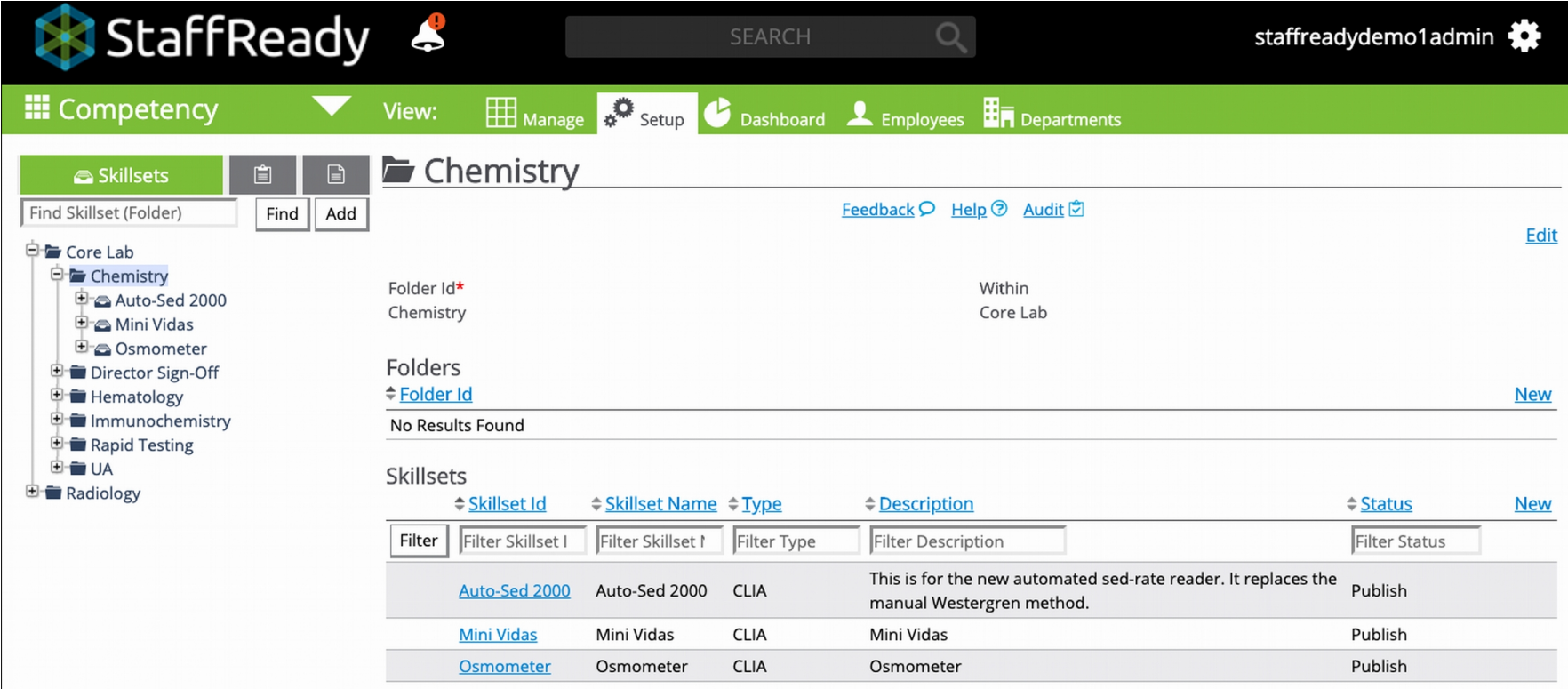


## Competency- Setup

### Publishing Skillsets

This reference guide provides a comprehensive overview of the process for Publishing Skillsets from within the StaffReady Competency module. The following process steps and instructional information are provided in this document:

- [Publishing Competency Skillsets](#)



The screenshot shows the StaffReady Competency Setup interface. The top navigation bar includes the StaffReady logo, a search bar, and the user 'staffreadydemo1 admin'. The main navigation bar shows 'Competency' with sub-options for 'Manage', 'Setup', 'Dashboard', 'Employees', and 'Departments'. The left sidebar shows a tree view of folders under 'Core Lab', with 'Chemistry' selected. The main content area shows the 'Chemistry' folder details, including 'Folder Id\*' (Chemistry) and 'Within' (Core Lab). Below this, there are sections for 'Folders' (no results found) and 'Skillsets'. The 'Skillsets' section contains a table with columns for Skillset Id, Skillset Name, Type, Description, and Status. The table lists three skillsets: 'Auto-Sed 2000', 'Mini Vidas', and 'Osmometer', all with a status of 'Publish'.

Skillset Id	Skillset Name	Type	Description	Status
<a href="#">Auto-Sed 2000</a>	Auto-Sed 2000	CLIA	This is for the new automated sed-rate reader. It replaces the manual Westergren method.	Publish
<a href="#">Mini Vidas</a>	Mini Vidas	CLIA	Mini Vidas	Publish
<a href="#">Osmometer</a>	Osmometer	CLIA	Osmometer	Publish

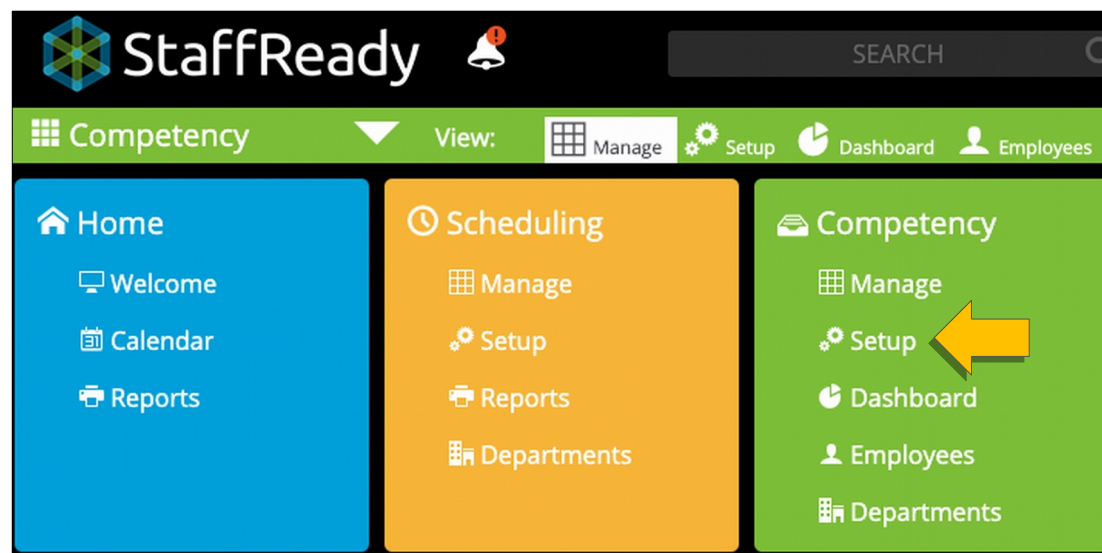
## 1 | Publishing Competency Skillsets

### Steps to Publish a Competency Skillset

Publishing a **Competency Skillset** will assign competency assessment tasks based on the **Skillset** and **Requirement Assignment Period** settings.

To publish a **Competency Assessment**, follow these steps-

1. Click on the Main Menu and select **Setup** under the **Competency** module.



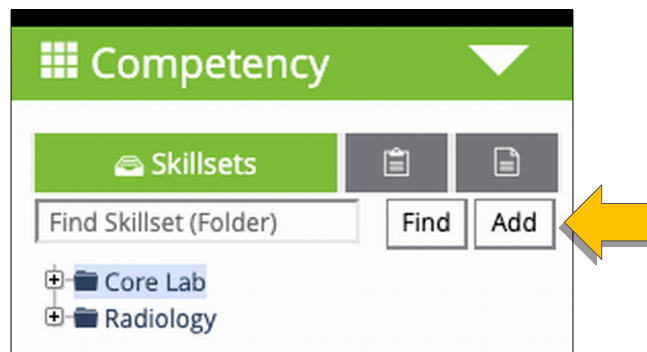
2. Click on primary **Skillset Folder** where the new skillset will be created. In this example, the Chemistry folder has been highlighted.

The screenshot shows the 'Competency' module 'Setup' page. The 'Chemistry' folder is highlighted in the left-hand navigation tree with a yellow arrow. The page displays a list of skillsets under the 'Chemistry' folder, including 'Auto-Sed 2000', 'Mini Vidas', 'Mini Vidas II', and 'Osmometer'. The 'Auto-Sed 2000' skillset is selected, and its details are shown on the right.

Filter	Filter Skillset Id	Filter Skillset N	Filter Type	Filter Description
	<a href="#">Auto-Sed 2000</a>	Auto-Sed 2000	CLIA	This is for the new automated sed-rate reader. It replaces the manual Westergren method.
	<a href="#">Mini Vidas</a>	Mini Vidas	CLIA	Mini Vidas
	<a href="#">Mini Vidas II</a>	Mini Vidas II	CLIA	Mini Vidas II
	<a href="#">Osmometer</a>	Osmometer	CLIA	Osmometer

## Steps to Publish a Competency Skillset

3. Click on the **Add** button.



4. Select **Skillset** from the left side action menu.

5. Select the **Skillset Type**.

6. Enter in a short **Skillset Id** name (this is a required field) and a **Skillset Name**, if desired.

7. Click the **Save Changes** button to create your new **Skillset**.

 A screenshot of the 'Add New Skillset' form. On the left, there's a vertical menu with 'Folder' and 'Skillset' options; 'Skillset' is selected and highlighted in blue, with a yellow arrow pointing to it. The main form area is titled 'Skillset'. It has several fields:
 

- 'Folder' with a dropdown menu showing 'Chemistry'.
- 'Skillset Type\*' with a dropdown menu showing 'CLIA'.
- 'Skillset Id\*' with an empty text input field, highlighted with a yellow arrow.
- 'Repeat\*' with a dropdown menu showing 'Annual'.
- 'Skillset Name' with an empty text input field, highlighted with a yellow arrow.
- 'Description' with a large text area.
- 'Save Changes' button at the bottom.

→ [Read this training guide for more details on Skillset Setup.](#)

## Steps to Publish a Competency Skillset

8. There are three requirements for **Publishing a Skillset** -

a. At least one **Skillset Employee** must be assigned the **Skillset**.








b. At least one **Skillset Requirement** must be assigned to the **Skillset**.

→ A document must also be attached to the requirement.

c. At least one **Skillset Manager** must be assigned to the **Skillset**.

→ For detailed instructions on adding **Skillset Requirements**, refer to this training guide for needed information.

[Skillset Requirements Setup](#)

Mini Vidas III		
	Skillset	
	Skillset Employees	<i>No workers have been assigned to the skillset</i>
	Requirements	<i>Skillset does not have any requirements</i>
	Assessment Periods	
	Levels	
	Skillset Managers	<i>No managers have been assigned to the skillset</i>
	Skillset Messages	<i>No messages are currently turned on</i>

Steps to Publish a Competency Skillset / Adding Employees

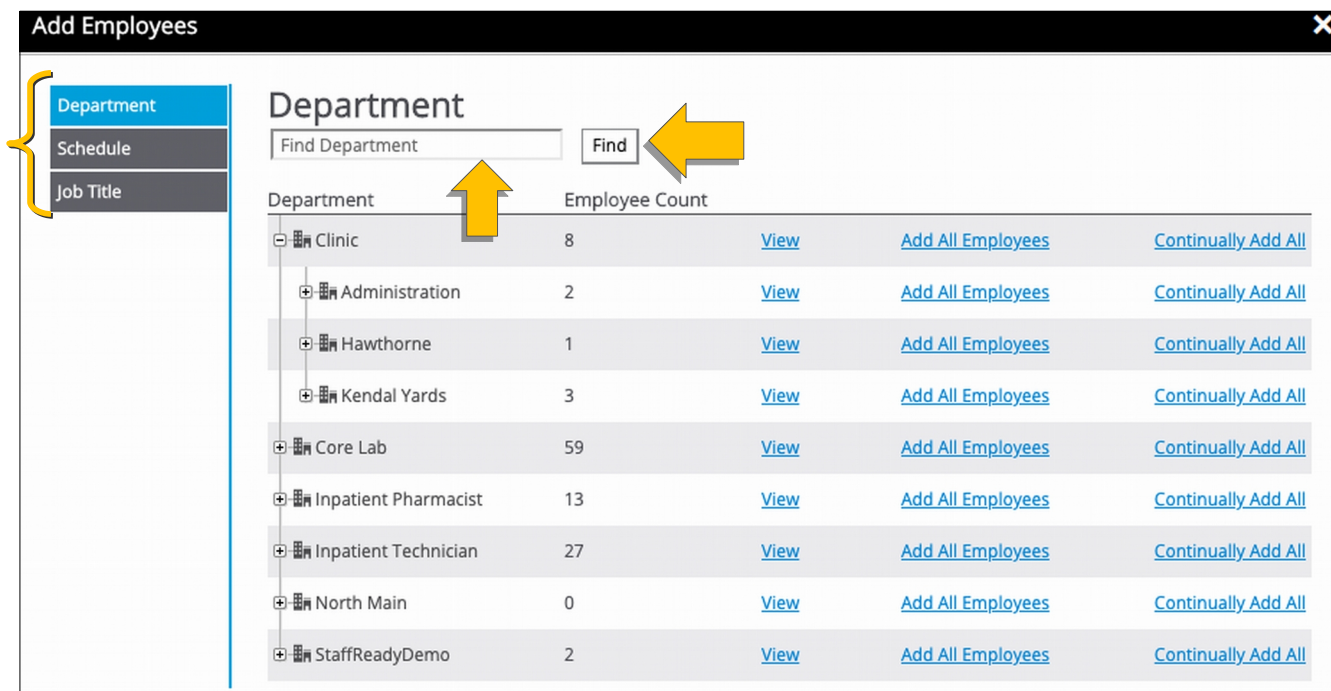
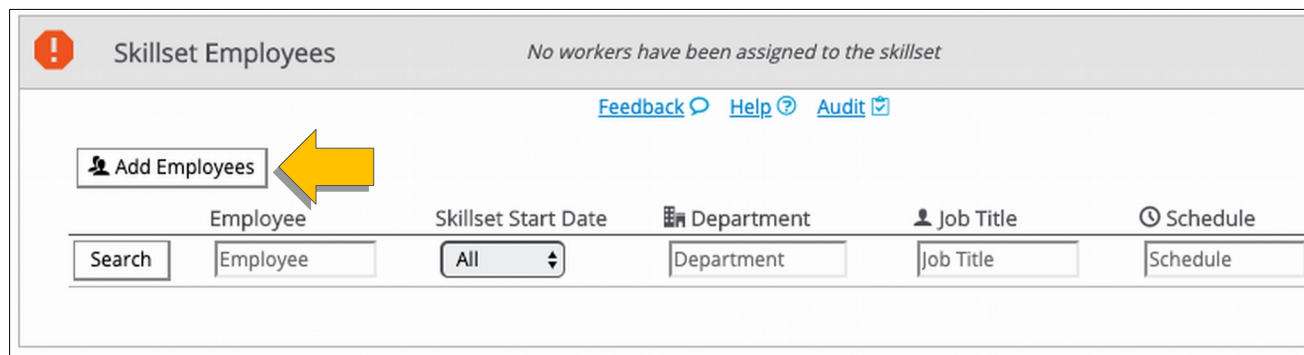
9. To add new **Skillset Employees** by group, use one of two methods.

**Method One:**

a. Click the **Add Employees** button. This will open the **Add Employees** screen.

b. Use the left side menu to select an **Employee** or **Employees** from either a **Department**, **Job Title**, or **Schedule**.

c. You can narrow your search using the **Find Department**, **Job Title**, or **Schedule** text fields.



## Steps to Publish a Competency Skillset / Adding Employees

d. Click the [View](#) link to populate **Employees** to the **Skillset Employees** color bar.

e. Click the [Add All Employees](#) link to add employees into the **Skillset Employees** list.

f. Click the [Continually Add All](#) (also known as *Pinning*) link to add all **Employees** listed within the **Department**, **Schedule** or **Job Title**. This means that any new **Employee** added will automatically be added to the **Skillset**.

The screenshot shows the 'Add Employees' interface. At the top, there is a table with columns for Department, Employee Count, View, Add All Employees, and Continually Add All. A yellow arrow points to the 'View' link for the 'Laboratory' department.

Department	Employee Count	View	Add All Employees	Continually Add All
Core Lab	0	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Laboratory	22	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Medical Center	75	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Nursing	22	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Patient Services	1	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Pharmacy	0	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Radiology	59	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>

Below this table is a section for 'Skillset Employees' with a message: 'No workers have been assigned to the skillset'. There are links for Feedback, Help, and Audit. Below that is a search bar and a table of employees to be added.

Employee	Skillset Start Date	Department	Job Title	Schedule	Grade	New
<a href="#">Anthony Mullins</a>	[not set]	Laboratory				<a href="#">Add</a>
<a href="#">Beth Collins</a>	[not set]	Laboratory				<a href="#">Add</a>
<a href="#">Bob Smith</a>	[not set]	Laboratory				<a href="#">Add</a>

A yellow arrow points to the 'Add' button for Anthony Mullins.

The screenshot shows the 'Add Employees' interface with a search and filter section. There is a 'Find Department' input field and a 'Find' button. Below this is a table with columns for Department, Employee Count, Hide, Add All Employees, and Continually Add All. A yellow arrow points to the 'Add All Employees' link for the 'Clinic' department.

Department	Employee Count	Hide	Add All Employees	Continually Add All
Clinic	8	<a href="#">Hide</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>
Core Lab	59	<a href="#">View</a>	<a href="#">Add All Employees</a>	<a href="#">Continually Add All</a>

Steps to Publish a Competency Skillset / Adding an Employee

**Method Two:**

10. To add **Employees** individually, click the [New](#) link.

a. Search for the employee in using the **Add New Employee Wizard**. Click the **Next** button to go to the next screen.

b. Click the **Choose** button to select an **Employee**, or create a new **Employee** using the **Create New Employee** option.

Employee	Login	Employee Id	Department	Email	Schedules	
Barbara Dodd	BDodd	BDodd	NM Pharmacy	bdodd@staffready.com	2 Assigned	Choose

Steps to Publish a Competency Skillset / Adding an Employee

c. Click the **Finish** button to complete adding an individual **Employee** to the **Skillset Employees** list.

### Add Employee Wizard

**Employee Information**

Full Name\*  Employee Hire Date\*  Employee Id\*

StaffReady Login Id\*  Reset Password  Require Password Change\*

Department\* [NM Pharmacy](#) Job Title [MLT](#)

**Contact Information**

Email Address  Phone Number

**Schedule Information**

Schedule  Name on Schedule  Schedule Start Date

< Previous Next > Cancel Finish

✓ Skillset Employees

[Feedback](#) [Help](#) [Audit](#)

[Add Employees](#)

Employee	Skillset Start Date	Department	Job Title	Schedule	
<a href="#">Barbara Dodd</a>	<a href="#">05/02/2018</a>	NM Pharmacy	MLT	Core Lab, Pharmacists	<a href="#">Remove</a>
<a href="#">John Scott</a>	<a href="#">04/11/2019 (New Hire)</a>	Core Lab		Core Lab	<a href="#">Remove</a>

## Steps to Publish a Competency Skillset / Adding a Skillset Manager

11. To add a new **Skillset Manager**, click the [New](#) link.

12. Type the name of the **Skillset Manager** in the **Manager** text field.

13. Select a **Manager** name from the auto-populated search list.

14. Click the **Save Changes** button to add the **Manager** to the **Skillset**.

Screenshot of the Skillset Managers page. The header shows "Skillset Managers" and "No managers have been assigned to the skillset". Below the header are links for "Feedback", "Help", and "Audit". A table with columns "Full Name", "Email", "Department", and "User Id" is shown, with "No Results Found" below it. A yellow arrow points to the "New" link in the top right corner.

Diagram illustrating the "New Skillset Manager" form. The form has a "Manager" field with a search icon. A search list is shown below the field, containing "Robert", "Robert Duncan", and "Robert Smith". A yellow arrow points from the search list to the "Robert Duncan" entry. Another yellow arrow points to the "Save Changes" button.

Screenshot of the Skillset Managers page. The header shows "Skillset Managers" and "No manager messages are On in the Skillset Messages color bar". Below the header are links for "Feedback", "Help", and "Audit". A table with columns "Full Name", "Email", "Department", and "User Id" is shown. The table contains one entry: "Robert Duncan", "[not set]", "Core Lab", "RDuncan". A yellow arrow points to the "Robert Duncan" entry. There are also "Adjust Email Settings" and "Remove" links for this entry. A "New" link and "Remove All" link are also visible.

## Steps to Publish a Competency Skillset

→ The new **Skillset** *Mini Vidas III* is now ready to be **Published**.

15. Click on the **Skillset** color bar to expand it.

16. The **Skillset Publish** button will become available.

17. Click the **Publish** button to complete the process.

→ Note that once a **Skillset** is published, **all** of the requirements and associated assessments will roll out to staff according to the settings assigned in setup.

→ Further, once a **Skillset** is **Published**, it cannot be unpublished. Contact **StaffReady Customer Support** to discuss options for archiving **Skillsets**.

**Mini Vidas III**

**Skillset** (Warning icon)

[Feedback](#) [Help](#) [Audit](#) [Edit](#)

**Publish** (Yellow arrow points here)

<b>Skillset Id*</b> Mini Vidas III	<b>Skillset Name</b> Mini Vidas III	<b>Type</b> CLIA
<b>Within</b> Chemistry	<b>Assessment Period</b> Annual	<b>Status</b> <a href="#">View History</a> Draft (05/23/2019 15:00:35)
<b>Description</b> Mini Vidas III		

**Mini Vidas III**

**Skillset** (Checkmark icon)

[Feedback](#) [Help](#) [Audit](#) [Edit](#)

<b>Skillset Id*</b> Mini Vidas III	<b>Skillset Name</b> Mini Vidas III	<b>Type</b> CLIA
<b>Within</b> Chemistry	<b>Assessment Period</b> Annual	<b>Status</b> <a href="#">View History</a> Publish (05/23/2019 15:11:09) (Yellow arrow points here)
<b>Description</b> Mini Vidas III		

## Visit Our Training Center

To learn more about the **Staff Ready Competency** module, please review the following documents in the **Training Media Center**.

For assistance with the **StaffReady Competency** features, please contact our Customer Support team:

6am-5pm PST  
 Monday thru Friday  
 Phone: 1.877.229.5230  
[Online Support Form](#)

Click the **Need Help?** box in StaffReady to access our new online Chat feature!



<b>Skillset Folder Setup</b>	<a href="#">PDF Document</a>
<b>Skillset Setup</b>	<a href="#">PDF Document</a>
<b>Skillset Requirements Setup</b>	<a href="#">PDF Document</a>
<b>Managing Skillset Employees</b>	<a href="#">PDF Document</a>