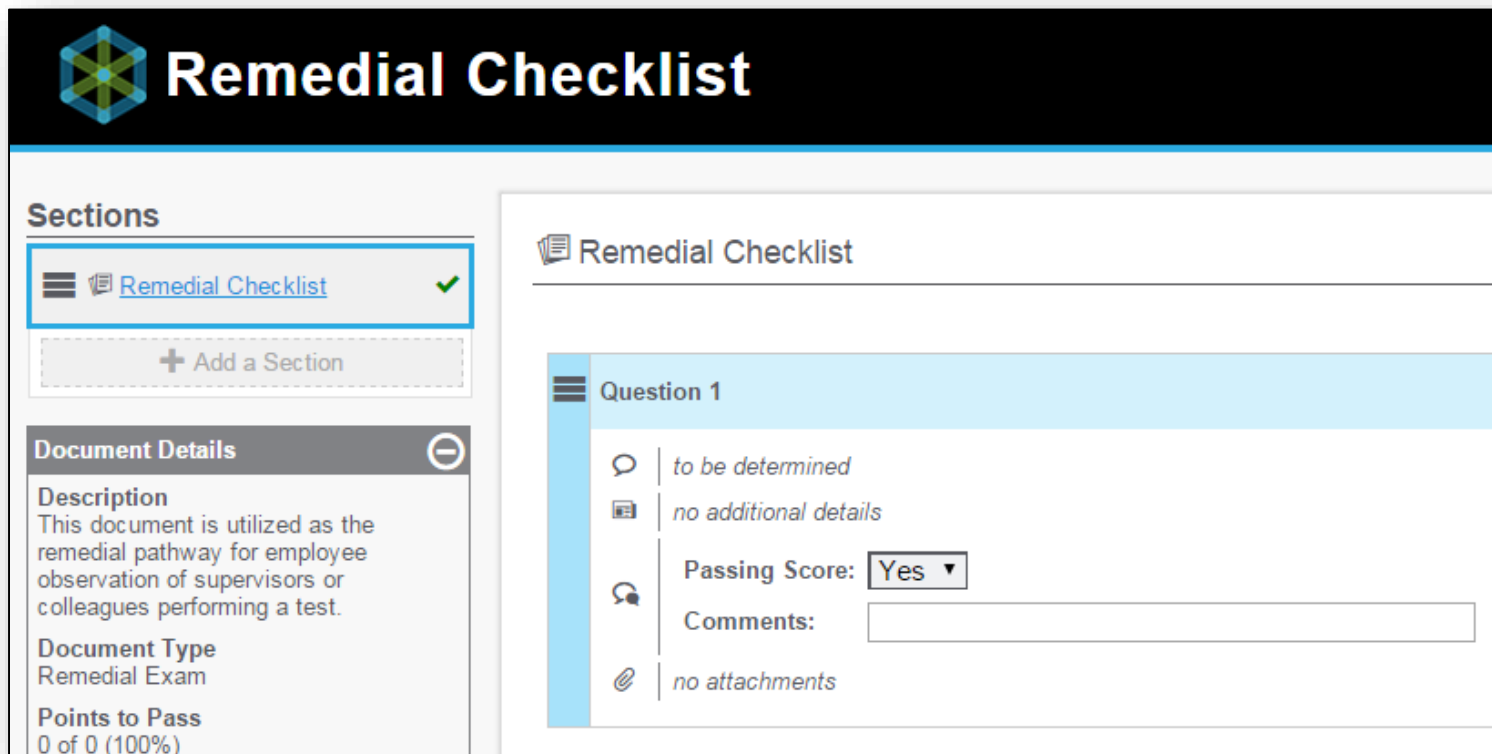


## Setup View – Competency Documents Perspective

### Build Remedial Documents

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 Remedial Observation
- Build Remedial Document Review



The screenshot displays the 'Remedial Checklist' setup interface. The main header is 'Remedial Checklist'. On the left, there is a 'Sections' panel with a list containing 'Remedial Checklist' (checked) and an 'Add a Section' button. Below this is a 'Document Details' panel with the following information:

- Description:** This document is utilized as the remedial pathway for employee observation of supervisors or colleagues performing a test.
- Document Type:** Remedial Exam
- Points to Pass:** 0 of 0 (100%)

The main content area shows a 'Remedial Checklist' with a single question, 'Question 1', which is currently expanded. The question details are:

- to be determined** (indicated by a speech bubble icon)
- no additional details** (indicated by a document icon)
- Passing Score:** Yes (dropdown menu)
- Comments:** (text input field)
- no attachments** (indicated by a paperclip icon)

# 1 | Build Remedial Observation

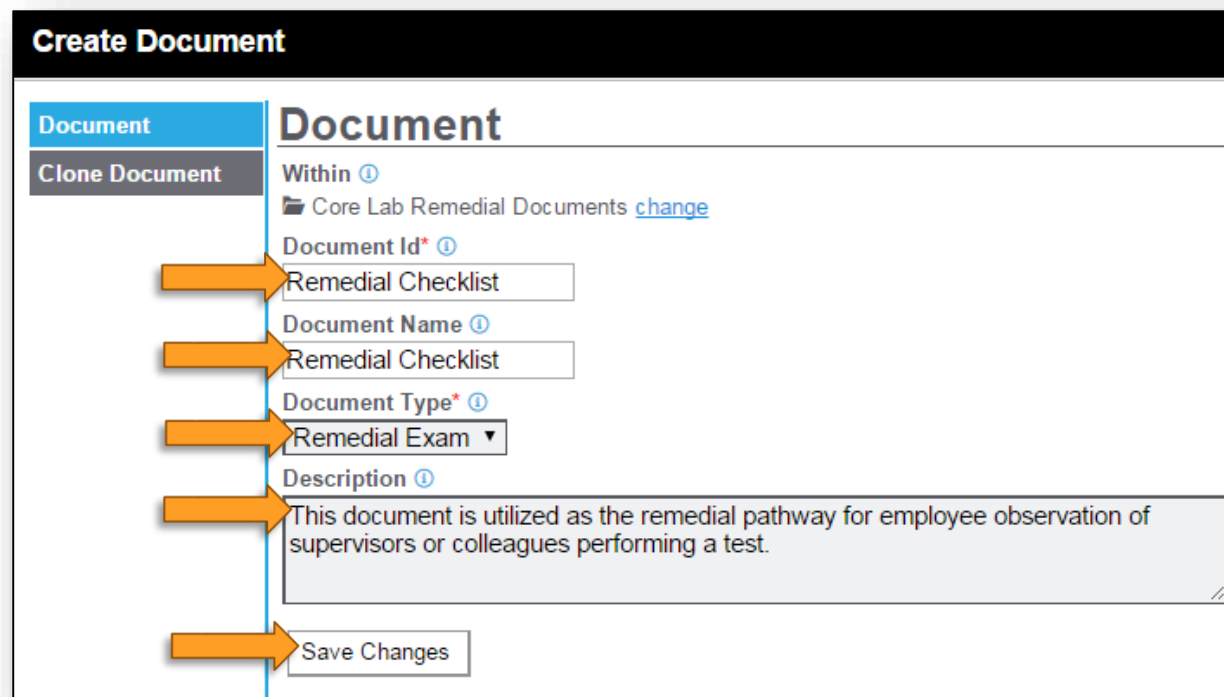
Remedial observation documents can be utilized as remedial pathways for employee observation of supervisors or colleagues performing a test.

## Build Remedial Observation

- 1. Select **Competency Documents** perspective.
- 2. Select **Competency Document Folder**.
- 3. Click [New](#).

The screenshot shows the StaffReady web application interface. At the top, there is a search bar and the user name 'Barbara Dodd'. Below this is a navigation bar with tabs for 'Competency', 'Manage', 'Setup', 'Dashboard', and 'Department'. The 'Competency' tab is active, and a dropdown menu is open showing a list of folders: 'Core Lab Competency Documents', 'Core Lab Remedial Documents', 'Nursing Competency Documents', 'Pharmacy Competency Documents', and 'POCT Documents'. The 'Core Lab Remedial Documents' folder is selected. To the right, the 'Core Lab Remedial Documents' folder configuration page is displayed, showing a 'Document Folder' header with 'Feedback', 'Help', and 'Audit' links. Below this are buttons for 'New Folder', 'Edit Folder', 'Move Folder', and 'Delete Folder'. The 'Folder Name' field contains 'Core Lab Remedial Documents' and the 'Within' field contains 'Documents (Root)'. There is a 'Sub Folders' section with a 'Sub Folder Id' field and a 'New' link. At the bottom, there is a 'Documents' section with a table header: 'Document Id', 'Document Name', 'Type', 'Description', and a 'New' link. An orange arrow points to the 'New' link in the 'Documents' section.

4. Enter **Document Id**.
5. Enter **Document Name**.
6. Select **Remedial Exam** for **Document Type**.
7. Enter **Description**.
8. Click **Save Changes**.



**Create Document**

**Document**

**Clone Document**

Within ⓘ  
Core Lab Remedial Documents [change](#)

Document Id\* ⓘ  
Remedial Checklist

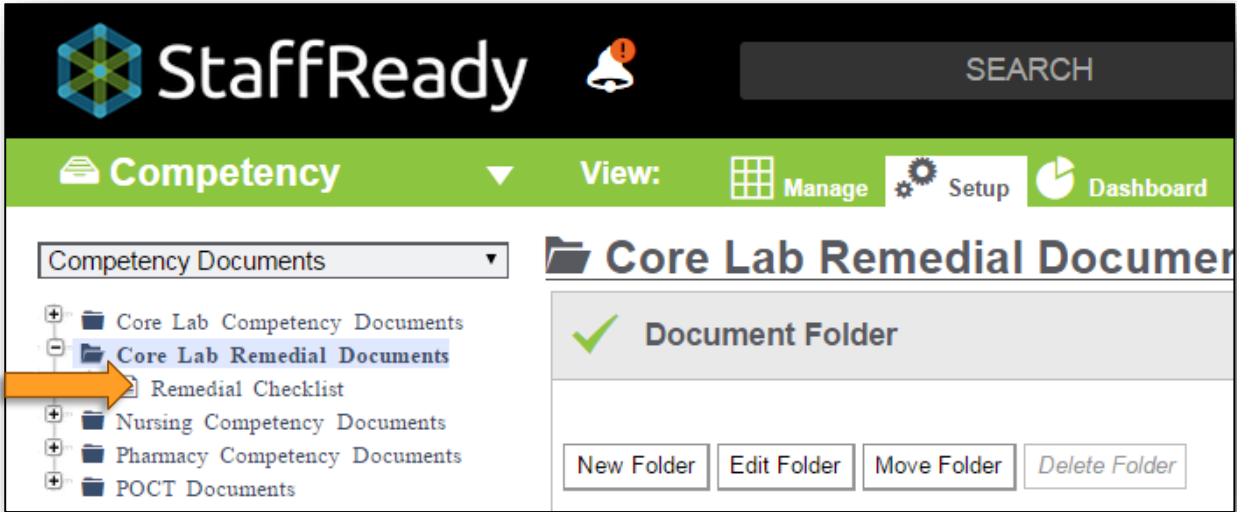
Document Name ⓘ  
Remedial Checklist

Document Type\* ⓘ  
Remedial Exam ▼

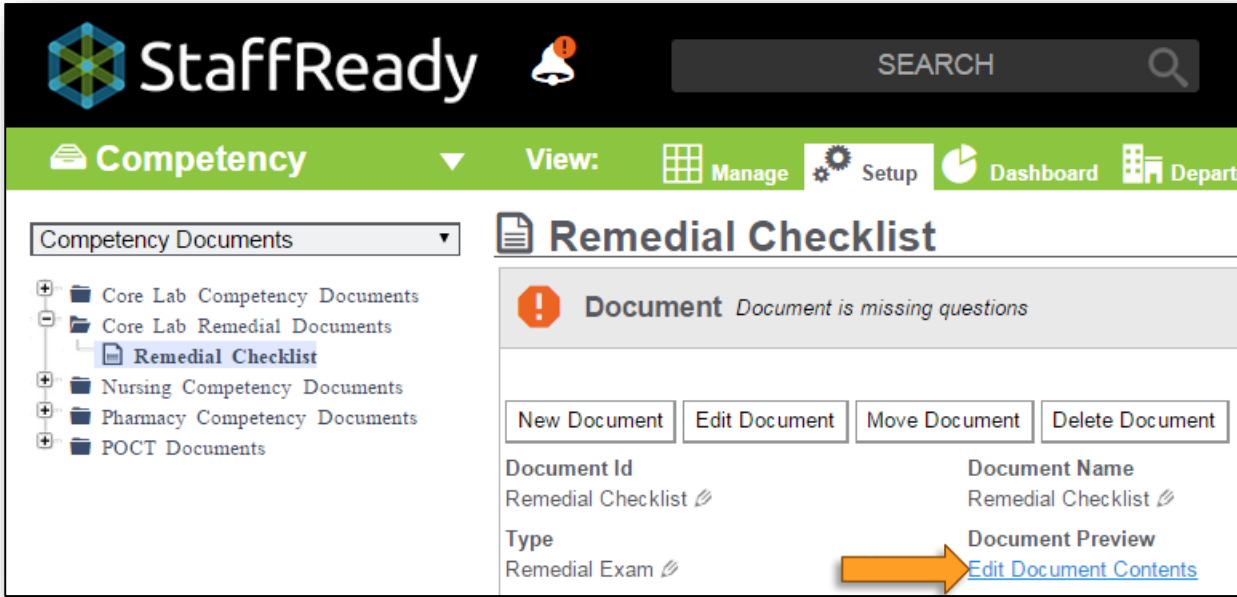
Description ⓘ  
This document is utilized as the remedial pathway for employee observation of supervisors or colleagues performing a test.

Save Changes

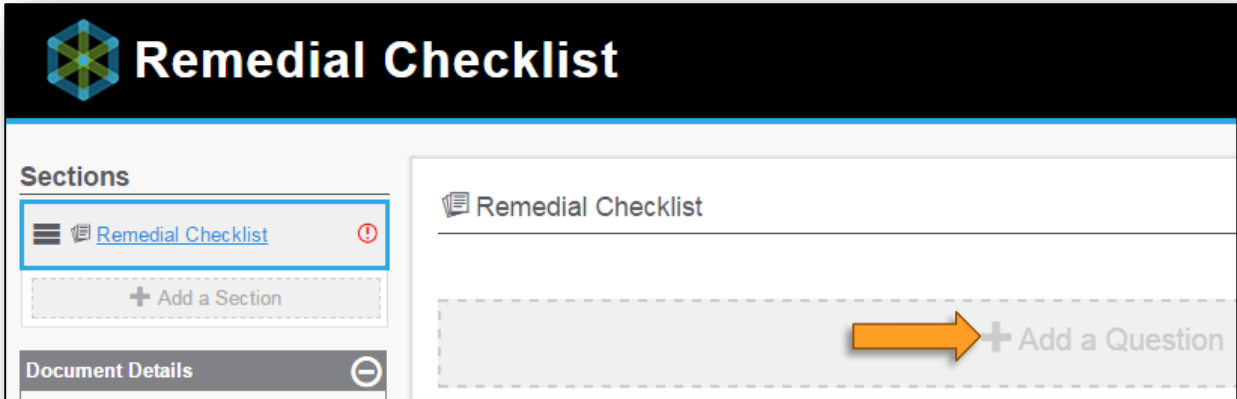
9. Select **Remedial Checklist** document from **Competency Document Folder** tree.



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

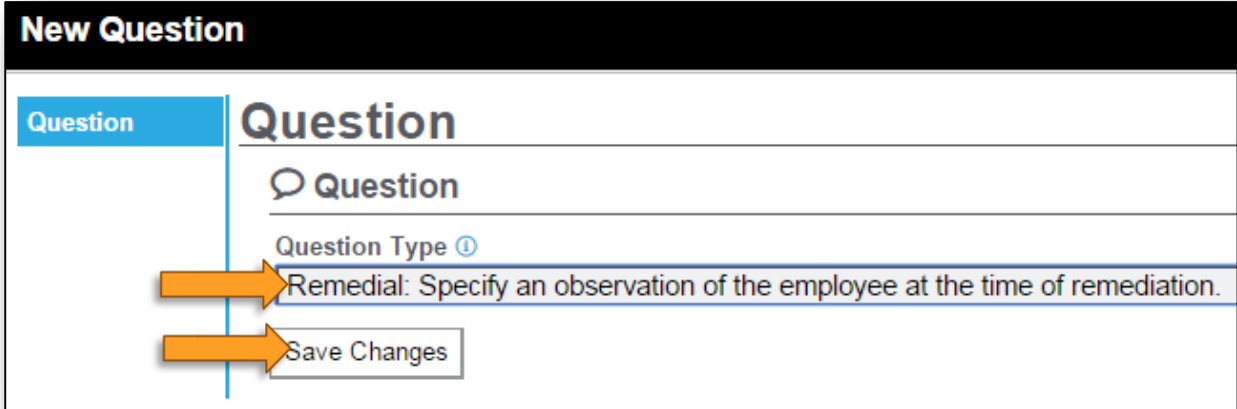


11. Click **Add a Question**.



12. Select **Remedial: Specify an observation...** for Question Type.

13. Click **Save Changes**.



## 2 | Build Remedial Document Review

Remedial document review documents can be utilized as remedial pathways for employees to read an SOP or policy.

### Build Remedial Document Review

- 1. Select **Competency Documents** perspective.
- 2. Select **Competency Document Folder**.
- 3. Click [New](#).

The screenshot displays the StaffReady web application interface. At the top, there is a search bar and the user name 'Barbara Dodd'. Below this is a navigation bar with tabs for 'Competency', 'Manage', 'Setup', 'Dashboard', and 'Department'. The 'Competency' tab is active, and a dropdown menu is open, showing a list of folders: 'Core Lab Competency Documents', 'Core Lab Remedial Documents', 'Nursing Competency Documents', 'Pharmacy Competency Documents', and 'POCT Documents'. The 'Core Lab Remedial Documents' folder is selected. The main content area shows the details for this folder, including a 'Document Folder' header, action buttons (New Folder, Edit Folder, Move Folder, Delete Folder), and a table for 'Documents'. The table has columns for 'Document Id', 'Document Name', 'Type', and 'Description'. A 'New' button is located at the end of the table, highlighted by an orange arrow.

- 4. Enter **Document Id**.
- 5. Enter **Document Name**.
- 6. Select **Remedial Exam** for **Document Type**.
- 7. Enter **Description**.
- 8. Click **Save Changes**.

**Create Document**

**Document**

Document

Within ⓘ

Core Lab Remedial Documents [change](#)

Document Id\* ⓘ

Remedial Document Revi

Document Name ⓘ

Remedial Document Revi

Document Type\* ⓘ

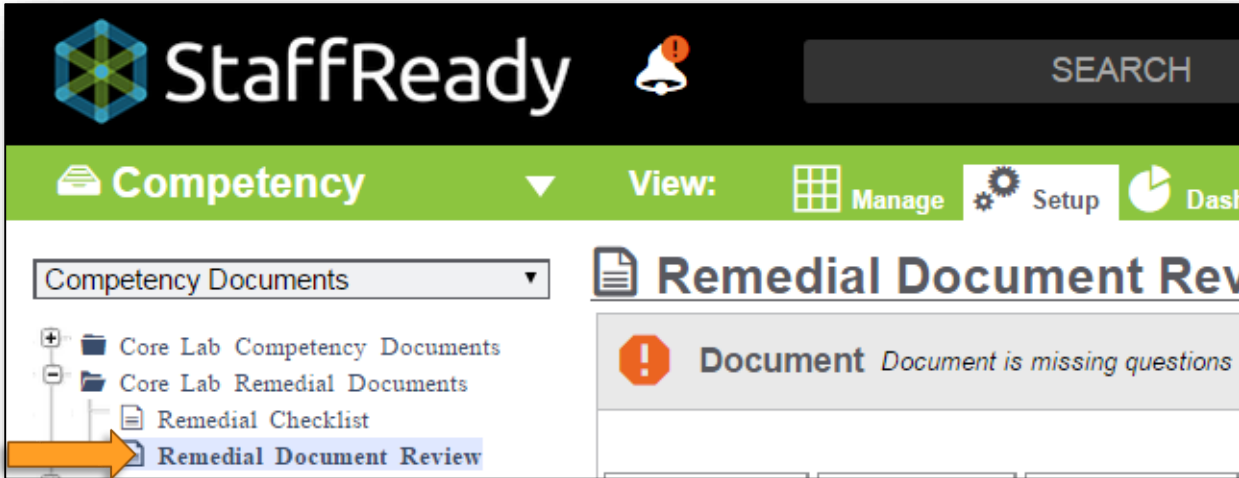
Remedial Exam ▼

Description ⓘ

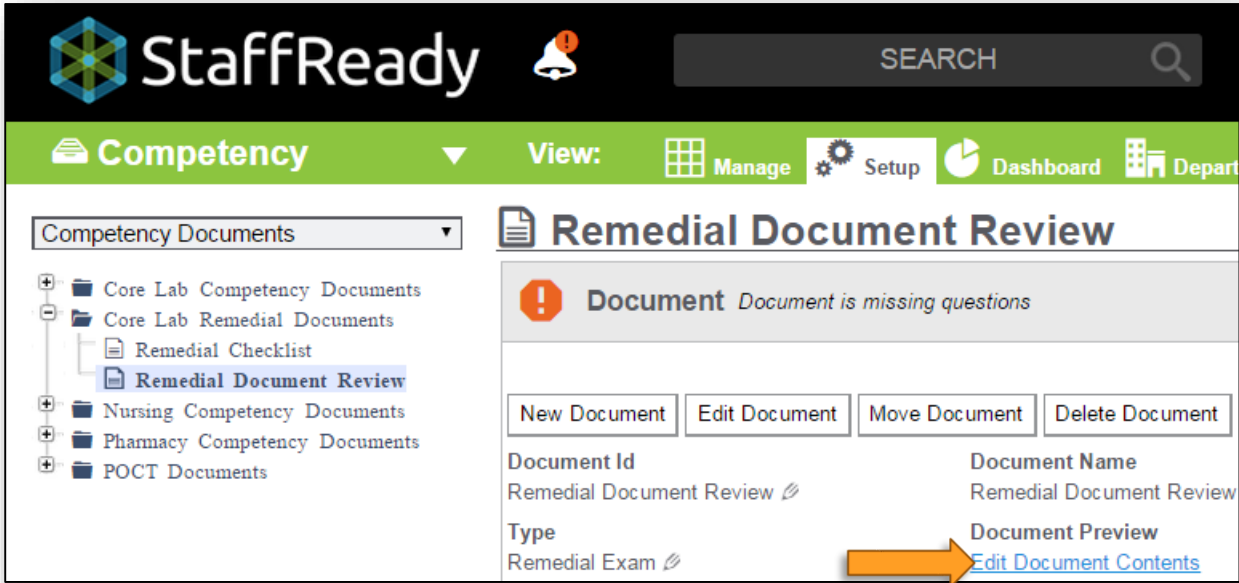
This document is utilized as the remedial pathway for employees to read an SOP or policy.

Save Changes

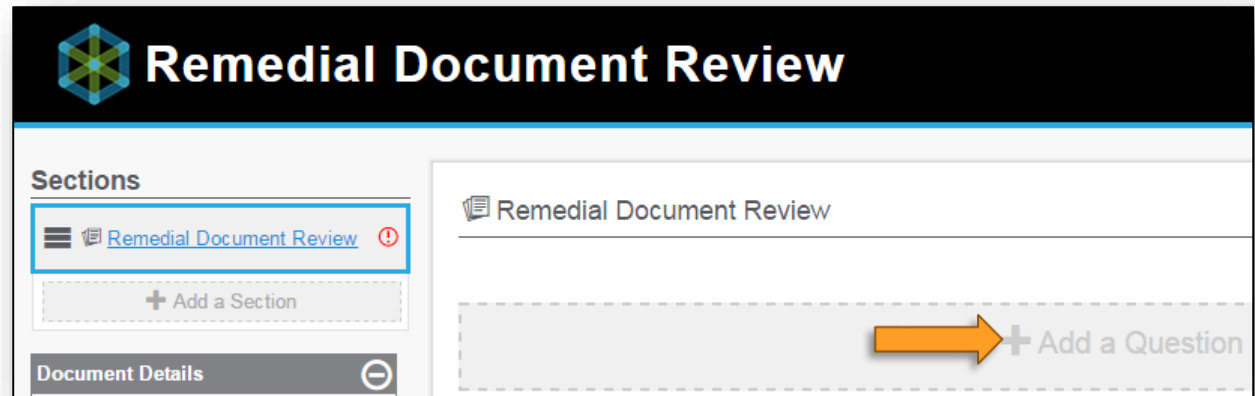
9. Select **Remedial Checklist** document from **Competency Document Folder** tree.



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



11. Click **Add a Question**.



12. Select **Remedial: Specify a document...** for Question Type.

13. Click **Save Changes**.

