

Development of Competency Assessment Tracker and Training Dashboard Smartsheets

Claribel Colon, Delia Sanchez, Rachel Beddard, MD¹ and Scott Jones, PhD¹ ¹ BioBridge Global, San Antonio, TX

Objective:

Develop a tool to manage the training and competency assessment process, automate status and feedback communication, and provide visibility of training and competency status.

Methods:

Two Smartsheets were developed to manage the training process and track competency assessments. These Smartsheets generate automatic alerts that flow through email communication to notify of pending, upcoming, and overdue training and competency assessments. In addition, a Training Dashboard was created to provide a one view summary of the overall training and competency status.

Training Management Smartsheet

The Training Management Smartsheet is used to handle the training process, from requesting training until the initial competency has been completed.

The tasks handled by the Training Management Smartsheet include:

- Lab Management assigns or requests training for staff
- Training Coordinator assigns Trainer
- Trainers and Trainees receive upcoming training notifications
- Trainers receive training status and feedback requests
- Training Coordinator tracks completion of Training
- Training Coordinator assigns Initial Competency Assessor
- Training Coordinator tracks completion of Initial Competency Assessment

Automated Communication

Communication	То
Training Request	Training Coordinator
Training Assignment	Trainer, Trainee, Supervisor
Assign Curriculum	Training Coordinator
Training Update & Feedback	Trainer
Initial CA Assignment	Assessor
Initial CA Status Request	Assessor, Trainee
Training Task Verification Pend-	Lab Director or designee

Other Automated Tasks

Trigger	Action
Completed Initial	Copies row to the Competency Track Smartsheet
Competency	Moves the row to the Completed Training Smartsheet
In Process Training Report	Sent weekly to Training Coordinator to verify training completion in eQMS.
Pending Initial Competency Report	Sent weekly to Training Coordinator to verify completion of Initial Competency in eQMS.

Competency Assessment Tracker

The Competency Assessment Tracker Smartsheet is used to manage ongoing competencies, that is, semi-annual competencies and subsequent annual competencies

The tasks handled by the Competency Assessment Tracker Smartsheet include:

- List Competent staff per Testing Platform/Process ٠
 - o The Smartsheet allows for data filtering by Testing Platform/Process or by Trainee
- Training Coordinator assigns Competency Assessor for upcoming competencies
- Visibility of upcoming, pending, and overdue competencies





Automated Communication

Communication	То
Assign Assessor	Training Coordinator
Pending Competency – 30 Day Notification	Trainee, Assessor, Supervisor
Competency Assessment Status Request -	Trainee, Assessor, Supervisor
Status Updates	Training Coordinator
Overdue Competency Assessment - Daily	Trainee, Assessor, Supervisor

Trigger	Action
Completed Competency	Copies row to the Completed Competencie
completed competency	Clear specific cell value for Assessor
Pending Competencies	Sent weekly to Training Coordinator to verif completion of Semi-Annual & Annual Comp

in eQMS

Lab Services Training Status

6800/8800 6800/8800

6800/8800

6800/8800

6800/8800

6800/8800

6800/8800

Primary

6800/8800

T-05-do002/M0

T-05-do002/MC

T-05-do002/MC

T-05-do002/M0

T-05-do002/MC

T-05-do002/MC

T-05-do002/MC

T-05-do002/M0

Other Automated Tasks

Training Dashboard

The Training Dashboard pulls information from the two Smartsheets and generates a Training Status Summary, including:

- Competency matrix per Testing Platform/Process
- Status of pending training
- Status of all competencies

Results:

Data related to training and competency assessment was analyzed from pre-(May 2021 - April 2022) and post-Smartsheet implementation (May 2022 - April 2023).

- Training task closure rate remained at 24 days, despite a 26% increase in training tasks.
- Reduced the maximum number of days to close competency assessment tasks by 23%.
- Reduced the percentage of overdue competencies from 20% to 12%.
- The overall time invested in managing and tracking training was reduced by 75%.

		T-05-do0	02/MC	6800/8800	Clayton Trevino			1st Annual
		Platform/Proc Abbott a						
		T-02-do0	03/MC	Abbott a3600	Alice Gallegos			Annual
		T-02-do0	03/MC	Abbott a3600	Armando Gomez			Annual
		T-02-do0	03/MC	Abbott a3600	Alexis Manzo-Lo	pez		Annual
		T-02-do0	03/MC	Abbott a3600	Maria Wong			Annual
		OPP CU T	03/4/0	Appatt = 3600	Alucia Dadriauca			Appual
				Training Sta	tus			
In Process Train	ina				Pending Training	na		
Training Start Date	Trainee	Platform/Process	Trainer		Trainee	-	rm/Process	Training Start
and the second second				d Harris Barba				rraining Start
03/02/23	Chesney Migl	Alinity s		rd, Hector Rocha	Alexis Manzo-Lopez		Decapping	
03/02/23 04/09/23	Chesney Migl	Alinity c&i SPE	Hector Rocha	rd, Hector Rocha	Alexis Manzo-Lopez		rgy Pooling	
04/23/23	Dante Johnson Jonathan Morris	Ortho V3600	Hector Rocha		Alexis Manzo-Lopez Chartrice Bedford			
02/22/23	Michaela Johnson			in Vanessa Gallegos		Dyne		05/07/23
03/22/23	Roel Villarreal		essin Julia Thomas		Jonathan Morris	Dyne	x	05/07/23
)4/23/23	Sandra H – Mendez	Box Reception	Vanessa Galleg	0.0	Karen Chac	Produ	uction Pools	04/01/23
)4/23/23	Sandra H – Mendez		cessin Vanessa Galleg					
03/07/23	Sean Sutton		cessin Vanessa Galleg					
				Competency S	Status			
Pending Initial	Competency			Pending	Ongoing Competen	cies (LS	;)	
Trainee	Platform/Process	Training Start Date	Assessor	Trainee	Platform/Pro	cess	Test Code	Asses
Braesha Andrews	Capillarys 3	10/18/22		Alice Gallego	s 6800/8800	6800/8800 T-05-		/MC Sandr
Ezequiel Herrera	Capillarys 3	10/18/22	Delia Sanchez	Alice Gallego			PL15/MC	Sandr
Hector Rocha	Capillarys 3	10/18/22	Delia Sanchez	Jaqueline Go			PL06/MC	Hecto
Jada Dauphine	Abbott a3600	04/13/23	Vanessa Gallegos	Clayton Trevi	ino Synergy Poo	oling	T-02-do007/	/MC Sandi
Jonathan Morris	Synergy Pooling	03/24/23	Hector Rocha	Alexis Manzo	-Lopez Box Recepti	on	T-02-do002/	/MC Vanes
Julia Thomas	Capillarys 3	10/18/22		Eamon Morri	s SPE		PL04/MC	Hecto
Karen Chac	Abbott a3600	03/12/23	Vanessa Gallegos	Sophia Abou	di PK7300		PL09/MC	Sand
Matthew Lapetoda	HTLV Blot	04/02/23	Mridula Patel	Megan Gree	ASI Evolutio	n	E-04-do013	/MC Julia
Matthew Lapetoda	Chagas (CF)	04/02/23	Mridula Patel	Sophia Abou			T-05-do005	Sandr
Megan Greer Michaela Johnson	Alinity c&i	03/05/23	Devon Contreras	Braesha And	rews ASi Evolutio	n	E-04-do013	/MC Julia 1
	Box Reception	02/22/23	Vanessa Gallegos					
Nathanael Lisanti	p512 Decapping	03/10/23	Hector Rocha					
Nathanael Lisanti	Synergy Pooling	03/10/23	Hector Rocha					

Vanessa Gallegos

Discussion:

Development and implementation of the Competency Assessment Tracker Smartsheet and Training Dashboard allowed us to close training competencies quicker and decrease the percentage of overdue competencies by 8%. The use of these Smartsheets increased (26%) the number of training tasks performed, allowed us to maintain a task closure rate of 24 days and decreased the time invested in management/tracking of training by 75%. The implementation of Smartsheets for management and tracking of training has also resulted in improved visibility for the Laboratory Management team and improved historical data gathering on training tasks and their completion.

Roel Villarreal

Sean Suttor

Box Reception

02/17/23

Useful Links MasterControl Login

Assessors

Training Request

Competency Tracker

Training Process Management

South Texas Blood & Tissue





s Smartsheet

petencies

Next Eval Du

Annual Annual Semi-Annual Annual Annual Semi-Annual Annual

Eval State

Alice Gallegos Fabiola Gomez

Amber Gonzalez

Sandra H -- Mende

Roxanne Jacobsen

Tilo Pena Hector Rocha

01/15/24 04/12/23 09/05/23 12/18/23 09/05/23 12/18/23 09/05/23 12/18/23 09/05/23 12/09/23 09/05/23 12/09/23 06/03/23 06/03/23 06/30/23 06/03/23 0/10/24 06/03/23 </th <th></th> <th></th> <th></th>			
e Evaluation e Valuation 01/15/24 04/12/23 09/05/23 12/18/23 09/16/23 09/16/23 09/05/23 12/09/23 06/03/23 06/03/2 06/03/2 06/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03			
e Evaluation e Valuation 01/15/24 04/12/23 09/05/23 12/18/23 09/16/23 09/16/23 09/05/23 12/09/23 06/03/23 06/03/2 06/03/2 06/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03			
e Evaluation e Valuation 01/15/24 04/12/23 09/05/23 12/18/23 09/16/23 09/16/23 09/05/23 12/09/23 06/03/23 06/03/2 06/03/2 06/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03			
e Evaluation e Valuation 01/15/24 04/12/23 09/05/23 12/18/23 09/16/23 09/16/23 09/05/23 12/09/23 06/03/23 06/03/2 06/03/2 06/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03			
e Evaluation e Valuation 01/15/24 04/12/23 09/05/23 12/18/23 09/16/23 09/16/23 09/05/23 12/09/23 06/03/23 06/03/2 06/03/2 06/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03			
e Evaluation e Valuation 01/15/24 04/12/23 09/05/23 12/18/23 09/16/23 09/16/23 09/05/23 12/09/23 06/03/23 06/03/2 06/03/2 06/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03/2 00/03			
01/15/24 04/12/23 09/05/23 12/18/23 09/05/23 12/09/23 06/30/23 07/05/23 11/08/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/23 08/12/24 10/10 11/08/25 08/12/24 08/12/23 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 08/12/24 11/08/24 11/08/24 11/08/24 11/08/24 11/08/24 11/08/24 11/08/24 11/08/24 <	e		
04/12/23 09/05/23 12/18/23 09/16/23 09/05/23 12/09/23 09/05/23 12/09/23 06/30/23 06/30/23 08/12/23 11/08/23 08/12/23 12/12/14/14/14/14/14/14/14/14/14/14/14/14/14/		Linden	at.
04/12/23 09/05/23 12/18/23 09/16/23 09/05/23 12/09/23 09/05/23 12/09/23 06/30/23 06/30/23 08/12/23 11/08/23 08/12/23 12/12/14/14/14/14/14/14/14/14/14/14/14/14/14/			
09/05/23 12/18/23 09/15/23 12/19/23 09/05/23 12/09/23 06/30/23 06/30/23 07/10/23 12/09/23 06/30/24 06/30/24 06/30/24 06/30/24 06/30/24 06/30/24		01/15/24	
te Trainer Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
e Trainer Clayton Trevino Clayton Trev			
09/16/23 09/05/23 12/09/23 06/03/23 12/09/23 06/03/23 07/05/23 11/08/23 08/12/23 08/12/23 06/03/23 06			
12/09/23 06/03/23 06/03/23 06/03/23 07/05/23 11/08/23 08/12/23 06/30/23 11/08/23 08/12/23 08/12/23 06/30/23 11/08/23 08/12/23 06/30/23 06/30/23 te Trainer Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha Hector Rocha Hector Rocha			
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha		06/03/23	
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha		06/30/23	
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
te Trainer Clayton Trevino Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha		06/30/33	
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha			
Clayton Trevino Clayton Trevino Hector Rocha Hector Rocha	ite	Trainer	
Clayton Trevino Hector Rocha Hector Rocha		Clayton Trev	rino
Hector Rocha Hector Rocha Eval Str		Clayton Trev	vino
Hector Rocha		Clayton Trev	rino
Eval Str			
		Hector Roch	а
-Mendez Overdu			Evel Chat
	r		Eval Stat
		lez	Overdue
	H -Meno		Overdue
	H -Meno		
	H – Meno H – Meno Jocha	lez	Overdue Overdue Overdue Pending
	H – Meno H – Meno Socha H – Meno Gallego	lez lez	Overdue Overdue Overdue Pending Pending
	H – Meno H – Meno Jocha H – Meno Gallego Jocha	lez lez os	Overdue Overdue Overdue Pending Pending Pending
	H – Meno docha H – Meno Gallego docha H – Meno	lez lez os	Overdue Overdue Overdue Pending Pending Pending Pending
	H – Meno ocha d – Meno Gallego cocha H – Meno omas	lez dez dez	Overdue Overdue Overdue Pending Pending Pending Pending Pending
	H – Meno ocha d – Meno Gallego cocha H – Meno omas	lez dez dez	Overdue Overdue Overdue Pending Pending Pending Pending

