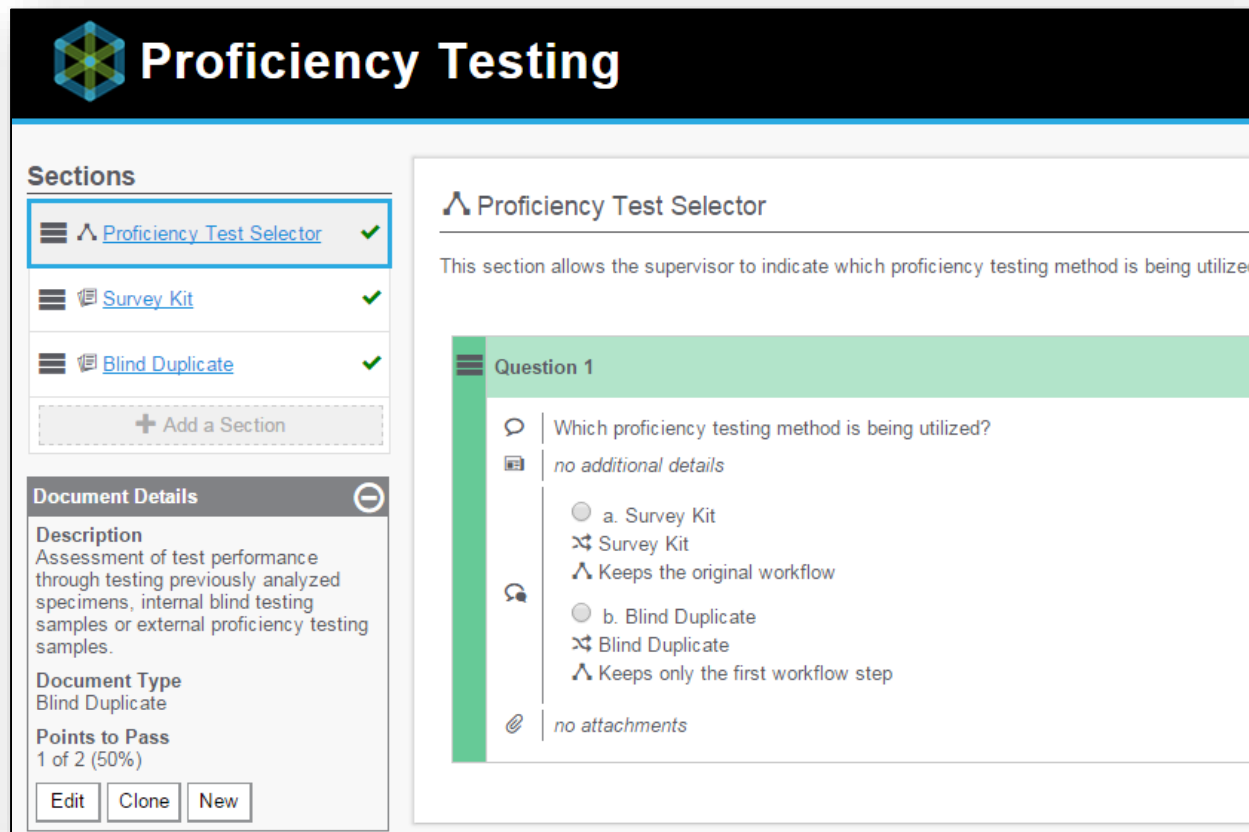


Setup View – Browse Requirements Perspective

Build Proficiency Tests

This reference guide provides an overview of the 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' setup 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 a description of test performance assessment, the document type 'Blind Duplicate', and 'Points to Pass' set to '1 of 2 (50%)'. At the bottom of this 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 checkbox for 'no additional details' and a dropdown arrow for workflow options: 'Survey Kit' offers 'Keeps the original workflow', and 'Blind Duplicate' offers 'Keeps only the first workflow step'. There is also a 'no attachments' option at the bottom.

1 | Build Proficiency Tests

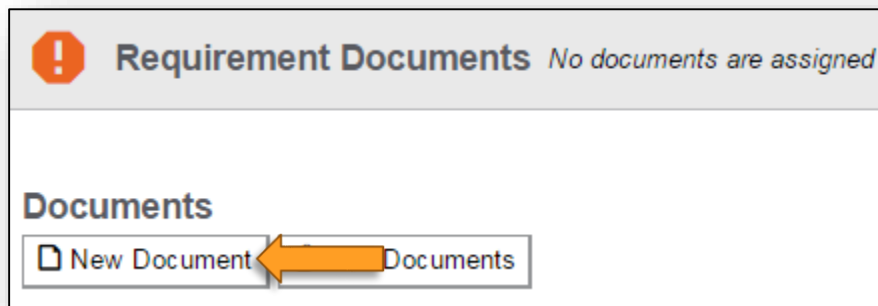
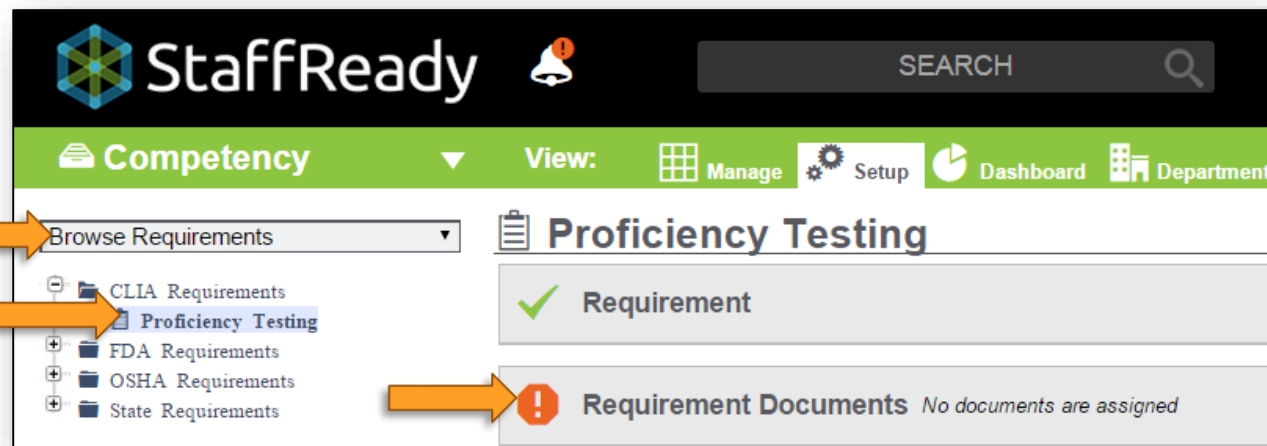
Build Competency Checklists

1. Select **Browse Requirements** perspective.

2. Select **Requirement**.

3. Click to open **Requirement Documents** colorbar.

4. Click **New Document**.



5. Enter **Document Id.**

6. Enter **Document Name.**

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

8. Enter **Description.**

9. Click **Save Changes.**

10. Click [Proficiency Testing](#).

Edit Document

Document Id* ⓘ
Proficiency Testing

Document Name ⓘ
Proficiency Testing

Document Type* ⓘ
Blind Duplicate

Document Description ⓘ
Assessment of test performance through testing previously analyzed specimens, internal blind testing samples or external proficiency testing samples.

Save Changes

Requirement Documents

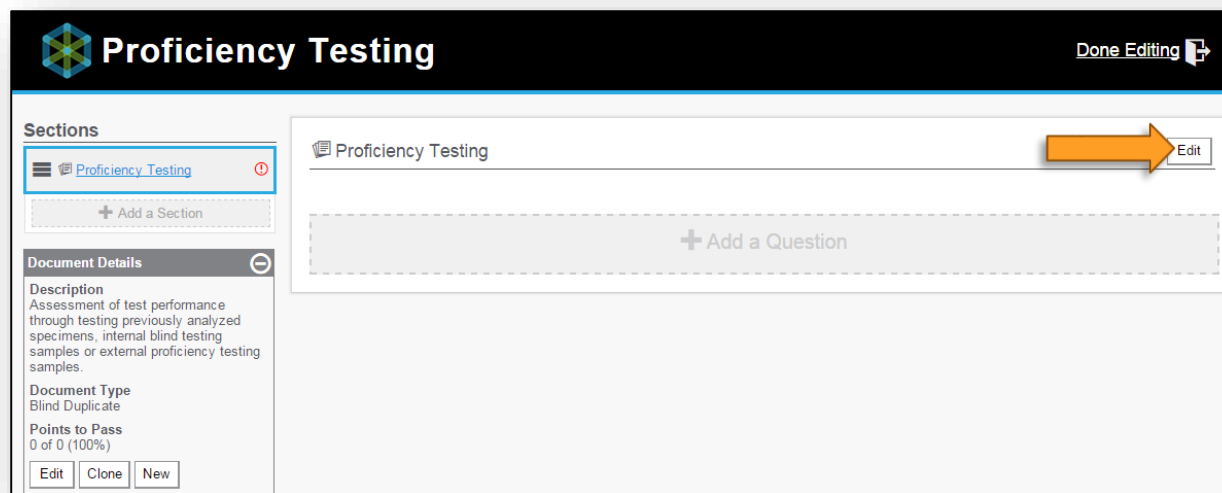
Feedback ⓘ Help ⓘ Audit ⓘ

Documents

New Document Add Documents

Document	Type	Folder	Assignee	
Proficiency Testing	CLIA	Documents (Root)		Edit Add All Remove

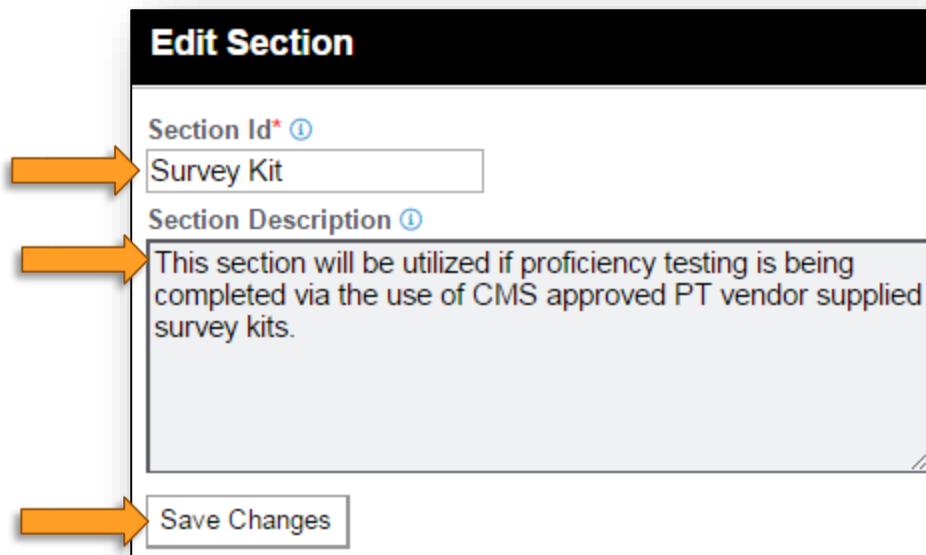
11. Click **Edit**.



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 'Proficiency Testing' logo and a 'Done Editing' button with an external link icon. Below the header, the interface is divided into several sections:

- Sections:** A list containing 'Survey Kit' with a red warning icon and a '+ Add a Section' button below it.
- Document Details:** A section with a minus icon and a description: 'Assessment of test performance through testing previously analyzed'.
- Main Content Area:** A large white box titled 'Survey Kit' containing the text: 'This section will be utilized if proficiency testing is being completed via the use of CMS approval'. At the bottom of this box, there is a dashed-line area with a grey '+ Add a Question' button, which is highlighted by a large orange arrow.

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 surevey 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 an '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 '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 1/17) 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' (marked with a green check) and 'Blind Duplicate' (marked with a red warning icon and highlighted with a blue border). Below the list is a '+ Add a Section' button. At the bottom of the sidebar is a 'Document Details' section with a minus sign 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 pointed to by a large orange arrow.

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

27. Enter **Question**.

28. Click **Save Changes**.

New Question ✕

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 first section is 'Survey Kit' with a green checkmark. The second section is 'Blind Duplicate', which is highlighted with a blue border and also has a green checkmark. Below the list is a dashed box containing a '+ Add a Section' button.
- Document Details:** A section with a minus sign icon. It contains:
 - 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 detailed view of the 'Blind Duplicate' section. It includes:
 - A header 'Blind Duplicate' with a document icon.
 - A description: 'This section will be utilized if proficiency testing is being completed via'.
 - Question 1:** A section with a blue header containing:
 - A speech bubble icon and text: 'Please fill in the following information:'
 - A document icon and text: 'no additional details'
 - A speech bubble icon and text: 'Initial Value: [input field]'
 - A speech bubble icon and text: 'Allowable Tolerance %: [input field]'
 - An attachment icon and text: 'no attachments'

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. Check **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

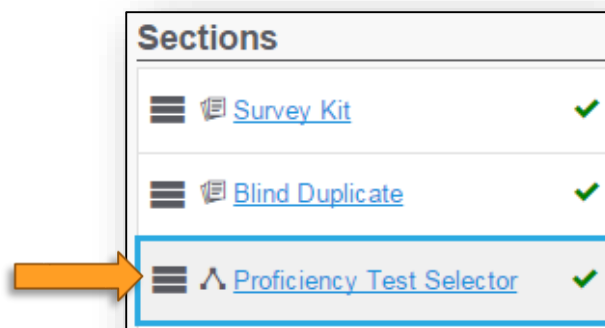
Answer Option*	Question Set*	Action
Survey Kit	Survey Kit ▼	Keep original workflow
Blind Duplicate	Blind Duplicate ▼	Keep first workflow step

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

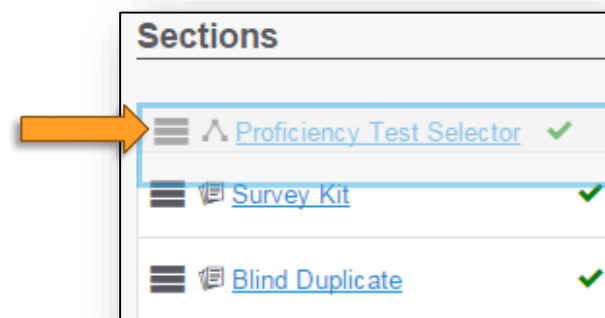
📎 Attachment


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

38. Click  handle icon.



39. Drag  handle icon.



40. Drop  handle icon.

