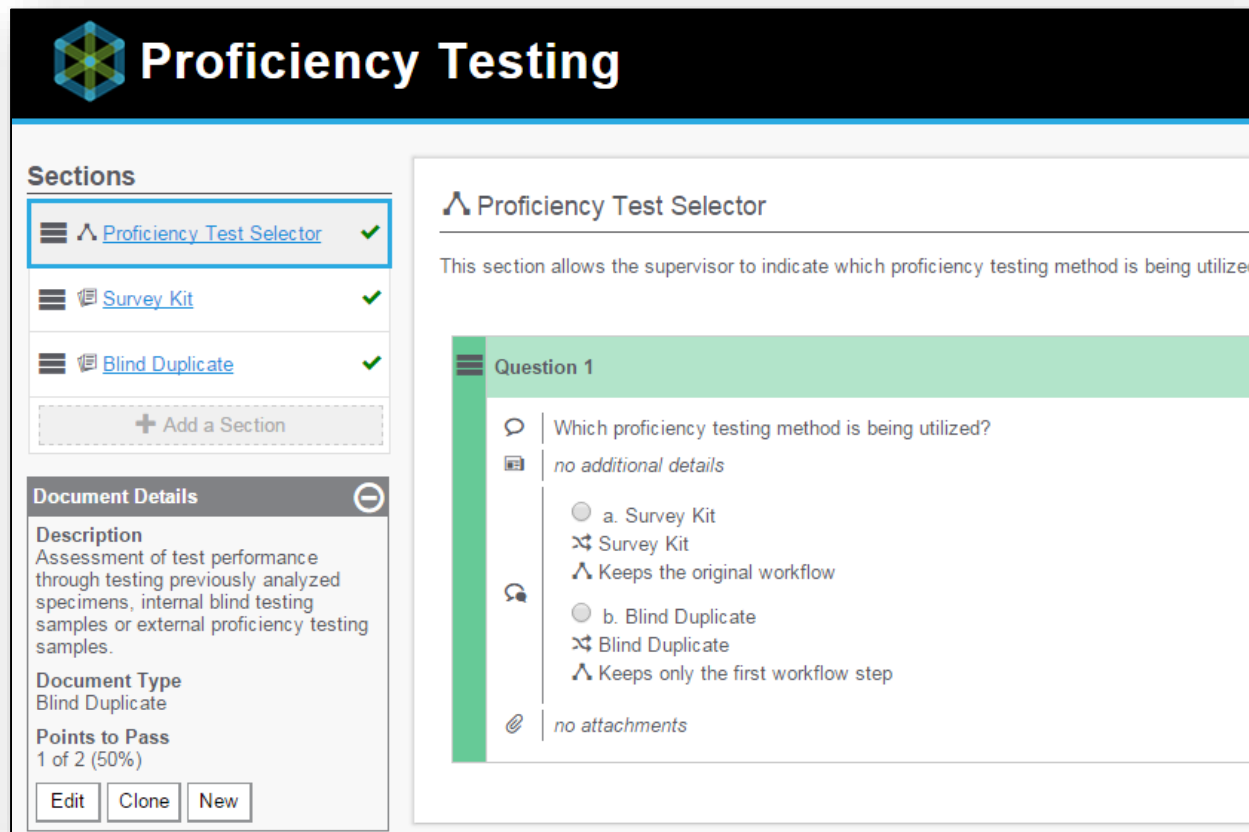


Setup View – Competency Documents Perspective

Build Proficiency Tests

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

- **Build Proficiency Tests**



The screenshot displays the 'Proficiency Testing' interface. On the left, there is a sidebar with two main sections: 'Sections' and 'Document Details'. The 'Sections' section lists three items: 'Proficiency Test Selector' (checked), 'Survey Kit' (checked), and 'Blind Duplicate' (checked), with an 'Add a Section' button below. The 'Document Details' section shows the 'Description' (Assessment of test performance through testing previously analyzed specimens, internal blind testing samples or external proficiency testing samples), 'Document Type' (Blind Duplicate), and 'Points to Pass' (1 of 2 (50%)). At the bottom of the sidebar are 'Edit', 'Clone', and 'New' buttons.

The main content area is titled 'Proficiency Test Selector' and includes a description: 'This section allows the supervisor to indicate which proficiency testing method is being utilized.' Below this, 'Question 1' is displayed with the text 'Which proficiency testing method is being utilized?'. It features two radio button options: 'a. Survey Kit' and 'b. Blind Duplicate'. Each option has a 'Survey Kit' or 'Blind Duplicate' icon and a description: 'Keeps the original workflow' for Survey Kit and 'Keeps only the first workflow step' for Blind Duplicate. There are also icons for 'no additional details' and 'no attachments'.

1 | Build Proficiency Tests

Build Proficiency Tests

1. Select **Competency Documents** perspective.

2. Select **Competency Document**.

3. Click **New Document**.

4. Enter **Document Id.**

5. Enter **Document Name.**

6. Select **Blind Duplicate** for **Document Type.**

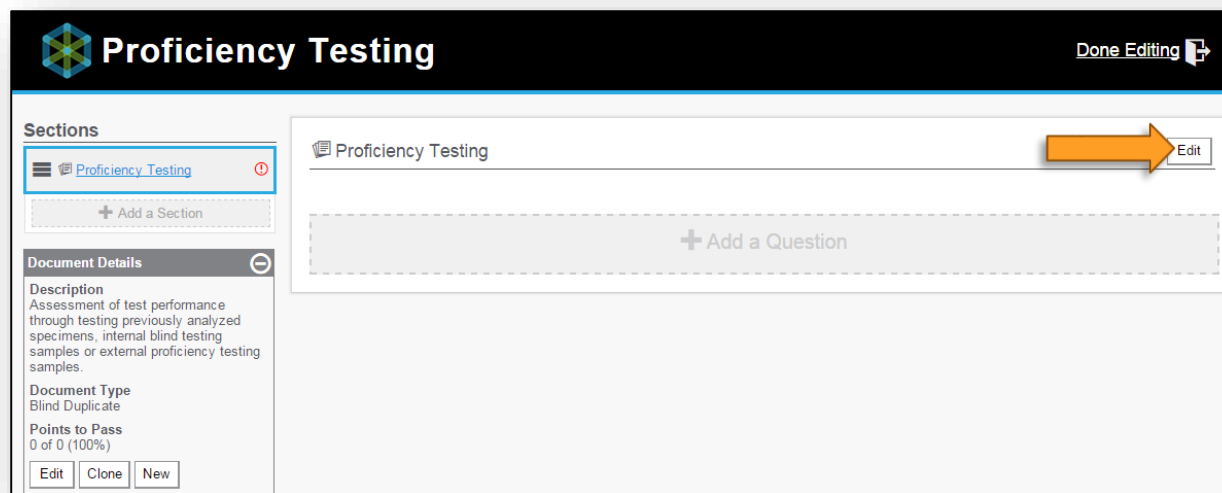
7. Enter **Description.**

8. Click **Save Changes.**

9. Select **Proficiency Testing** competency document from **Competency Documents** tree.

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

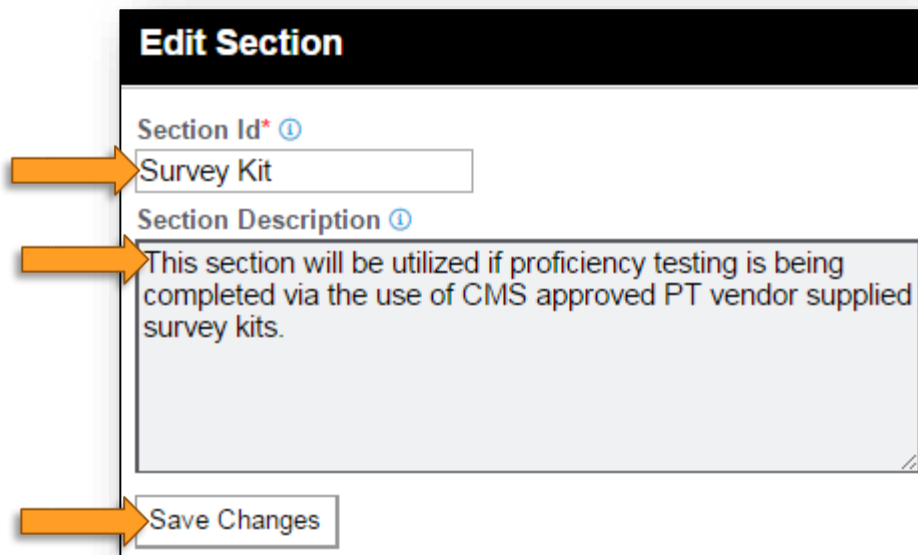
11. Click **Edit**.



12. Enter **Section Id**.

13. Enter **Section Description**.

14. Click **Save Changes**.



15. Click **Add a Question**.

The screenshot displays the 'Proficiency Testing' interface. At the top, there is a header with the StaffReady logo and the text 'Proficiency Testing' on the left, and a 'Done Editing' button with an external link icon on the right. Below the header, the interface is divided into two main sections. On the left, there is a sidebar with a 'Sections' section containing a 'Survey Kit' item and an '+ Add a Section' button, and a 'Document Details' section with a minus sign icon and a description: 'Assessment of test performance through testing previously analyzed'. The main content area on the right shows the 'Survey Kit' title and a description: 'This section will be utilized if proficiency testing is being completed via the use of CMS approval'. At the bottom of this main area, there is a dashed-line box containing a grey '+ Add a Question' button, which is highlighted by a large orange arrow pointing to it from the left.

16. Select **Question Type**.

17. Enter **Question**.

18. Click **Save Changes**.

Note: Add questions for each piece of information needing to be collected for a PT survey event, such as:

- Survey Kit Id?
- Survey Kit Vendor?
- Date Survey Completed?
- Was PT test completed successfully by operator/technologist?

New Question

Question

Question

Question Type ⓘ
Small Text Field: Fill in the blank

Question* ⓘ
Enter Survey Kit Id Number:

[Add More Detail](#)

Answer Configuration ⓘ

This question is required to be answered

Attachment ⓘ

[Attach a File or Website...](#)

Image

Image to Upload ⓘ
Choose File No file chosen

Save Changes

19. Click **Add a Section**.

Note: Examples of **Survey Kit** questions are shown in image to the right, such as:

- Survey Kit Id?
- Date Survey Completed?
- Was PT test completed successfully?

The screenshot displays a software interface for managing survey sections and questions. On the left, a sidebar titled 'Sections' contains a 'Survey Kit' entry with a green checkmark and a dashed 'Add a Section' button, which is highlighted by an orange arrow. Below this are sections for 'Document Details' (including Description, Document Type, and Points to Pass) and a 'Question Navigator'. The main content area on the right shows three questions:

- Question 1:** 'Enter Survey Kit Id Number.' with a text input field and 'no attachments'.
- Question 2:** 'Date Survey Completed?' with a date picker (showing 17) and 'no attachments'.
- Question 3:** 'Was PT test completed successfully?' with radio button options 'a. Yes' and 'b. No', and an 'ANSWER: a. Yes'.

20. Select **Question Set: A section that holds a series of questions** for **Section Type**.

21. Enter **Section Id**.

22. Enter **Section Description**.

23. Click **Save Changes**.

24. Click [Blind Duplicate](#).

New Section

Section Type* ⓘ
Question Set: A section that holds a series of questions

Section Id* ⓘ
Blind Duplicate

Section Description ⓘ
This section will be utilized if proficiency testing is being completed via Blind Duplicate test.

Save Changes

Proficiency Testing

Sections

- Survey Kit ✓
- Blind Duplicate ⓘ

+ Add a Section

Survey Kit

This section will be utilized if proficiency testing is

Question 1

25. Click **Add a Question**.

The screenshot displays the 'Proficiency Testing' interface. On the left, a sidebar contains a 'Sections' list with 'Survey Kit' (checked) and 'Blind Duplicate' (selected with a blue border and a red warning icon). Below the list is a '+ Add a Section' button. At the bottom of the sidebar is a 'Document Details' section with a minus icon. The main content area shows the 'Blind Duplicate' section details, including a description: 'This section will be utilized if proficiency testing is being completed via Blind Duplicate test.' At the bottom of this area, a dashed box contains a '+ Add a Question' button, which is highlighted by a large orange arrow pointing to it.

26. Select **Validated Numeric** for **Question Type**.

27. Enter **Question**.

28. Click **Save Changes**.

New Question [X]

Question

Question

Question Type ⓘ
Validated Numeric: Used to track deviation in a blind duplicate samples

Question* ⓘ
Please fill in the following information:

[Add More Detail](#)

Answer Configuration ⓘ

This question is required to be answered

Points Possible* ⓘ
1

Attachment ⓘ

[Attach a File or Website...](#)

Image

Image to Upload ⓘ
Choose File No file chosen

Save Changes

29. Click **Add a Section**.

The screenshot displays the 'Proficiency Testing' interface. At the top, there is a header with a logo and the title 'Proficiency Testing'. Below the header, the interface is divided into several sections:

- Sections:** A list of sections is shown. The 'Blind Duplicate' section is highlighted with a blue border and a checkmark. Below the list is a button labeled '+ Add a Section'.
- Document Details:** A section with a minus sign icon, containing:
 - Description:** Assessment of test performance through testing previously analyzed specimens, internal blind testing samples or external proficiency testing samples.
 - Document Type:** Blind Duplicate
- Blind Duplicate:** A section with a plus sign icon and the title 'Blind Duplicate'. Below the title, there is a text area stating: 'This section will be utilized if proficiency testing is being completed via'. Below this, there is a section titled 'Question 1' with a plus sign icon, containing:
 - Initial Value:**
 - Allowable Tolerance %:**

30. Select **Workflow Modifier** for **Section Type**.

31. Enter **Section Id**.

32. Enter **Section Description**.

33. Enter **Question**.

34. Enter **Answer Options**.

35. Select **Question Set** route.

Note: This will take the supervisor to the correct proficiency test option based on their answer.

36. Click **Include a letter before each choice** checkbox.

37. Click **Save Changes**.

New Section ✕

Section Type* ⓘ
Workflow Modifier: Choosing one answer can adjust the workflow to single step ▾

Section Id* ⓘ
Proficiency Test Selector

Section Description ⓘ
This section allows the supervisor to indicate which proficiency testing method is being utilized.

Question* ⓘ
Which proficiency testing method is being utilized?

[Add More Detail](#)

🔄 Answer Configuration

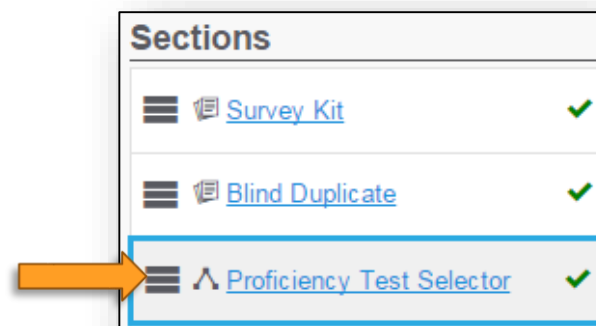
Answer Option*	Question Set*	Action
Survey Kit	Survey Kit ▾	Keep original workflow
Blind Duplicate	Blind Duplicate ▾	Keep first workflow step

Include a letter before each choice (e.g. a. choice, b. choice, c. choice, etc.)

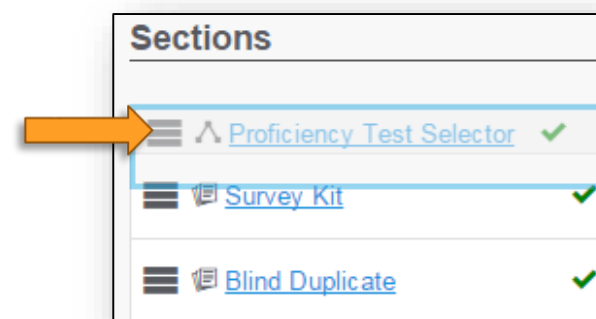
📎 Attachment

[Attach a File or Website...](#)

38. Click  handle icon.



39. Drag  handle icon.



40. Drop  handle icon.

