



# PowerDMS<sup>®</sup>

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by NEOGOV

## Assessments: Participating as a Team Member

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# A Few Things to Note:

- This session is being recorded.
- The recording will be automatically Emailed to all registrants of this session, as soon as it becomes available.
- You can and should download a copy of this presentation from the Handouts section of the GoToWebinar sidebar.
- You can type in your questions any time within the questions field of GoToWebinar



# After This Session, You Will Be Able To:

- ✓ Access your tasks
- ✓ Add an attachment
- ✓ Label and map an attachment
- ✓ Highlight the attachment
- ✓ Set a status
- ✓ Clear tasks



# By the Way...

Terminology across accrediting bodies may vary but are typically the same thing.

**Assessor**

**Written Directive**

**Proof**

**Auditor**

**Protocol**

**Process Indicator**

**Surveyor**

**General Order**

**Secondary Document**

**Regulator**

**Primary Document**

**Evidence**

# How to Access Tasks

## Participate in the Assessment

The screenshot shows a 'To Do' list with the following items:

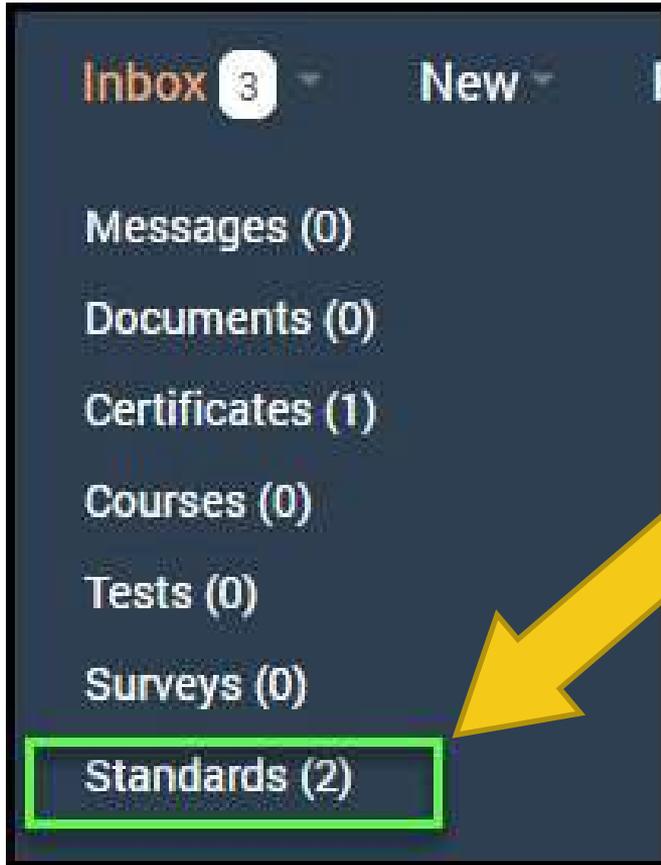
- Acquire Webinar C
- Assess 4 tasks as Accreditation Team Member in Webinar Assessment 9/2018 - 9/2021

Callout 1 (pointing to 'Assess 4 tasks'): Navigates to the **TASKS** tab at Root level of the assessment

Callout 2 (pointing to 'Webinar Assessment 9/2018 - 9/2021'): Navigates to the Summary tab at Root level of the assessment

Video for accessing tasks





**Or use your Inbox**

# Inbox

Messages (0) Documents (0) Certificates (1) Courses (0) Tests (0) Surveys (0) Standards (2)

Current History

Assessment	Standard	Role	Status	Tasks
Webinar Assessment 9/2018 - 9/2021	Sample Standards Manual > Oath of Office > New Recruits	Accreditation Team Member	-	<a href="#">2 tasks</a>
Webinar Assessment 9/20	Attach policy #001-003. Highlight section D. Attach a signed form #2F-01 for new recruit that establishes acknowledgement for breaking the oath. Needs Status			<a href="#">2 tasks</a>

Refresh | [Print] [Download] [Share]

Click on the link to go directly to the task within the assessment

Hover over this link to snapshot the task

Summary History

<> Sample Standard / Oath of Office / New Recruits

Standard

**New Recruit**

Agency policy establishes procedures for administering the Oath of Office for new recruits. The procedures must:

1. Absolution of past crimes
2. Training

Tasks (2) Statuses Attachments

**New Task**

- Current
- Needs Status
- Attach policy #001-001 Sections A and map to bullet point 1. Attach a PROC... (F-09). Date: 10/19/2018 10:00 AM Role: Accreditation Team Member

Task #1

Task #2

Clear task

Tasks (2) Statuses

▼ Accreditation Team Mem

No status has been set

Expires:  

Save

Use the drop down menu to select a status

Use the calendar pop-up to expire the status

Tasks (2) Statuses Attachments

**+ Add New Attachment**

Filters: None Applied

To attach your proof or evidence of compliance

# PowerDMS Tip

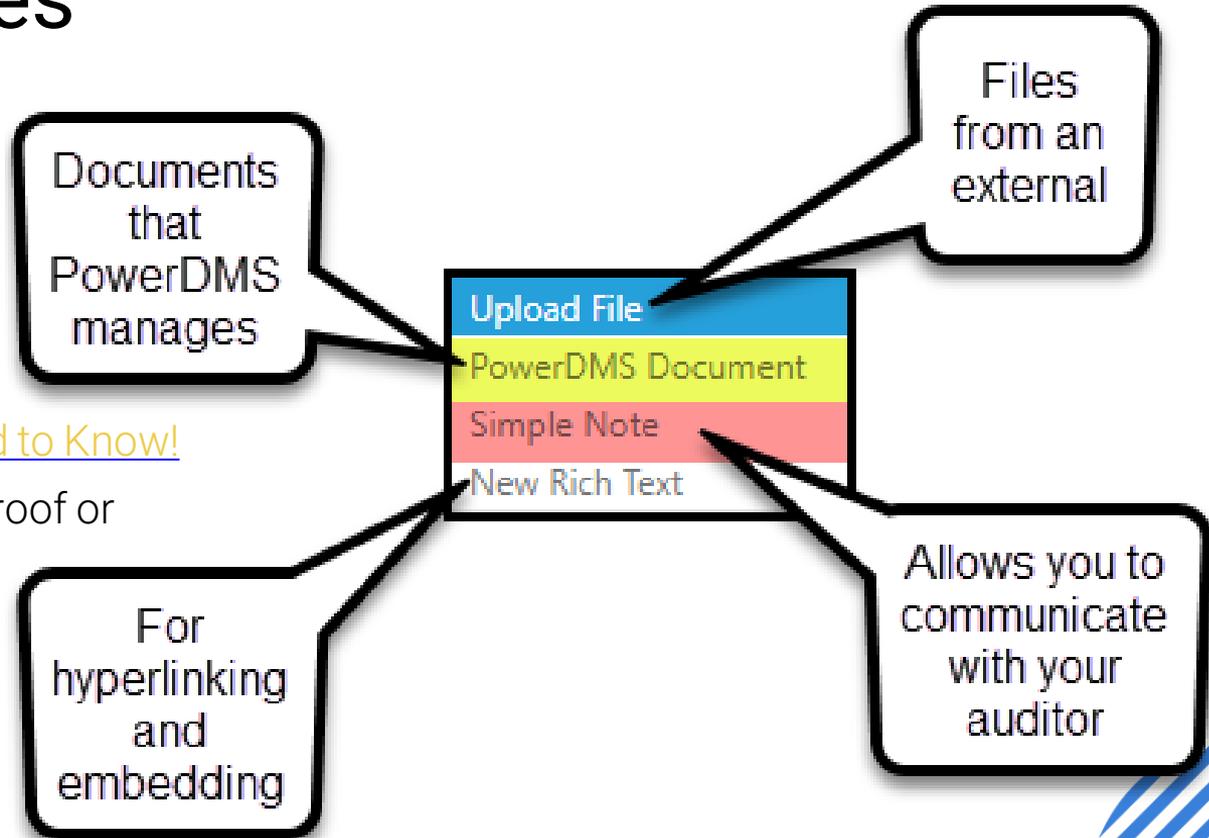
Use the Inbox to:

The screenshot shows the 'Inbox' interface with a navigation bar containing 'Messages (0)', 'Documents (0)', 'Certificates (1)', 'Courses (0)', 'Tests (0)', 'Surveys (0)', and 'Standards (1)'. Below the navigation bar are tabs for 'Current' and 'History'. A table lists assessments with columns for 'Assessment', 'Standard', 'Role', and 'Tasks'. Callouts point to the 'Assessment' column, a specific standard path, and the 'Tasks' column.

Assessment	Standard	Role	Tasks
Webinar Assessment 9/2018 - 9/2021	Sample Standards Manual > Oath of Office > New Recruits	Accreditation Team Member	2 tasks
Webinar Assessment 9/2018 - 9/2021	Sample Standards Manual > Oath of Office > Breaking the Oath	Accreditation Team Member	2 tasks

- ✓ See the assessment name
- ✓ See a snapshot of the *task*
- ✓ See the number of *tasks* for each standard
- ✓ Navigate directly to the *task*

# Attachment Types



[Attachments: Everything you need to Know!](#)

[Hyperlink](#) or [Embed a video](#) as a proof or evidence of compliance

# Adding Your Attachment

Summary History

<> Sample Standards / Oath of Office / New Recruits

**New Recruits**

Agency policy establishes procedures for administering the Oath of Office for new recruits. The procedures must include:

1. Absolution of past crimes
2. Training

Remove the default map if appropriate **2**

Map to the appropriate level of the standard **3**

Tasks (2) Statuses Attachments

Type  
Upload File

Standard  
1 point selected

Upload Files (Drag & Drop to upload)

Select

Notes **1**

Label the attachment

Save Cancel

Filters: None Applied **SAVE!** **4**



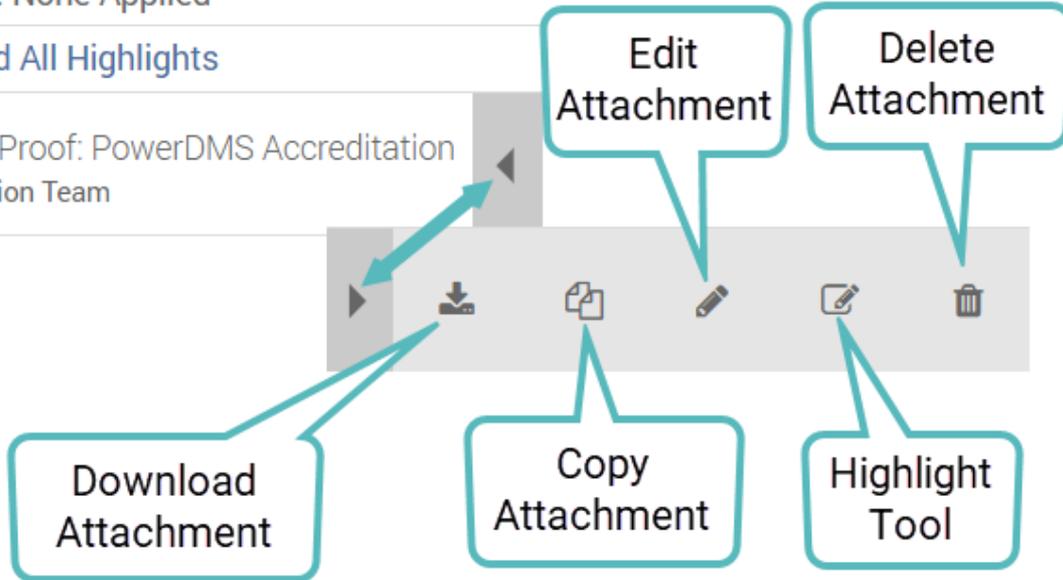
# Attachment Menu

+ Add New Attachment

▼ Filters: None Applied

▲ Expand All Highlights

📄 2021 Proof: PowerDMS Accreditation  
Accreditation Team



# Highlights

Webinar Assessment 9/2018 - 9/2021  
Sample Standards Manual - 2nd Edition

**New Recruits** Print

Agency policy establishes procedures for administering the Oath of Office for new recruits. The procedures must include:

1. Absolution of past crimes
2. Training

Page 1 of 1      Zoom 100%

Map

1

2

3

4

Click and drag until the entire area you want to showcase is highlighted

Label or title your highlight

You do **NOT** need to save between highlights.  
You can make them **ALL** before you save!

ADMINISTRATIVE POLICIES AND PROCEDURES  
LAW ENFORCEMENT AGENCY

Index #: 100-06	Page: 1
Effective Date: January 1, 2019	
Distribution: ALL	
Supersedes: 1/1/2018	

Subject: OATH OF OFFICE

Tasks (2)    Statuses    Attachment

➕ Add New Attachment

Filters: None Applied

WD Policy and Procedures  
Accreditation Team Member

Select your highlight on the document to the left

Policy name and effective date

Save    Cancel

# Clearing Tasks

Pro-Tip: Don't mark the task complete until ALL aspects of the task are accounted for.

The screenshot shows a task management interface with three tabs: 'Tasks (2)' (highlighted in yellow), 'Statuses', and 'Attachments'. Below the tabs is a '+ New Task' button. The task list is organized into a 'Current' section. The first task is 'Needs Status'. The second task is 'Attach policy #001-003', which has a pull-out menu open. The menu contains four icons: a left arrow, a pencil, a checkmark (highlighted with a green box), and a trash can. The task description includes 'A and map to bullet point 1. Attach a blank form to point 2. Attach a blank form. 3. Attach PROOF of an original copy of the Oath of Office form'. Below the task description, the date 'Date: 10/19/2018 10:30 AM' and the role 'Role: Accreditation Team Member' are visible.

**Pull-out menu**

# Setting Your Status

Select your compliance level

Tasks (2) **Statuses** Attachments

▼ Accreditation Team Member

- In-Progress
- Compliant
- Non-Compliant
- Not Applicable

Set an expiration date if appropriate

Tasks (2) **Statuses** Attachments

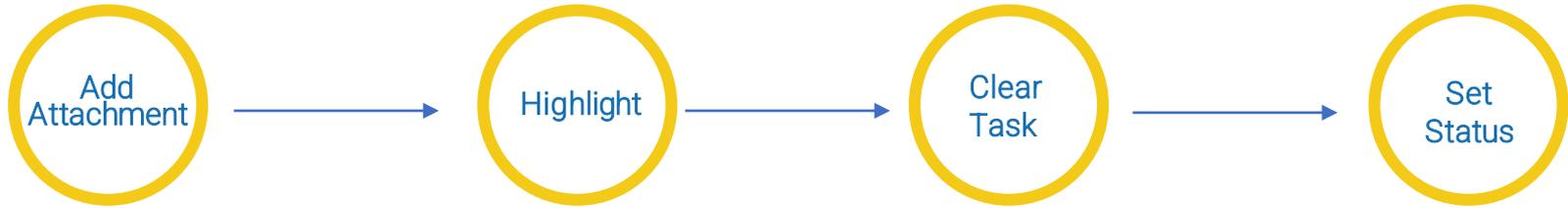
▼ Accreditation Team Member

Compliant

Expires:

# PowerDMS Tip

Build this consistency into your process flow so it becomes muscle memory.



Map to appropriate level of standard

Label using Best Practice Guide or consistency

Save

Drag around material to highlight and map to standard

Label using Best Practice Guide or consistency

Save

Navigate to the task tab  
Click the "check mark" from the pull-out menu

Navigate to the status tab

Select the appropriate status from the drop-down menu

Enter an expiration date

Save

# What if.... a PowerDMS Document attachment is updated?

Inbox

Messages (0) Documents (0) Certificates (1) Courses (0) Tests (0) Surveys (0) Standards (2)

Current History

Assessment	Standard	Role	Status	Tasks
Webinar Assessment 9/20				2 tasks
Webinar Assessment 9/20	Attach policy #001-003. Highlight section D. Attach a signed form #27-01 for new recruit that establishes acknowledgement for breaking the path. Please Review - an attachment on this standard has been flagged because it no longer represents its current publication.			1 tasks

 Please Review - an attachment on this standard has been flagged because it no longer represents its current publication.

Date: 3/24/2019 3:15 PM  
Role: Accreditation Team Member

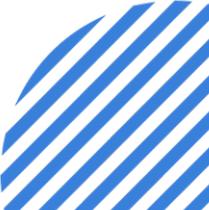
 Please Review - an attachment on this standard has been flagged because it no longer represents its current publication.

Date: 3/24/2019 3:15 PM  
Role: Accreditation Team Member

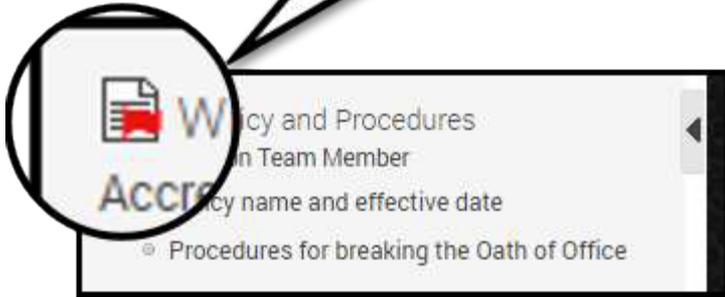
  

**View the attachment**

**Clear the task**



Click the flag  
to adjust  
highlights



Policy and Procedures  
Team Member  
Accuracy name and effective date  
Procedures for breaking the Oath of Office

Required  
to Update!

Document has been updated

The PowerDMS Document used for this attachment has been changed.

There is a new active file for the document.

Compare files View active file

Please select your desired action with highlights specific to this document:  
*(If you choose to keep highlights they will remain in their original locations on the page. Text that has been added or removed to this document may cause their location to become incorrect so please review them.)*

Keep all Highlights  
 Delete all Highlights

I understand and want to update this attachment to the PowerDMS Document's active file

Update Attachment

# PowerDMS Tip

Check periodically for  
FLAGS!



## WD Policy and Procedures

Accreditation Team Member

- Policy name and effective date
- Procedures for breaking the Oath of Office

# You Should Now Be Able To:

- ✓ Access your tasks
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- ✓ Highlight the attachment
- ✓ Set a status
- ✓ Clear tasks





**Questions?**