

Development of Competency Assessment Tracker and Training Dashboard Smartsheets

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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	To
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 Competency	Copies row to the Competency Track Smartsheet 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.

Automated Communication

Communication	To
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

Other Automated Tasks

Trigger	Action
Completed Competency	Copies row to the Completed Competencies Smartsheet Clear specific cell value for Assessor
Pending Competencies	Sent weekly to Training Coordinator to verify completion of Semi-Annual & Annual Competencies in eQMS

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

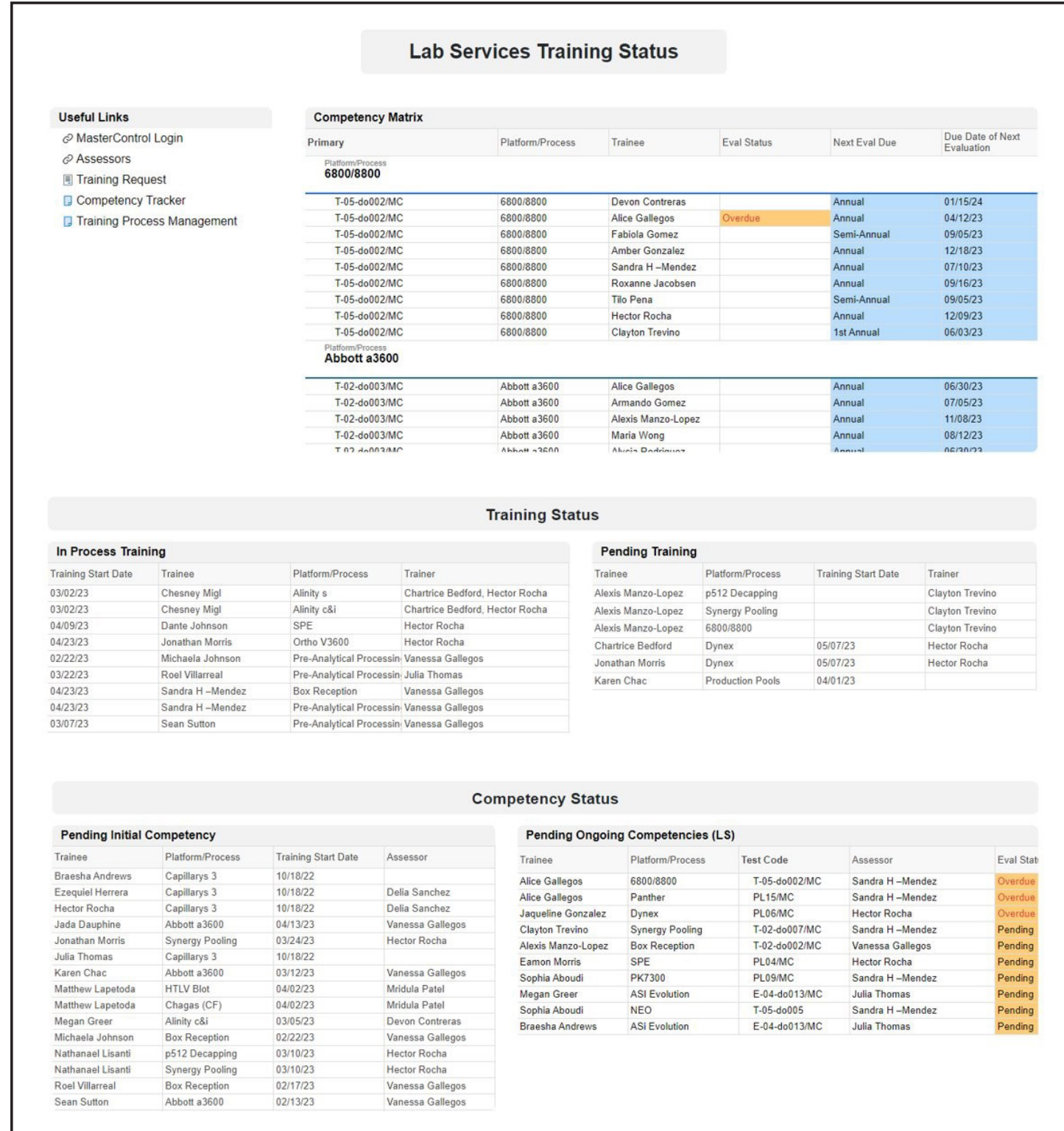
Results:

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%.

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.



The screenshot displays the 'Lab Services Training Status' dashboard. It includes three main sections:

- Competency Matrix:** A table with columns for Primary, Platform/Process, Trainee, Eval Status, Next Eval Due, and Date of Next Evaluation. It lists various competency codes (e.g., T-05-d002/MC) and their corresponding trainees and assessors.
- Training Status:** A table with columns for In Process Training and Pending Training. It details training start dates, trainees, platform/processes, training start dates, and trainers.
- Competency Status:** A table with columns for Pending Initial Competency and Pending Ongoing Competencies (LS). It lists trainees, platform/processes, training start dates, assessors, and evaluation dates.

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
 - 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