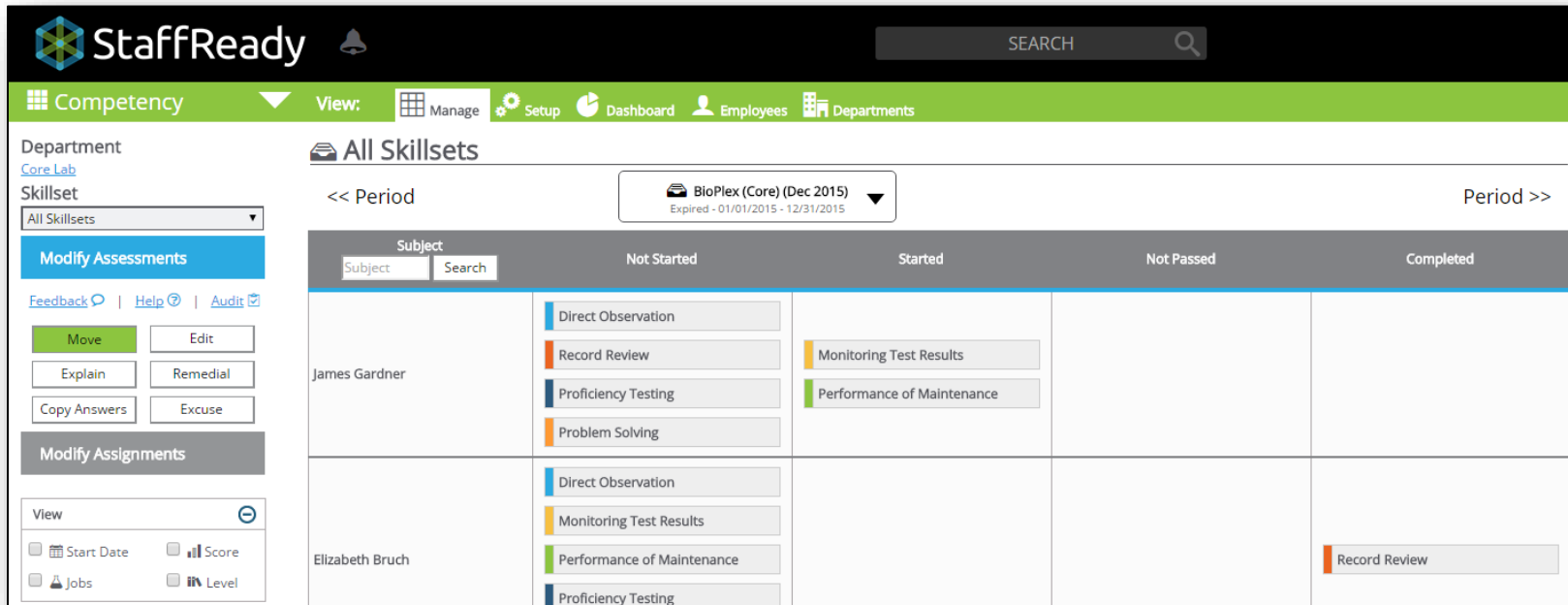


Manage View – Competency Grid Modify Assessments Menu

This reference guide provides an overview of the **Manage** view's **Modify Assessments** menu within StaffReady. The following process steps and instructional information are provided within this document:

- **Modify Assessments Grid Navigation**
- **Move**
- **Explain**
- **Excuse**
- **Copy Answers**



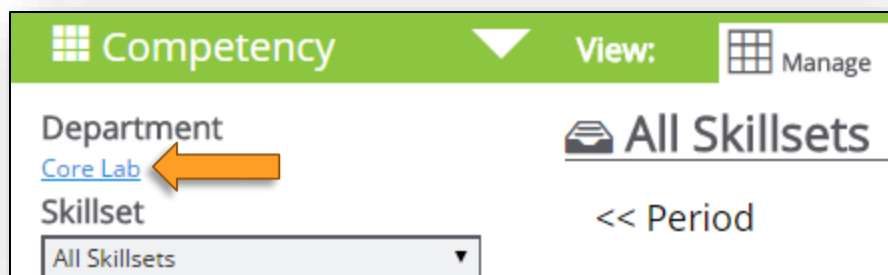
The screenshot displays the StaffReady interface in the Manage view. The top navigation bar includes the StaffReady logo, a search bar, and navigation icons for Competency, Manage, Setup, Dashboard, Employees, and Departments. The left sidebar shows the Department (Core Lab) and Skillset (All Skillsets) filters, along with the Modify Assessments menu containing options like Move, Edit, Explain, Remedial, Copy Answers, and Excuse. The main area shows the 'All Skillsets' section for 'BioPlex (Core) (Dec 2015)' with a table of assessment results for two subjects: James Gardner and Elizabeth Bruch. The table columns are Not Started, Started, Not Passed, and Completed. The 'Started' column contains various assessment types for each subject.

| Subject | Not Started | Started | Not Passed | Completed |
|-----------------|--|---|------------|---|
| James Gardner | <ul style="list-style-type: none"> Direct Observation Record Review Proficiency Testing Problem Solving | <ul style="list-style-type: none"> Monitoring Test Results Performance of Maintenance | | |
| Elizabeth Bruch | <ul style="list-style-type: none"> Direct Observation Monitoring Test Results Performance of Maintenance Proficiency Testing | | | <ul style="list-style-type: none"> Record Review |

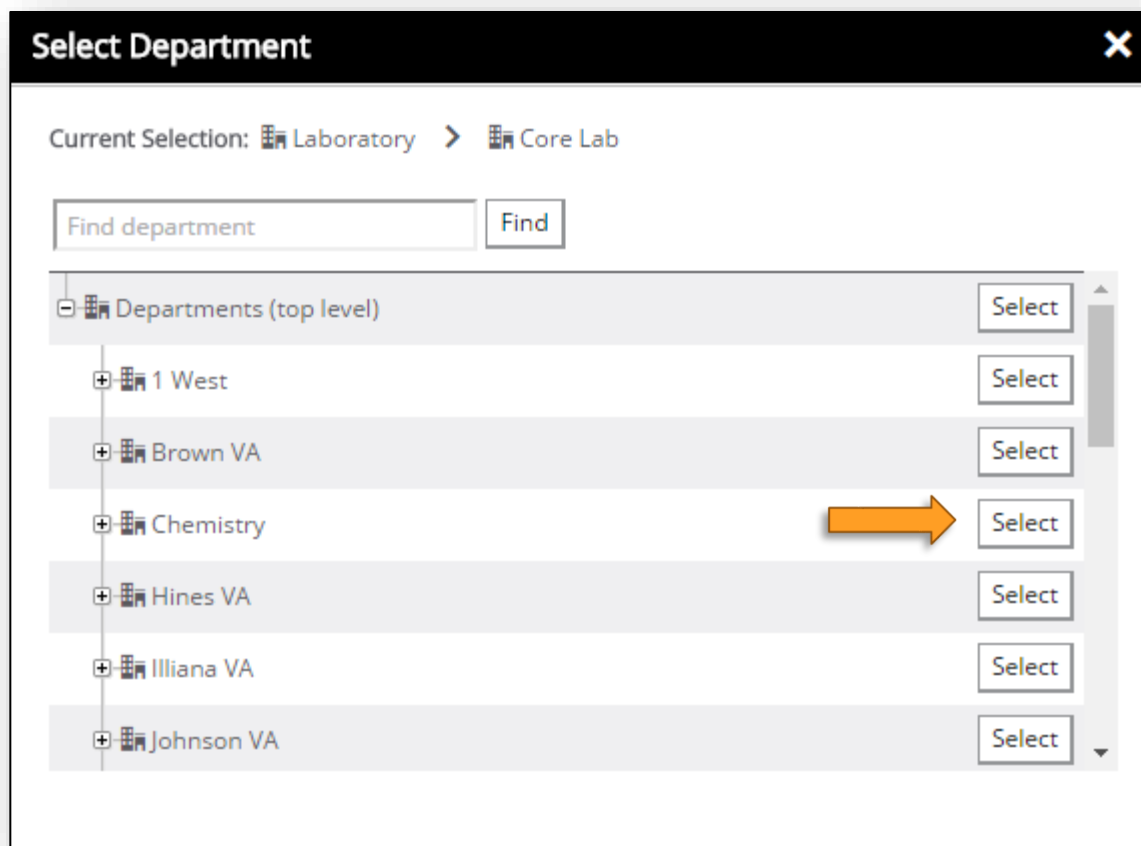
1 | Modify Assessments Grid Navigation

Modify Assessments Grid Navigation

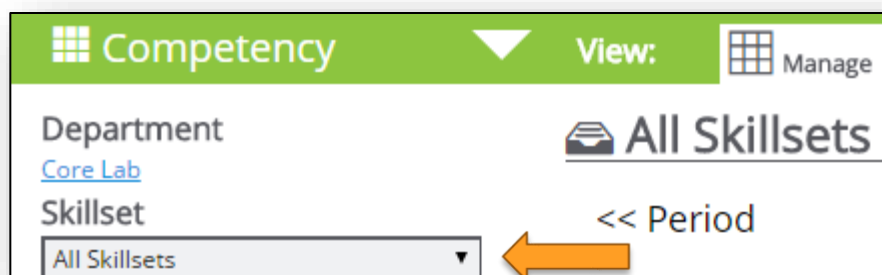
1. Click the [department](#) to adjust the department employees displaying assessments within the **Competency Grid**.



2. Click [Select Department](#).



3. Click **Skillset** to change the test system viewed within the **Competency Grid**.

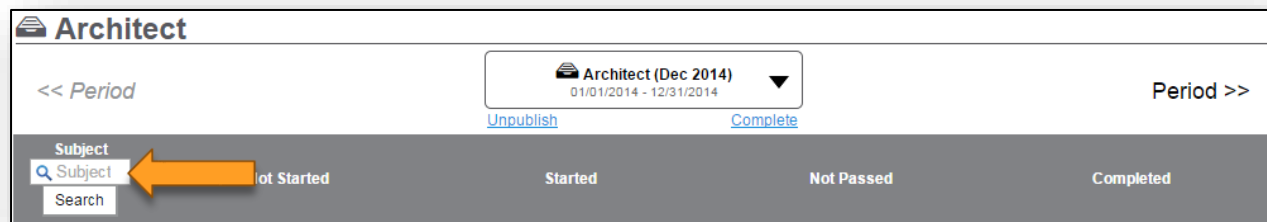
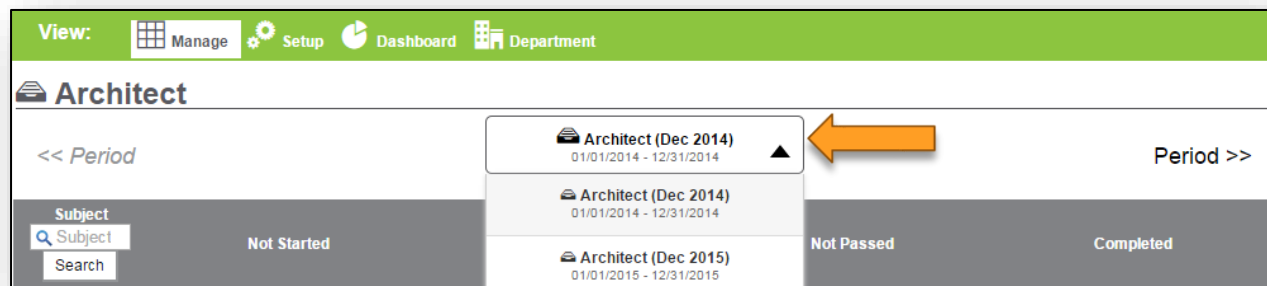


4. Click << **Period** to view a previous annual assessment period.

5. Click **Period** >> to view a future annual assessment period.

6. Click **Skillset Assessment** menu to change displayed annual assessment period.

7. Search **Subject** to limit **Competency Grid** assessment information to a single department employee.



2 | Move

Using the Move Mode

1. Click **Move**.
2. Click the **Assessment** within the competency grid that you wish to move.

The screenshot displays the StaffReady interface. At the top, there is a navigation bar with 'Competency' and 'View: Manage Setup Dashboard Employees Depa'. Below this, the 'Department' is set to 'Core Lab' and the 'Skillset' is 'BioPlex (Core)'. A 'Modify Assessments' button is visible. An orange arrow points to the 'Move' button in the 'Modify Assessments' section. To the right, the 'BioPlex (Core)' section shows a 'Period' dropdown set to 'BioPlex (Core) (Dec 2017)'. Below this is a table with columns for 'Subject', 'Not Started', and 'Started'. The 'Subject' column lists 'Allison McAlister' and 'Performance of Maintenance', 'Proficiency Testing', 'Problem Solving (Graded)', and 'Monitoring Test Results'. An orange arrow points to the 'Monitoring Test Results' assessment in the 'Not Started' column.

3. Click the status column the assessment should be moved.

The screenshot displays the 'Competency' management interface. The top navigation bar includes 'View: Manage Setup Dashboard Employees Departments'. The main content area is titled 'BioPlex (Core)' and shows a table of assessment results for two employees: Allison McAlister and Angela Reed. The table has columns for 'Subject', 'Not Started', 'Started', and 'Not Passed'. An orange arrow points to the 'Monitoring Test Results' entry in the 'Started' column for Allison McAlister.

| Subject | Not Started | Started | Not Passed |
|-------------------|---|---|------------|
| Allison McAlister | Performance of Maintenance Proficiency Problem Solving (Graded) | Monitoring Test Results | |
| Angela Reed | Record Review Proficiency Testing Problem Solving (Graded) | Monitoring Test Results Performance of Maintenance | |

3 | Explain

Using the Explain Mode

1. Click **Explain**.
2. Click the **Assessment** within the competency grid that you wish to receive information.

The screenshot displays the StaffReady BioPlex (Core) interface. The top navigation bar includes 'Competency', 'View: Manage', 'Setup', 'Dashboard', 'Employees', and 'Departments'. The main header shows 'BioPlex (Core)' and a period selector for 'BioPlex (Core) (Dec 2017)' with a date range of 'Started - 01/01/2017 - 12/31/2017'. The interface is divided into a left sidebar and a main grid.

The left sidebar contains the following elements:

- Department: Core Lab
- Skillset: BioPlex (Core)
- Buttons: Modify Assessments, Feedback, Help, Audit, Move, Edit, Explain (highlighted in green), Remedial, Copy Answers, Excuse, Modify Assignments, View.

The main grid displays a table with columns for 'Subject', 'Not Started', 'Started', 'Not Passed', and 'Completed'. The table contains two rows of data:

| Subject | Not Started | Started | Not Passed | Completed |
|-------------------|---|---|------------|-----------------------------------|
| Allison McAlister | Performance of Maintenance, Proficiency Testing, Problem Solving (Graded) | Monitoring Test Results | | Record Review, Direct Observation |
| Angela Reed | Record Review, Proficiency Testing, Problem Solving (Graded) | Monitoring Test Results, Performance of Maintenance | | Direct Observation |

An orange arrow points from the 'Explain' button in the sidebar to the 'Performance of Maintenance' assessment in the 'Not Started' column for Allison McAlister.

4 | Excuse

Using the Excuse Mode

1. Click **Excuse**.
2. Click the **Assessment** within the competency grid that you wish to excuse.

The screenshot displays the StaffReady interface for the 'BioPlex (Core)' competency. On the left, a sidebar menu contains several options, with the 'Excuse' button highlighted in green and an orange arrow pointing to it. The main area shows a competency grid for 'BioPlex (Core)' with columns for 'Not Started', 'Started', 'Not Passed', and 'Completed'. The grid lists two employees: Allison McAllister and Angela Reed. Allison McAllister's 'Problem Solving (Graded)' assessment is highlighted with an orange arrow, indicating it is the target for the 'Excuse' action.

| Subject | Not Started | Started | Not Passed | Completed |
|--------------------|---|---|------------|---|
| Allison McAllister | <ul style="list-style-type: none"> Performance of Maintenance Proficiency Testing Problem Solving (Graded) | <ul style="list-style-type: none"> Monitoring Test Results | | <ul style="list-style-type: none"> Record Review Direct Observation |
| Angela Reed | <ul style="list-style-type: none"> Record Review Proficiency Testing Problem Solving (Graded) | <ul style="list-style-type: none"> Monitoring Test Results Performance of Maintenance | | <ul style="list-style-type: none"> Direct Observation |

5 | Copy Answers

Using the Copy Answers Mode

Note: You are able to copy all document and workflow types from the started or completed columns

1. Click **Copy Answers**.

2. Click the **Assessment** within the competency grid that you wish to copy answers from.

**If you are copying documents that contain multiple signature sections, all signatures will be copied over from the original started/completed document to the assessments that you have selected.

The screenshot displays the StaffReady interface for a competency grid. On the left, a sidebar contains a 'Copy Answers' button highlighted with an orange arrow. The main area shows a grid for 'DxC-800 (C)' with columns for 'Not Started', 'Started', 'Not Passed', and 'Completed'. An orange arrow points to the 'Record Review' assessment in the 'Completed' column. Another orange arrow points to the 'DxC-800 (C) (Dec 2017)' dropdown menu.

3. Click the “Top Box” to select every employee in the department assigned the assessment.

OR

4. You can click individual checkboxes to select individual skillset employees.

5. Once you are ready, select **Copy To Selected Assessments**

Copy Assessment Answers

Copy From Assessment

| | | |
|-------------------|---------------|-------------|
| Subject | Document | Assigned |
| Allison McAlister | Record Review | 04/13/2017 |
| Status (Score) | Requirement | Skillset |
| Excused (Excused) | Record Review | DxC-800 (C) |

Copy To Assessments

| <input type="checkbox"/> | Subject | Document | Status | Assigned |
|--------------------------|----------------|---------------|-------------|------------|
| <input type="checkbox"/> | Angela Reed | Record Review | Not Started | 04/13/2017 |
| <input type="checkbox"/> | Bill Longwell | Record Review | Not Started | 04/13/2017 |
| <input type="checkbox"/> | Bob Thompson | Record Review | Not Started | 04/13/2017 |
| <input type="checkbox"/> | Brian Curtis | Record Review | Not Started | 04/13/2017 |
| <input type="checkbox"/> | Dan Steiner | Record Review | Not Started | 04/13/2017 |
| <input type="checkbox"/> | Dennis Alvarez | Record Review | Not Started | 04/13/2017 |

Copy To Selected Assessments

Note: If an assessment has been restarted, there could then be multiple document versions displayed in the manage view.

If this is true, you will then be unable to copy answers to specific versions. Only documents with the same version can be copied to one another.



Copy Assessment Answers ✕

Copy From Assessment ⓘ

| | | |
|--|-------------------------------------|--------------------------------|
| Subject Allison McAlister | Document Record Review | Assigned 04/13/2017 |
| Status (Score) Excused (Excused) | Requirement Record Review | Skillset DxC-800 (C) |

Copy To Assessments ⓘ Copy To Selected Assessments

[Subject](#) [Document](#) [Status](#) [Assigned](#)

No Results Found

Other Assessment Versions ⓘ

| Subject | Document | Status | Assigned |
|-------------------------|--------------------------|------------------------|--------------------------|
| Elizabeth Bruch | Record Review | Not Started | 04/13/2017 |
| Elizabeth Martin | Record Review | Not Started | 04/13/2017 |
| Jack Johnson | Record Review | Not Started | 04/13/2017 |
| Jack Wegner | Record Review | Not Started | 04/13/2017 |
| Jaime Glover | Record Review | Not Started | 04/13/2017 |
| James Gardner | Record Review | Not Started | 04/13/2017 |
| Kelly Webb | Record Review | Not Started | 04/13/2017 |
| Olivia Johnson | Record Review | Not Started | 04/13/2017 |