

Setup View – Browse Skillsets Perspective

Skillset Assignment Period Settings

This reference guide provides an overview of the setup process for Skillset Assignment Period Settings within StaffReady. The following process steps and instructional information are provided within this document:

- Skillset Assignment Period Settings
- Specific Assignment Window
- Skillset Start Date Assignment Window
- Assignee Option: The Employee Completes
- Assignee Option: The Department Supervisor Completes
- Assignee Option: A Specific Individual
- Assignee Option: A Team of Individuals
- Multi-step Workflow

Edit Skillset

Skillset	Assignment Period								
Assignment Period	Assignment ⓘ								
Employees	Assignment Window* ⓘ <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Specific Window ▼</div> Adjust Assignment Window								
	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Assignment Begins*</td> <td style="width: 25%;">Warning Reminder* ⓘ</td> <td style="width: 25%;">Time to Complete* ⓘ</td> <td style="width: 25%;">Assignment Ends</td> </tr> <tr> <td><div style="border: 1px solid #ccc; padding: 2px;">10/01/2014</div> ⓘ</td> <td><div style="border: 1px solid #ccc; padding: 2px;">15</div> Day(s)</td> <td><div style="border: 1px solid #ccc; padding: 2px;">31</div> Day(s)</td> <td>11/01/2014</td> </tr> </table>	Assignment Begins*	Warning Reminder* ⓘ	Time to Complete* ⓘ	Assignment Ends	<div style="border: 1px solid #ccc; padding: 2px;">10/01/2014</div> ⓘ	<div style="border: 1px solid #ccc; padding: 2px;">15</div> Day(s)	<div style="border: 1px solid #ccc; padding: 2px;">31</div> Day(s)	11/01/2014
Assignment Begins*	Warning Reminder* ⓘ	Time to Complete* ⓘ	Assignment Ends						
<div style="border: 1px solid #ccc; padding: 2px;">10/01/2014</div> ⓘ	<div style="border: 1px solid #ccc; padding: 2px;">15</div> Day(s)	<div style="border: 1px solid #ccc; padding: 2px;">31</div> Day(s)	11/01/2014						
	Assignee* ⓘ <input checked="" type="radio"/> The employee completes the assessment themselves <input type="radio"/> The department supervisor completes the assessment <input type="radio"/> A specific individual <input style="width: 100px;" type="text"/> <input type="radio"/> A team of individuals								
	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block; margin-bottom: 10px;">Add Step</div> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">Save Changes</div>								

1 | Skillset Assessment Period Settings

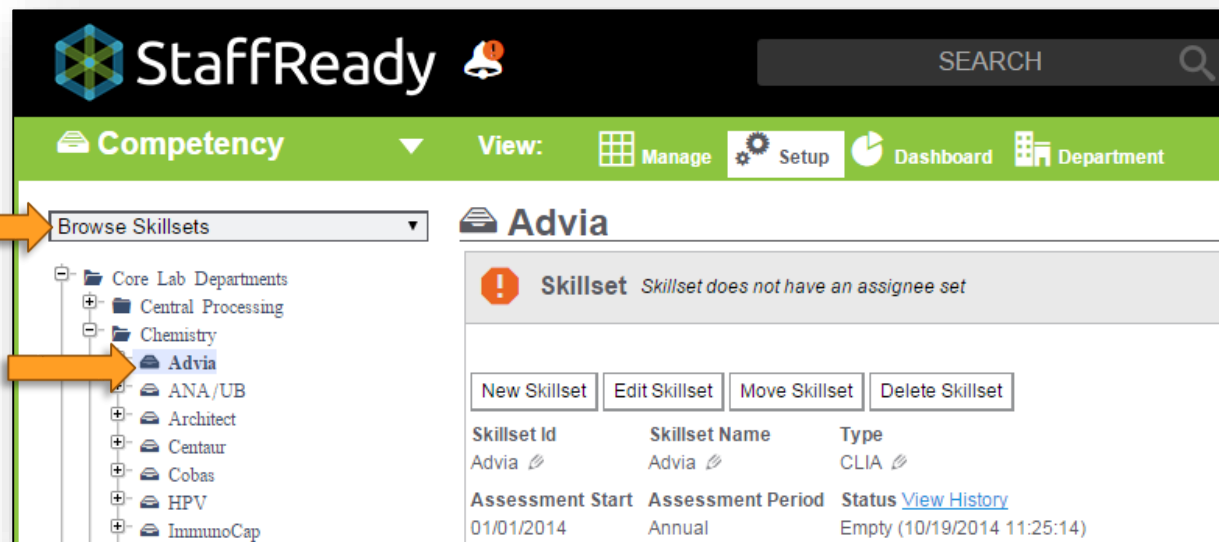
The automated assignment of competency assessment tasks is a result of the skillset assessment period settings.

Skillset Assessment Period Settings

1. Select **Browse Skillsets** perspective.

2. Select a **Skillset**.

3. Click **Edit Skillset**.



StaffReady

Competency View: Manage Setup Dashboard Department

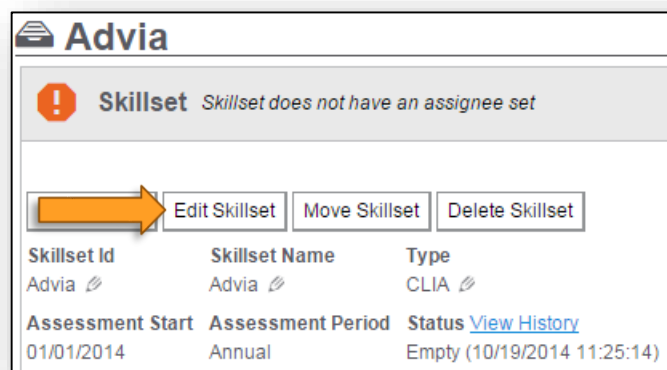
Browse Skillsets

Advia

! Skillset Skillset does not have an assignee set

New Skillset Edit Skillset Move Skillset Delete Skillset

Skillset Id	Skillset Name	Type
Advia	Advia	CLIA
Assessment Start	Assessment Period	Status View History
01/01/2014	Annual	Empty (10/19/2014 11:25:14)



Advia

! Skillset Skillset does not have an assignee set

Edit Skillset Move Skillset Delete Skillset

Skillset Id	Skillset Name	Type
Advia	Advia	CLIA
Assessment Start	Assessment Period	Status View History
01/01/2014	Annual	Empty (10/19/2014 11:25:14)

4. Select **Assignment Period**.

The screenshot shows the 'Edit Skillset' interface. On the left, there is a vertical navigation menu with three tabs: 'Skillset' (highlighted in blue), 'Assignment Period' (highlighted in grey with an orange arrow pointing to it), and 'Employees' (highlighted in grey). On the right, the 'Skillset' section is visible, containing a 'Skillset Type*' dropdown menu set to 'CLIA' and a 'Skillset Id*' text input field containing the text 'Advia'.

5. Select **Assignment Window**:

- Skillset Start Date
- Specific Window

6. Enter **Warning Reminder**.

7. Enter **Time to Complete**.

8. Select **Assignee** option.

9. Click **Save Changes**.

The screenshot shows the 'Edit Skillset' interface with the 'Assignment Period' tab selected. The left navigation menu has 'Skillset', 'Assignment Period' (highlighted in blue), and 'Employees'. The main content area is titled 'Assignment Period' and contains the following fields and options:

- Assignment Window***: A dropdown menu set to 'Choose One' with a link to 'Adjust Assignment Window'.
- Assignment Begins***: A date field set to '01/01/2014'.
- Warning Reminder***: A field set to '15' with a calendar icon and 'Day(s)' label.
- Time to Complete***: A field set to '30' with 'Day(s)' label.
- Assignment Ends**: A date field set to '01/01/2014'.
- Assignee***: A section with four radio button options:
 - The employee completes the assessment themselves
 - The department supervisor completes the assessment
 - A specific individual (with an empty text input field)
 - A team of individuals

At the bottom of the form, there are two buttons: 'Add Step' and 'Save Changes'.

2 | Specific Assignment Window (Slider)

The **Specific Assignment Window** option assigns every employee the skillset competency assessment together on the same date each year. This assignment window option allows competency assessments across departments to be staggered strategically throughout the year.

Specific Assignment Window (Slider)

1. Select **Specific Window** option from **Assignment Window** menu.

Edit Skillset

Skillset	Assignment Period
Assignment Period	Assignment ⓘ
Employees	Assignment Window* ⓘ
	<input type="text" value="Specific Window"/> ▼ Adjust Assignment Window

2. Select **Assignee** option.

Note: An **Assignee** selection must be made in order to access the [Adjust Assignment Window](#) in Step #3. The **Assignee** selection can be changed later.

Assignee* ⓘ

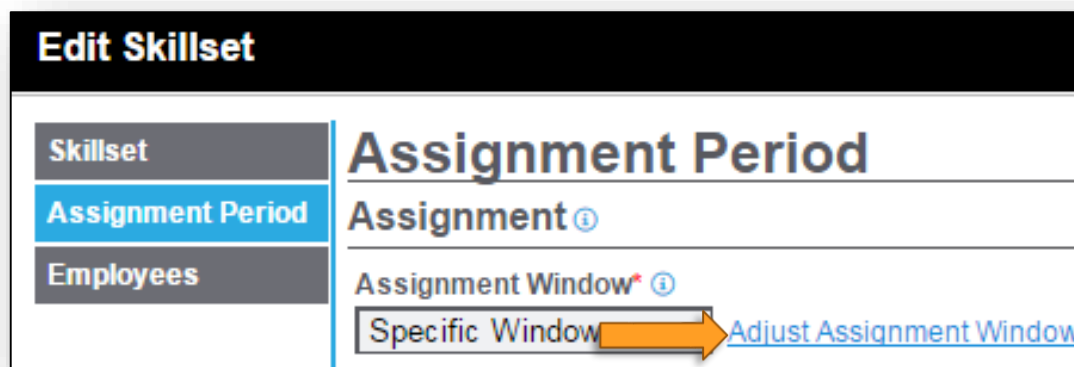
- The employee completes the assessment themselves
- The department supervisor completes the assessment
- A specific individual
- A team of individuals

3. Click [Adjust Assignment Window](#) link.

4. Adjust **Assignment Window Slider**.

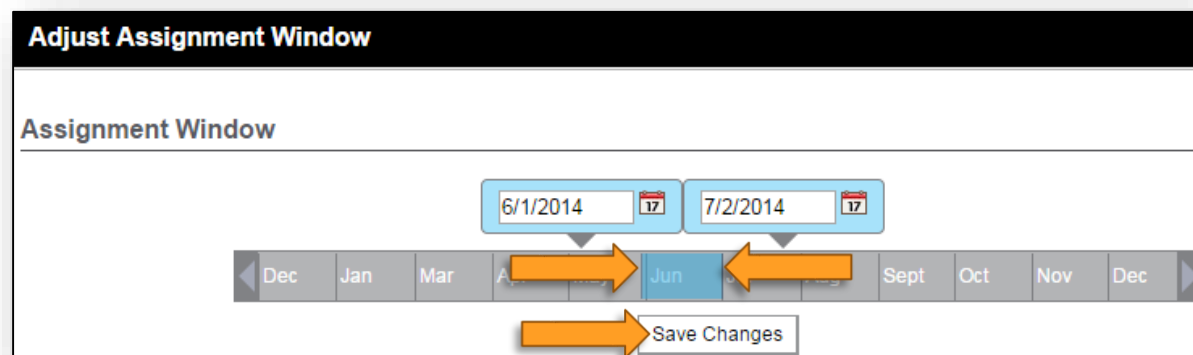
5. Click **Save Changes**.

Note: Click and drag the slider from either side to select the desired beginning and ending date of the competency assignment. The dates can also be manually adjusted using the calendar icons.



Edit Skillset

Skillset	Assignment Period
Assignment Period	Assignment ⓘ
Employees	Assignment Window* ⓘ
	Specific Window → Adjust Assignment Window



Adjust Assignment Window

Assignment Window

6/1/2014 17 7/2/2014 17

◀ Dec Jan Mar A Jun Sept Oct Nov Dec ▶

→ Save Changes

3 | Specific Assignment Window (Without Slider)

Specific Assignment Window (Without Slider)

1. Select **Specific Window** option from **Assignment Window** menu.

2. Enter **Assignment Begins** date.
3. Enter **Warning Reminder**.

Note: The **Warning Reminder** is the number of days before the due date. For example, a **Warning Reminder** of '5' days will result in a system generated **Warning Reminder** five days before the assessment due date.

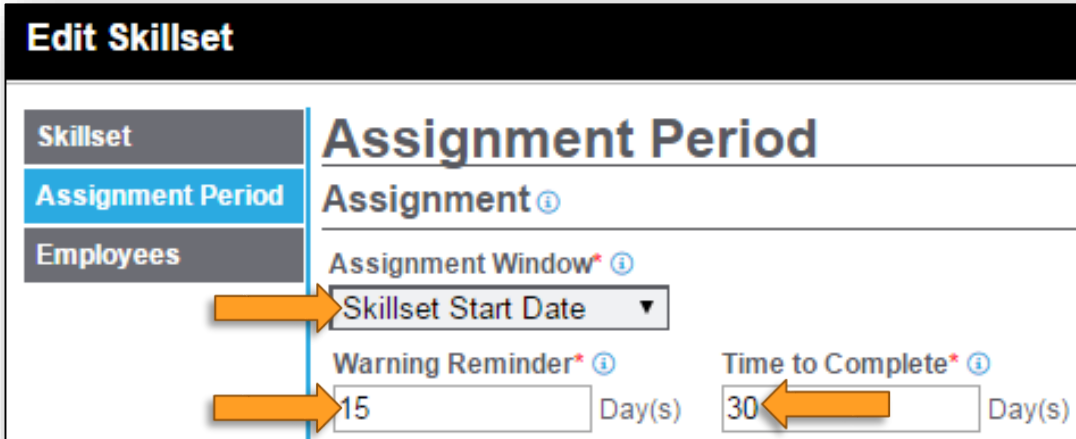
4. Enter **Time to Complete**.

4 | Skillset Start Date Assignment Window

The **Skillset Start Date Assignment Window** option assigns each employee the skillset assessment on the annual anniversary date they first worked the skillset.

Skillset Start Date Assignment Window

1. Select **Skillset Start Date** option from **Assignment Window** menu.
2. Enter **Warning Reminder**.
3. Enter **Time to Complete**.



Edit Skillset

Skillset	Assignment Period
Assignment Period	Assignment ⓘ
Employees	Assignment Window* ⓘ
	Skillset Start Date ▼
	Warning Reminder* ⓘ
	15 Day(s)
	Time to Complete* ⓘ
	30 Day(s)

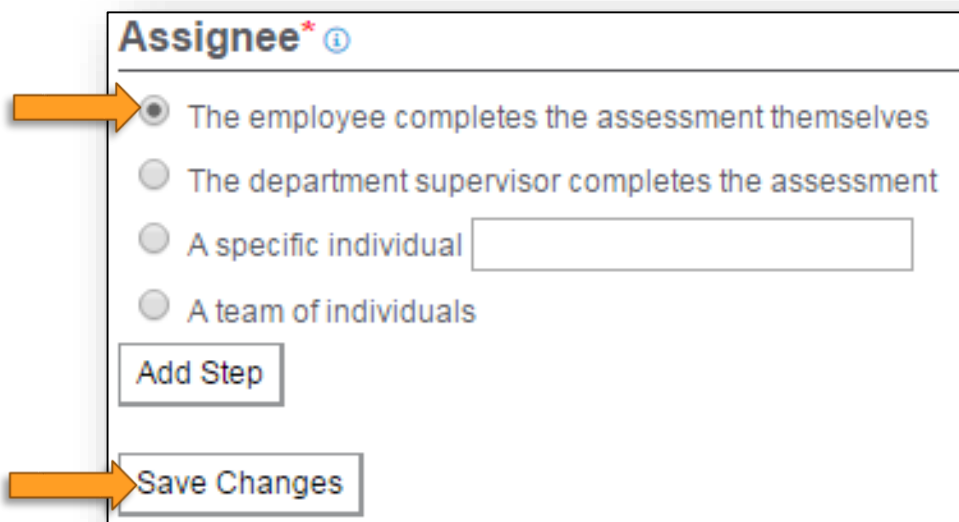
5 | Assignee Option: The Employee Completes the Assessment Themselves

The “**Employee Completes**” **Assignee** option is for assessments (such as **problem solving** exams) that employees completes without assistance from their supervisor.

Assignee Option: The Employee Completes

1. Select **The employee completes...**
Assignee option.

2. Click **Save Changes**.



Assignee* ⓘ

- The employee completes the assessment themselves
- The department supervisor completes the assessment
- A specific individual
- A team of individuals

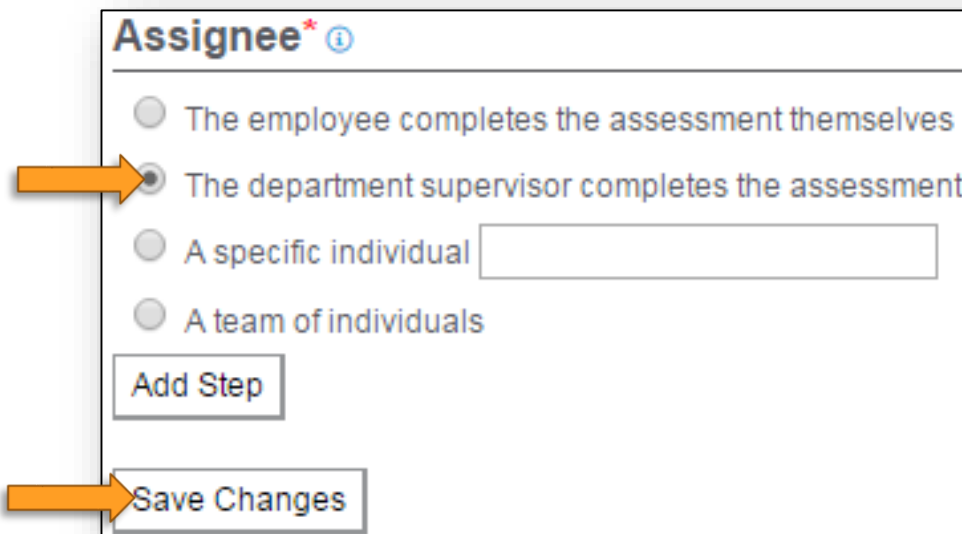
6 | Assignee Option: The Department Supervisor Completes the Assessment Themselves

The “**Department Supervisor Completes**” **Assignee** option is for assessments (such as **direct observations**) where the same department supervisor always conducts the assessment (observation). Consult **Department Settings** training resources to set the department supervisor.

Assignee Option: The Department Supervisor Completes

1. Select **The department supervisor completes... Assignee** option.

2. Click **Save Changes**.



The screenshot shows a form titled "Assignee*" with an information icon. It contains four radio button options: "The employee completes the assessment themselves", "The department supervisor completes the assessment", "A specific individual" (with an adjacent text input field), and "A team of individuals". The second option is selected. Below the options are two buttons: "Add Step" and "Save Changes". Two orange arrows point to the selected radio button and the "Save Changes" button.

7 | Assignee Option: A Specific Individual

The “**Specific Individual**” **Assignee** option is for departments that require a unique supervisor to be chosen for each test system.

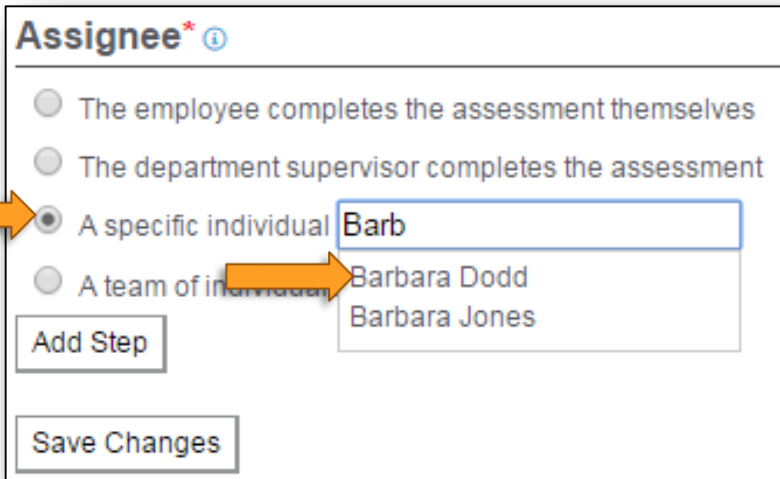
Assignee Option: A Specific Individual

1. Select **The specific individual...** **Assignee** option.

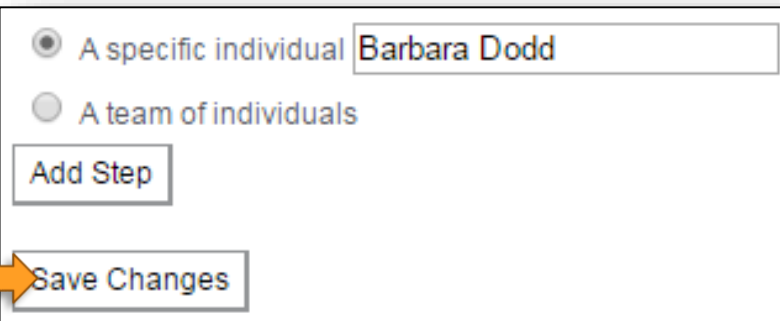
2. Begin typing the supervisor name within the **Specific Individual** field.

3. Select the supervisor name from the auto-complete below the **Specific Individual** field.

4. Click **Save Changes**.



The screenshot shows a form titled "Assignee*" with an information icon. It contains four radio button options: "The employee completes the assessment themselves", "The department supervisor completes the assessment", "A specific individual", and "A team of individuals". The "A specific individual" option is selected. Below it is a text input field containing "Barb". An orange arrow points to the radio button, and another points to the dropdown menu showing "Barbara Dodd" and "Barbara Jones". Below the input field are "Add Step" and "Save Changes" buttons.



The screenshot shows the same form as above, but the dropdown menu is closed and the text input field now contains "Barbara Dodd". An orange arrow points to the "Save Changes" button at the bottom of the form.

8 | Assignee Option: A Team of Individuals

The “**Team of Individuals**” **Assignee** option is for departments with multiple supervisors that can complete employee assessments for a given test system. This option allows for any qualified supervisors to complete assessment tasks at any time.

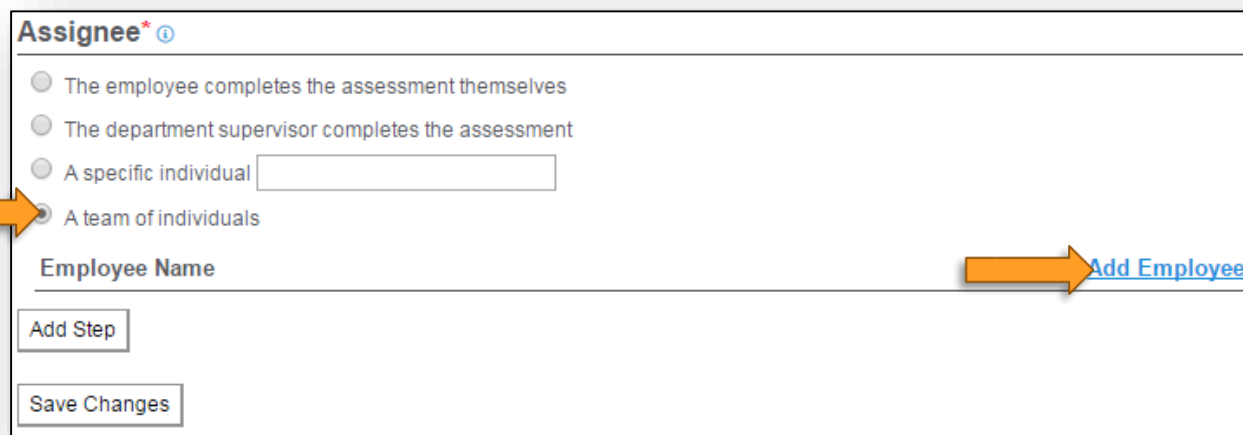
Assignee Option: A Team of Individuals

1. Select **A team of individuals...**
Assignee option.

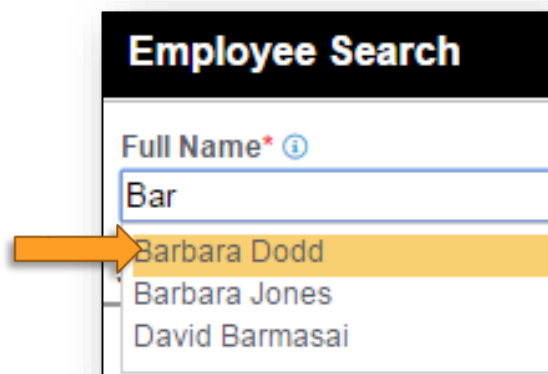
2. Select [Add Employee](#) link

3. Begin typing a supervisor name
within the **Full Name** search field.

4. Select the supervisor name from
the auto-complete menu below
the **Full Name** search field.

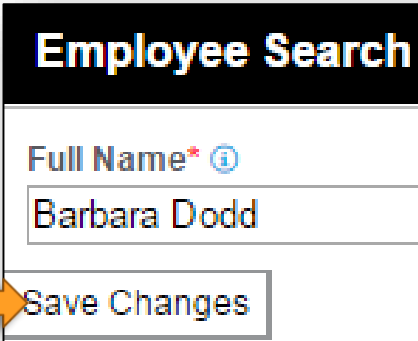


The screenshot shows a form titled "Assignee*" with four radio button options: "The employee completes the assessment themselves", "The department supervisor completes the assessment", "A specific individual" (with a text input field), and "A team of individuals" (which is selected). Below the options is a section labeled "Employee Name" containing an "Add Step" button and a "Save Changes" button. An "Add Employee" link is located to the right of the "Employee Name" section. An orange arrow points from the "A team of individuals" option to the "Add Employee" link.



The screenshot shows an "Employee Search" dropdown menu. The search field is labeled "Full Name*" and contains the text "Bar". Below the search field is a list of names: "Barbara Dodd", "Barbara Jones", and "David Barmasai". The name "Barbara Dodd" is highlighted in yellow. An orange arrow points from the "Add Employee" link in the previous screenshot to the "Barbara Dodd" entry in this dropdown menu.

5. Click **Save Changes**.



Employee Search

Full Name* ⓘ

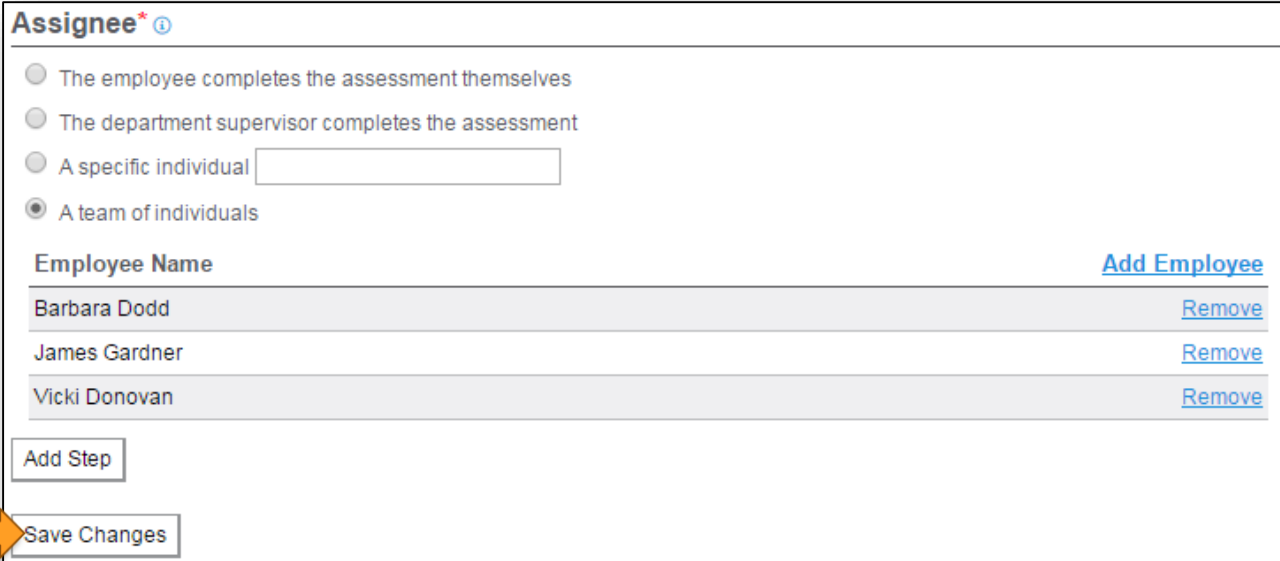
Barbara Dodd

Save Changes

An orange arrow points to the 'Save Changes' button.

6. Click **Save Changes**.

Note: Repeat steps 2-5 for every qualified supervisor required for the **Team of Individuals** assignee option.



Assignee* ⓘ

- The employee completes the assessment themselves
- The department supervisor completes the assessment
- A specific individual
- A team of individuals

Employee Name	Add Employee
Barbara Dodd	Remove
James Gardner	Remove
Vicki Donovan	Remove

Add Step

Save Changes

An orange arrow points to the 'Save Changes' button.

9 | Multi-step Workflows

Some assessments (such as blind duplicate proficiency tests) require multiple employees to complete tasks before the assessment can be completed.

Multi-step Workflows

1. Select **The specific individual...** **Assignee** option.

2. Within the **Specific Individual** field, begin typing the name of the supervisor for the first step of the workflow.

3. Select the supervisor name from the auto-complete menu below the **Specific Individual** field.

4. Click **Add Step**.

Assignee* ⓘ

- The employee completes the assessment themselves
- The department supervisor completes the assessment
- A specific individual
- A team of individuals

5. Select **The employee completes...**
Assignee option for the second
step of the workflow.

6. Click **Finish**.

Multi-Step Assignee ✕

Step 2

This represents a single step in the workflow (assignee list).

Assignee* ?

- The employee completes the assessment themselves
- The department supervisor completes the assessment
- A specific individual
- A team of individuals