StaffReady

Skillsets and Employees User Guide

Competency Module

Introduction

StaffReady Competency allows you to define Skillsets and all of its associated components. When an employee is assigned that skillset, all the parts of that skillset are automatically rolled out. From there, managers can gain a system-wide perspective in real-time regarding the status of their overall competency assessment program. Employees themselves also always know the real-time status of the tasks they have due in their own employee profile.

StaffReady Competency also manages rotating dates and competency windows, keeping organizations on top of the many due dates that come and go for employees and the organization throughout any given timeframe.

Your employees will also know that the burden of keeping track of when their qualifications need to be renewed is no longer solely on them.

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Skillset Setup

To begin setting up a **Skillset**, navigate to the **Setup** tab of the Competency Module. Select **Skillsets (Yellow box, Figure 1)** and then the **Add** button **(Orange box, Figure 1)**. You can also select the **New** link. **(Blue box, Figure 1)**

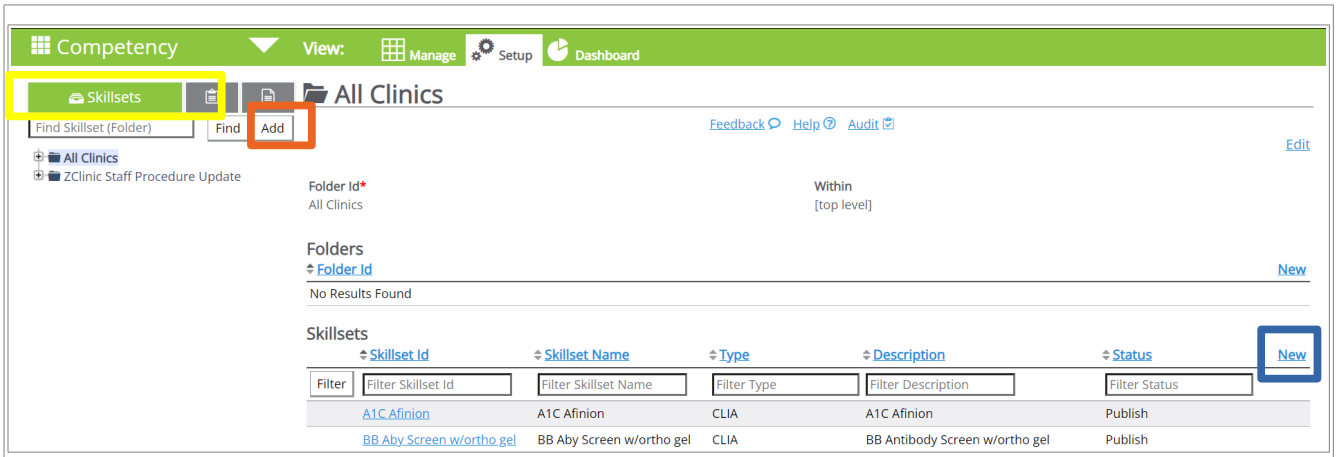

Figure 1

This will open the **Add New** pop-up window. **(Figure 2)** Select the **Skillset** side tab. Next, select the **Skillset Type** (**CLIA**, **One Time**, or **Working Task**). The **CLIA** skillset type means that new hires will receive initial, six month, and one year assessments occurring annually going forward. The **One Time** skillset type is useful for assignments that only need to be completed once and do not need to meet **CLIA** requirements for new hire assessments. **Working Task** is useful for assignments that need to be completed in a recurring manner and do not need to meet **CLIA** requirements for new hire assessments.

Enter a **Skillset ID**, a **Skillset Name**, if applicable, and a description of the **Skillset**. We recommend that the **Skillset** name be the same as the **Skillset ID** for consistency. It should be noted that the **Skillset ID** must be unique on the license and cannot be used for other **Skillsets**. When finished, select the **Save Changes** button. Once created, the type of **Skillset** cannot be changed.

Note: If the **Working Task Skillset Type** is selected, a new dropdown will appear titled **Repeat**. You can select the recurring pattern for the **Skillset** from here.

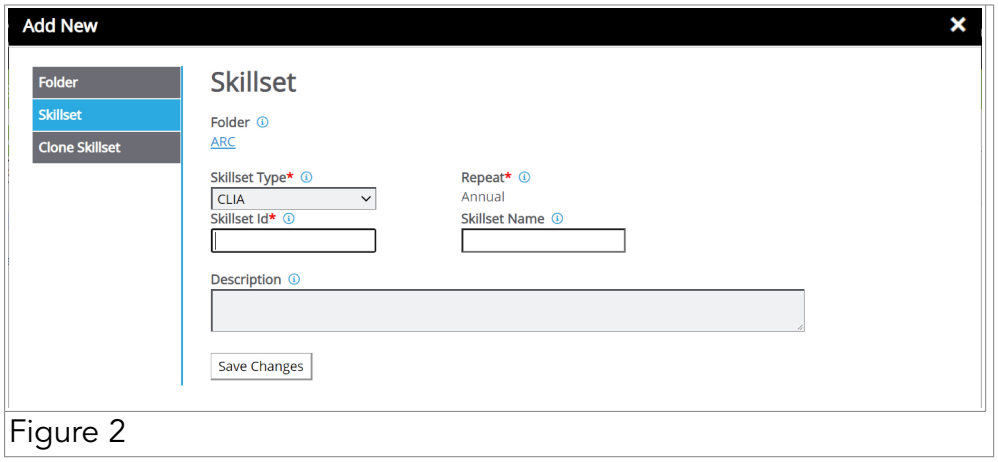

Figure 2

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Clone Skillset

If you would like to clone an existing **Skillset**, navigate to the **Setup** tab, locate the **Skillset** you wish to clone, and then select the **Add** button. **(Yellow box, Figure 1)**

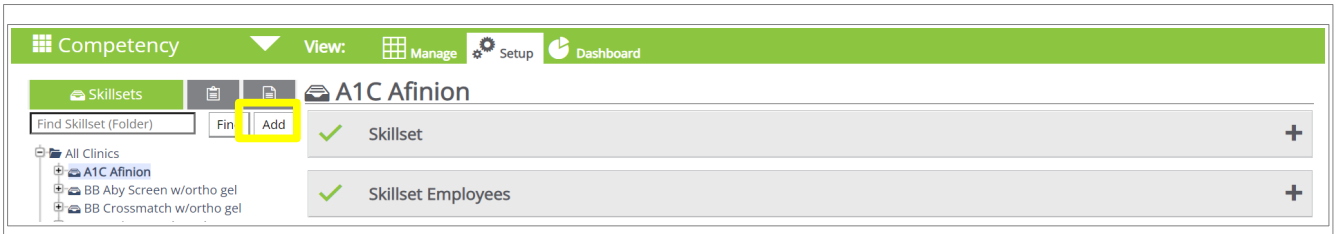

Figure 1

From the **Add New** pop-up window **(Figure 2)**, select the **Clone Skillset** side tab. Enter in the **Skillset ID**. It must be unique and cannot be the same as the **Skillset** you are cloning or any other skillset on the license. Enter in the **Skillset Name**. We recommend that this be the same as the **Skillset ID** for consistency.

Enter in a **Skillset Description** if applicable. Any field left blank will be filled with the cloned information if it was filled in on the original **Skillset**. The **Cloned Skillset** will be the same type as the original and it cannot be changed. If you need to change the parent folder, select the **Change** link. This will open the **Move Skillset** pop-up window. **(Figure 3)**

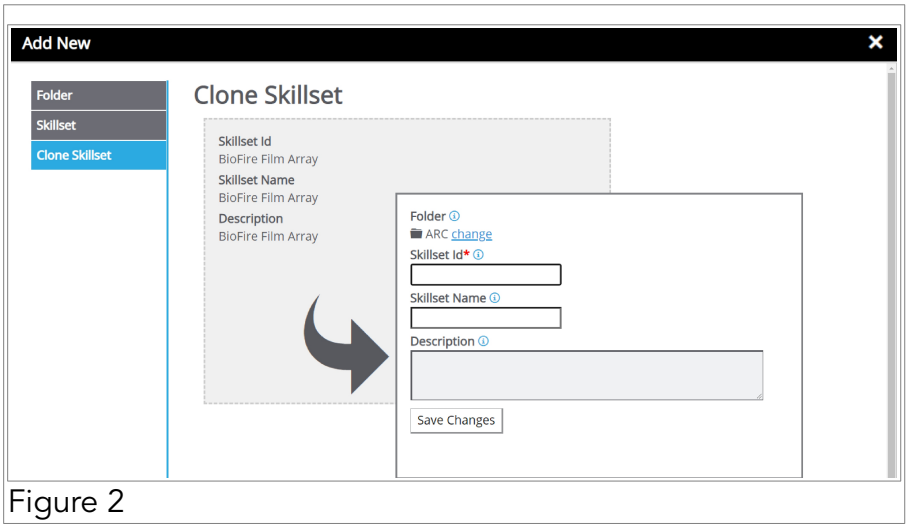

Figure 2

Locate the folder you want the cloned **Skillset** to reside in and then click the **Select** button.

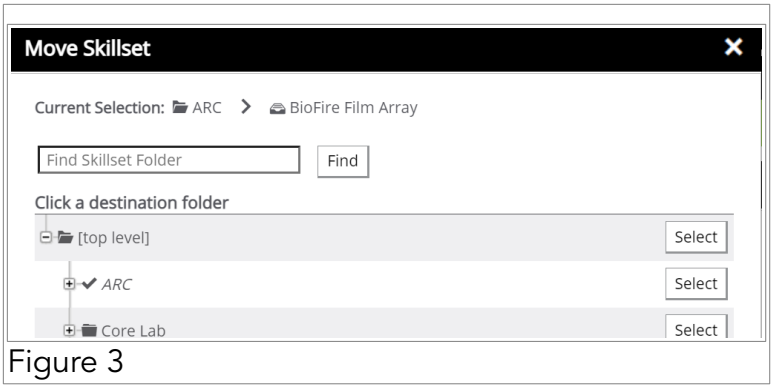

Figure 3

Note: When cloning **Skillsets**, all **Skillset Employees**, **Requirements**, **Levels**, **Skillset Managers** and **Skillset Messages** will be cloned to the new **Skillset**. **Assessment Periods** are not copied during the cloning process. **Requirements** are not duplicated but are shared with the original **Skillset**.

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Edit or Delete Skillset

To edit an existing **Skillset**, open the **Skillset** color bar for the one you wish to edit and select the **Edit** link. **(Yellow box, Figure 1)**

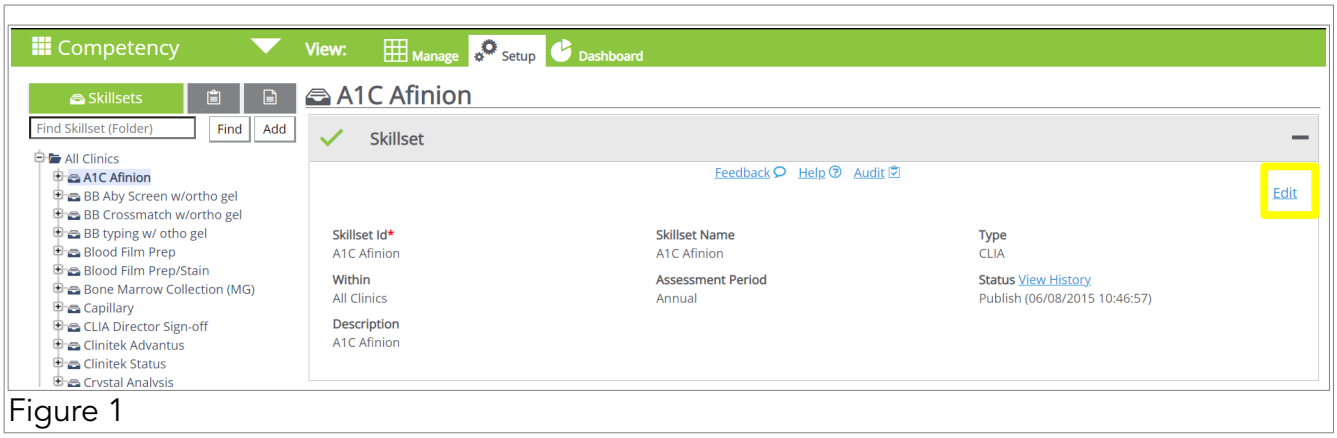

Figure 1

The color bar will update to allow you to make changes. **(Figure 2)** You can adjust the **Skillset ID**, the **Skillset Name**, the **Description**, and you can view the history of the the **Skillset**.

As before, selecting the **Within** link **(Yellow box, Figure 2)** will open the **Move Skillset** pop-up window and allow you to adjust the parent folder the **Skillset** is currently in.

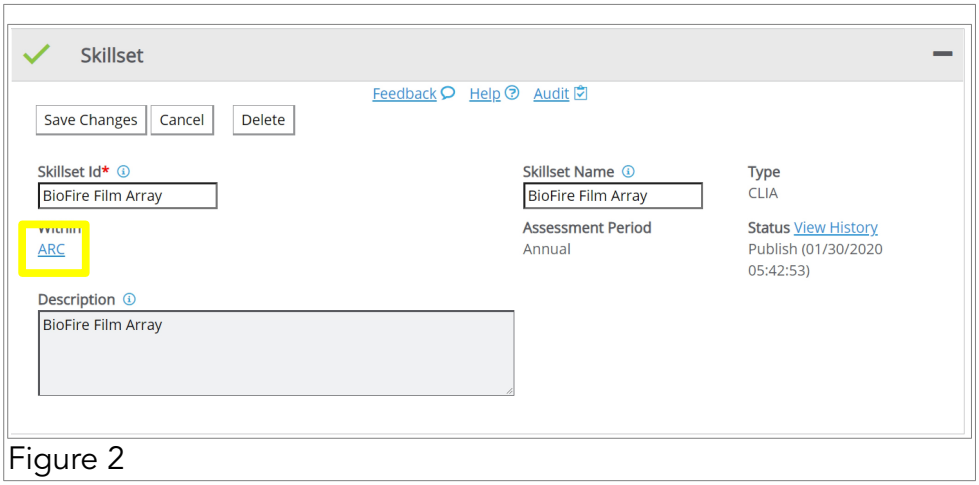

Figure 2

You can also delete a **Skillset** by selecting the **Delete** button. If the **Skillset** has already been published, it cannot be deleted. **(Figure 3)**

If you need to remove a published **Skillset**, please contact our Technical Support team.

Figure 3

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Create New Skillset Folders

To create a new **Folder**, first select the **Setup** tab and then select the **Add** button. **(Yellow box, Figure 1)**

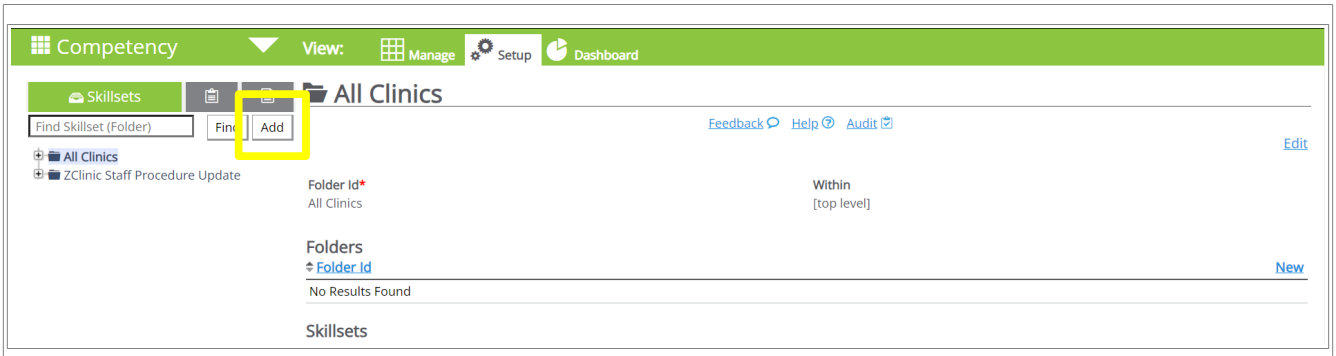

Figure 1

This will open the **Add New** pop-up window. **(Figure 2)** Enter a name for the **Folder** and then select the **Save Changes** button.

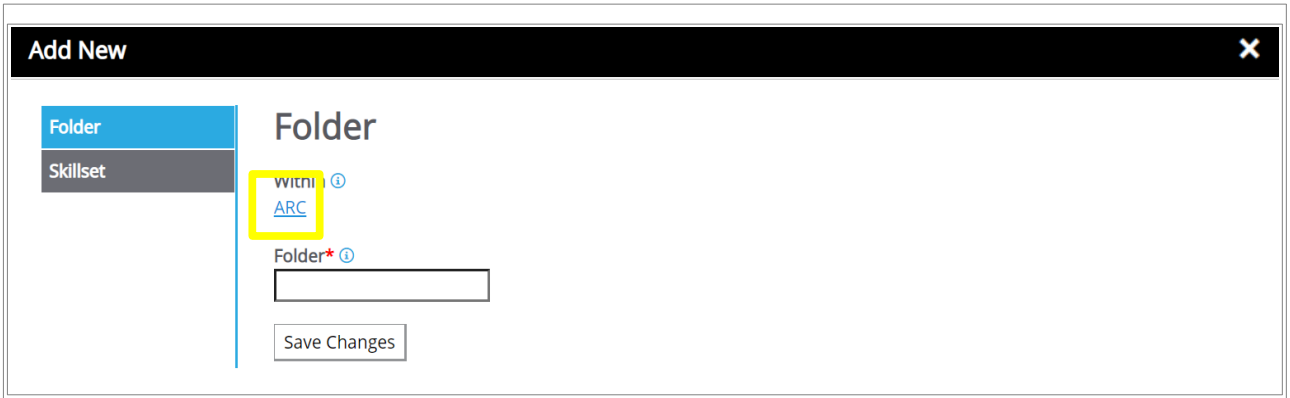

Figure 2

If you need to change the parent folder, clicking the link below **Within (Yellow box, Figure 2)** will open the **Choose Skillset Folder** pop-up window and allow you to change the parent folder of the folder you are creating. **(Figure 3)**

As before, click the **Select** button next to the parent folder you want your folder to be under hierarchically.

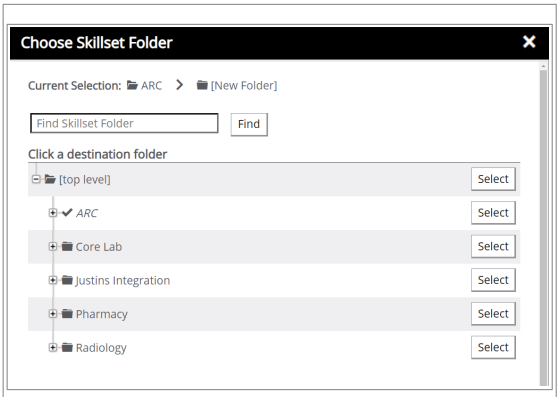

Figure 3

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Deleting a Skillset Folder

First select a **Skillset Folder** you wish to delete and select the **Edit** link. **(Yellow box, Figure 1)**

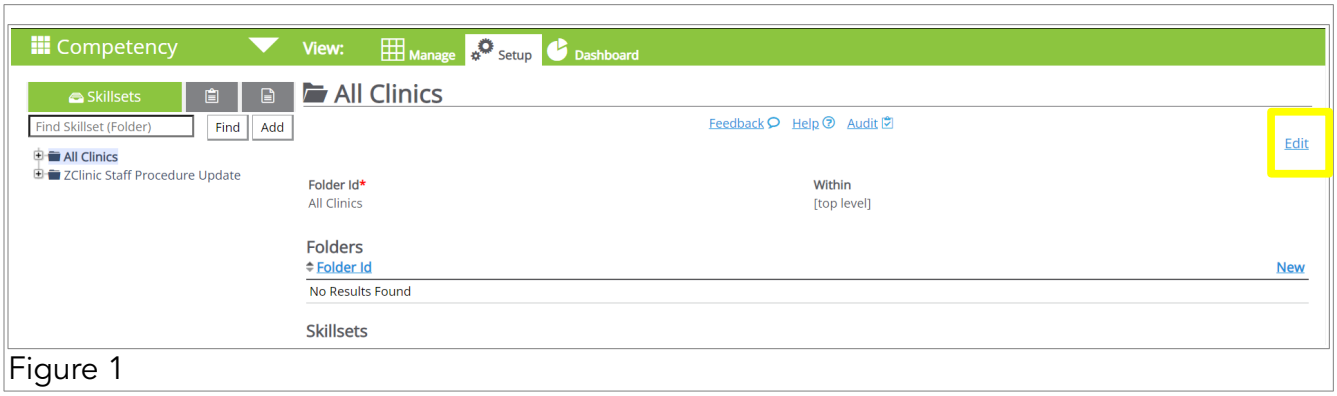

Figure 1

Select the **Delete** button **(Figure 2)** to remove the **Skillset** folder.

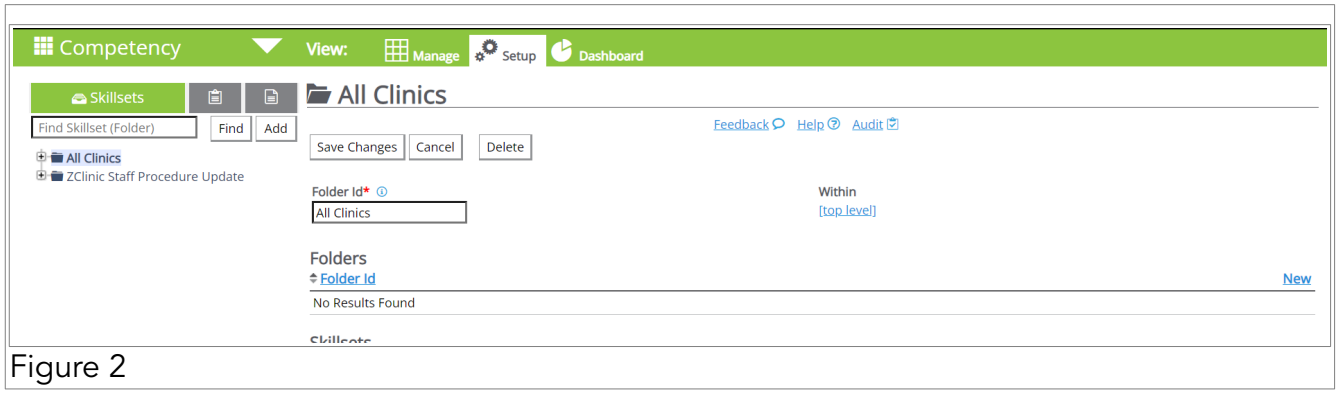

Figure 2

If the **Skillset** folder you are trying to delete contains one or more **Folders** and/or **Skillsets**, you will see an error message **(Figure 3)** that the **Folder** cannot be deleted. Associated **Folders** or **Skillsets** must be moved, deleted, or archived in order to proceed.

If the **Folder** you are trying to delete does not contain other **Folders** and/or **Skillsets**, selecting the **Delete** button will complete the process. You will not be asked to confirm the deletion of the **Folder**.

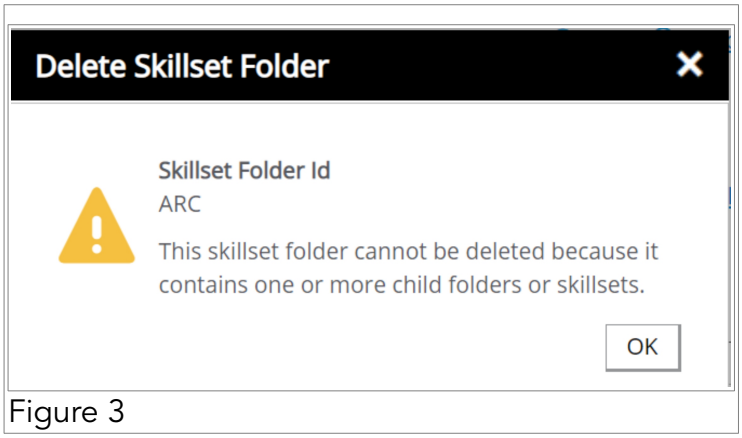

Figure 3

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Adding Existing Employees To a Skillset

Now that you've created a new **Skillset**, you need to add **Employees** to it. Navigate to a **Skillset** in the **Setup** tab of the **Competency Module**, and select the **Skillset Employees** color bar. **(Yellow box, Figure 1)** Select the **Add Employees** button or the **New** link **(Orange box, Figure 1)** if you're adding an existing employee or creating a new employee from scratch.

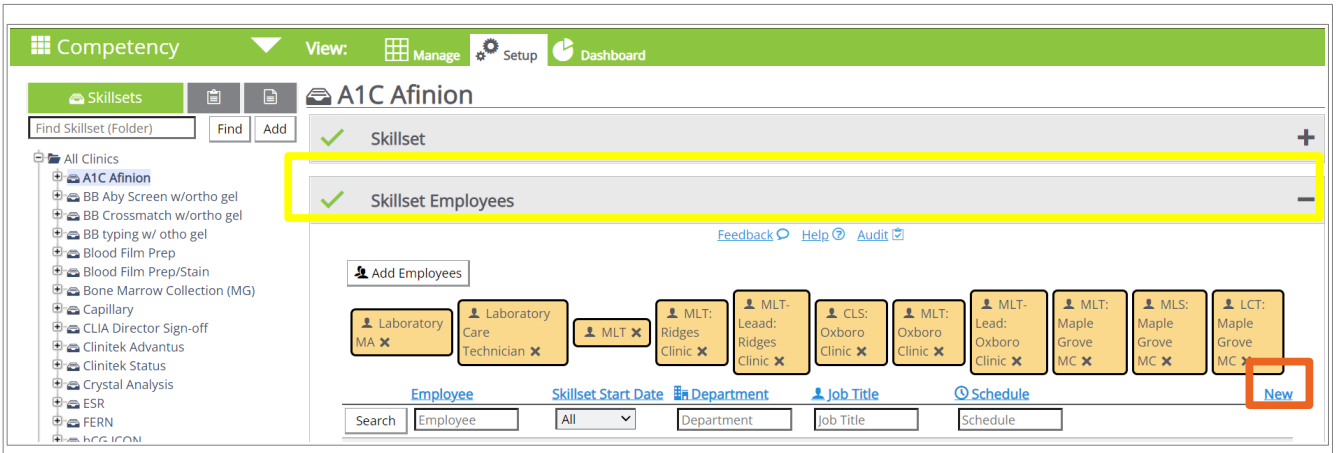

Figure 1

If you selected **Add Employees**, this will open the **Add Employees** pop-up window. **(Figure 2)** You can search for employees to add by **Department**, **Schedule**, or **Job Title**. You can choose to view all employees in each category and select either all employees or individual ones depending on your needs.

Selecting the **Continually Add All** link will ensure that any new and existing employees added to the **Department**, **Schedule**, **Job Title** will be automatically added to the **Skillset** going forward.

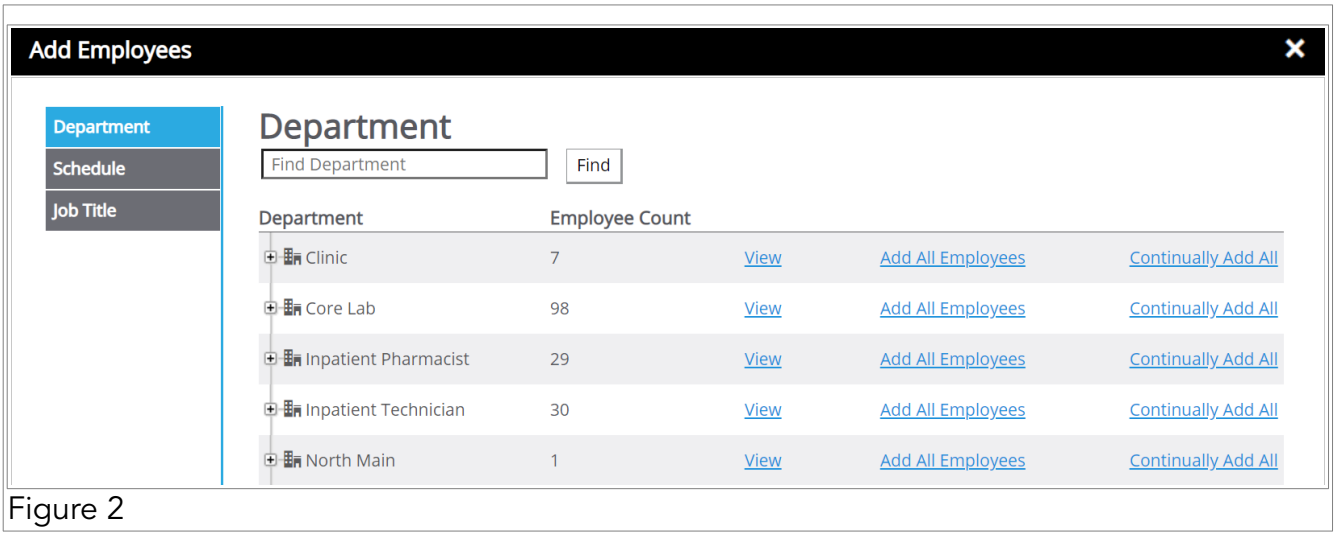

Figure 2

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Add New Employees To Skillset

Selecting **New** will open the **Add Employee Wizard**. Begin by typing the employee's name into the search field. **(Yellow box, Figure 1)** Select the **Next** button when done.

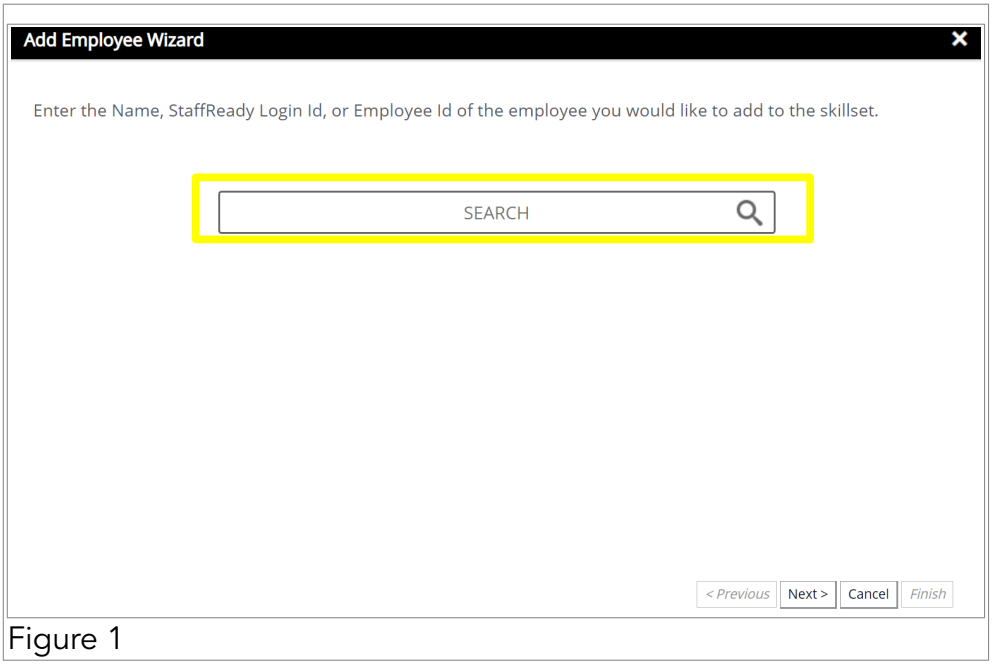

Figure 1

If that employee already exists, the system will display their name and their relevant information. **(Figure 2)** If the search returns no results, select the **Create New Employee** button. **(Yellow box, Figure 2)**

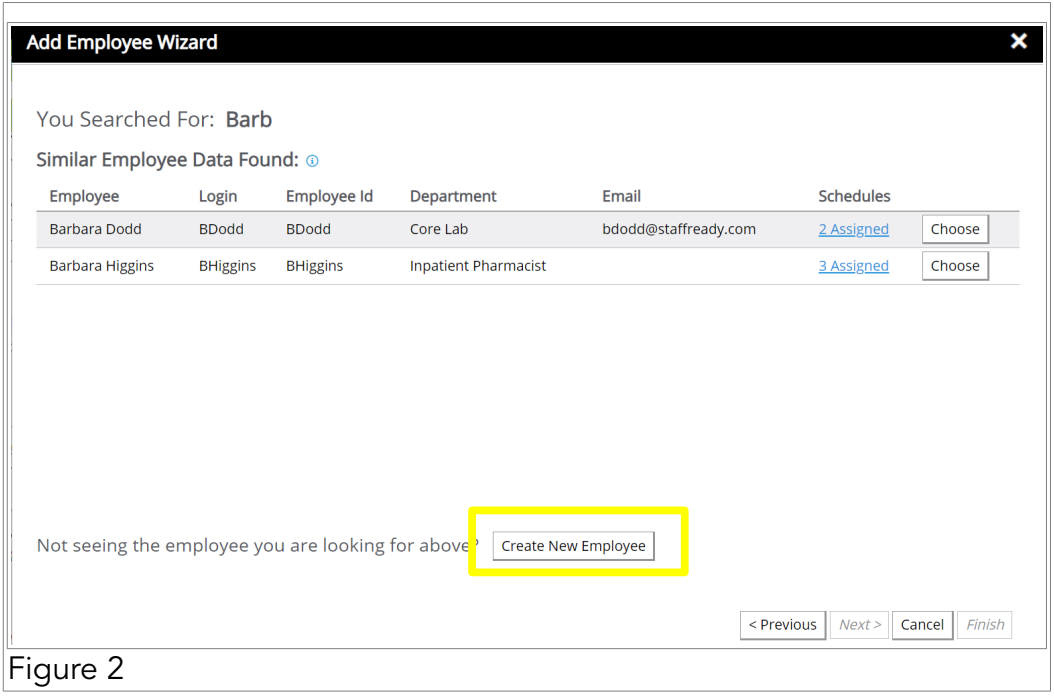

Figure 2

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Add New Employees (Continued)

Enter information within the required (marked with red asterisk) fields. Select the appropriate **Department**. **(Yellow box, Figure 1)** When you are finished, select the **Next** button. You can also select **Finish** if you wish to do the rest of the setup process at a later time.

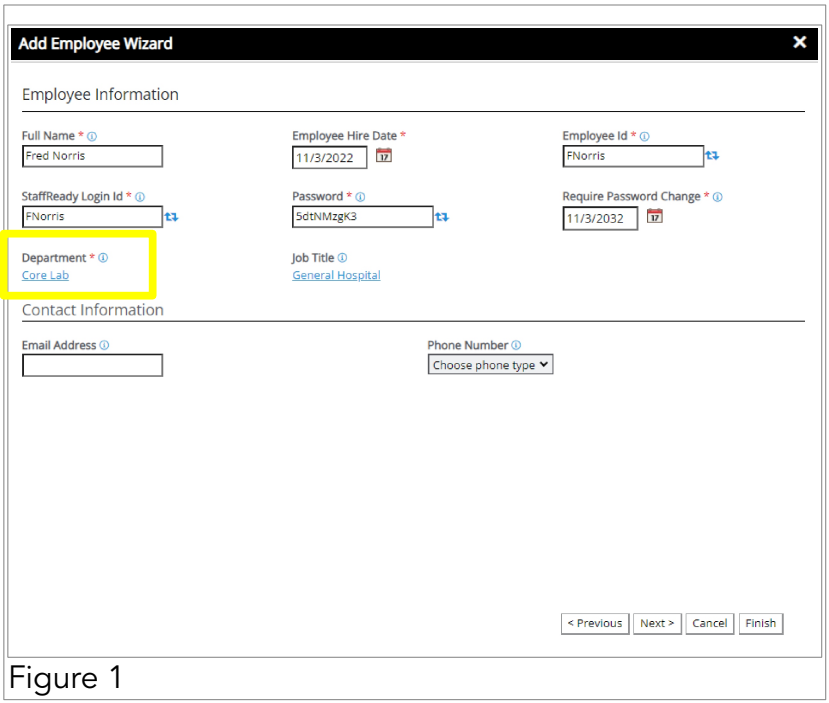

Figure 1

Note: Selecting Finish at any point in during setup will complete the process of adding a newly created employee to a skillset. It will create default information for any field left blank.

The system will check for duplicates within the pool of existing employees and will highlight them so that no work is duplicated unnecessarily. **(Figure 2)** Select the **Next** button to advance to the next section.

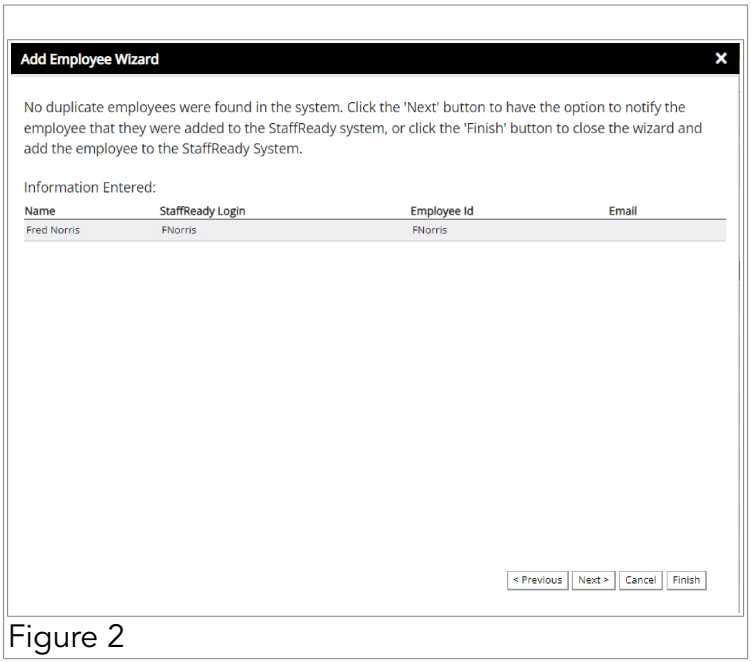

Figure 2

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Add New Employees: Conclusion

To conclude adding a new employee, you have the option of sending an email notification to them with their **Skillset** and login information.

Enter in the recipient email and then select the check box to ensure that a notification is sent to the recipient. **(Yellow box, Figure 1)** A message will automatically populate in the body section of the message but you can customize it if you wish to. When finished, select the **Finish** button.

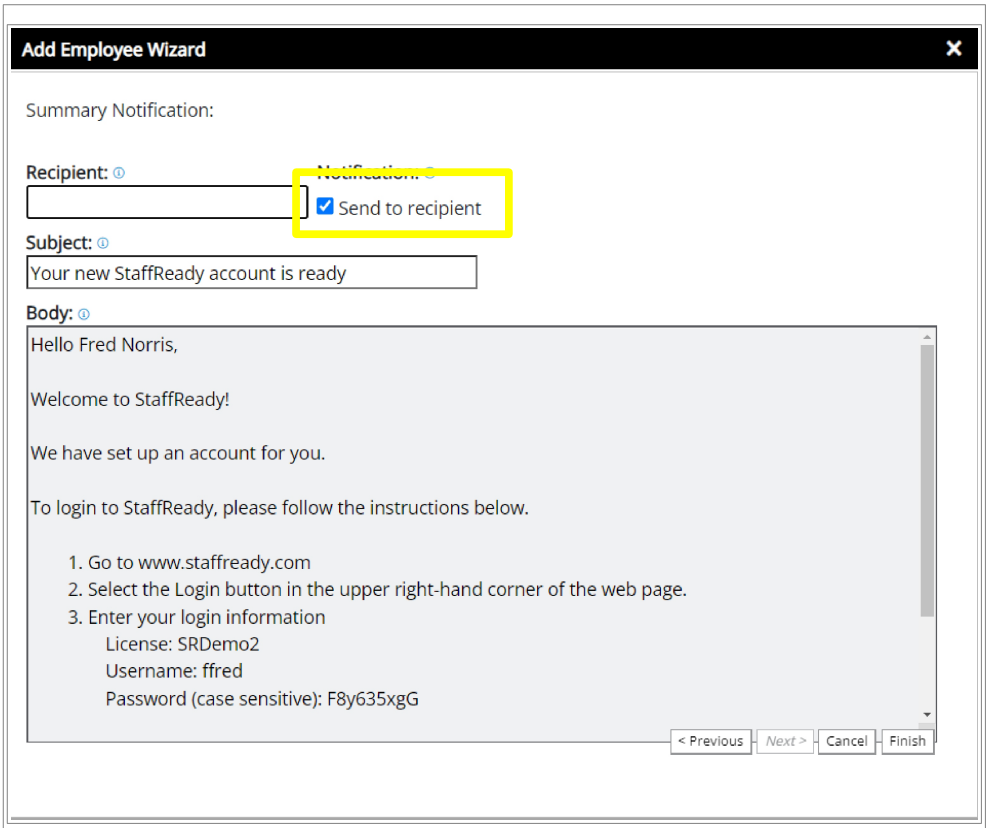

Figure 1

The selected employee will now be added to that **Skillset** and will appear in the **Skillset Employees** color bar for that **Skillset**.

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Remove an Employee from a Skillset

To remove an employee from a **Skillset**, first navigate to the **Skillset Employees** color bar and locate the employee you wish to remove. Select the **Change** button next to their name. **(Yellow box, Figure 1) Note:** The button will say **Remove** unless there are multiple **Levels** on the **Skillset** wherein it will appear as **Change**.

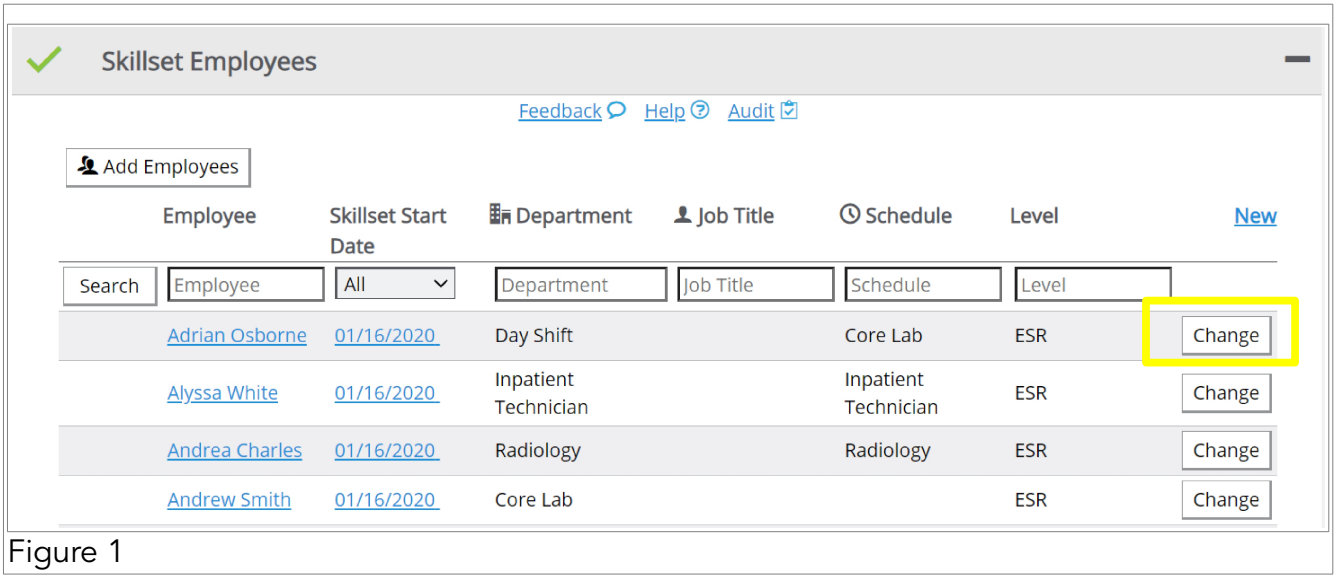

Figure 1

This will open the **Skillset Settings** pop-up window. **(Figure 2)** If there are not multiple levels, the employee will just be removed. Select the **Remove Employee** button. If you wish to retain the employee but change the level, you can also do that from this window.

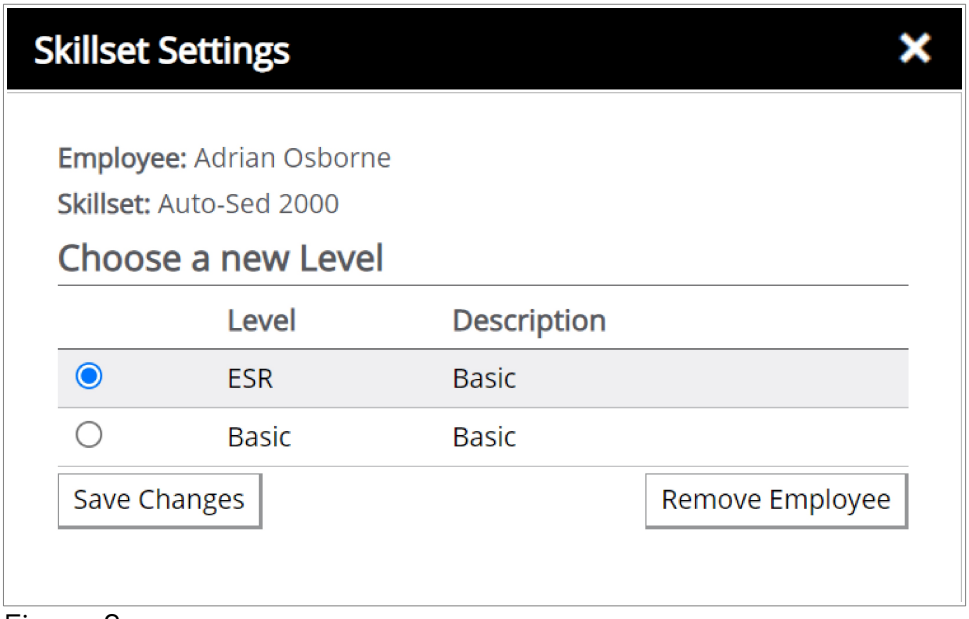

Figure 2

Note: If the employee is part of a pin and is removed, they will have an **Excluded** tag displayed in the **Skillset Employees** color bar.

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Discontinue Pins

If you wish to discontinue the **Continually Add All Pin** and prevent employees from automatically being added to a **Skillset**, first navigate to the **Skillset Employees** color bar. **(Figure 1)**

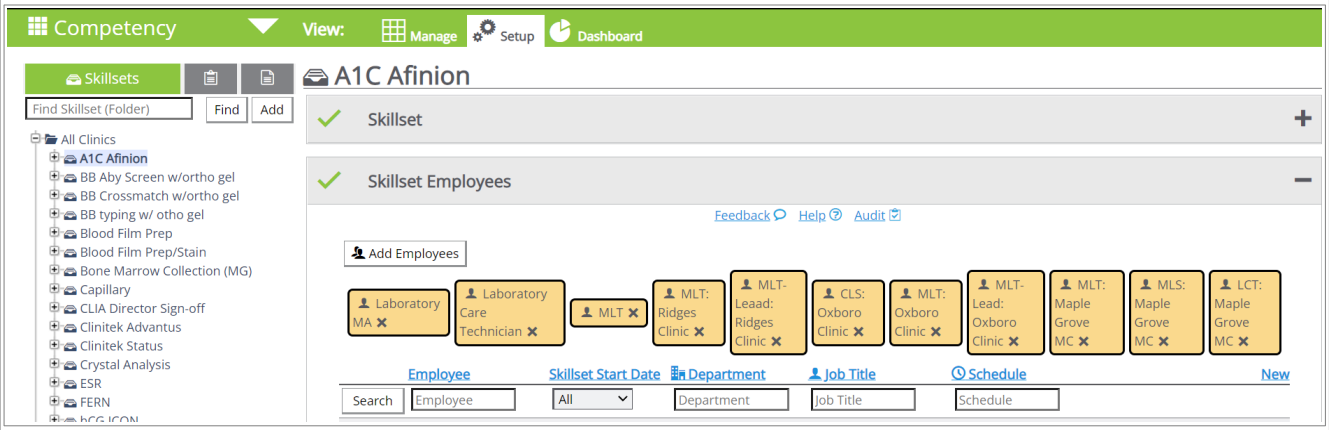

Figure 1

Departments, **Job Titles**, or **Schedules** that are set to **'Continually Add All'** will be highlighted as a **Pin** beneath the **Add Employees** button. **(Figure 2)**

Select the **X** within that **Pin** to delete it. Deleting a **Continually Add All Pin** will revoke all competency assessments that haven't been started for every employee added by the **Pin**. Employees added manually that are associated with the **Pin** will remain. However, adding the **Continually Add All** option again will restore every employee and all competency assessments back to their previous state.

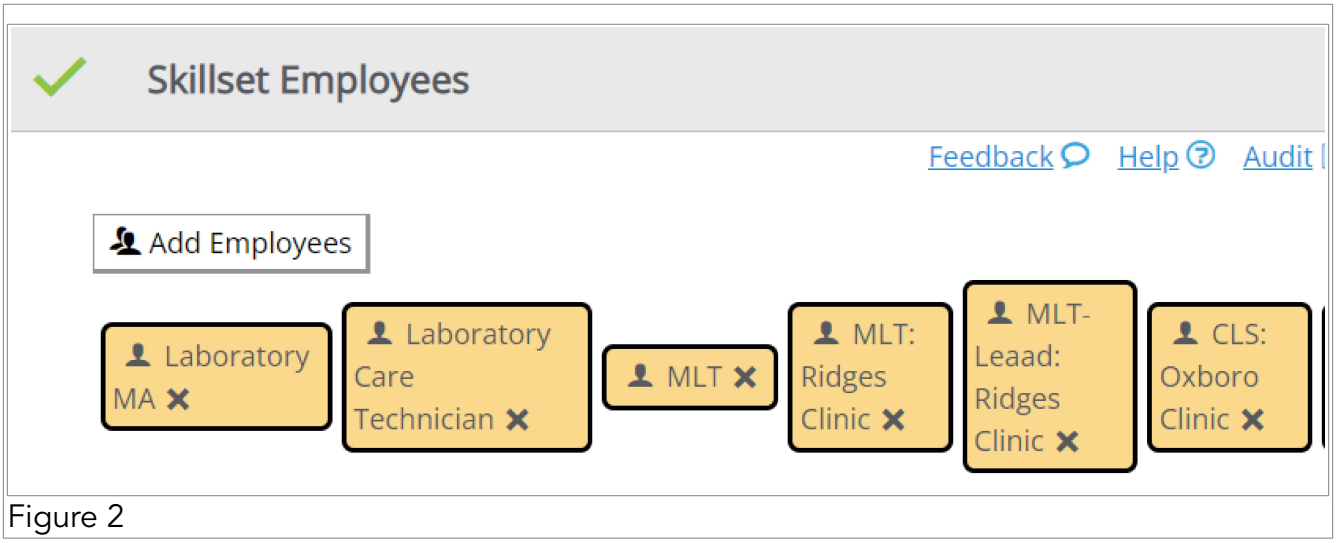

Figure 2

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Edit Skillset Employee Profile

To edit an employee's profile from the Competency module, navigate to the **Setup** tab, select a **Skillset**, and then select the **Skillset Employees** color bar to expand it. **(Yellow box, Figure 1)**

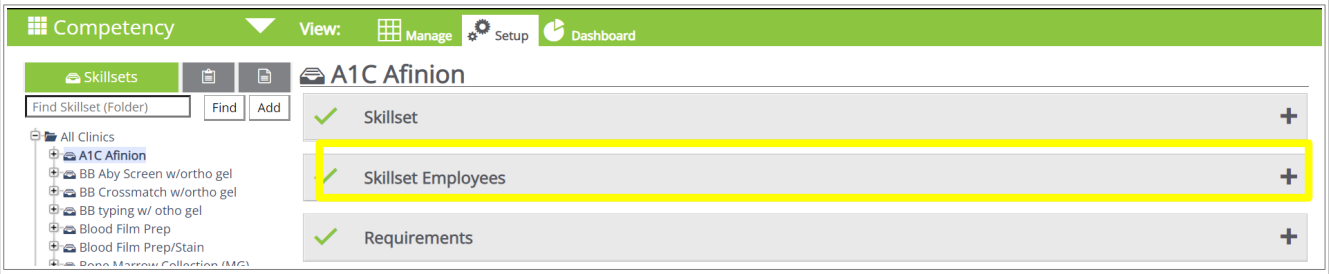

Figure 1

Select the **Employee** link **(Yellow box, Figure 2)** to open the **Edit Employee** pop-up window. (Covered on page 16)

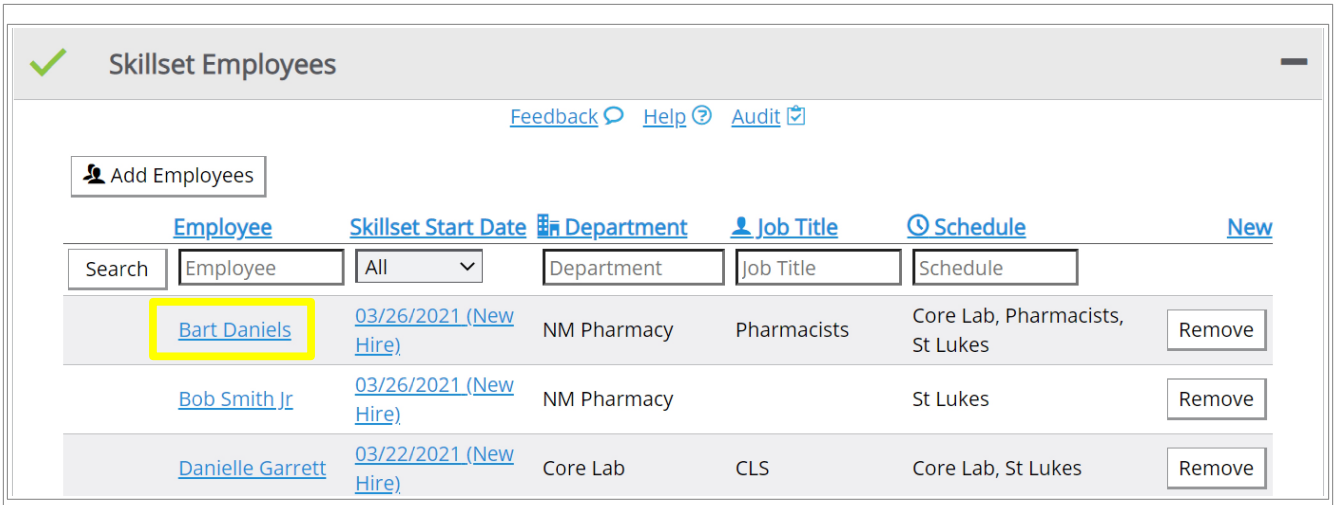

Figure 2

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Edit Employee Profile: Edit Information

The **Edit Employee Profile** window has four side tabs in which different information can be edited.

Employee Information: You can update the **Full Name**, **Hire Date**, **Employee ID**, **Login ID**, the employee password, and the date which the password must be updated by. **(Figure 1)**

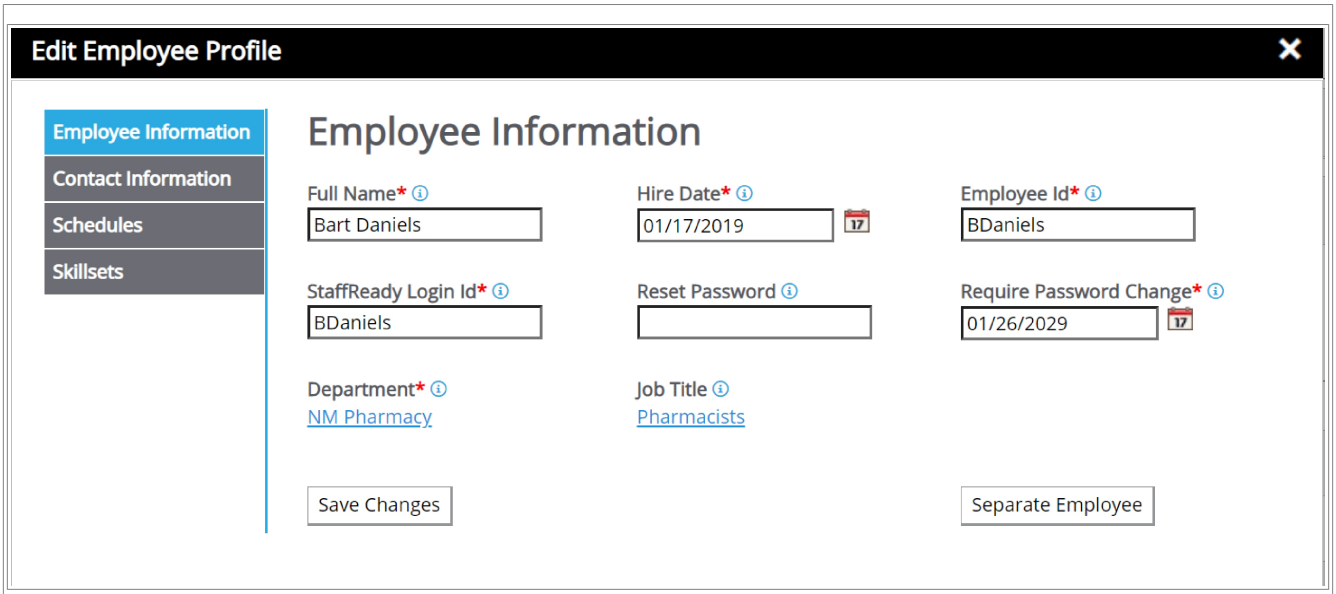

Figure 1

Contact Information: Enter in an email address and/or a phone type and phone number and then select the **Add** button to save that information. **(Figure 2)** The phone type can only be set up by an organization admin. The phone dropdown will only display the phone types that have been added.

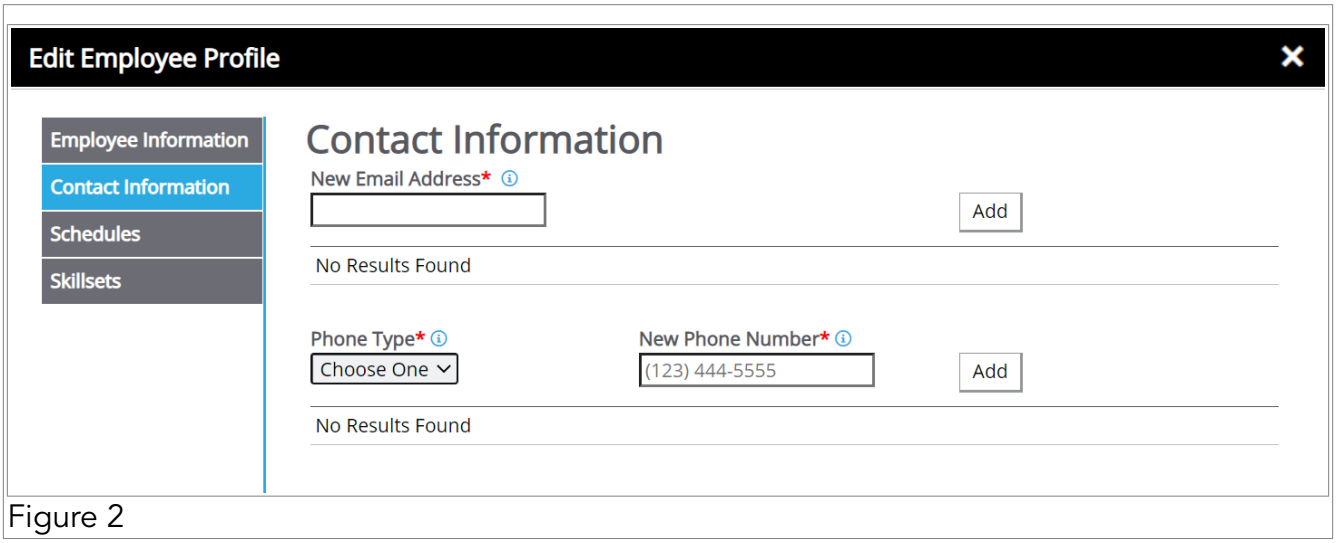

Figure 2

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Edit Employee Profile: Schedules and Skillsets

Schedules: This section will only display if you have the Scheduling Module included in your license. In this section, you can view the **Schedules** the employee is assigned to. You can also edit how their name appears on the schedule by editing the **Name on Schedule** field and then selecting the **Save Changes** button. **(Figure 1)**

Skillsets: This side tab displays a list of all **Skillsets** assigned to the **Employee**. **(Figure 2)** The **Skillsets** displayed will only be those that you manage, not all existing **Skillsets**.

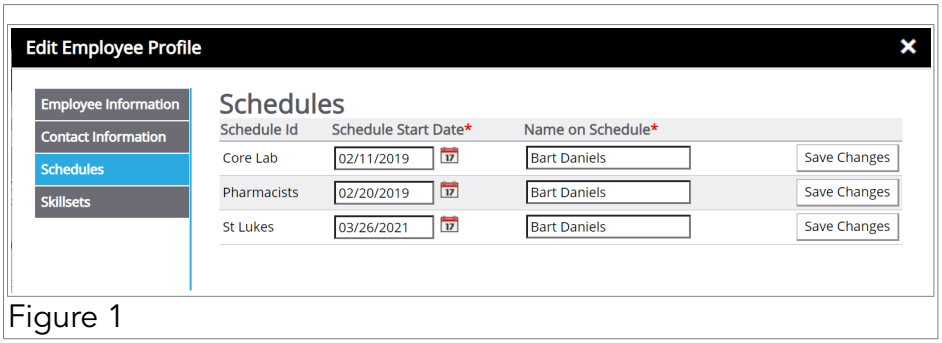

Figure 1

This includes the **Skillset ID**, the **Skillset Level ID**, and the **Skillset Start Date**.

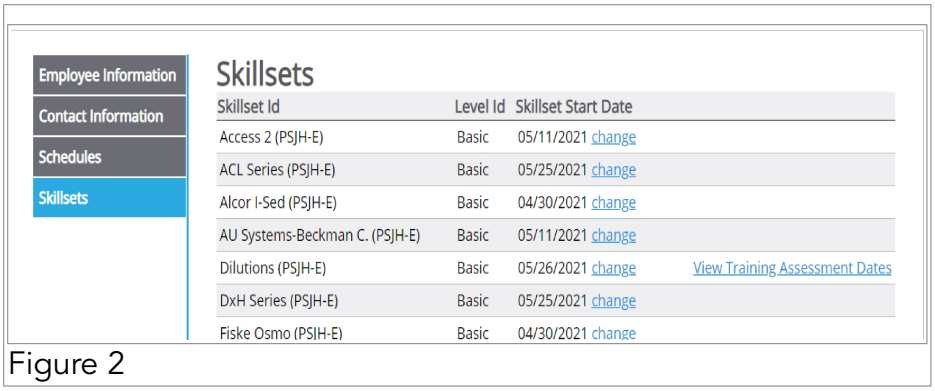

Figure 2

The **Skillset Start Date** can be modified to either today's date, to the employee's **Hire Date**, or any date you specify. **(Figure 3)**

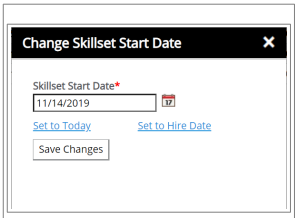

Figure 3

Occasionally, you may also see a **View Training Assessments** link. **(Yellow box, Figure 2)**

Selecting this will open the **View Training Assessment Dates** pop-up window. **(Figure 4)**

This will display the **Initial**, **Six Month**, and **One Year** training dates for **CLIA** assessments. This will only apply to **CLIA** type **Skillsets**.

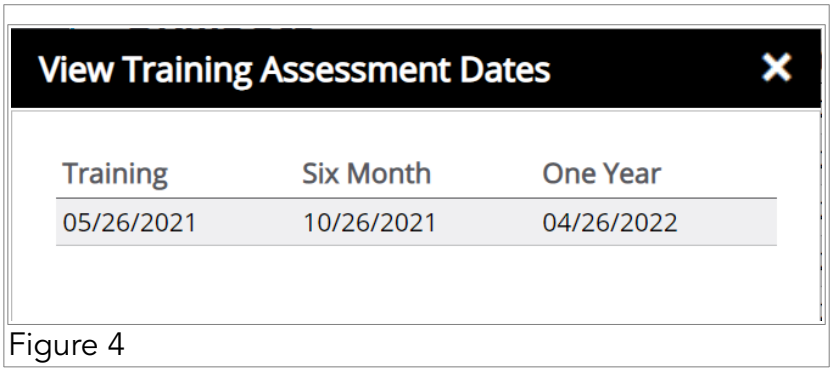

Figure 4

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Resources

This concludes the User Guide for **Skillsets and Employees**. We hope that this has given you a better understanding of this feature and how it functions within 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.

Skillset Levels	PDF Document
Skillset Messages and Managers	PDF Document
Requirements and Requirement Folders	PDF Document
Publish and Restart Assessment Periods	PDF Document

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