Assessments

Legal Requirements for Assessments

Employers must ensure visitors, contractors and employees are informed about the methods, processes, equipment and hazards of their tasks and workplaces.

Procedure for Assessments

Where particular jobs or environments require prior knowledge or skills, or where there have been changes to the hazards, methods, rules or conditions, the people employed to perform these roles or tasks should be **Pre-qualified** by confirming they have understood and agree to the requirements.

How to create and use Assessments

Ensure you have a relevant Group created in the **Groups** tab at the top of the page. You may, for example, wish to identify groups of employees, such as "Operations" or "Distribution". What about external parties such as "Contractors"? Or you can name the Group by their company name

Add member's names and email addresses EITHER directly into the People tab, by assigning them to a Group, OR bulk upload a CSV in the Assessment itself (see item 5 below)

Create your Assessment. Go to Training/Assessments and click the **Add** button. In the first tab, you create the specifications for the Assessment, including period of currency, reminders for incomplete Assessments, how many attempts the recipients are allowed, when refresher Invitations are to be sent and page header/footer.

Now, in the next tab, create your Assessment by specifying the questions and information to be provided. The Assessment can be used to both provide the recipient with information and test their understanding and agreement. You can attach pictures, information, training courses such as PowerPoint and even short videos. You can provide multiple choice answers and specify which answer(s) are correct. You can ask the recipient to attach relevant information, such as their certification

To invite Group members, click the Assessment you want and then click the **Invitations** tab in the dark grey bar. You can then see a list of Groups from which to invite. (If the Group you want is not listed, click the **Add group** button and select). Click on the Group name and you will see a list of Group members. On this page, you can also add new members individually or upload a bulk CSV file.

Please note. If your recipient(s) do not have their personal email address, or do not wish to have invitations sent to one, it is not possible to simply add them to the People tab. This is because an email address is the unique ID for a person and it cannot be attributed to more than one person without a work-around. This is what you have to do:

Go to the Invitations tab in an Assessment
Select the Group you want
In the Invite tab, go to the "Bulk Upload New Members" window and follow the instructions for creating a CSV file using an email address belonging to the people's supervisor, manager or any other cooperating third party. Then upload the CSV as per instructions. The new people will be added. The system will create a third invisible unique ID and ignore the email address. This will allow tracking of completed Assessments in the normal way

Tick the box next to all the members you wish to invite and click **Send invitations**. You will see a screen drop confirmation and you will land in the next tab, **Invitations sent**. (Note that you cannot re-send an invitation to anyone who already has an incomplete invitation for the same Assessment). The invitations you just sent, and any other previous ones will be displayed along with "traffic lights", which give a visual clue as to the status of the Assessment and currency.

You can make the Assessment a condition for other files, such as **Approved Contractors** or **Safety Inductions**. To do this, open your Assessment and in the dark grey bar, select **Required for** and click **Add File Type**. Select the file you want and hit "Create". Now, go to the file type you added and create a new file. You will be prompted to select people from droplists. If the person you want is in the droplist, it means they have passed the required Assessment and are still within the currency period.

Tips and Tricks for using the Assessments feature

For people without their own email addresses, you can use a generic address or your own address for the invitations to go to. Just make sure the person has a unique name and use whatever email address you want. **PLEASE NOTE:** Because email addresses are the standard unique ID for each recipient, if you want to send to a generic email address, you need to upload the identities using the CSV upload (below). This will insert a "background" unique ID, so the system knows the difference between the users of the email address

When using the CSV upload feature, make sure you use the correct headings for each column. These are **name** and **email**, exactly as they appear here. (Use the **Download an example CSV** link if it helps). If you have an existing spreadsheet, ensure you save it as file type CSV before uploading.

When creating your Assessment, it pays to save it every 15 minutes to avoid losing your work if the system times out.

On the **Invitations sent** tab, you can sort some columns and reverse order them by clicking the blue column headings. You can also use the provided Sort feature.

If you want to delete questions or answers you have already saved, clear the box and simply save it again.

When the recipient gets answer(s) wrong, they are provided with another opportunity (if one is still available) and the incorrect question or questions are highlighted. Both senders and recipients are notified by e-mail of the result.

Remember, you may have to refresh your **Invitations sent** page to make the traffic lights and results update for recently completed Assessments.

There are many uses for Assessments. You can use them for internal/external inductions, "read and sign" notifications, theory training, opinion polls, surveys and more.