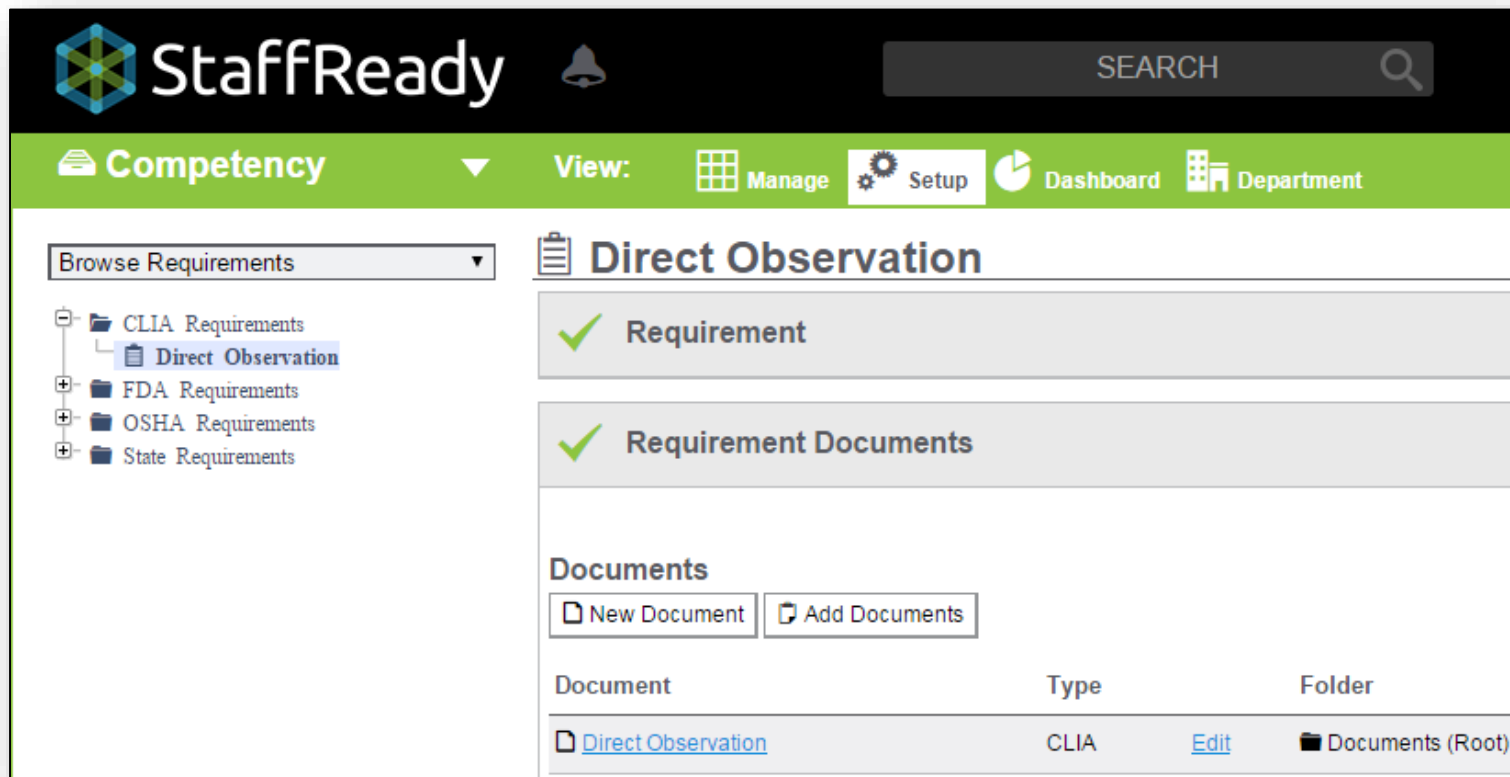


Setup View – Browse Requirements Perspective

Create Requirement (Competency) Documents

This reference guide provides an overview of the process for Creating Requirement (Competency) Documents within StaffReady. The following process steps and instructional information are provided within this document:

- **Create Requirement (Competency) Documents**
- **Clone Requirement (Competency) Document**



The screenshot displays the StaffReady web application interface. At the top, there is a navigation bar with the StaffReady logo, a search bar, and a notification bell. Below the navigation bar, there is a green header with the word "Competency" and a dropdown arrow. To the right of "Competency" are icons for "View:", "Manage", "Setup", "Dashboard", and "Department".

The main content area is divided into two sections. On the left, there is a "Browse Requirements" dropdown menu with a tree view showing folders for "CLIA Requirements", "FDA Requirements", "OSHA Requirements", and "State Requirements". The "Direct Observation" folder under "CLIA Requirements" is selected and highlighted in blue.

On the right, the "Direct Observation" section is active. It features a green checkmark icon and the text "Requirement". Below this, there is another green checkmark icon and the text "Requirement Documents".

Under "Requirement Documents", there is a "Documents" section with two buttons: "New Document" and "Add Documents".

Below the buttons is a table with the following columns: "Document", "Type", and "Folder".

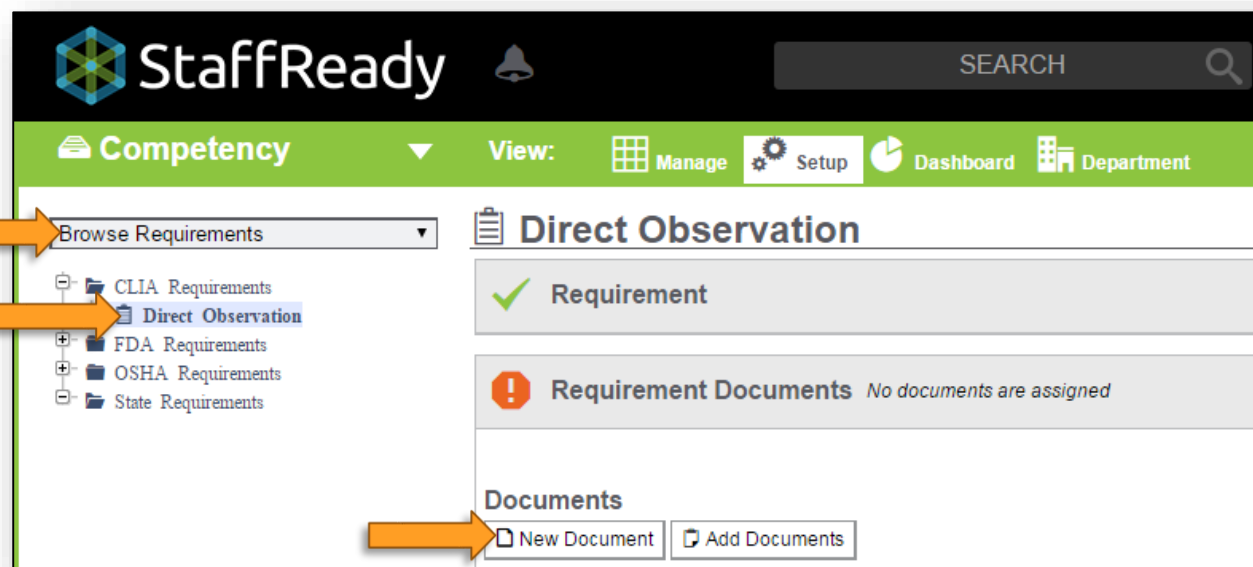
Document	Type	Folder
Direct Observation	CLIA	Edit Documents (Root)

1 | Create Requirement (Competency) Document

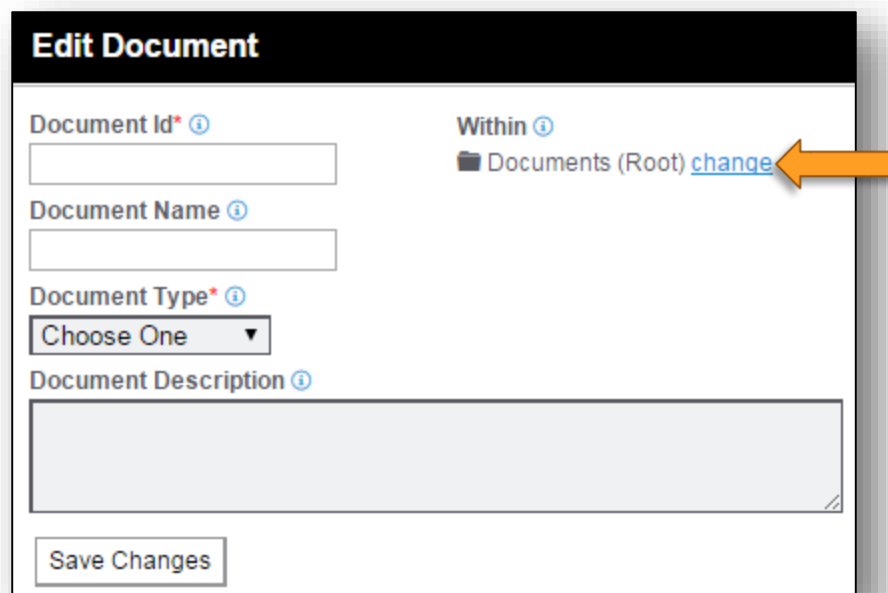
Requirement Documents (a.k.a. competency documents) can be created via the **Requirement Documents** colorbar within the **Browse Requirements** perspective. Documents can also be created via the Documents colorbar within the **Browse Documents** perspective.

Create Requirement (Competency) Document

1. Select **Browse Requirements** perspective.
2. Select a **Requirement**.
3. Open **Requirement Documents** colorbar.
4. Click **New Document**.



5. Click [change](#).



Edit Document

Document Id* ⓘ

Document Name ⓘ

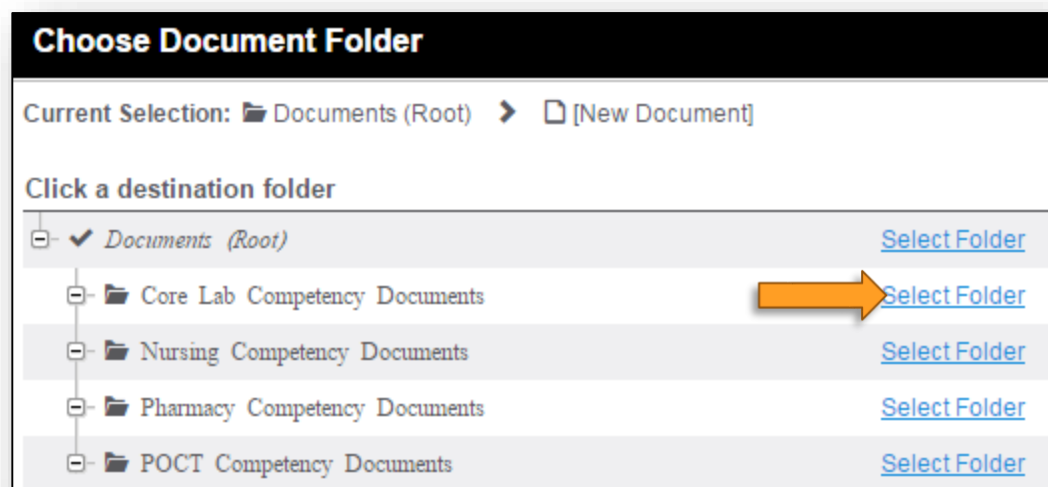
Document Type* ⓘ
Choose One ▼

Document Description ⓘ

Save Changes

Within ⓘ
Documents (Root) [change](#)

6. Click [Select Folder](#).



Choose Document Folder

Current Selection: Documents (Root) > [New Document]

Click a destination folder

[-] ✓ Documents (Root)	Select Folder
[-] Core Lab Competency Documents	Select Folder
[-] Nursing Competency Documents	Select Folder
[-] Pharmacy Competency Documents	Select Folder
[-] POCT Competency Documents	Select Folder

7. Enter **Document Id**.

8. Enter **Document Name**.

9. Select **Exam** for **Document Type**.

10. Check **Exam Retake**.

Note: Only check **Exam Retak** if employees do not need permission to retake a failed exam.

11. Enter **Document Description**.

12. Click **Save Changes**.

Edit Document

Document Id* ⓘ Within ⓘ
📁 Documents (Root) [change](#)

Direct Observation

Document Name ⓘ

Direct Observation

Document Type* ⓘ

Exam ▼

Retake Options ⓘ

An exam retake can be initiated by an employee

Document Description ⓘ

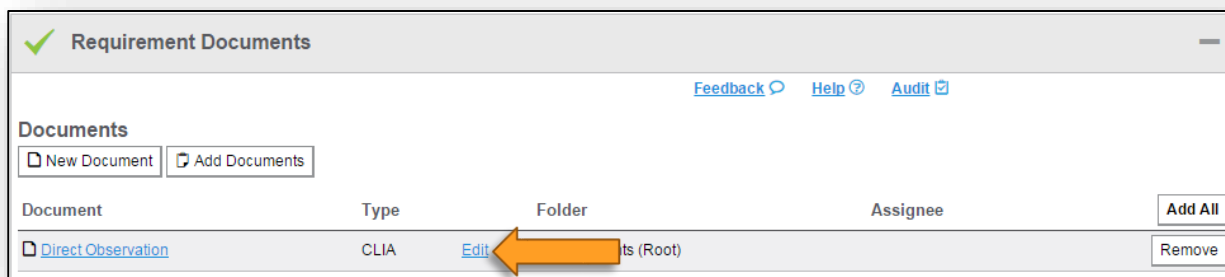
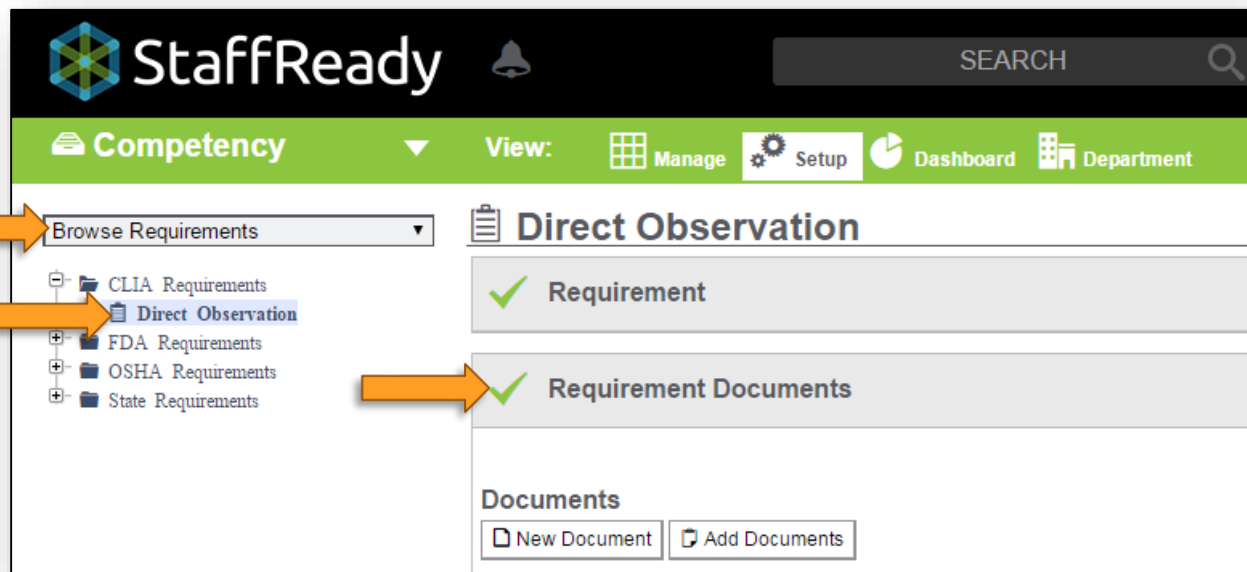
Direct observations of routine patient test performance, including patient preparation, if applicable, specimen handling, processing and testing.

Save Changes

2 | Clone Requirement (Competency) Document

Clone Requirement (Competency) Document

1. Select **Browse Requirements** perspective.
2. Select a **Requirement**.
3. Open **Requirement Documents** colorbar.
4. Click [Edit](#).



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

Edit Document

Document Id* ⓘ
Direct Observation

Document Name ⓘ
Direct Observation

Points to Pass* ⓘ
10 10 of 10 (100%)

Retake Options ⓘ
 An exam retake can be initiated by an employee

Document Description ⓘ
Direct observations of routine patient test performance, including patient preparation, if applicable, specimen handling, processing and testing.

Within ⓘ
Documents (Root) [change](#)

Document Preview ⓘ
[Edit Document Contents](#)

Save Changes

6. Click **Clone**.

Direct Observation

Sections

- Direct Observation ✓
- + Add a Section

Document Details

Description
Direct observations 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%)

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)

7. Click [change](#).

Clone Document

Document Id
Direct Observation

Document Name
Direct Observation

Document Description
Direct observations of routine pa
preparation, if applicable, specin

Documents (Root) [change](#)

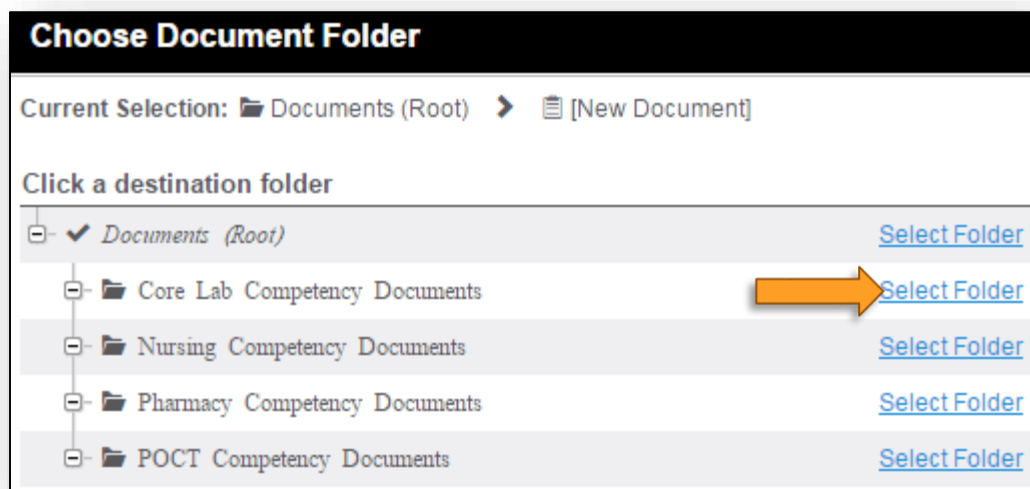
Document Id*

Document Name

Document Description

Clone Document

8. Click [Select Folder](#).



- 9. Enter **Document Id**.
- 10. Enter **Document Name**.
- 11. Enter **Document Description**.
- 12. Click **Clone Document**.

Clone Document

Document Id
Direct Observation

Document Name
Direct Observation

Document Description
Direct observations of routine pa
preparation, if applicable, specin

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

Document Id* ⓘ
Monitoring Test Results

Document Name ⓘ
Monitoring Test Results

Document Description ⓘ
Primary checklist CLIA Element #2, monitoring the recording and reporting of test results.

Clone Document