



Modify Assessments,
Assignments, and Remediation User Guide

Competency Module



Introduction

The StaffReady Competency module allows you to centralize the documents and tasks needed to fully manage a competency assessment program. Our integrated software suite makes managing large amounts of complex clinical data simple and easily accessible

The Manage tab in StaffReady Competency is the location where Assessments, Assignments, and Remediation tasks are modified. As a result, the effective management of your organization's competency assessment program depends on having the confidence to make quick edits to Assessments or Assignments and managing Remediation.

The Modify Assessments, Assignments, Remediation User Guide provides you a comprehensive overview of mastering this feature and helping you save time on competency maintenance, experience less paperwork, and greater workplace efficiency.

Table of Contents

(Please select any topic to skip to that section)

Modify Assessments pg. 3	Resources pg. 13
Move or Edit Assessments pg. 4	
Explain pg. 5	
Excuse pg. 6	
Copy Answers pg. 7	
Remedial Assessments and Remediation pg. 8	
Remedial Assessment: Conclusion pg. 9	
Modify Assignment pg. 10	
Edit or Explain Assignment pg. 11	
Move or Move All pg. 12	

Modify Assessment

To begin modifying assessments, first navigate to the **Manage** tab of the Competency module. (Figure 1)

Select the department you wish to view assessments for by selecting the **Department** link (Yellow box, Figure 2) and then clicking the **Select** link (Yellow box, Figure 3) next to the department you wish to view assessments for.

The **Departments** pop-up window will automatically close and refresh to display your newly selected department.

Next, select which Skillset you want to view from the **Skillssets** dropdown menu. (Figure 4)

Finally, select the **Assessment Period** you want to edit. (Figure 5)

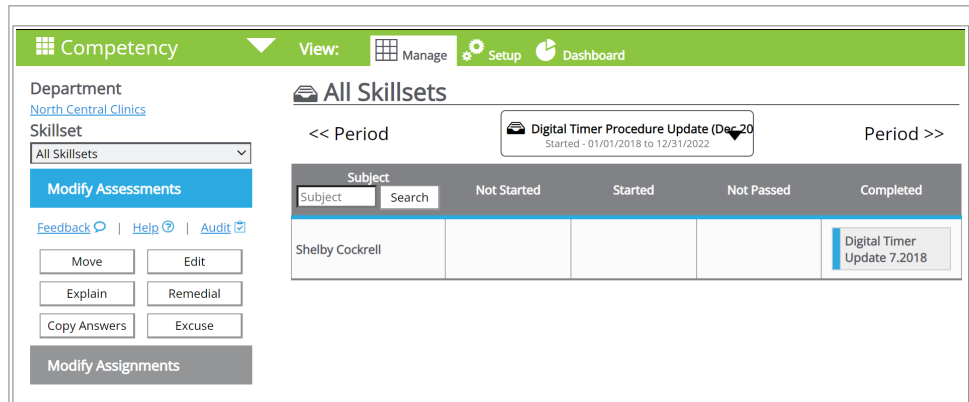


Figure 1

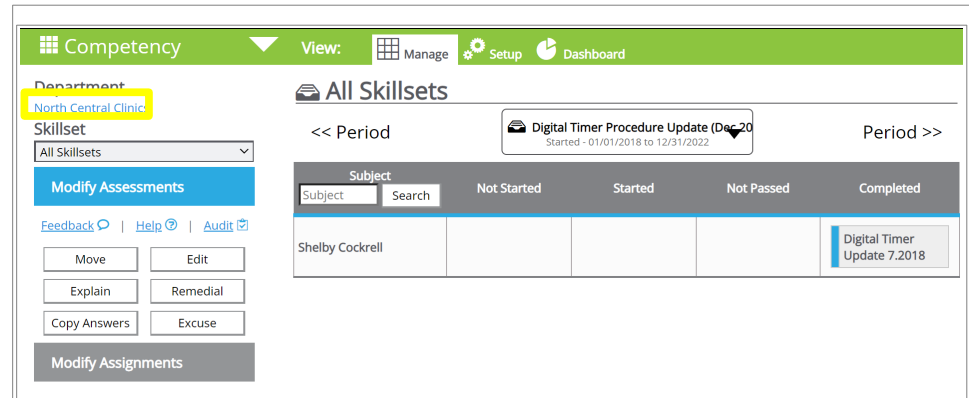


Figure 2

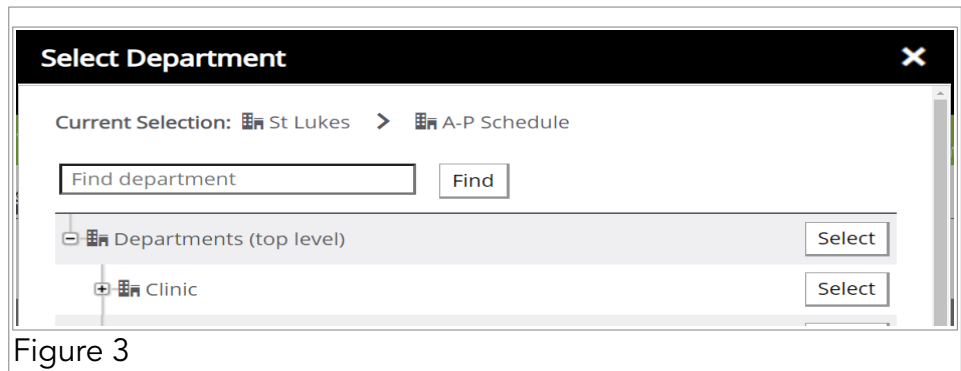


Figure 3

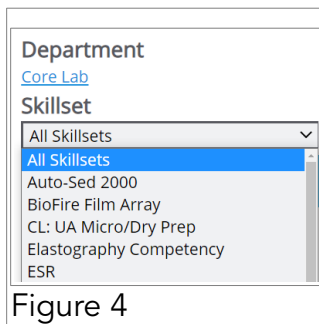


Figure 4



Figure 5

Move or Edit Assessment

Now that you've selected a skillset to view assessments for, it's time to start modifying. Selecting the **Move** button and then selecting an **Assessment** allows you to move it from a given status to another status column ahead of it (except for Not Passed) in the Competency grid. You cannot move a skillset to a previous status i.e. a Started Skillset cannot be moved to a Not Started Skillset. (Figure 1)

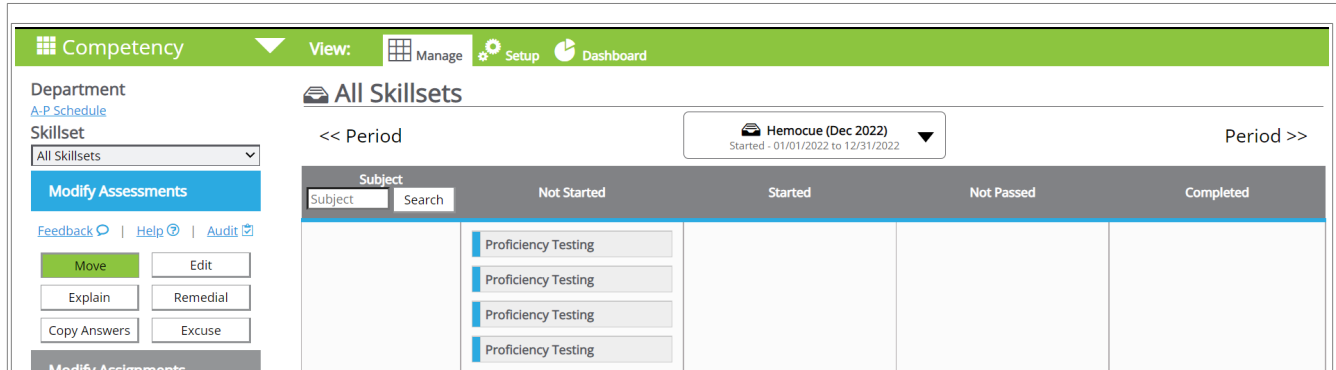


Figure 1

Selecting **Edit** and then selecting a Skillset will open the **Edit Assessment** pop-up window. You can update the **Start Date** from here. Select **Save Changes** when you are finished. (Figure 2)

Editing a start date in this way is isolated to that single assessment for that single employee and if any edits are made to the Skillset then the date will revert to its original setting. For example, an admin may use this if an employee is on leave when the assessment window opens and the admin would like to complete it early.

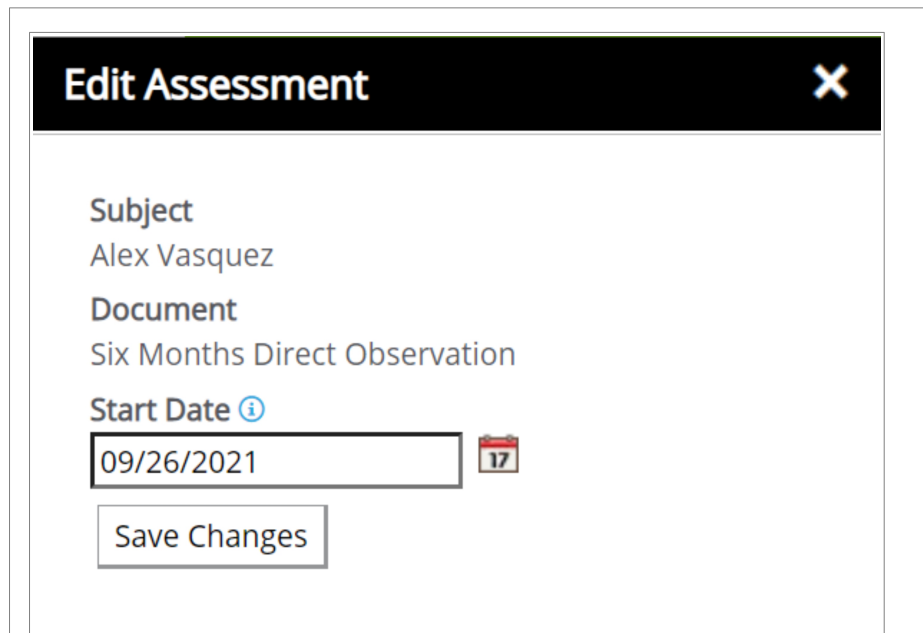


Figure 2

Explain

Selecting the **Explain** function (Figure 1) and then selecting an Assessment will open the **Explain Assessment** pop-up window. (Figure 2)

From the **Overview** side tab, you can view information such as the name of the document, the requirement it belongs to, its status, the date it was assigned on, and the score.

Selecting the **Assessment History** side tab (Figure 3) will allow you to view any actions that have occurred such as when it was started, completed, or failed.

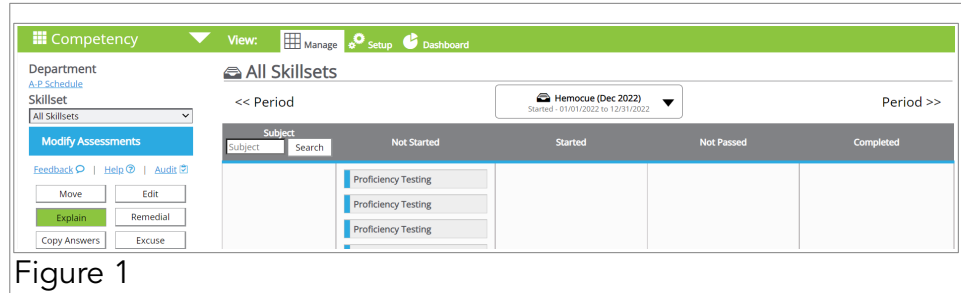


Figure 1

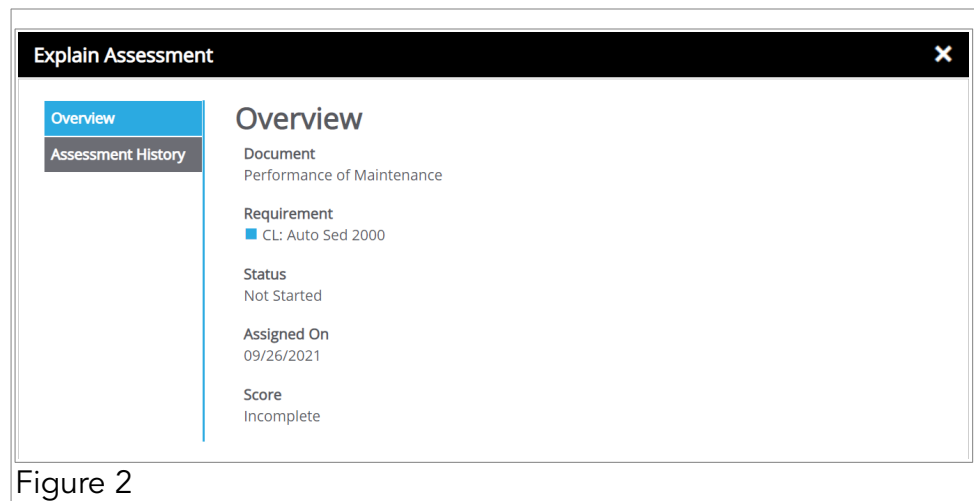


Figure 2

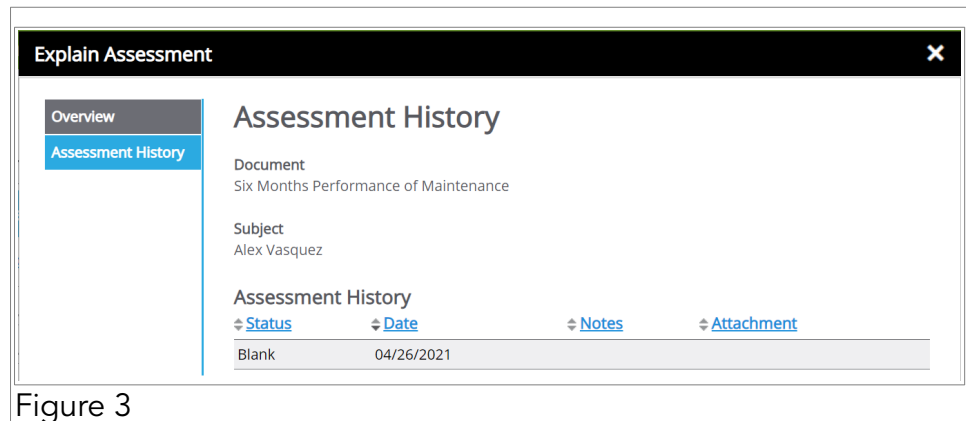


Figure 3

Excuse

Excuse will allow you to move any assessment from the **Not Started**, **Started**, or **Not Passed** columns into the completed column. Selecting **Excuse** (Figure 1) and then an assessment will open the **Excuse Assessment** pop-up window. (Figure 2)

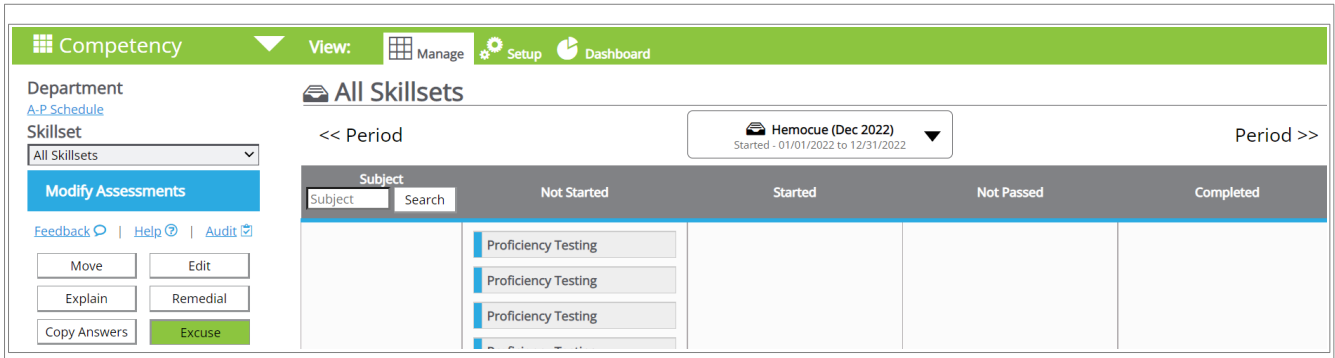


Figure 1

Type in a reason for excusing the task (i.e. person was sick and unable to complete on time), attach a file if necessary, enter in your PIN and then select the **Save Changes** button. The Assessment will be moved to the **Completed** column.

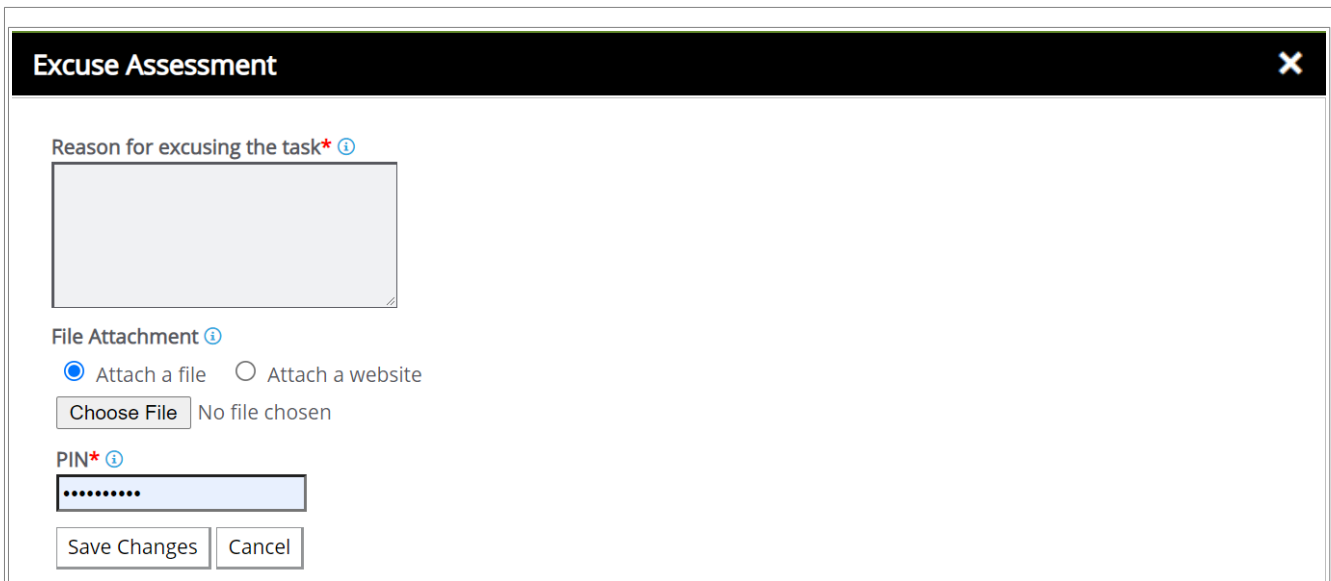


Figure 2

Copy Answers

Select the **Copy Answers** function and then select any assessment in the **Started** or **Completed** columns that you wish to copy answers from. (Figure 1)

This will open the **Copy Assessment Answers** pop-up window. (Figure 2)

Select the top box (Yellow box, Figure 1) if you want to copy the answers to every employee on the skillset or select individual check boxes next to each employee to select individual skillset employees. When you have finished making your choices, select the **Copy to Selected Assessments** button. (Orange box, Figure 1)

Note: If you are copying documents that contain multiple signature sections, all signatures will be copied over from the original Started or Completed document to the assessments that you selected.

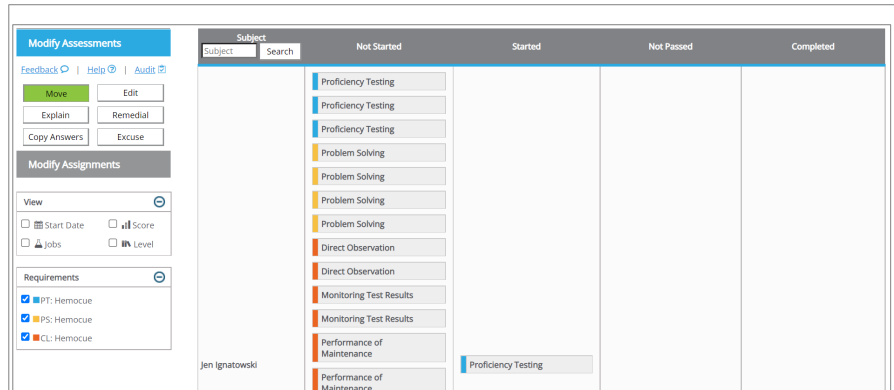


Figure 1

Note: If an assessment has been restarted, there could be multiple document versions displayed in the manage view. If there are multiple versions, you will not be able to copy answers to specific versions of those documents. Only documents with the same version can be copied to one another.

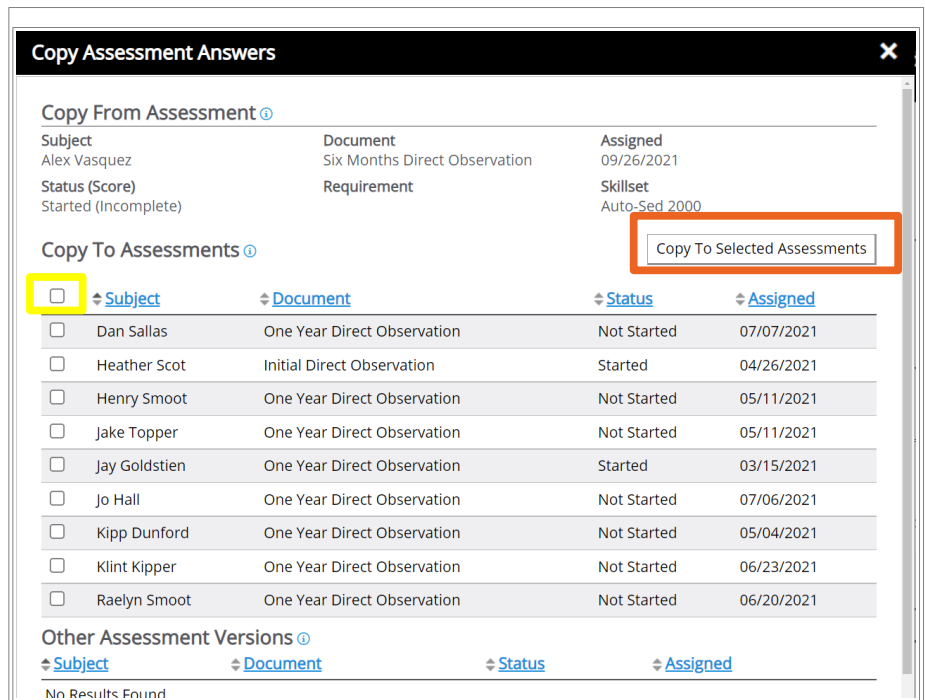


Figure 2

Remedial Assessments and Remediation

To remediate a **Not Passed** assessment, select the **Remedial** function and then select an assessment in the **Not Passed** column. (Figure 1)

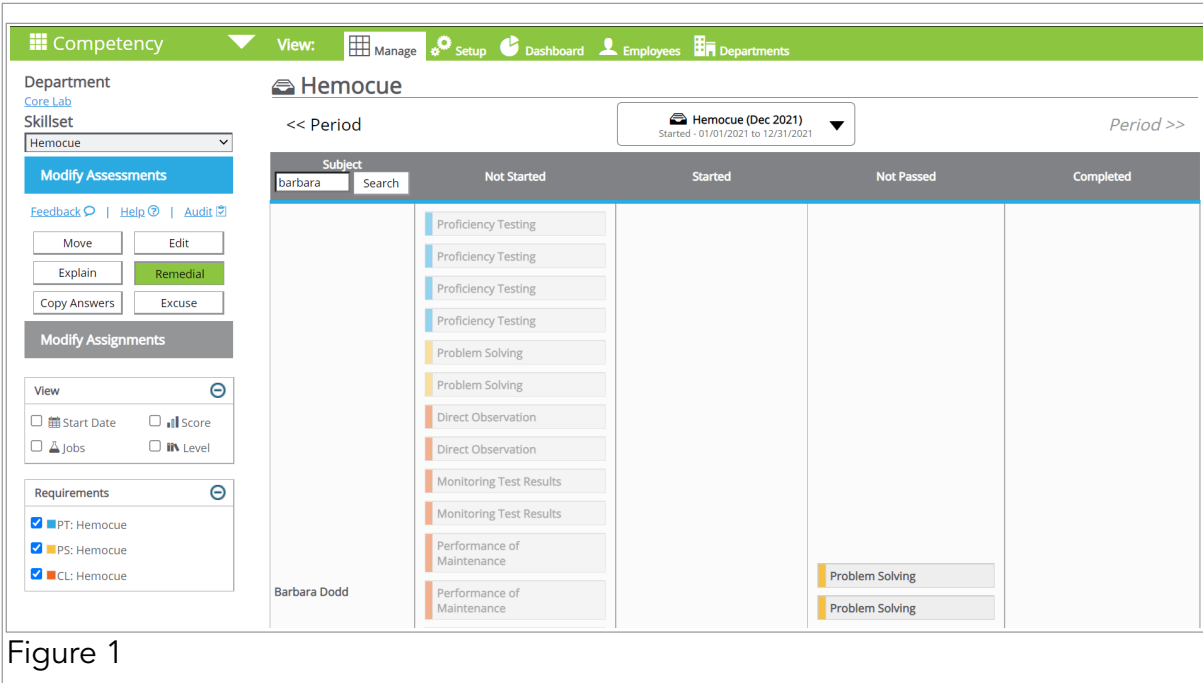


Figure 1

This will open the **Remediate Assessment** pop-up window. Next, select one or more **Remediation Pathways**. (Yellow box, Figure 2) You can choose from **Remedial Document Review**, **Remedial Observation**, or **Take the Exam Again**. You will need to have remedial documents attached to the requirement in order to have more options than 'Take The Exam Again'. If you selected **Take The Exam Again**, you will also have the option to select **Retake Exam** or **Retake Missed Questions Only**. Then select one option from the **Remediation Sign Off** section. When finished, select the **Setup Pathways** button to advance to the next step.



Figure 2

Remedial Assessment: Conclusion

Next, type in the **Review Instructions**. If applicable, attach a file or a website. Enter in an assignment start date, a time to complete, after what duration a reminder is sent out, and then choose whether the assignee is a remedial supervisor or an employee. (Figure 1)

Figure 1

If you selected Remedial Supervisor as an assignee, the Remedial Supervisor field will become visible. (Yellow box, Figure 2) When finished, select either **Cancel** to stop the Remedial Assessment or the **Finish** button to complete the process.

Figure 2

Your **Remedial Assessment** will now appear in the **Not Started** column in the grid. (Yellow box, Figure 3)

Figure 3

Modify Assignment

The **Modify Assignment** menu allows admins or **Qualified Personnel** to view and modify employee assignment within a given period. As before, begin by selecting the Department. (Yellow box, Figure 1) Next select the correct time period from the period selection section. (Orange box, Figure 1)

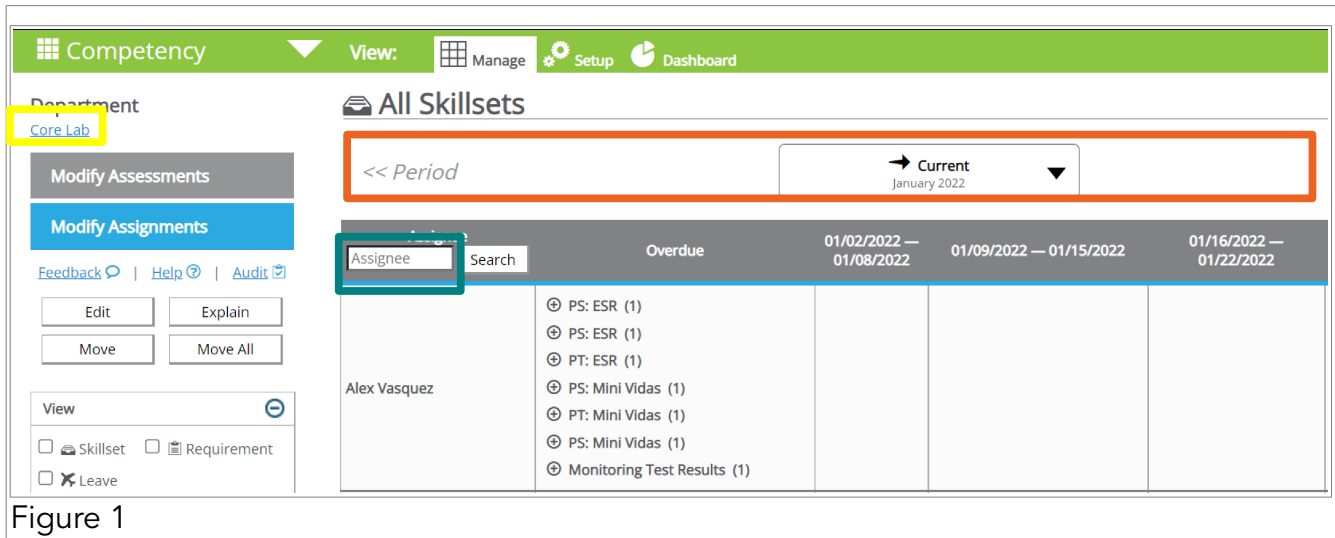


Figure 1

Next, either search for an **Assignee** (Teal Box, Figure 1) or scroll through the employee list to find one. When you’ve found the person you want, select the plus next to one of the document names to display all of the subjects of that assignment. (Green box, Figure 1) This will open the **Edit Assignment** pop-up window. (Figure 2) (Continued on next page)

If you want to display additional information on the **Manage** grid such as **Skillset**, **Requirement**, or **Leave**, select any of the check boxes in the View section. (Figure 2)

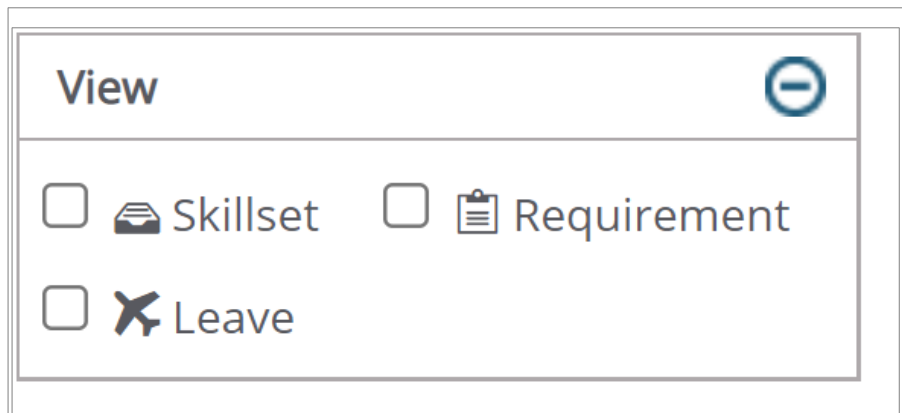


Figure 2

Edit or Explain Assignment

You can update the Employee assigned or the Deadline Date. **(Figure 1)** Select the **Save Changes** button when you are finished. The Assignment will move to the selected Assignee.

Figure 1

Selecting the **Explain** button **(Figure 2)** and then selecting an Assignment will open the **Explain Assignment** pop-up window. **(Figure 3)** Basic information regarding the **Assignee**, **Document**, and **Status** will be displayed as well as **Start**, **Warning**, and **Deadline** dates for the assignment. Select the **X** in the top right corner to close the window.

Figure 2

Figure 3

Move and Move All

The **Move** function is used if you want to move an individual Assignment from one employee to another. Select the **Move** function (Yellow box, Figure 1), then select the plus icon next to a Skillset to select it. (Orange box, Figure 1) Your chosen Skillset will be highlighted and all others on the Manage grid will become greyed out. (Teal box, Figure 1)

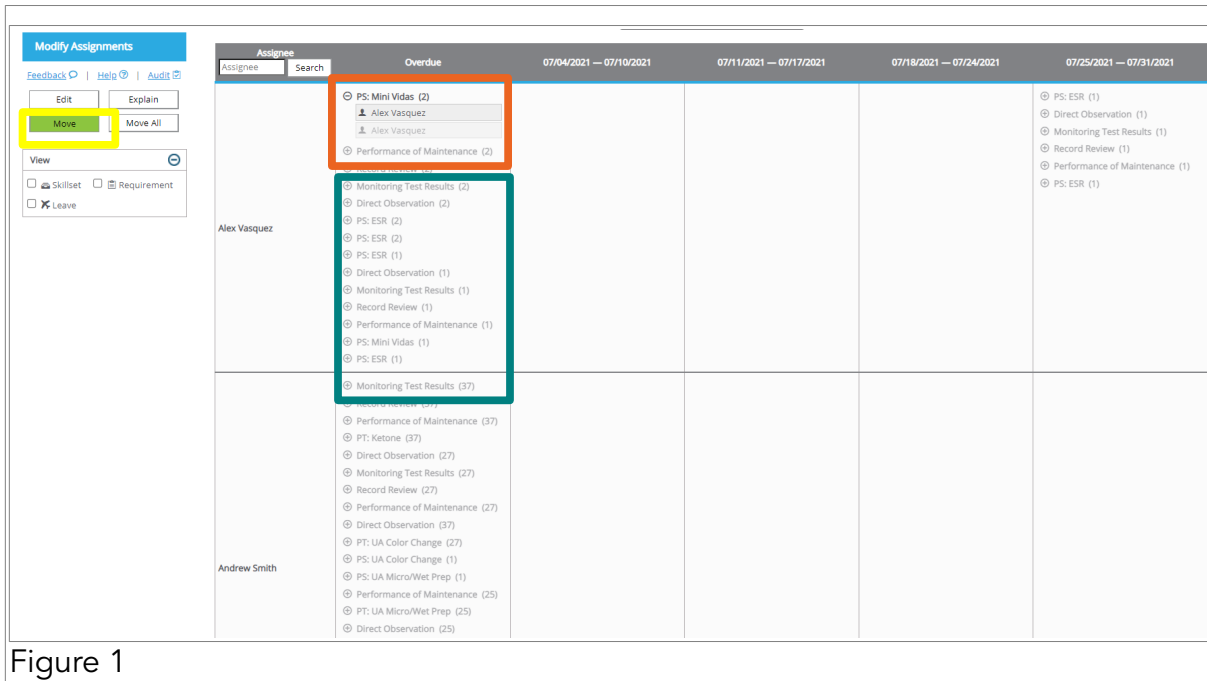


Figure 1

Next, select another employee that you want to give the assignment to. The assignment will be moved and the **Manage** grid will update accordingly. Selecting the **Move All** function (Figure 2) allows you to move all assignments from one employee to another simply by selecting an employee and then selecting a recipient as before. The Manage grid will update automatically to reflect the redistributed assignments.

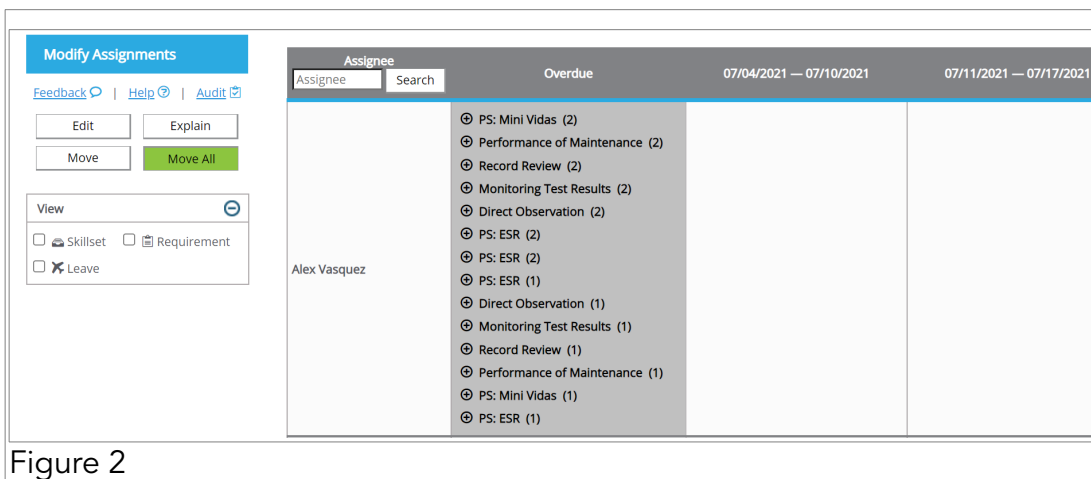


Figure 2

Resources

This concludes the User Guide for **Modify Assessments, Assignments, Remediation**. We hope that this has given you a better understanding of this process 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

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Related Topics

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