taking the survey. For example, you might first take the survey considering your behavior in Environment-1, which is: Whole Life. You might take the survey a second time considering your behavior in Environment-2, which is: Personal-Life-Only.

   Later, when you use the OC360 Report Generator you can choose which Identity will be used for creating the report.

4. Once you choose your "Identity" for the self-assessment, click on the "Go to the Survey" link. Fill out the survey using the on-screen instructions as a guide.

5. When you have finished the last page of statements, **you must click the "Submit" button** at the bottom right-hand side of the page to complete the assessment. You may cancel and return to the beginning of the assessment at any time using the icon at the bottom left-hand side of the screen.

6. After submitting the self-assessment, the following page will be displayed, where you have the option of generating your report—in this case for the Holistic Living 360 survey. You may choose which third parties you would like included in your report (all, none, or any combination of the different third party types), as well as which User Assessment Identity you want to use for the report. You may generate the report either on-screen or as a PDF file.

Holistic Living Report Generator

Choose which third party relationships you would like included in this report.
You may choose none, one, or more than one
The default is All Relationships.

☐ No Third Party

☑ All Relationships

☑ Workplace Manager

☑ Coworker or Work Colleague

☑ Other Work Associate

☑ Spouse or Life Partner

☑ Family Member

☑ Friend

☑ Other

Choose which Self Assessment you would like to use for this report.
The default is the most recent Self Assessment.

Assesment Date	User Identity	Selection
2015-11-02	Whole-Life	●

Generate Report on 🖥️   Download Report as 📄

Other Usage Notes:

- There are help symbols throughout the survey. Click on these for more details on the section you are reviewing. ❓