



**Administrator's Manual**  
**- Observation Checklist Supplement**

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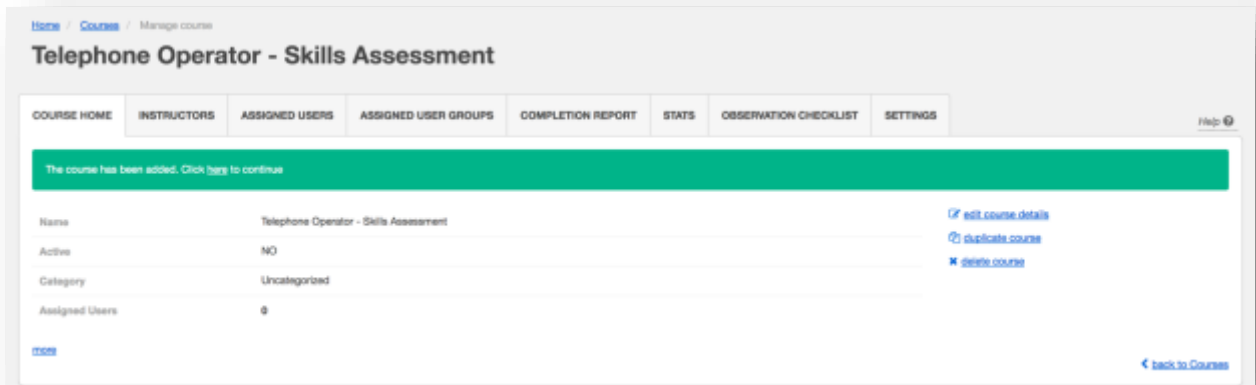
## Adding an Observation Checklist Course


An Observation Checklist course is a type of course which allows Administrator and Supervisor level users to perform in-person assessments of learners in order to document skills and proficiency.

To create an Observation Checklist course, click the [add new course](#) link and enter in the name of the course. Then scroll to the dropdown for Course Type and select [*Observation Checklist*].



Once selected, simply click the [Submit](#) button to begin creating your assessment statements.




Click the link in the alert statement highlighted in green  to go to the **OBSERVATION CHECKLIST** tab. You can also click on the **OBSERVATION CHECKLIST** tab to start building your Observation statements.

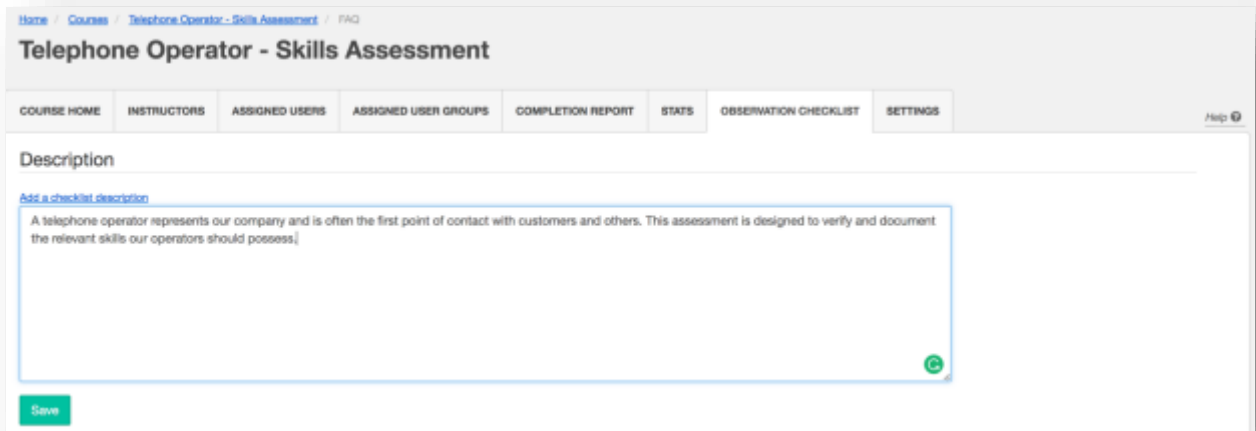
### Add/Edit Observation Checklist Statements

To begin adding or editing your Observation Statements, click the **OBSERVATION CHECKLIST** tab.

#### Add a description

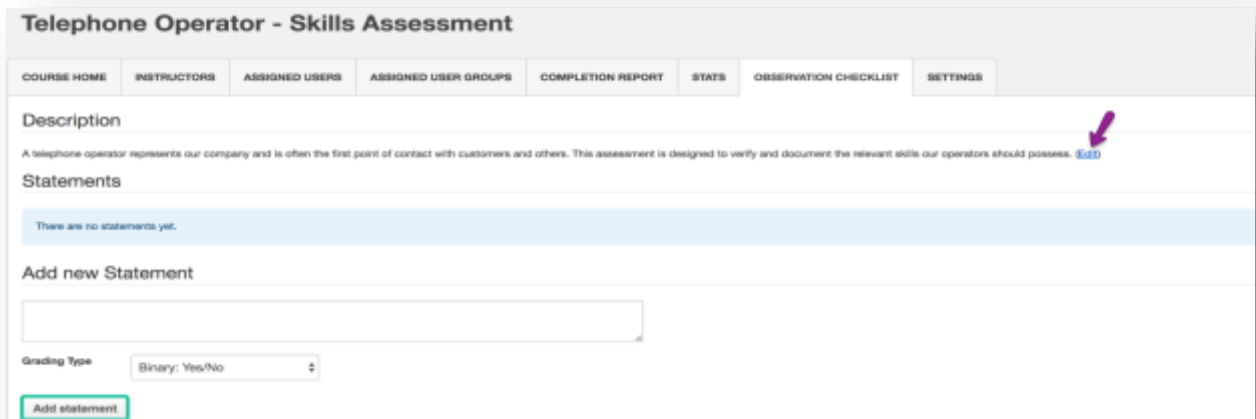
Adding a description will help the assessor performing the assessment understand and communicate to the learner the what and why for performing this assessment. To add a description, click the link

[Add a checklist description](#) then enter your description and click .



The screenshot shows the 'Telephone Operator - Skills Assessment' page. At the top, there is a breadcrumb trail: Home / Courses / Telephone Operator - Skills Assessment / FAQ. Below this is the title 'Telephone Operator - Skills Assessment'. A navigation bar contains links: COURSE HOME, INSTRUCTORS, ASSIGNED USERS, ASSIGNED USER GROUPS, COMPLETION REPORT, STATS, OBSERVATION CHECKLIST, and SETTINGS. The 'Description' section is active, showing a text area with the text: 'A telephone operator represents our company and is often the first point of contact with customers and others. This assessment is designed to verify and document the relevant skills our operators should possess.' A green 'Save' button is at the bottom left of the text area.

**Remember**, you can always come back and edit the description. To edit the description, click the [Edit] link next to the description.



The screenshot shows the 'Telephone Operator - Skills Assessment' page with the 'Statements' section active. The 'Description' section is collapsed. The 'Statements' section shows a message: 'There are no statements yet.' Below this is a form to 'Add new Statement' with a text input field. A 'Grading Type' dropdown menu is set to 'Binary: Yes/No'. A green 'Add statement' button is at the bottom left of the form. A purple arrow points to the 'Edit' link at the end of the description text in the previous section.

### Add an Observation Checklist Statement

To add a statement for your Observation checklist, simply enter the statement into the statement box, select the *Grading Type* and click the **Add statement** button.

Here's an example:



### Add new Statement

Active Listening - Giving full attention to what other people are saying, taking the time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

Grading Type

☒ Binary: Yes/No  
☐ Star: ★★★★★  
☐ Scale: Excellent/Good/Fair/Insufficient/Poor  
☐ Points: 0-10

Add statement

**Active Listening** - Giving full attention to what other people are saying, taking the time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

To assess this statement using a **Yes/No** grading type, simply select that grading type and click

Add statement







### Observation Checklist Grading Types

There are four (4) grading types for Observation Checklist statements:

1. **Binary (Yes or No):** The binary grading type is for when you simply need a yes or no assessment result for a statement, i.e. can the learner do this action or not?
2. **Star:** Star assessments are useful if you want to award an increasing level of proficiency for an assessment. This is simple and almost universally understood. The Star grading starts at 1 star to a maximum of 5 stars. Typically, the higher the number of stars, the higher the value of the assessment.
3. **Scale:** The scale grading type is like the Star grading type except you now have specific descriptions for what each level or proficiency equates to. The Scale ranges from “Excellent” to “Poor”. It also includes, “Good”, “Fair” and “Insufficient” levels.
4. **Points:** The points grading type is designed to allow you to customize your own level or values for the assessment. If you prefer to award specific points for each statement, the Point grading type works best.

### Activating/Editing/Ordering Statements

Your observation checklist statements are in inactive status by default. This is to give you the choice of selecting which statements end up being used in your live assessments.

- To activate a statement, simply click on the inactive icon  to turn it to an active  statement.
- To re-order your statements, use the down or up arrows  .
- To edit or delete an existing statement, click the  [edit](#)  [delete](#) links.

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Here's an example of my list of active and inactive statements:

Description				
The objective of the workplace Observation is for an Observer to observe the applicant apply the safe work behaviors learned from their training program (or from previous work experience) to the work environment and their job role. <a href="#">Add</a>				
Statements				
Statement	Grading Type	Order	Active	Actions
Obtain & Complies with Permits	Binary: Yes/No	+	○	<a href="#">edit</a> <a href="#">delete</a>
Places signs and barriers	Binary: Yes/No	++	○	<a href="#">edit</a> <a href="#">delete</a>
Selects and wears correct PPE	Binary: Yes/No	++	●	<a href="#">edit</a> <a href="#">delete</a>
Identifies hazards of the task and surrounds	Star: <a href="#">www</a> <a href="#">www</a>	++	○	<a href="#">edit</a> <a href="#">delete</a>
Selects correct tools and equipment	Star: <a href="#">www</a> <a href="#">www</a>	++	○	<a href="#">edit</a> <a href="#">delete</a>
Uses correct tools, equipment and techniques	Star: <a href="#">www</a> <a href="#">www</a>	++	●	<a href="#">edit</a> <a href="#">delete</a>
Maintains tools and equipment	Scale: Excellent/Good/Fair/Insufficient/Poor	++	○	<a href="#">edit</a> <a href="#">delete</a>
Manages Lock out and Tag out processes	Scale: Excellent/Good/Fair/Insufficient/Poor	++	●	<a href="#">edit</a> <a href="#">delete</a>
Maintains good housekeeping	Scale: Excellent/Good/Fair/Insufficient/Poor	++	○	<a href="#">edit</a> <a href="#">delete</a>
Follows work instructions	Points: 0-10	++	●	<a href="#">edit</a> <a href="#">delete</a>
Is familiar with location and use of emergency equipment and exits	Scale: Excellent/Good/Fair/Insufficient/Poor	++	●	<a href="#">edit</a> <a href="#">delete</a>
Communicates with others when undertaking work tasks to maintain safety	Points: 0-10	+	○	<a href="#">edit</a> <a href="#">delete</a>

## Assigning an Observation Checklist Course

**Note:** Observation Checklist courses are to be used for performing physical assessments of skills and proficiencies. This means they are going to be performed by a system administrator or a designated Supervisor level user.

### Assigning to users:

Observation checklists can be assigned to specific users. Simply click on the **ASSIGNED USERS** tab. (You will need to activate your course prior to assignment).

Then click the [+ assign new users](#) link. Select the users you want to assign to be assessed.

**Note:** **No emails** are sent to individual users regarding Observation Checklist courses.

### Assigning to user groups:

To assign an Observation Checklist to user groups, click the **ASSIGNED USER GROUPS** tab. Then click the [+ assign new user groups](#) link and select the relevant user groups to be assigned and assessed.

**Note:** While **no emails** are sent to individual users within the assigned user group regarding this Observation Checklist course, if a Supervisor is assigned to manage the assigned user group, the supervisor will receive a notification regarding a pending assessment.

## How to perform an Observation Checklist Assessment

### Administrator performing assessments:

As an Administrator, you can perform an Observation Checklist assessment. Once an Observation

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Checklist course has been assigned to individual users or user groups, click on the **COMPLETION REPORT** tab to begin performing your assessment.

The screenshot shows the 'Telephone Operator - Skills Assessment' completion report. At the top, there are tabs for 'COURSE HOME', 'INSTRUCTORS', 'ASSIGNED USERS', 'ASSIGNED USER GROUPS', 'COMPLETION REPORT' (which is active), 'STATS', 'OBSERVATION CHECKLIST', and 'SETTINGS'. Below the tabs, a 'Summary Report' shows 'Completed: 1% (1 of 4)' and a 'Export to Excel' button. A filter section includes fields for 'User', 'Select User Group', 'Select Progress', 'From', 'To', and a 'Filter' button. Below this is a table with columns: 'No.', 'Name', 'Email', 'Progress', 'Observation Assessment', 'Completed', 'Release Certificate', 'Deadline', 'Active', and 'Set Completed'. The table lists four users: Jack Kempf, Constant Seval, Sam The man, and TP System. Each user has a 'Not started' progress status and a 'Start' button in the 'Observation Assessment' column. A purple arrow points to the 'Start' button for Jack Kempf. At the bottom, there is a 'Total users: 4' and a 'back to Course' button.

No.	Name	Email	Progress	Observation Assessment	Completed	Release Certificate	Deadline	Active	Set Completed
1.	Kempf, Jack	jack@releasur.com	Not started	<a href="#">Start</a>	-	-	none	<input type="radio"/>	<a href="#">Set Completed</a>
2.	Seval, Constant	sevaltraining@gmail.com	Not started	<a href="#">Start</a>	-	-	none	<input type="radio"/>	<a href="#">Set Completed</a>
3.	The man, Sam	csb@ethataskoftears.com	Not started	<a href="#">Start</a>	-	-	none	<input type="radio"/>	<a href="#">Set Completed</a>
4.	TP System, Testing	user33@releasur.com	Not started	<a href="#">Start</a>	-	-	none	<input type="radio"/>	<a href="#">Set Completed</a>

Click the [Start](#) button next to each assigned user to begin your assessment.

The screenshot shows the 'Observation Assessment' form for Jack Kempf. The course is 'Telephone Operator - Skills Assessment'. The user is 'Kempf, Jack'. The form includes several sections for assessment: 'Active Listening - Giving full attention to what other people are saying, taking the time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.' with 'No' and 'Yes' buttons; 'Speaking - Talking to others to convey information effectively.' with a star rating from 1 to 5; 'Service Orientation - Actively looking for ways to help people.' with buttons for 'Poor', 'Insufficient', 'Fair', 'Good', and 'Excellent'; and 'Social Perceptiveness - Being aware of others' reactions and understanding why they react as they do.' with a numeric rating from 0 to 10. At the bottom, there is a 'Save this Assessment' button and a 'back to Assessments' link.

Click or, if on a mobile device, tab the various assessment grading options. For example, if you agree with **Yes** as the appropriate assessment for the binary statement, select or tab the [Yes] option.

This screenshot shows a close-up of the 'Active Listening' assessment section. It includes the text: 'Active Listening - Giving full attention to what other people are saying, taking the time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.' Below this text are two buttons: 'No' and 'Yes'. The 'Yes' button is highlighted with a green border.

If you need to save the current assessment and come back later, you can. Simply click the [Save this Assessment](#) button. This button also works to finalize the assessment and move on to the next learner to be assessed.



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An assessment that is completed will show an assessment score (**Score: 90.00%**) in the Completion Report tab. In incomplete assessment will show an **In Progress** status.

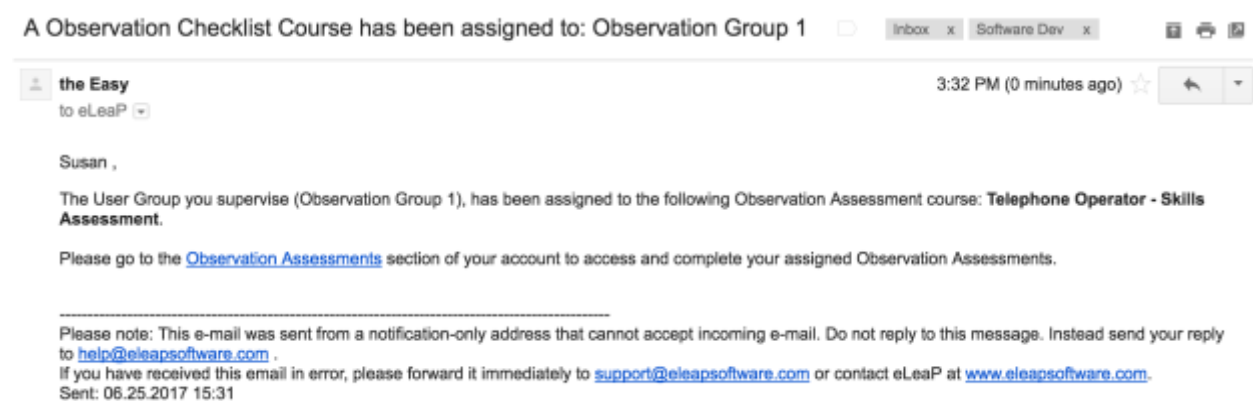
To continue assessing an incomplete checklist, click the **In Progress** link.

### **Supervisor performing assessments:**

Supervisors can help Administrators manage and perform Observation Checklist assessments. However, for a Supervisor to view and perform assessments, two conditions need to be met:

1. The Supervisor must be assigned to manage the assigned User Group(s)
2. The Supervisor managed user group must be assigned to the Observation Checklist course using the **ASSIGNED USER GROUPS** tabs. This means even if members of a user group which is managed by a supervisor are assigned individually to an Observation Checklist course, the associated Supervisor will not be able to view and perform that assessment.

If the two conditions above are met, the assigned Supervisor, will receive an email notification regarding a pending Observation Checklist course.



The supervisor can click on the **Observation Assessments** link to go directly to the assigned and pending assessment.


Supervisors should also check their INBOX section of their accounts for additional notifications.



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[Home](#) / [Inbox](#)

### Inbox

No.	<input type="checkbox"/>	Read	Subject	Date
1.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/25/2017
2.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/23/2017
3.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/23/2017
4.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/16/2017
5.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/14/2017
6.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/13/2017
7.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/12/2017
8.	<input type="checkbox"/>		<a href="#">An Observation Assessment Course needs your attention</a>	06/12/2017


Once on the relevant Observation Checklist course to be assessed, the Supervisor can begin by clicking the  **Start** button next to the learners' name.

 [HOME](#) [COURSES](#) [USER GROUPS](#) [TRAINING PATHS](#) [FORUM](#) [MY ACTIVITY](#)  Baker Smith, Susan ▾

[Home](#) / [User Groups](#) / [Observation Assessments](#)


### Observation Assessments

[MEMBERSHIP](#) [GROUPS YOU SUPERVISE](#) [OBSERVATION ASSESSMENT](#) [Help](#)

User  Telephone Operator ▾ 

No.	Name	Course	Progress	Observation Assessment	Completed	Deadline	Assessor
1.	Captain, James	Telephone Operator - Skills Assessment			-	none	-
2.	Griessel, Brandon	Telephone Operator - Skills Assessment			-	none	-
3.	Don, Simon	Telephone Operator - Skills Assessment			-	none	-
4.	Centar, Kennedy	Telephone Operator - Skills Assessment			-	none	-
5.	Mark, James	Telephone Operator - Skills Assessment			-	none	-
6.	Kempt, Jack	Telephone Operator - Skills Assessment		Score: 90.00%	06/25/2017	none	Wachong, Don

Total Records: 6 [Back to User Groups](#)

The Observation Checklist tool is designed to be used on any device any time anywhere. We encourage you to access and perform assessments on mobile devices, laptops and other devices. Once the Supervisor clicks the  **Start** button next to each assigned user, they see a mobile responsive version of the tool to enable them easily perform their assessment.

Course: Telephone Operator - Skills Assessment

User: Captain, James

**Active Listening - Giving full attention to what other people are saying, taking the time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.**

No Yes

**Speaking - Talking to others to convey information effectively.**

☆ ☆☆ ☆☆☆ ☆☆☆☆ ☆☆☆☆☆

**Service Orientation - Actively looking for ways to help people.**

Poor Insufficient Fair Good Excellent

**Social Perceptiveness - Being aware of others' reactions and understanding why they react as they do.**

0 1 2 3 4 5 6 7 8 9 10

Save this Assessment

[back to Assessments](#)

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Click or, if on a mobile device, tab the various assessment grading options. For example, if you agree with **Yes** as the appropriate assessment for the binary statement, select or tab the [Yes] option.

If you need to save the current assessment and come back later, you can. Simply click the

Save this Assessment

button. This button also works to finalize the assessment and move on to the next learner to be assessed.

An assessment that is completed will show an assessment score (**Score: 90.00%**) in the Completion Report tab. In incomplete assessment will show an **In Progress** status.

To continue assessing an incomplete checklist, simply click the **In Progress** link.

### Selecting Additional Observation Checklist Courses:

To select additional Observation Checklist courses to assess, use the drop-down selector to select the relevant course:



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The screenshot shows the 'OBSERVATION ASSESSMENT' tab in the eLeaP Administrator's Manual. A dropdown menu is open, showing a list of courses. A red arrow points to the 'Select Course' option. Below the dropdown is a table with columns: No., Name, Progress, Observation Assessment, Completed, Deadline, and Assessor. The table lists 11 items, mostly completed assessments with scores and deadlines.

No.	Name	Progress	Observation Assessment	Completed	Deadline	Assessor
1.	Webbong, Don	Completed	Score: 62.50%	05/17/2017	none	-
2.	Webbong, Don	Completed	Score: 70.00%	05/13/2017	none	-
3.	Webbong, Don	Completed	Score: 62.50%	05/13/2017	none	-
4.	Captain, James	Completed	Score: 60.00%	05/13/2017	none	-
5.	Captain, James	Completed	Score: 78.16%	05/19/2017	none	Baker Smith, Susan
6.	Captain, James	Completed	Score: 63.33%	05/05/2017	none	-
7.	Captain, James	Completed	Score: 61.80%	05/07/2017	none	-
8.	Captain, James	Completed	Score: 48.00%	05/09/2017	none	-
9.	Captain, James	0%	In Progress	-	none	-
10.	Captain, James	Completed	Score: 100.00%	05/13/2017	none	-
11.	Captain, James	Completed	Score: 67.50%	05/13/2017	none	-

Once you select the relevant course, click the **Filter** button to see the assigned users to be assessed. Use the **Start** button to begin performing your assessment.

**Note:** As a supervisor, you can also perform assessments from the **User Group Activity** report page for user groups you supervise. Simply, select the relevant course and if there are pending users to be assessed you will see the **Start** button next to their names.