



Getting Started:
Core User Guide
Competency Module



Introduction

StaffReady Competency was specifically designed to make life easier for all employees, from core users to managers, QP's, system administrators and everything in between. This Getting Started: Core User Guide is designed to highlight all the features specific to Core users regarding managing personal settings, assessments, remediation and tasks.

With StaffReady Competency, staff can now view and manage assessments from home. Employees can quickly see the status of tasks needing completion, knowing all activities are date and time stamped. Staff can also communicate directly with supervisors regarding questions through an internal messaging portal.

As a result of these features, managing your competency tasks and activities as well as personal settings are much more flexible and easy processes. Work requirements and tasks are more transparent, the notification and recording process is centrally organized, and ease-of-access to all personal profile information dramatically increases. As you get started, we've created a Glossary at the end that highlights terms unique to the software.

Table of Contents

Updating Personal Settings	pg. 3
Updating Time Format, Password, and Signature	pg. 4
Assessments	pg. 5
Exporting and Printing Assessments	pg. 6
Review Assessment Details	pg. 7
Assessment Details: History and Remedial Documents	pg. 8
Tasks to Complete	pg. 9
Tasks to Complete (Continued)	pg. 10
Reporting a Problem	pg. 11
Finishing a Task	pg. 12
Competency Minibar	pg. 13
Calendar and Competency	pg. 14
Glossary	pg. 15
Resources	pg. 16

Updating Personal Settings

Before jumping into how to use our modules, we want to configure our basic settings. Select the gear symbol next to your user name and then select **Settings**. (Figure 1)

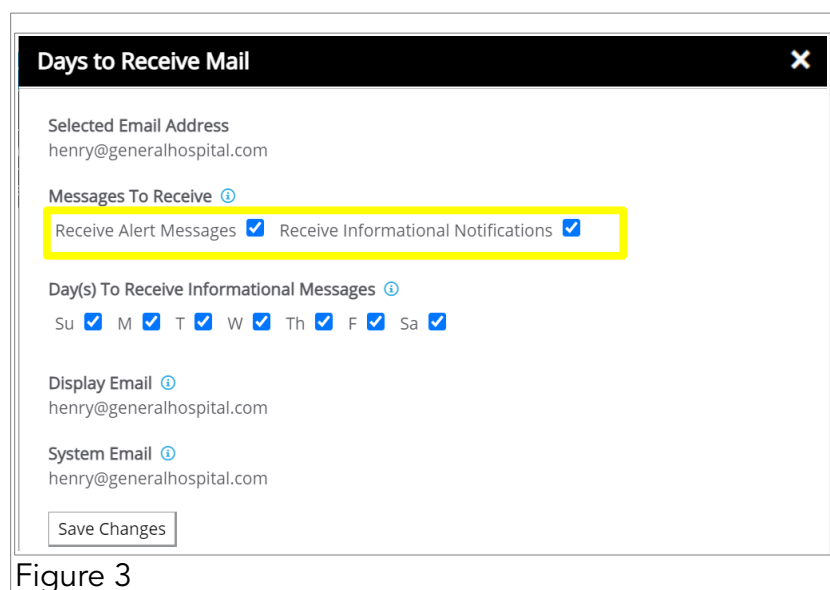
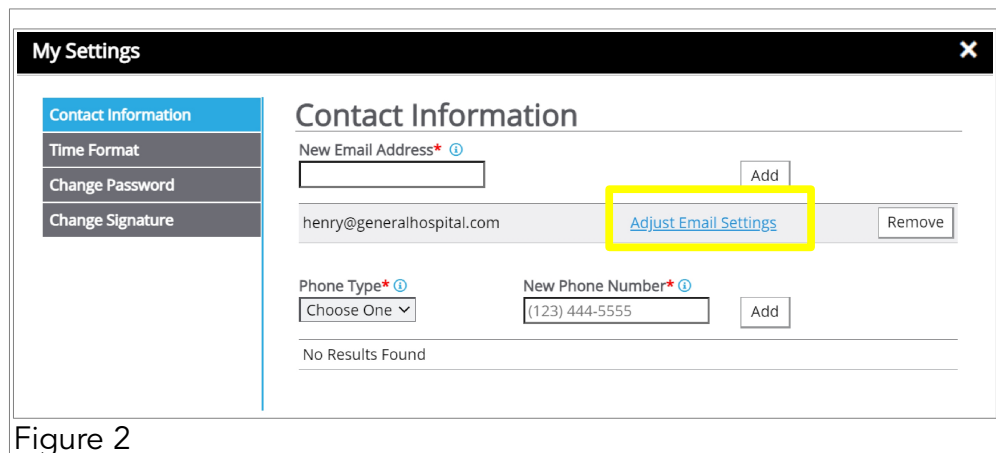
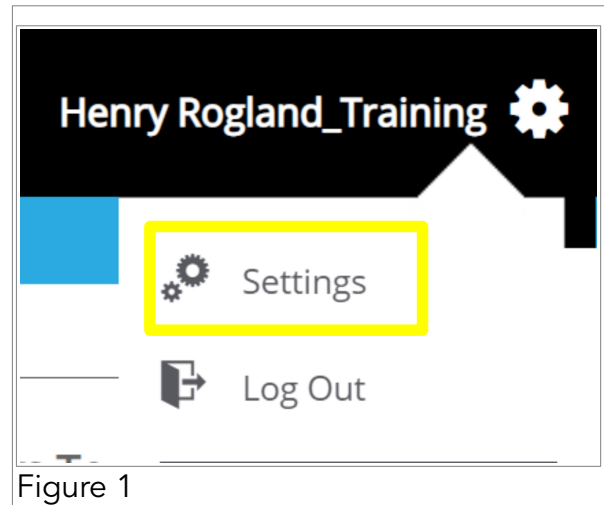
This will open the **My Settings** pop-up window.

In the **Contact Information** side tab, you can manage your email address(es) and phone numbers. Email settings can be further adjusted by selecting the **Adjust Email Settings** link adjacent to your email address. (Figure 2)

This will open the **Days to Receive Mail** pop-up window. (Figure 3)

You can opt into or out of receiving alert messages or informational notifications by selecting the appropriate check boxes. (Yellow box, Figure 3)

If you opt to receive informational messages, you can also choose which days you receive them on. Once you have made your choices, select the **Save Changes** button.

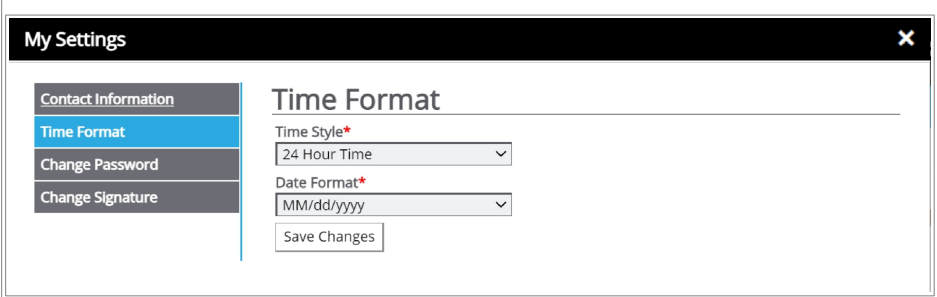


Updating Time Format, Password, and Signature

Selecting **Time Format** will allow you to adjust the **Time Style** display to either 12 or 24 hour time. You can also adjust the Date Format to MM/DD/YYYY (i.e. 12/25/2021) or DD/MMM/YYYY (i.e. 12-Dec-2021). **(Figure 1)** You will need to logout and back in for this change to take effect.

Selecting the **Change Password** side tab will allow you to enter and save a new password. **(Figure 2)**

Selecting the **Change Signature** side tab will allow you to enter a new PIN as well as enter the name for your signature and customize its style. Both the PIN and the signature can be used to sign documents.



My Settings

Contact Information

Time Format

Change Password

Change Signature

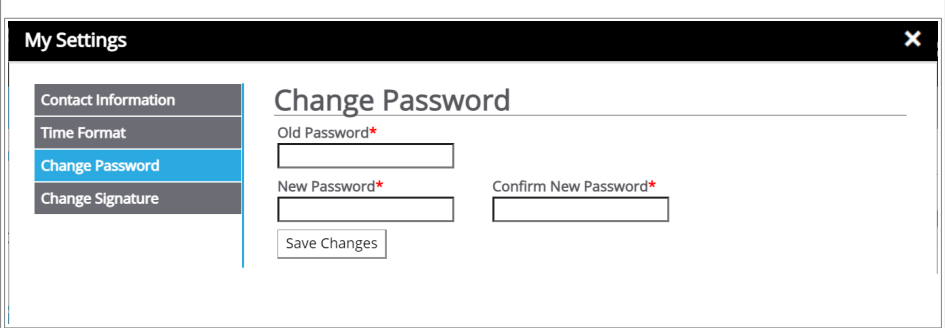
Time Format

Time Style*
24 Hour Time

Date Format*
MM/dd/yyyy

Save Changes

Figure 1



My Settings

Contact Information

Time Format

Change Password

Change Signature

Change Password

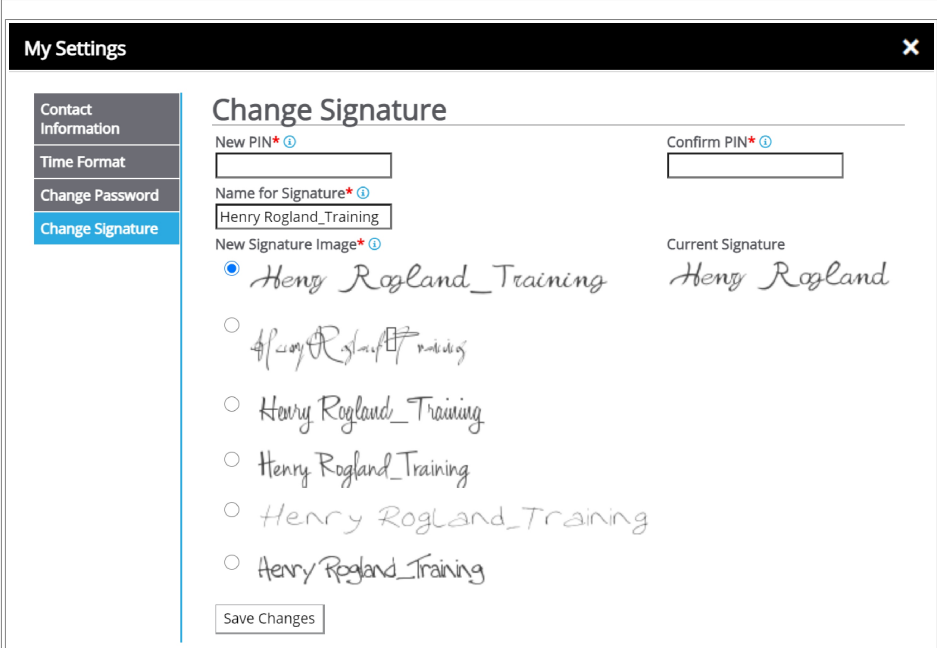
Old Password*

New Password*

Confirm New Password*

Save Changes

Figure 2



My Settings

Contact Information

Time Format

Change Password

Change Signature

Change Signature

New PIN* ⓘ

Confirm PIN* ⓘ

Name for Signature* ⓘ
Henry Rogland_Training

New Signature Image* ⓘ

Current Signature

Henry Rogland_Training

Henry Rogland_Training

Henry Rogland_Training

Henry Rogland_Training

Henry Rogland_Training

Save Changes

Figure 3

Assessments

Select the **Welcome View** within the **Home** option of the Module menu and then select **My Competency** from the icon stack. You can then select either the **Assessments** color bar or the **Tasks to Complete** color bar to expand them. If you're looking for a specific event, you can adjust the date values to filter your results. (Yellow box, Figure 1)

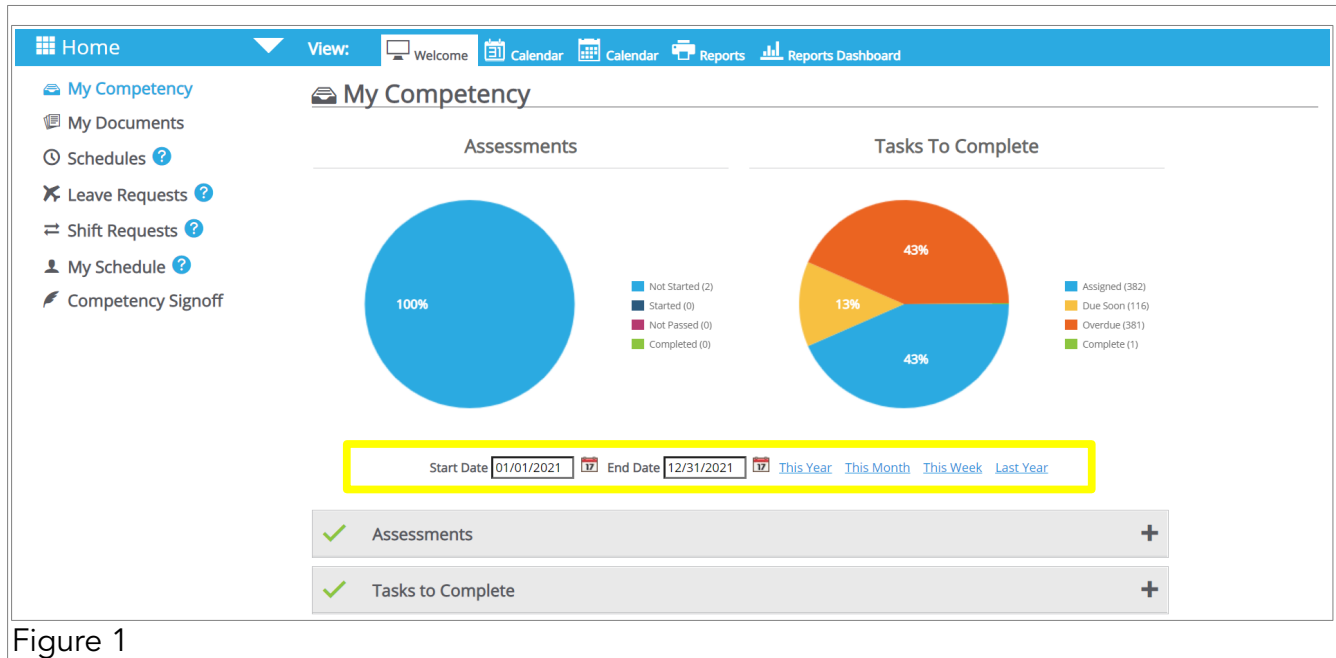


Figure 1

Within the **Assessments** color bar (Figure 2), you can use any of the search filters such as **Subject**, **Document**, **Requirement**, **Skillset**, or **Status** to refine your search results. If an attempt was made to complete the assessment, there will be an **Attempt** link underneath the **Completed Attempts** heading. Selecting that link will allow you to review the results of the exam.

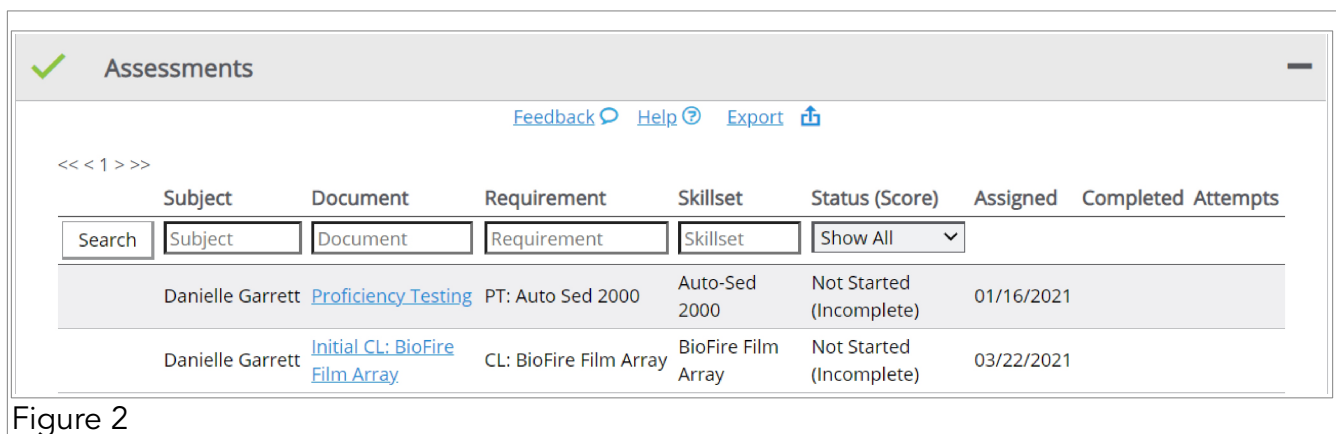
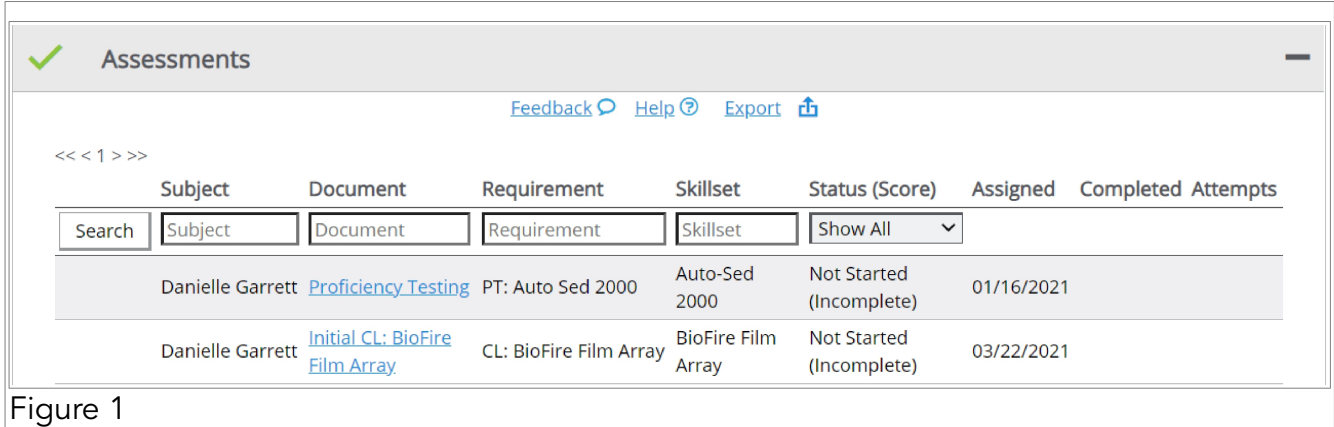


Figure 2

Exporting and Printing Assessments

To export and print your list of assessments, select the **Export** link. (Yellow box, Figure 1) You can choose to print or export the list into Excel.



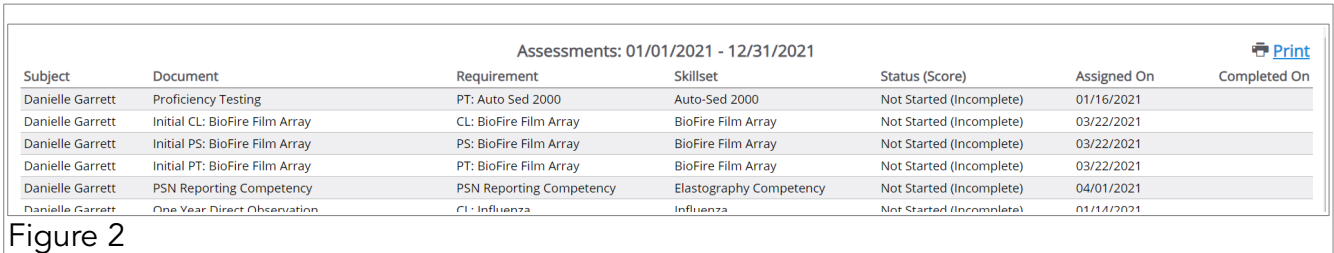
The screenshot shows the 'Assessments' interface. At the top, there is a green checkmark and the title 'Assessments'. Below the title are links for 'Feedback', 'Help', and 'Export' (highlighted in a yellow box). A navigation bar shows '<< 1 >>'. Below this is a table with the following columns: Subject, Document, Requirement, Skillset, Status (Score), Assigned, Completed, and Attempts. The table contains two rows of data:

Subject	Document	Requirement	Skillset	Status (Score)	Assigned	Completed	Attempts
Danielle Garrett	Proficiency Testing	PT: Auto Sed 2000	Auto-Sed 2000	Not Started (Incomplete)	01/16/2021		
Danielle Garrett	Initial CL: BioFire Film Array	CL: BioFire Film Array	BioFire Film Array	Not Started (Incomplete)	03/22/2021		

Figure 1

Selecting the **Export** link will automatically create and download an Excel format copy of all assessments.

Selecting **Print** will first display a preview (Figure 2) and then will open the dialog box where you can adjust the printer being used, how many copies, page orientation, and other settings.



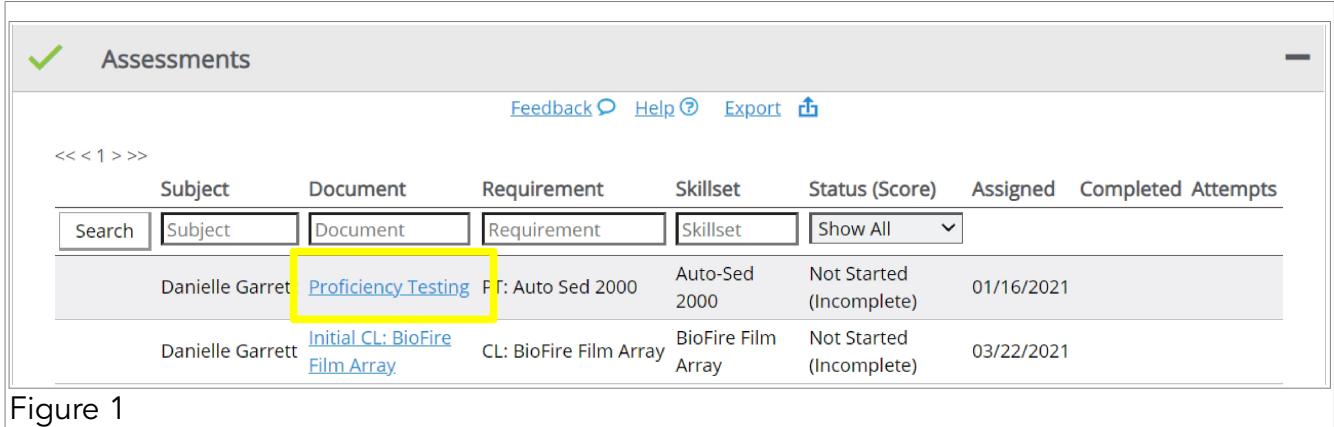
The screenshot shows the 'Assessments: 01/01/2021 - 12/31/2021' preview page. At the top right, there is a 'Print' link (highlighted in a yellow box). The table below has the following columns: Subject, Document, Requirement, Skillset, Status (Score), Assigned On, and Completed On. The table contains six rows of data:

Subject	Document	Requirement	Skillset	Status (Score)	Assigned On	Completed On
Danielle Garrett	Proficiency Testing	PT: Auto Sed 2000	Auto-Sed 2000	Not Started (Incomplete)	01/16/2021	
Danielle Garrett	Initial CL: BioFire Film Array	CL: BioFire Film Array	BioFire Film Array	Not Started (Incomplete)	03/22/2021	
Danielle Garrett	Initial PS: BioFire Film Array	PS: BioFire Film Array	BioFire Film Array	Not Started (Incomplete)	03/22/2021	
Danielle Garrett	Initial PT: BioFire Film Array	PT: BioFire Film Array	BioFire Film Array	Not Started (Incomplete)	03/22/2021	
Danielle Garrett	PSN Reporting Competency	PSN Reporting Competency	Elastography Competency	Not Started (Incomplete)	04/01/2021	
Danielle Garrett	One Year Direct Observation	CL: Influenza	Influenza	Not Started (Incomplete)	01/14/2021	

Figure 2

Review Assessment Details

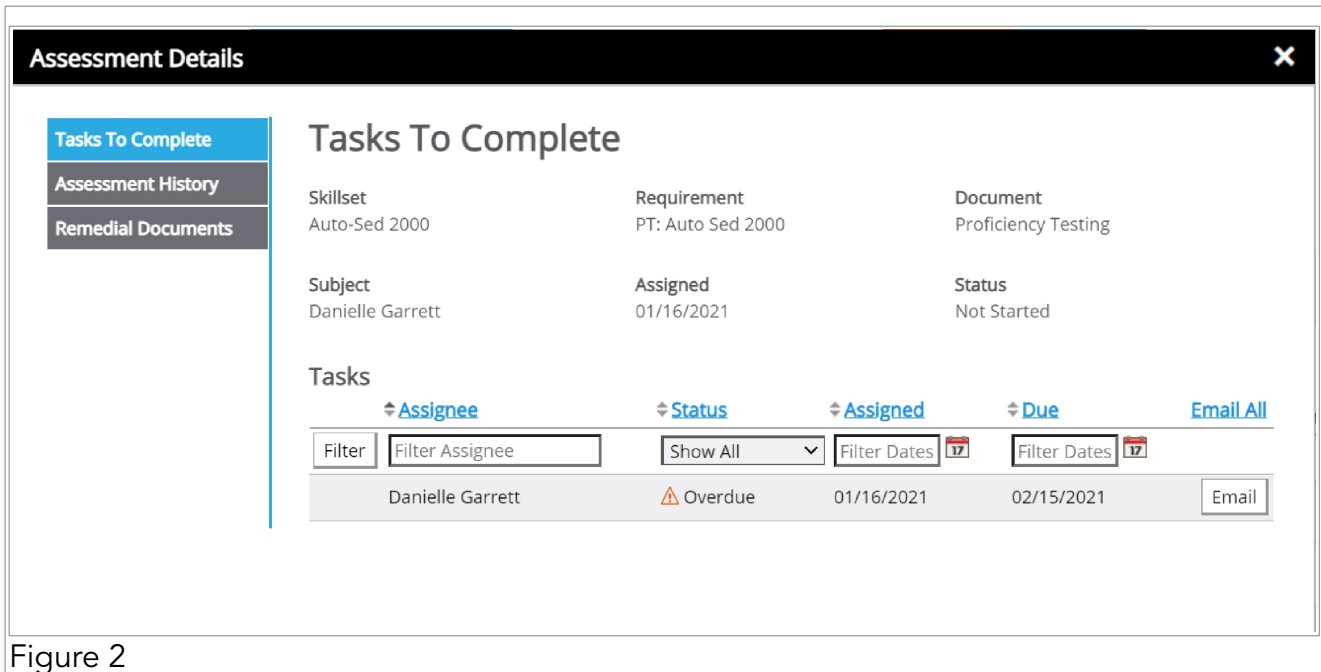
To review document details, select the **Document** link. (Yellow box, Figure 1) This will open the **Assessment Details** pop-up window. (Figure 2)



Assessments							
Feedback Help Export							
<< < 1 > >>							
Subject	Document	Requirement	Skillset	Status (Score)	Assigned	Completed	Attempts
Search	Subject	Document	Requirement	Skillset	Show All		
Danielle Garret	Proficiency Testing	PT: Auto Sed 2000	Auto-Sed 2000	Not Started (Incomplete)	01/16/2021		
Danielle Garrett	Initial CL: BioFire Film Array	CL: BioFire Film Array	BioFire Film Array	Not Started (Incomplete)	03/22/2021		

Figure 1

Within the **Assessments Details** pop-up window, you can view additional information for **Tasks to Complete**, **Assessment History**, or view any **Remedial** documents if you had to redo exams.

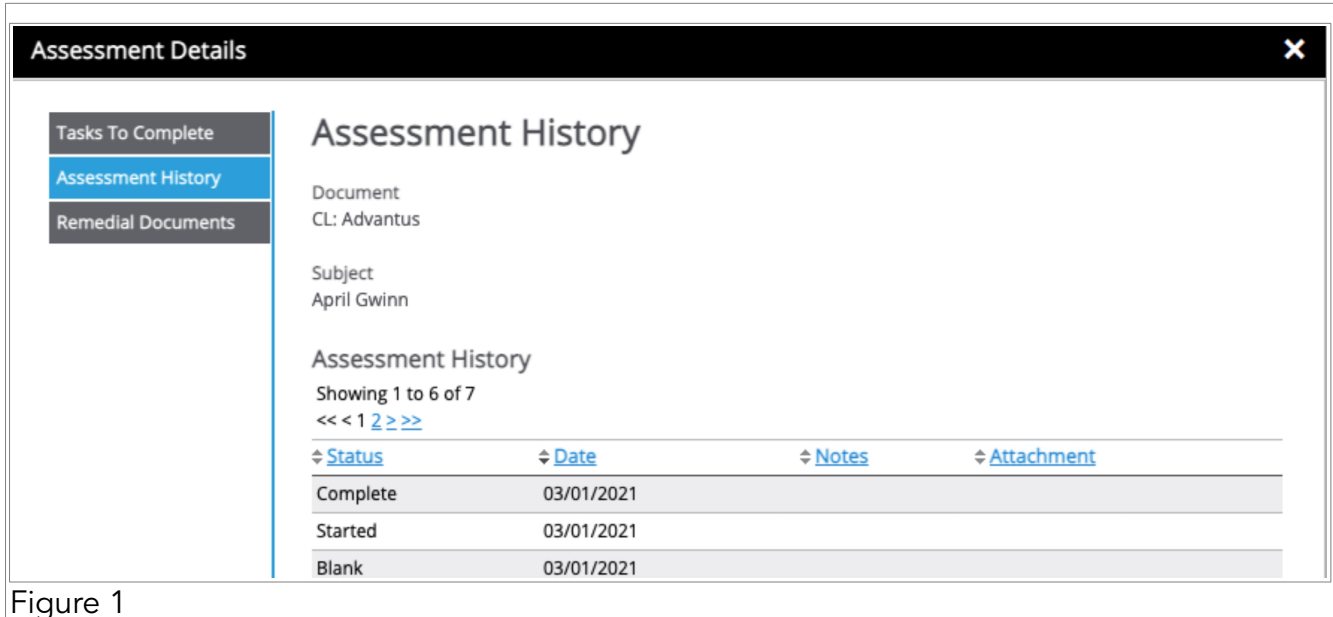


Assessment Details								
<div style="display: flex;"> <div style="width: 20%;"> <ul style="list-style-type: none"> Tasks To Complete Assessment History Remedial Documents </div> <div> <h3>Tasks To Complete</h3> <p>Skillset: Auto-Sed 2000 Requirement: PT: Auto Sed 2000 Document: Proficiency Testing</p> <p>Subject: Danielle Garrett Assigned: 01/16/2021 Status: Not Started</p> <p>Tasks</p> <p> Assignee Status Assigned Due Email All </p> <p> Filter: <input type="text" value="Filter Assignee"/> <input type="text" value="Show All"/> <input type="text" value="Filter Dates"/> <input type="text" value="Filter Dates"/> </p> <table border="1"> <tr> <td>Danielle Garrett</td> <td> Overdue</td> <td>01/16/2021</td> <td>02/15/2021</td> <td><input type="button" value="Email"/></td> </tr> </table> </div> </div>				Danielle Garrett	Overdue	01/16/2021	02/15/2021	<input type="button" value="Email"/>
Danielle Garrett	Overdue	01/16/2021	02/15/2021	<input type="button" value="Email"/>				

Figure 2

Assessment Details: History & Remedial Documents

Selecting the **Assessment History** side tab allows you to view the employees history with that assessment. It will display dates for when the assessment was started and completed as well as the notes or attachments included with the assessment. (Figure 1)



Assessment Details [X]

Tasks To Complete
Assessment History
 Remedial Documents

Assessment History

Document
CL: Advantus

Subject
April Gwinn

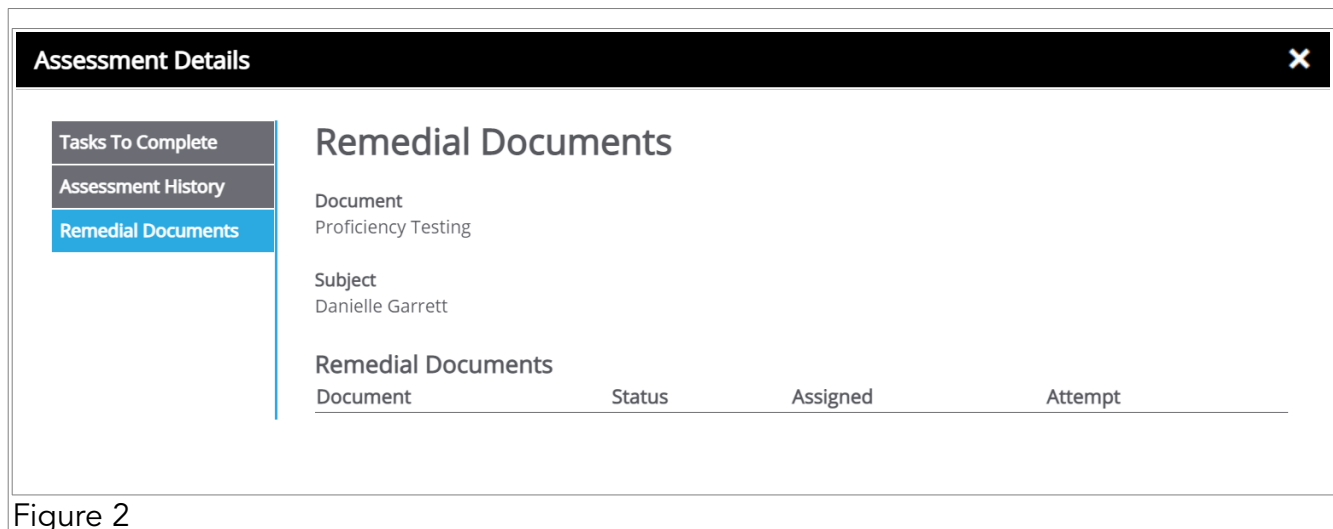
Assessment History

Showing 1 to 6 of 7
 << < 1 2 >> >>

Status	Date	Notes	Attachment
Complete	03/01/2021		
Started	03/01/2021		
Blank	03/01/2021		

Figure 1

Selecting **Remedial Documents** will allow you to view any instances in which you failed or had to retake an assessment. (Figure 2)



Assessment Details [X]

Tasks To Complete
 Assessment History
Remedial Documents

Remedial Documents

Document
Proficiency Testing

Subject
Danielle Garrett

Remedial Documents

Document	Status	Assigned	Attempt
----------	--------	----------	---------

Figure 2

Tasks to Complete

Selecting the **Tasks to Complete** color bar will allow you to view all the tasks you are currently assigned to complete. As before, you can use the filters to refine your search. To begin, select the **Start Task** link for the task you wish to start. (Yellow box, Figure 1)

The screenshot shows a web interface titled "Tasks to Complete" with a green checkmark icon. Below the title are links for "Feedback", "Help", and "Export". A pagination bar shows "10" selected. The main content is a table with columns: Subject, Document, Requirement, Skillset, Status, Assigned, and Due. Below the table are filter boxes for "Search", "Clear", "Subject", "Document", "Requirement", "Skillset", and a dropdown menu set to "Incomplete". The table lists seven tasks, all with a status of "Assigned" and due dates of "04/14/2021". Each row has a "Start Task" link at the end, which is highlighted with a yellow box in the first row.

Subject	Document	Requirement	Skillset	Status	Assigned	Due	
Jay Goldstien	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task
Jason Paco	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task
Jason Brown	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task
Crystal Beckman	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task
Matt Klinger	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task
King Scheele	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task
Jack Christensen	One Year Direct Observation	CL: Auto Sed 2000	Auto-Sed 2000	Assigned	03/15/2021	04/14/2021	Start Task

Figure 1

This will open the **Complete Document** screen. (Figure 2) Depending on the type of exam, your answer choices will differ. The different task types are **Checklist Tasks**, **Problem Solving Tasks**, **Proficiency Testing Survey Tasks**, and **Proficiency Testing Blind Duplicate Tasks**.

The screenshot shows an exam interface for "PS: BioFire Film Array - BioFire Film Array". The top bar includes an "Exit Exam" button. On the left, there is a "Sections" sidebar with "PS: BioFire Film Array" at 0% completion, and "Document Details" showing "Description: PS: BioFire Film Array", "Document Type: Exam", "Subject: Danielle Garrett", and "Points to Pass: 10 of 10 (100%)". The main area shows "Exam Progress:" with a progress bar and a "Save Progress" button. Two questions are visible: "Question 1" asks "Which reagent should not be mixed with bleach or disinfectant?" with options a. Sample buffer, b. Hydration solution, c. Sample buffer and Hydration solution, and d. None of the above. "Question 2" is a True or False question: "It is acceptable to receive a stool sample in a sterile container and add it to a Cary-Blair vial when it comes back to the molecular department."

Figure 2

Tasks to Complete (Continued)

From the **Complete Document** screen, you can view information in the **Document Details** minibar (**Figure 1**) or you can expand the **Question Navigator** bar to quickly locate a specific exam question.

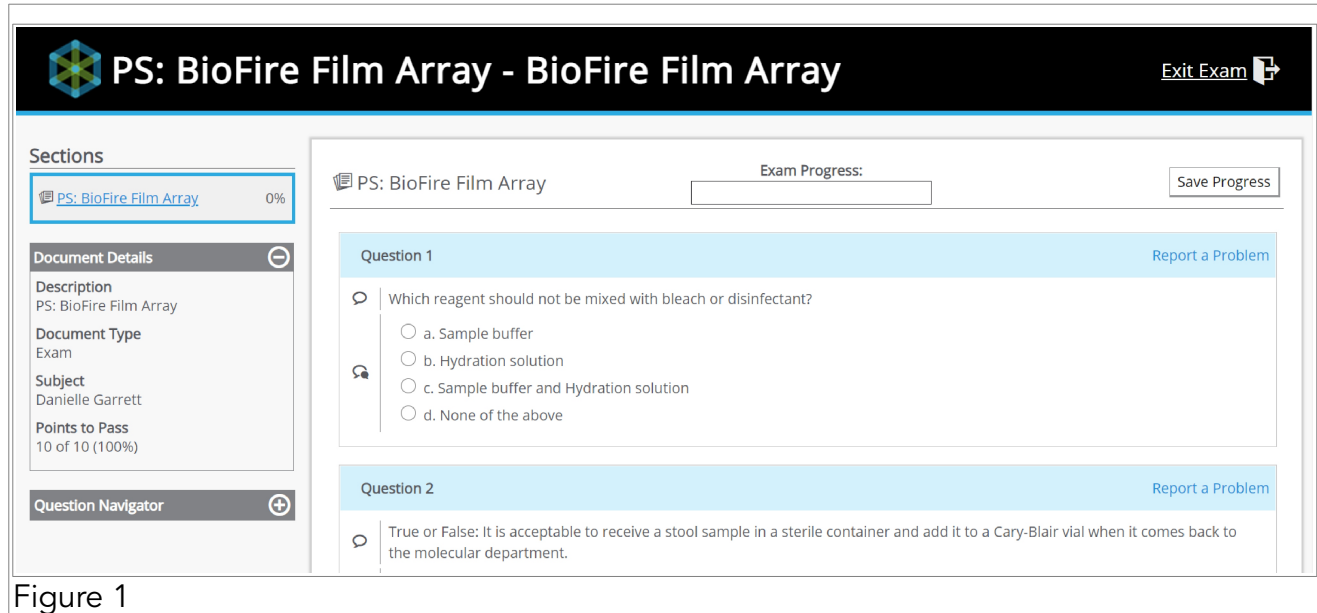


Figure 1

To complete the exam, enter answers for each required question. If you don't want to complete the exam but retain your answers, select the **Save Progress** button. You can then come back to complete the rest of the exam when you choose to. Once you've entered all answers, select the **Submit for Grading** button will appear. Select it to close out the **Complete Document** screen. (Yellow box, Figure 2)

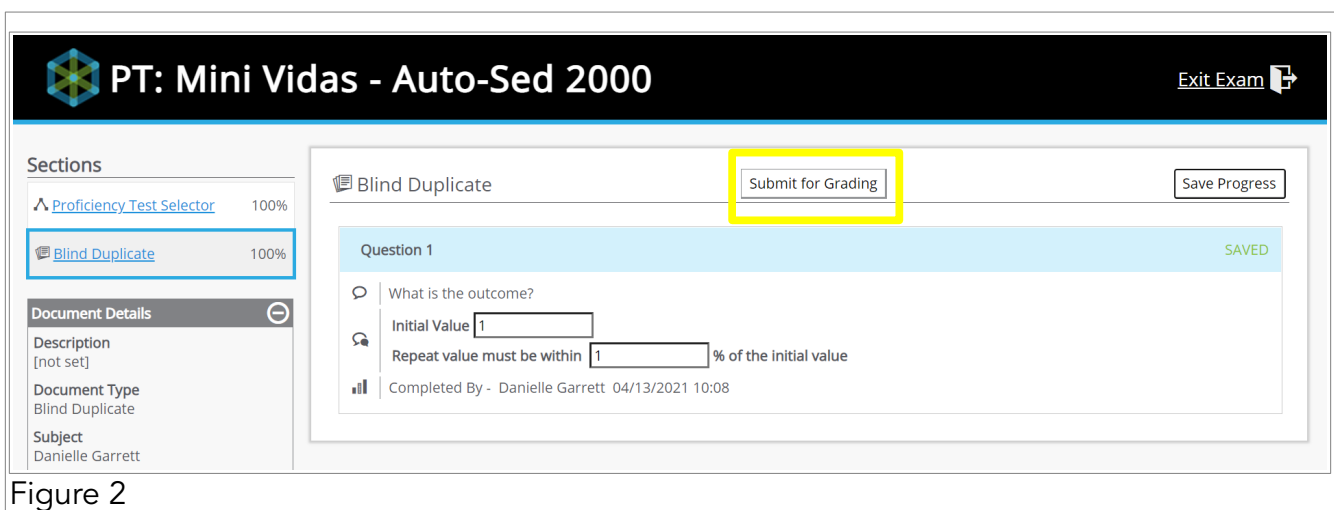


Figure 2

Reporting Problems

If you should encounter an issue with a question or a problem with the test, select the **Report a Problem** link located in the top right hand corner of any question area. (Yellow box, Figure 1)

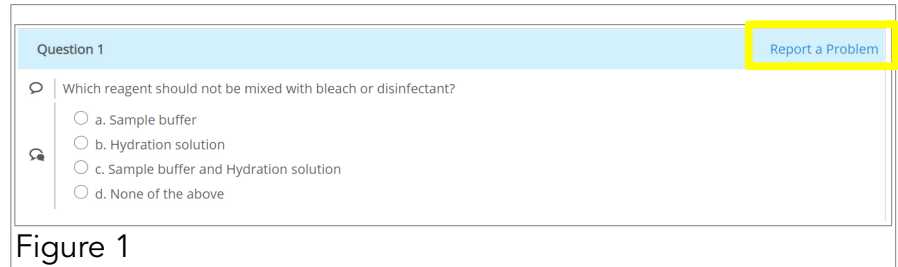


Figure 1

This will open the **New Message** pop-up window. (Figure 2)

Choose the recipient of the message by selecting the **Add Email** link. (Figure 3)

You can choose to CC another person but it is not required.

You can also choose an email template from the preset options in the **Template** dropdown menu. (Figure 4)

Once you've entered your message select the **Send Email** button to send your message.

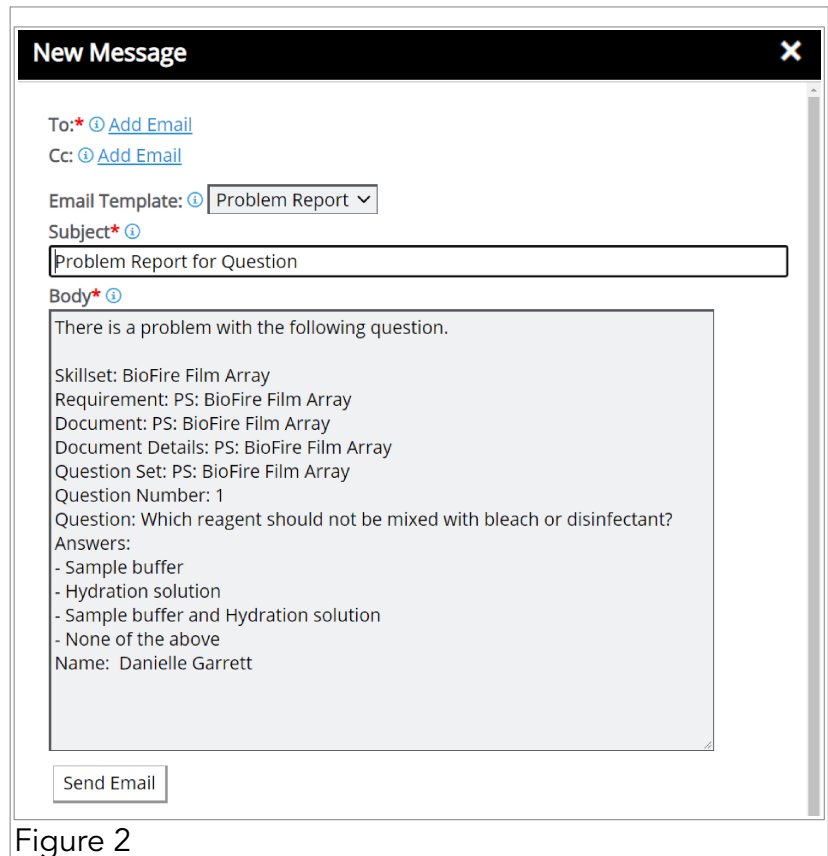


Figure 2

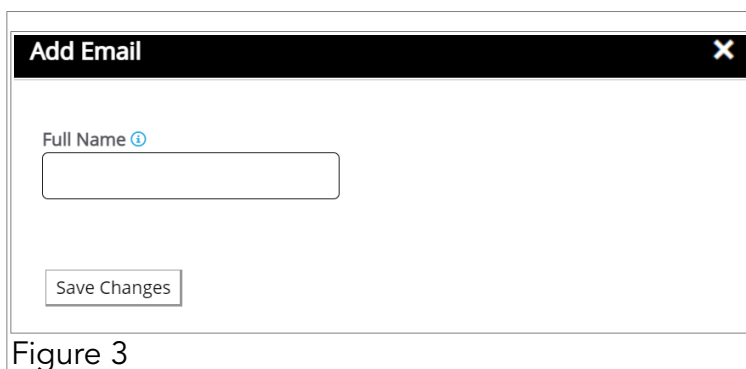


Figure 3

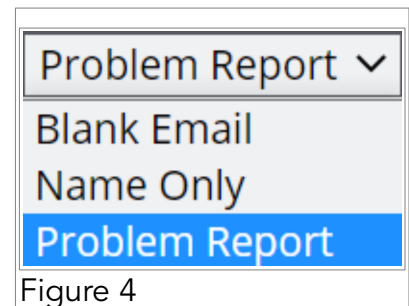


Figure 4

Finishing Tasks

Once you've finished your exam, you will have the opportunity to review your exam results before concluding your review. You can review the entire exam, your missed questions or request the opportunity to retake your exam. If you select **Retake Exam**, it will open the **New Message** pop-up window and you can send a message to your supervisor requesting a retake.

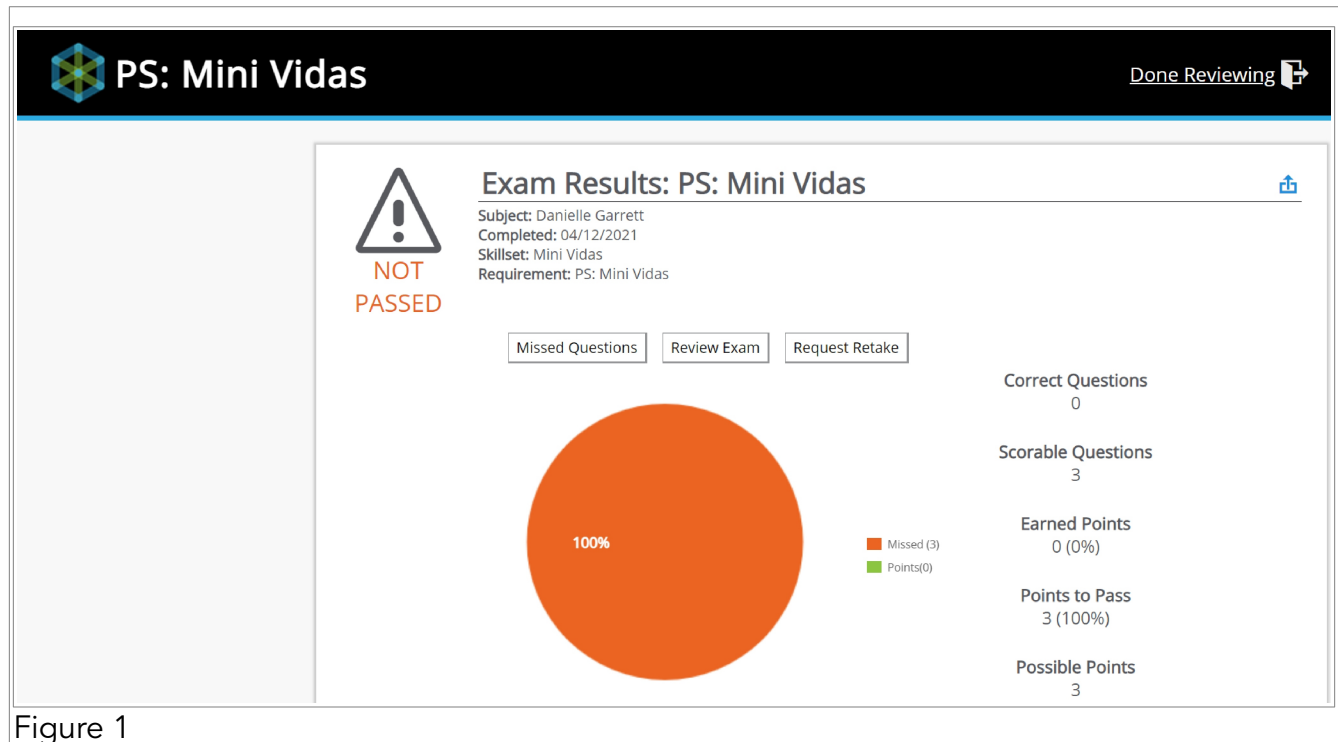


Figure 1

Select the **Done Reviewing** link when you are finished.

Competency Minibar

Selecting the Calendar tab allows you to view and utilize the Competency minibar. This is an additional way to access your Assessments and Tasks. Use the Previous or Next links to find the month you wish to view Assessments or Tasks for. (Yellow boxes, Figure 1)

You can filter your results by Overdue, Assigned, or Upcoming. (Figure 2)

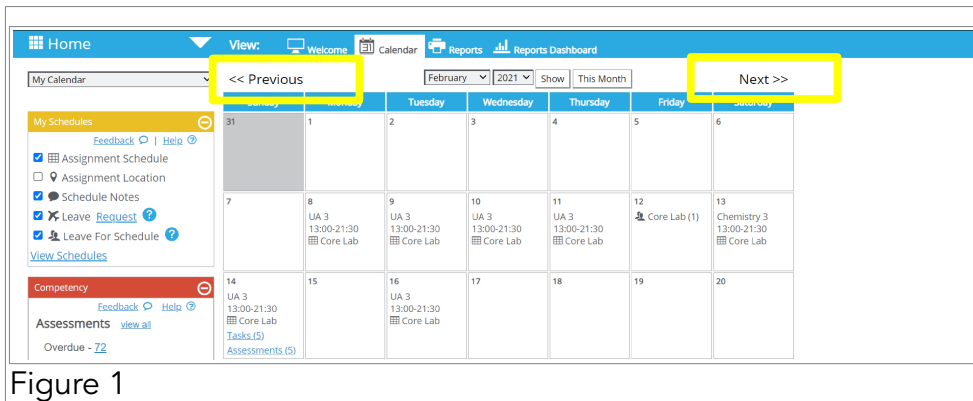


Figure 1

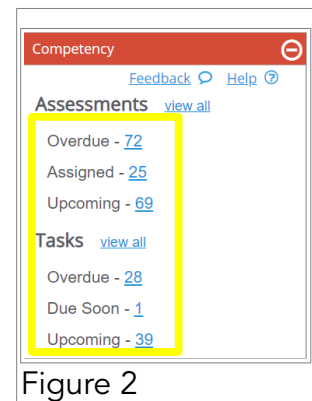


Figure 2

Selecting any of the Assessment links (Yellow box, Figure 2) will open the Assessments pop-up window. (Figure 3)

Selecting any of the Assessment links (Yellow box, Figure 3) will allow you to view Assessment Details

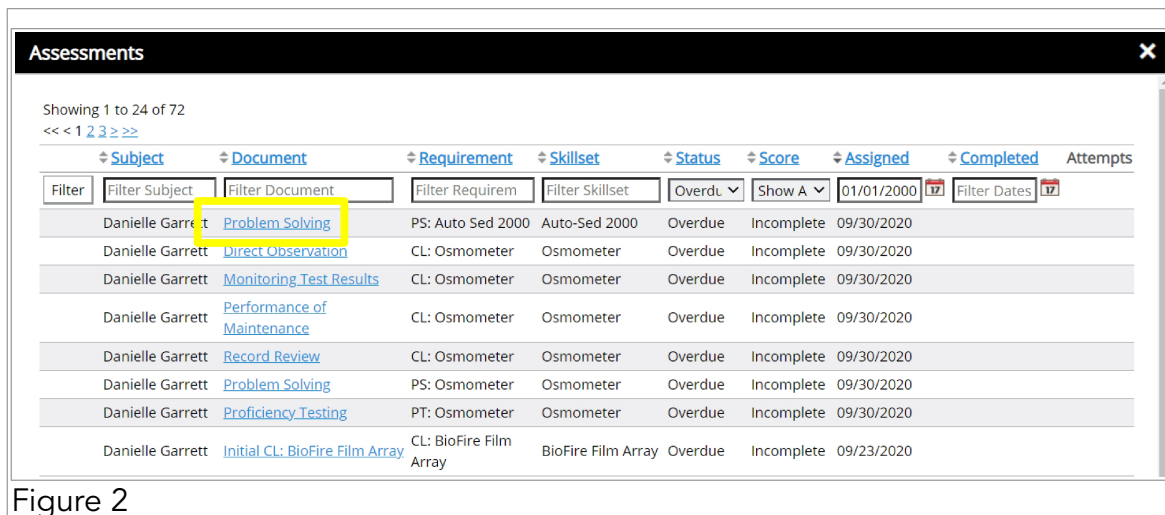


Figure 2

Competency and Calendar

Additionally, you can select Tasks and Assessments directly from the Calendar. Select either the Tasks or Assessment links within a calendar cell that contains them. (Yellow box, Figure 1)

This will open either the Tasks or Assessments pop-up windows depending on your selection.

Choosing Tasks (Figure 2) will let you view the status, date assigned, due date, and a link to start tasks as applicable.

Choosing Assessments will let you view the status of your assessments. Selecting any of the Assessments links (Yellow box, Figure 3) will open the Assessments Details pop-up window.

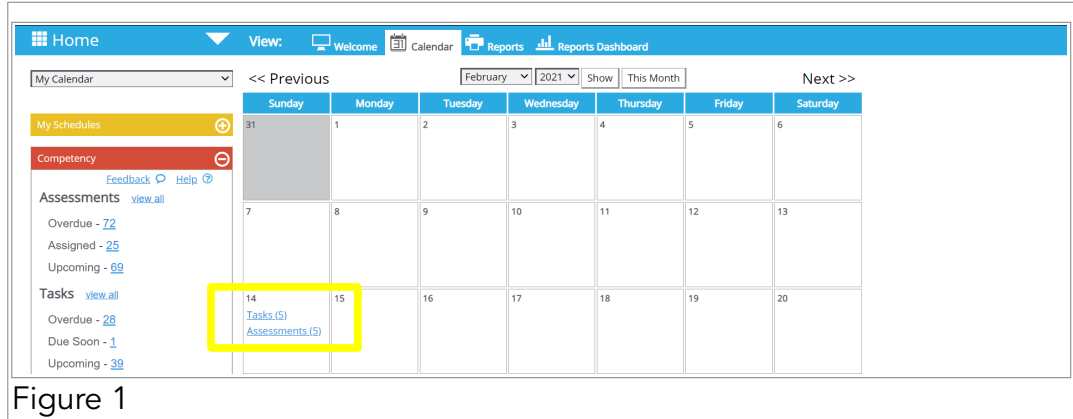


Figure 1

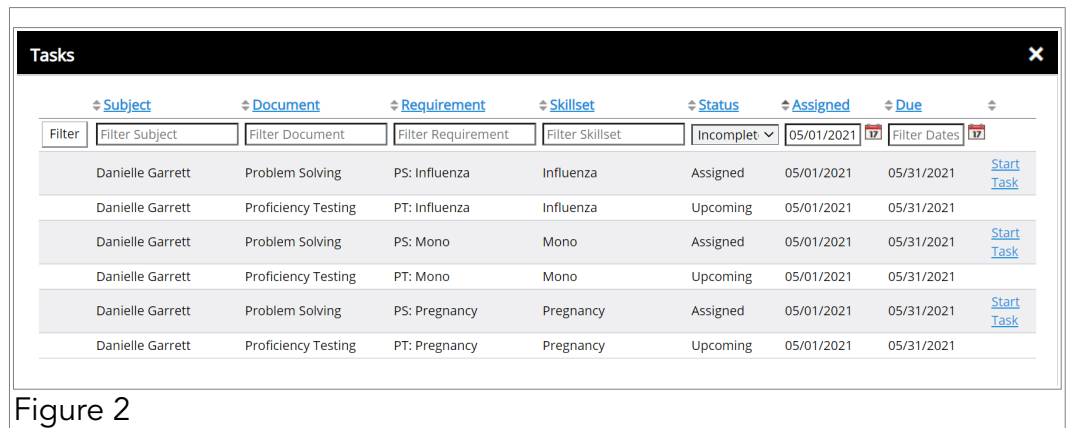


Figure 2

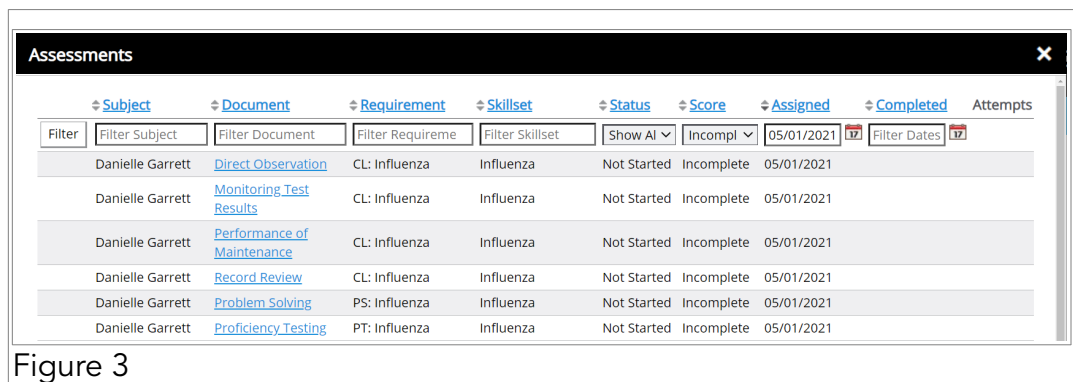


Figure 3

Glossary

Assessments: Exams that are given to employees or qualified personnel. These are essentially the documents once they are rolled out to people via the skillset publishing process.

Blank: This means that the exam has not been started and is currently blank.

Excused: The assessment was excused by an admin and no longer needs to be completed.

Requirements: These are the individual competency components that documents are attached to. These in turn are attached to skillsets and each can be configured to suit the workflow needs of the document or skillset.

Revoked: The assessment was taken away and deleted for some reason. Usually, this is due to a system admin or support performing a restart to correct an error.

Skillsets: These are the test systems, tasks, or other item that an employee must demonstrated competency on.

Skillset Start Date: This is the date the user 'Started' on the skillset. This date is independent from their hire date and can affect assessment roll out times.

Tasks: The assignment for a user/employee that is associated with a requirement/skillset.

Workflow Type: This is the path the Task will take. Depending on the option chosen, the document may go to a Qualified Personnel (Assessor is a commonly understood term here)

Resources

This concludes the Core User Guide for the Competency module. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Competency module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

Related Topics

Please select any link to skip to that topic.

Getting Started: Scheduling	PDF Document
Getting Started: Document Control	PDF Document