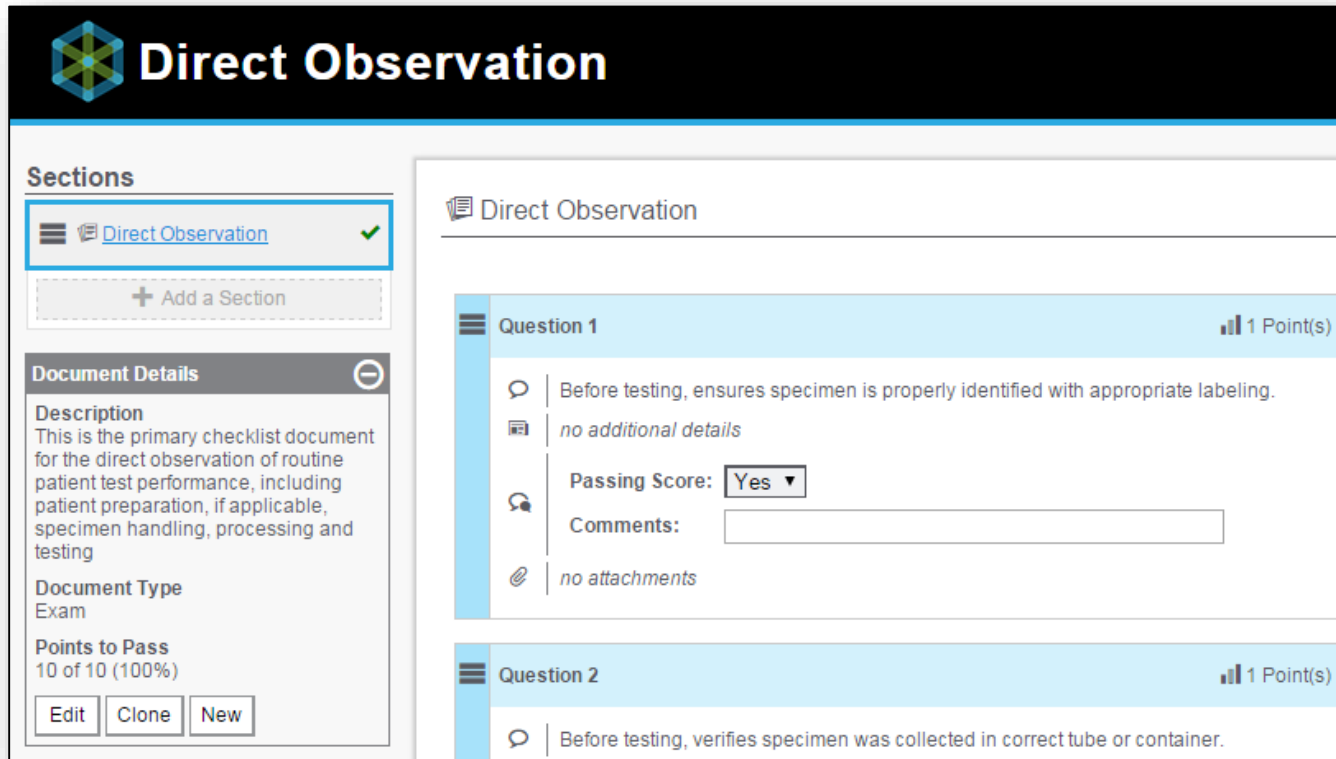


## Setup View – Competency Documents Perspective

### Build Competency Checklists

This reference guide provides an overview of the setup process for Building Competency Checklists within StaffReady. The following process steps and instructional information are provided within this document:

- **Build Competency Checklists**
- **Edit Question**
- **Copy Question**
- **Delete Question**



### Direct Observation

**Sections**

- Direct Observation ✓

+ Add a Section

**Document Details**

**Description**  
This is the primary checklist document for the direct observation of routine patient test performance, including patient preparation, if applicable, specimen handling, processing and testing

**Document Type**  
Exam

**Points to Pass**  
10 of 10 (100%)

Edit Clone New

#### Direct Observation

**Question 1** 1 Point(s)

- Before testing, ensures specimen is properly identified with appropriate labeling.
- no additional details
- Passing Score: Yes ▾
- Comments:
- no attachments

**Question 2** 1 Point(s)

- Before testing, verifies specimen was collected in correct tube or container.

# 1 | Build Competency Checklists

## Build Competency Checklists

1. Select **Competency Documents** perspective.

2. Select **Competency Document**.

The screenshot displays the StaffReady web application interface. At the top, there is a search bar and navigation tabs for 'Competency', 'Manage', 'Setup', 'Dashboard', and 'Department'. The 'Competency' tab is active, and a dropdown menu shows 'Competency Documents'. Below this, a tree view lists various competency documents under 'Core Lab Competency Documents', including 'Direct Observation', 'Monitoring Test Results', 'Performance of Maintenance', 'Problem Solving', 'Proficiency Testing', and 'Record Review'. The 'Direct Observation' document is selected, and its details are shown on the right. The details include a 'Document' header with a green checkmark, buttons for 'New Document', 'Edit Document', 'Move Document', and 'Delete Document', and fields for 'Document Id' (Direct Observation), 'Document Name' (Direct Observation), and 'Type' (Exam). A link for 'Edit Document Contents' is also present.

3. Click [Edit Document Contents](#).

**Direct Observation**

✓ Document

New Document Edit Document Move Document Delete Document

Document Id	Document Name	Document Preview
Direct Observation ✎	Direct Observation ✎	<a href="#">Edit Document Contents</a>
Type		
Exam ✎		

4. Click **Add a Question**.

The screenshot displays the 'Direct Observation' interface. On the left, a sidebar contains a 'Sections' list with 'Direct Observation' selected and a '+ Add a Section' button. Below this is a 'Document Details' section with a minus sign icon, containing fields for 'Description', 'Document Type' (Exam), and 'Points to Pass' (0 of 0 (100%)). At the bottom of the sidebar are 'Edit', 'Clone', and 'New' buttons. The main content area on the right shows a header 'Direct Observation' and a large dashed box containing an orange arrow pointing to a '+ Add a Question' button.

5. Select **Observation w/ N/A...** for **Question Type**.

6. Enter **Question**.

7. Leave **This question is required...** checked if required.

**Note:** Check **Include Method** if you require this to be documented and will be utilizing observation methods other than direct observation.

**New Question** [X]

**Question**

Question

Question Type ⓘ

Observation w/ N/A: Awards points for a Yes and a N/A answer

Question\* ⓘ

Before testing, ensures specimen is properly identified with appropriate labeling.

**Answer Configuration** ⓘ

Include Method of Observation

This question is required to be answered

8. Enter **Points Possible**.

9. Click [Attach a File or Website](#) or select **Choose File** to attach SOPs, URLs, or .jpg images.

10. Click **Save Changes**.

The screenshot shows a form with the following elements:

- Points Possible\*** with a value of **1** in a text input field.
- Attachment** section with a link [Attach a File or Website...](#).
- Image** section with a sub-section **Image to Upload** containing a **Choose File** button and the text "No file chosen".
- A **Save Changes** button at the bottom.

Four orange arrows point from the instructions on the left to these specific elements in the form.

## 2 | Edit Questions

### Edit Questions

1. Click [Edit](#).

Direct Observation Edit

**Question 1** Edit Copy Delete

*Before testing, ensures specimen is properly identified with appropriate labeling.*

*no additional details*

Passing Score: Yes

Comments:

*no attachments*

### 3 | Copy Questions

#### Copy Questions

1. Click [Copy](#).

Direct Observation Edit

**Question 1** 1 Point(s) Copy Delete

*Before testing, ensures specimen is properly identified with appropriate labeling.*

*no additional details*

Passing Score:

Comments:

*no attachments*

# 4 | Delete Questions

## Delete Questions

1. Click [Delete](#).

The screenshot shows a user interface for editing a question. At the top, it says 'Direct Observation' with an 'Edit' button. Below that, a blue header bar contains 'Question 1', '1 Point(s)', an 'Edit' icon, and a 'Delete' button with a blue 'X' icon. An orange arrow points to the 'Delete' button. The main content area includes a speech bubble icon with the text 'Before testing, ensures specimen is properly identified with appropriate labeling.', a document icon with 'no additional details', a 'Passing Score: Yes' dropdown menu, a 'Comments:' text input field, and a paperclip icon with 'no attachments'.