Performance Assessment and Training Needs Competency Tool Instructions

How to Download and Install the Performance Assessment and Training Needs Tool

1. Download the Competency Assessment Tool zip file from the Competency Assessment site.
2. Extract the file, and save to desired folder.
   Note: It is recommended that the tool reside in a shared folder that is automatically backed up so that multiple users can access it.
3. There will be two files in the extracted folder:
   - Assessment Populated.accdb
   - Assessment Populated_be.accdb
4. The Assessment Populated_be.accdb file contains the structure and data of the tool, and allows for updates if needed. This file must be co-located with the *.accdb file, but is not opened.
5. **If you do not have Microsoft Access**, go <u>here</u> and download the “64” version, but do not run it yet. Save the executable file to the same folder that contains the Assessment database (above). Once the executable file is in the same folder, run the installation (double click on the file).
6. Double click to open Assessment Populated.accdb file. The first time you run the tool, you may need to enable content. In this case, close the switchboard in the middle of the screen using the X in the upper right hand corner.
7. Click on **Enable Content**, which appears in a yellow background message.
8. Close the tool by exiting out of the screen and closing the Access software.
9. Right click on the Assessment Populated.accdb file (in the desired folder) and select **Send To >**
10. Select **Desktop (create shortcut)**
11. Open shortcut to Performance Assessment and Training Needs Tool.

Instructions for Use:

Performance Assessment Tool Login

The very first time the tool is used, login to the tool using Employee Name: **Manager** (prepopulated), and Password: **manager** This will allow the manager to access the switchboard, and the Facility/Employee Information screen in order to add employees, select roles (manager or staff), and assign passwords.

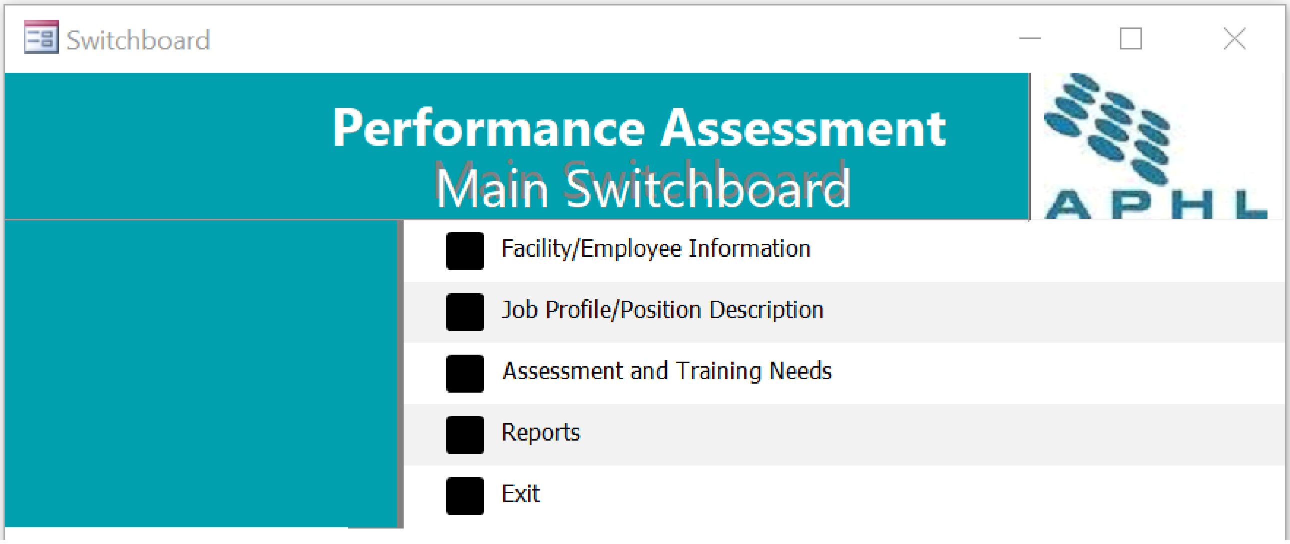
Employees who are assigned a manager role will have access to the main switchboard and all functions of the tool. Employees who are assigned a staff role will have a separate menu after logging in, and will have limited functions.

The **Change Password** button is used by the employee to change their password. If a staff member forgets their password, a manager must reset their password through the **Change Employee Information** option in the **Facility/Employee Information** screen.

Association of Public Health Laboratories
8515 Georgia Ave, Suite 700 • Silver Spring, MD 20910
PHLcompetencies@aphl.org

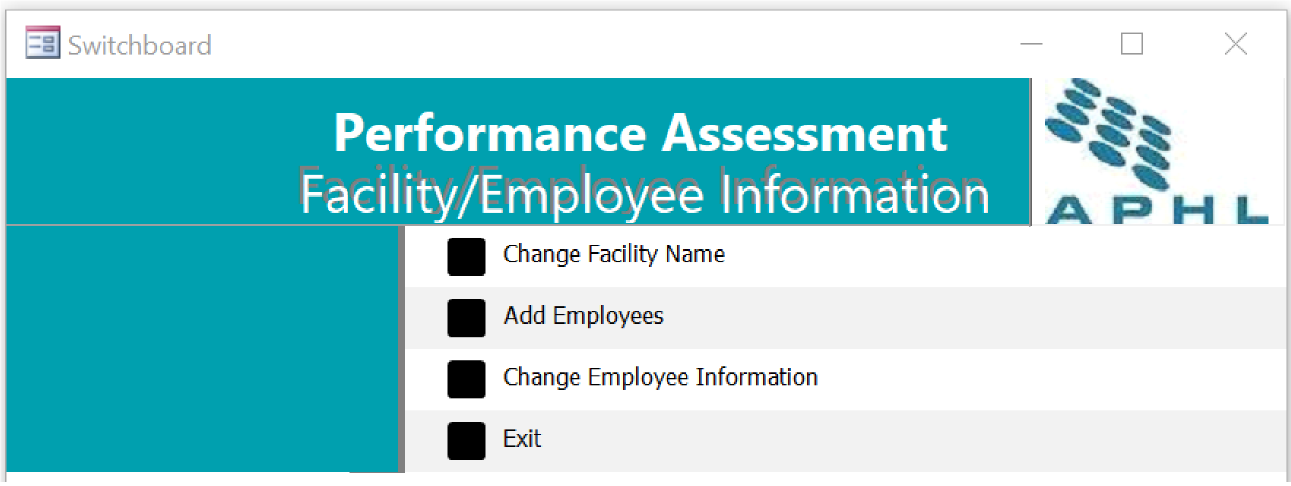
Manager Instructions

The following switchboard is only available to managers upon login, and contains some functions that are not available to staff members.



Facility/Employee Information

This option will allow you to change the facility name, and to add and change employee information, including inactivating employees.



Change Facility Name

- Select this option to edit the Laboratory name. Click on **Exit** to return to the previous screen.

Add Employees

- Select this option to add employee ID, and name, select role (manager or staff) and assign a password. After inputting each employee, click on **Add Record.**
  Note: The employee ID can be any alphanumeric value, unique to that employee.
  Note: There are no restrictions on the password.
- When all employees have been added, click on **Exit** to return to the previous screen.

Change Employee Information

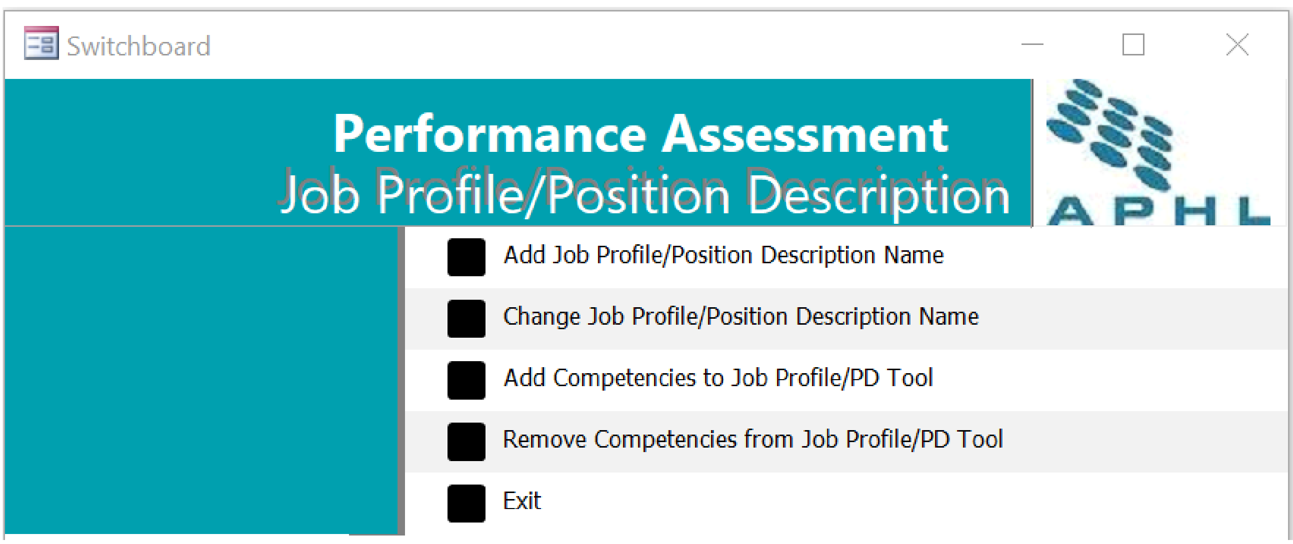
- Select this option to change employee information, including resetting passwords, changing roles, and to inactivate employees. You are prompted to enter a portion of the last name, and all records starting with that portion will be selected. Use the **Next Record** and **Previous Record** buttons to find the correct employee to change.
  Note: If you wish to see all employees in the tool, leave the box asking for a portion of the last name blank.
- Once you have changed the employee information, click on **Exit** to return to the previous screen.

Exit

- Select this option to return to the Main Switchboard.

Job Profile/Position Description

This option will allow you to customize competencies to a job profile (position description). There is no limit to the number of different job profiles that can be customized. The tool has been pre-populated with nine job profiles that were created from the position descriptions posted in the Laboratory Competency Implementation Toolbox on the APHL website.



Add Job Profile/Position Description Name

- Select this option to input the name of a new Job Profile (position description).
- Click on **Add Record** after each new job profile name has been added.
- Click on **Exit** to return to the previous screen.

Change Job Profile/Position Description Name

- Select this option to change the name of an existing job profile (position description). You are prompted to enter a portion of the job profile name, and all records starting with that portion will be selected.
- Use the **Next Record** and **Previous Record** buttons to find the correct job profile name to change.

Note: If you wish to see all job profiles in the tool, leave the box asking for a portion of the job profile name blank.

- Once you have changed the job profile name information, click on **Exit** to return to the previous screen.

<u>Add Competencies to Job Profile/PD Tool</u>

- Select the appropriate job profile/position description name using the down arrow.
- Add competencies to the job profile/PD tool by selecting the desired domain, competency and subcompetency and click on **Add Record**.
- Continue to populate the job profile/PD tool in this manner until all subcompetencies have been added.
  Note: The screen does not reset so that you can add multiple subcompetencies for the same domain and competency. When you change to a new domain, be sure to select new competencies and subcompetencies.
- Click on **Exit** to return to the previous screen

<u>Remove Competencies from Job Profile/PD Tool</u>

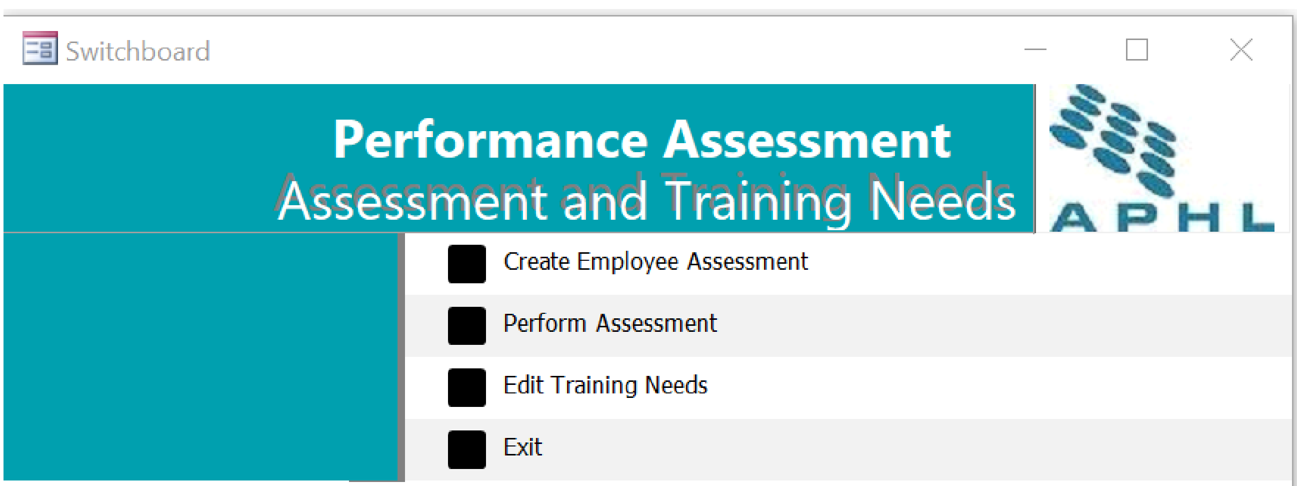
- Select the appropriate job profile/position description name that needs to have a competency/subcompetency removed using the down arrow.
- Select the desired domain, competency and subcompetency to be removed and click on **Remove Record**.
- Continue to remove competencies/subcompetencies from the job profile tool in this manner until all undesired subcompetencies have been removed.
- Click on **Exit** to return to the previous screen

<u>Exit</u>

- Select this option to return to the Main Switchboard.

Assessment and Training Needs

This option will allow you to create an employee assessment by associating a job profile/position description with an employee. The assessment can be performed by either the manager or by the employee.



Create Employee Assessment

- Select the employee name from the drop down arrow, or start typing the last name until you can select the employee from the drop down list.
- Select the job profile from the drop down arrow, or start typing the name of the job profile until you can select the job profile from the drop down list.
- Click on **Create Assessment.** This will create an assessment that associates the employee with the job profile tool for the current date.
  Note: Only one assessment can be created for the employee per day. If the same assessment is to be performed by the manager and the employee, they must be created on different days.
- Click on **Exit** to return to the previous screen.

Perform Assessment

- Select the employee name from the drop down arrow, or start typing the last name until you can select the employee from the drop down list.
- Select the assessment creation date using the drop down arrow.
  Note: This creation date corresponds to the date the employee was associated with the job profile tool.
- Click on **Begin Assessment**. The manager will click through the assessment, selecting the boxes next to each statement as to the current ability to perform the described actions.
- *Note: The statements are arranged in order of Beginner (B), Competent (C), Proficient (P) and Expert (E). These are progressive statements; the employee must be able to perform at the Beginner level before they can be assessed at the Competent level, perform at the Competent level before they can be assessed at the Proficient level, and perform at the Proficient level before they can be assessed at the Expert level.*
- When the entries for that subcompetency are completed, click on **Next Record**.
  Note: The assessment can be stopped, and picked up at a later time. The previously entered check marks will be retained.
- Use the **Next Record** and **Previous Record** to navigate through the assessment.
  Note: There is a progress display in the bottom right of the screen.
- After the information for the last record has been entered, the details of the assessment can be displayed or printed by clicking on the **Display/Print Details** button. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- After the information for the last record has been entered, a summary of the assessment can be displayed or printed by clicking on the **Display/Print Summary** button. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- Click on **Exit** to return to the Employee Assessment screen, where you can perform another assessment or click on **Exit** to return to the Assessment and Training Needs menu.

Edit Training Needs

- Enter a portion of the last name of the employee, and all records starting with that portion will be selected. Use the **Next Record** and **Previous Record** buttons to find the correct employee and the correct Date Assessed for which the training needs will be associated.

Note: If you wish to see all employees in the tool, leave the box asking for a portion of the last name blank.

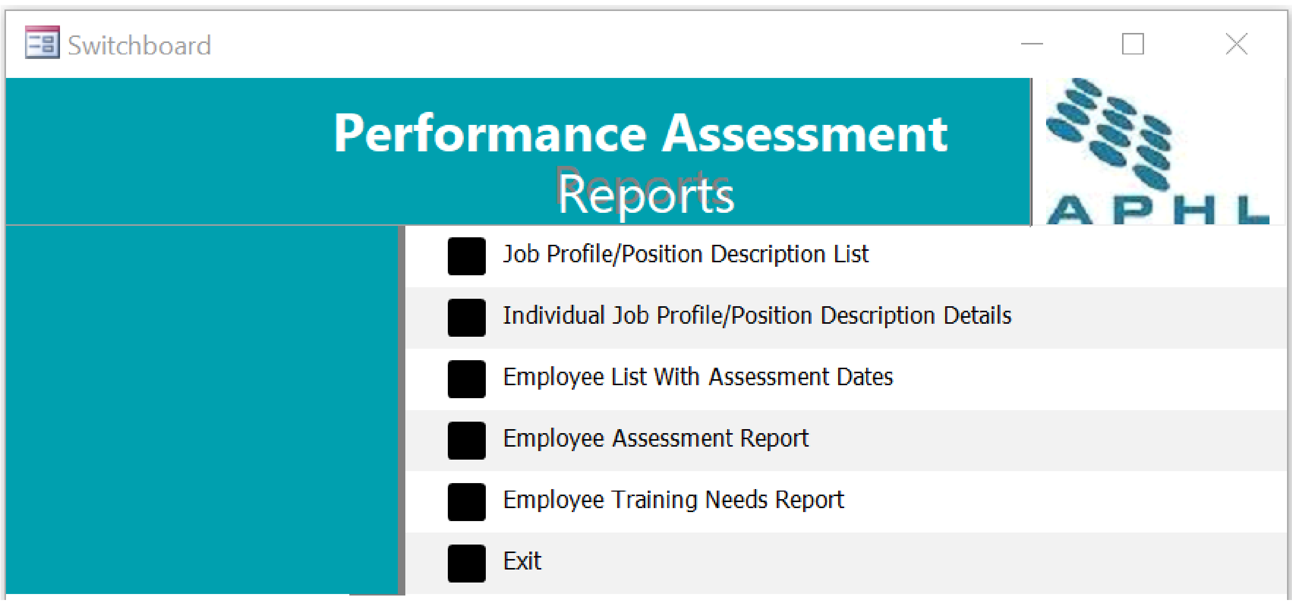
- Enter the identified training needs for that employee, which will be associated with the proper assessment, based on the Date Assessed.
  Note: If you want to go back and edit the training needs, this can be performed on this same screen.
- Click on **Exit** to return to the Assessment and Training Needs menu.

Exit

- Select this option to return to the Main Switchboard.

Reports

This option allows the user to display and print reports of the job profile/position description list and details, a listing of all employees who have completed assessments by date and person who performed the assessment, the employee assessment reports and an employee training needs report.



Job Profile/Position Description List

- Select this option to display or print a list of all existing job profiles/position descriptions are displayed, and whether the job profile is active.
- To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report and return to the Reports menu.

Individual Job Profile/Position Description Details

- Select the job profile tool to be displayed or printed using the down arrow, or start typing the job profile name until you can select the job profile name from the drop down list.
- Click on **Display/Print Report**. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- Click on **Exit** to return to the previous screen.

Employee List with Assessment Dates

- Select this option to display or print all employees who have either performed a self-assessment or have been assessed by a manager. The report is sorted by active and inactive employees, then by Employee and Assessment Date.
- To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report and return to the Reports menu.

Employee Assessment Report

- Select the employee name from the drop down arrow, or start typing the last name until you can select the employee from the drop down list.
- Select the assessment creation date using the drop down arrow.
  Note: This date corresponds to the date the employee was associated with the job profile tool.
- Click on **Display/Print Details**. This will display the details of each statement. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- Click on **Display/Print Summary**. This will display a summary report of the assessment. To print from the screen that is displayed, press **Control-P.**
- Click on the X in the upper right hand corner to close the report.
- Click on **Exit** to return to the Reports menu.

Employee Training Needs Report

- Select the employee name from the drop down arrow, or start typing the last name until you can select the employee from the drop down list.
- Select the assessment creation date using the drop down arrow.
  Note: This date corresponds to the date the employee was associated with the job profile tool.
- Select the desired competency level (Beginner, Competent, Proficient, Expert) from the drop down list. The report will use the desired level to determine areas where the assessment was less than the desired competency level, and provide a listing of competencies and associated subcompetencies for which the employee could benefit from training.
  Note: This report includes the training resources or opportunities that were entered using the Edit Training Needs option in the Assessment and Training Needs menu.
- Click on the X in the upper right hand corner to close the report and return to the Training Needs Report screen.
- Click on **Exit** to return to the Reports menu.

Exit

- Select this option to return to the Main Switchboard.

Staff Instructions

The following menu contains only the functions that are available to staff upon login.

Create Employee Assessment Record

- Select the job profile from the drop down arrow, or start typing the name of the job profile until you can select the job profile from the drop down list.
- Click on **Create Assessment.** This will create an assessment that associates the employee with the job profile tool for the current date.
  Note: Only one assessment can be created for the employee per day. If an assessment already exists for the employee, and error message is received.
- Click on **Exit** to return to the Employee Options screen.

Perform Assessment

- Select the assessment creation date using the drop down arrow.
  Note: This creation date corresponds to the date the employee was associated with the job profile tool.
- Click on **Begin Assessment**. Click through the assessment, selecting the boxes next to each statement as to the current ability to perform the described actions.
- *Note: The statements are arranged in order of Beginner, Competent, Proficient and Expert. These are progressive statements; the employee must be able to perform at the Beginner level before they can be assessed at the Competent level, perform at the Competent level before they can be assessed at the Proficient level, and perform at the Proficient level before they can be assessed at the Expert level.*
- When the entries for that subcompetency are completed, click on **Next Record**.
  Note: The assessment can be stopped, and picked up at a later time. The previously entered check marks will be retained.
- Use the **Next Record** and **Previous Record** to navigate through the assessment.
  Note: There is a progress display in the bottom right of the screen.

- After the information for the last record has been entered, the details of the assessment can be displayed or printed by clicking on the **Display/Print Details** button. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- After the information for the last record has been entered, a summary of the assessment can be displayed or printed by clicking on the **Display/Print Summary** button. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- Click on **Exit** to return to the Employee Assessment screen, and click on **Exit** to return to the Employee Options screen.

Job Profile/Position Description Report

- Select the job profile tool to be displayed or printed using the down arrow, or start typing the job profile name until you can select the job profile name from the drop down list.
- Click on **Display/Print Report**. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- Click on **Exit** to return to the Employee Options screen.

Employee Assessment Report

- Select the assessment creation date using the drop down arrow.
  Note: This date corresponds to the date the employee was associated with the job profile tool.
- Click on **Display/Print Details**. This will display the details of each statement. To print from the screen that is displayed, press **Control-P**.
- Click on the X in the upper right hand corner to close the report.
- Click on **Display/Print Summary**. This will display a summary report of the assessment. To print from the screen that is displayed, press **Control-P.**
- Click on the X in the upper right hand corner to close the report.
- Click on **Exit** to return to the Employee Options screen.

Employee Training Needs Report

- Select the assessment creation date using the drop down arrow.
  Note: This date corresponds to the date the employee was associated with the job profile tool.
- Select the desired competency level (Beginner, Competent, Proficient, Expert) from the drop down list. The report will use the desired level to determine areas where the assessment was less than the desired competency level, and provide a listing of competencies and associated subcompetencies for which the employee could benefit from training.
  Note: This report includes the training resources or opportunities that were identified and entered into the tool by the manager.
- Click on the X in the upper right hand corner to close the report and return to the Training Needs Assessment Report screen.
- Click on **Exit** to return to the Employee Options screen.