Assessments in ViewPoint

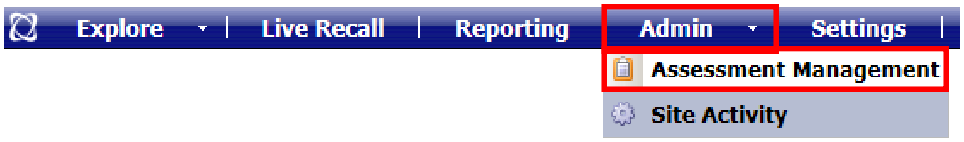
DSS/Equature Digital Logging Recorder

Assessments allow PSAP Administrators/QA Supervisors the ability to build and use a form, much like a checklist, to review and score calls for service that are being reviewed as part of a Quality Assurance system. An assessment form can be created from scratch or uploaded and edited.

To Access Viewpoint Assessment Management:

You must be logged into ViewPoint as the **PSAP Administrator (PSAPAdmin)**.

1. Within the Navigation Toolbar, click **Admin.**

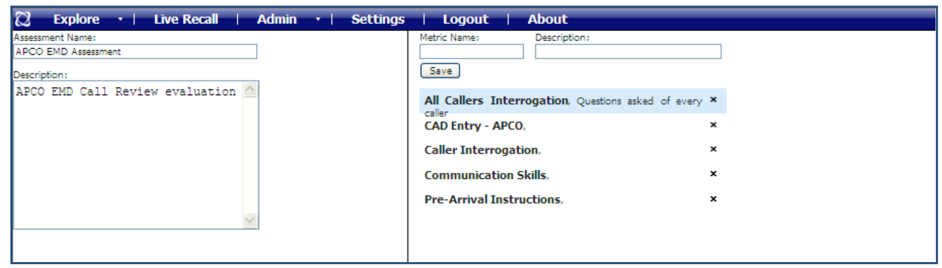


2. Within the Admin drop-down list, click the **Assessment Management** to open the Assessment interface.
   When the interface opens, a list of all existing forms will appear. Three templates may be loaded by default. The following is displayed: ***Name, Description, # of Questions, Times Taken (used).***
3. From the **Assessment Management** interface, you can do one of the following:
   - **Create a New Assessment –** To begin the process of creating a new assessment form and questions within the form.
   - **Import –** To import a pre-existing DSS assessment form from a saved file.
   - **Printable Version -** To review a form (either published or not publsihed) in the same format as if it were printed.
   - **Check Out –** To review a form previously created (but not yet published), edit the form and then publish it.
   - **Copy as New** – To create a copy of an existing form and edit the copy to create a new, modified form, which can then be published.

Assessment Forms can be saved, but do not have to be published right away. Only *Published* forms can be used to perform an Assessment of recording.

To Create a New Assessment Form:

1. From the **Assessment Management** interface, click **Create a New Assessment**.
2. At the top of the form enter the **Assessment Name** and **Description** (optional) for the new assessment form.



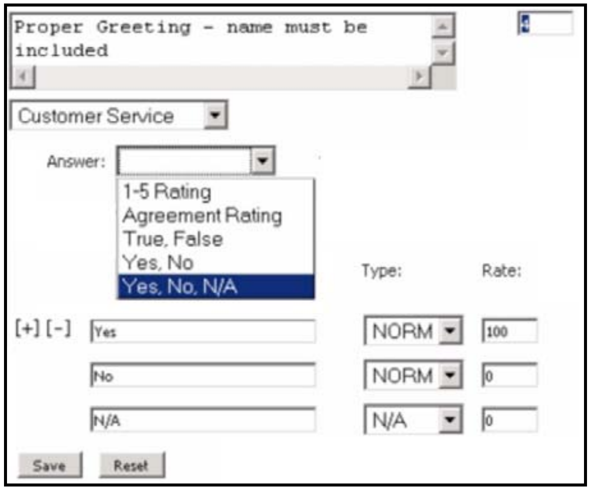
3. Under the Metric section, click within the **Metric Name**, enter a category for questions that will be created.
   FOR EXAMPLE: Greeting; Customer Service Caller Interrogration; CAD Entry; Policy and Procedure; Protocol Used; PreArrival Instructions; Call Closure.)
   PLEASE NOTE: You can create as many metrics as needed. Always create metrics before creating questions. A metric cannot be modified or deleted once attached to a question.
4. Under the Metric section, click within the **Metric Description**, and enter description for the metric (category) created to help better identify it.
5. Once the Metric Name and Description are created, click **Save** in Metric box.
   A list of the created metrics will be visible on the screen.
6. To begin **creating questions** on the Assessment form, continue to ***Page 2*** of this job aid.
7. To save the Assessment Form without creating questions, click the **Save** button at the bottom of the screen. Forms can only be used once **published**.
8. To reopen an ***unpublished*** Assessment Form from the Assessment Management interface, click once on the **Check Out** link.

To Create Questions on the Assessment Form:

1. Click within the **Question**: dialog box and type the question text which you would like to appear on the form.
2. Click within the **Weight** dialog box to enter the total value associated with the question. ***Please Note:*** *This will be the <u>highest number of POINTS</u> received in response to a question. The Weight can be changed to give importance to a certain question, so all question weights do not have to be equal.* ***For Example:*** *If you have twenty assessment questions, each could be worth 5 points in weight. Or the first five questions could be worth 10 points, and the remaining fifteen could be worth 3 points. The total points for the assessment* ***does not*** *have to always add up to 100 but this can be used as a basis. The end score is a percentage of the total not an actual calculation of the points.*
3. Below the Question text box, select a **Metric category** for the question from the **drop-down list.**
4. Within the **Answer** section, select the **answer format** which will best address the question.
   - **1-5 Rating –** Values 1 thru 5; 5 receiving the highest points possible; 1 receiving 0 points.
   - **Agreement Rating –** Values and responses range from "Strongly Agree", receiving the highest points possible, and "Strongly Disagree" receiving 0 points.
   - **True, False –** Values of "True" receiving the highest points, "False" receiving 0 points.
   - **Yes, No –** Values of "Yes" receiving the highest points, "No" receiving 0 points.
   - **Yes, No, N/A -** Values of "Yes" receiving the highest points possible, "No" receiving 0 points; **N/A** removes the points from the overall total points achievable (so that the person is not rewarded or penalized if the assessment questions does not apply)
5. Within the **Answer format** section, review the answer choices and/or modify the wording as desired (instead of using True/False, Yes/No, etc.).
6. Select the **Type** the answer will be from the following:
   - **Normal** would award the rating points listed under rate, based on the response chosen
   - **N/A** would remove the points from the overall weight of the assessment (so that the person is not rewarded or penalized if the assessment question does not apply)
   - **Void** would ONLY be used in a critical failure point for the assessment and results in an automatic failure of the assessment.

   For Example: *If there is a questions that needs to be answered as "Yes" or "No" for tracking purposes* ***BUT*** *you do not want any points to be added or taken away, you can enter the type as* ***N/A*** *and the* ***Rate as " O"*** *for all answer choices.*

7. Enter a **Rate** (as a percentage of points) to be earned for each answer.
   For example: *For a "Yes" response, receive 100% of the questions weighted points. Other responses can receive a different percentage, but rate MUST BE entered, even if a "0".*
   Please Note: Decimals are not permitted.
8. Once answers are completed, use the **[+] [-]** signs to **remove an answer or add an answer,** if desired.
   For example: *You can change the possible answers from five to four. If desired, the rating percentage can also be changed to reflect new answer options/elimination of an answer option.*
9. After question is finalized, click **Save** to save the question to the Assessment Output section.
   To Add additional questions, return to step 1 of this section.



Please Note: It is suggested that after creating a few questions, the Assessment Form be saved using the **Save** button at the bottom. To reopen the form, use the **<u>Check Out</u>** option from the Assessment Management interface.

10. To review questions created on the Assessment form, see the Assessment Output section to the right of the Question: dialog box.
    PLEASE NOTE: *Within this section, the questions will appear in the order the form will be published in, along with the metrics associated with it, and the value rate of the question.*
    

    The order of the questions can be modified using ***order selector drop down list*** *which appears in front of the question.*

To Save an Assessment Form:

If you have **not completed** the new Assessment Form in it's entirety or are not yet ready to publish the new form, it can be saved and reopened through the Assessment Management interface at another point.

1. After reviewing the questions in the Assessment Output section, click the **Save** button at the bottom of the screen to save the new Assessment Form.
2. To reopen an *unpublished* Assessment Form from the Assessment Management interface, in order to modify or publish, click once on the **Check Out** link.
   The Assessment Form and questions will reopen and allow changes to be made.

To Publish an Assessment Form:

Once the Assessment Form is **completed**, it must be **publishedd** before it can be used.

1. After proofing the questions in the Assessment Output section, click the **Publish** button at the bottom of the screen to publish the new form.
   Once published, no additional changes can be made to the form. If changes are needed, you must Copy as New (page 1) and edit the newly created form.

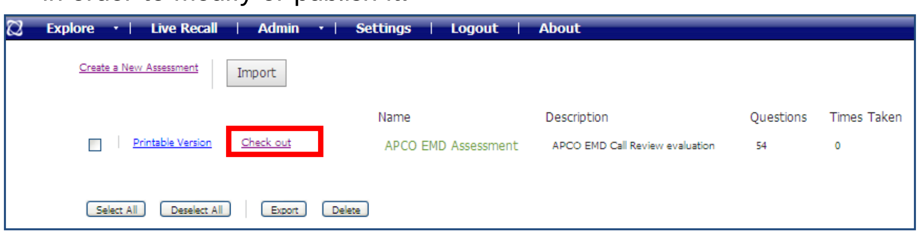
To Review an Assessment Form in Print Version:

If you have not published the form yet, or would like to see what the form looks like before using it or publishing it, it can be viewed in Print Version.

1. Within Assessment Management main interface, click **Printable Version** link.
   A new window will open with a printable version of the Asssment form, with all questions and possible answers, in the same format as if it were printed.

To Open an Unpublished Assessment Form:

1. Within the Assessment Management main interface, click the **Check Out** link in order to modify or publish it.



The Assessment Form and questions will reopen and allow changes to be made.

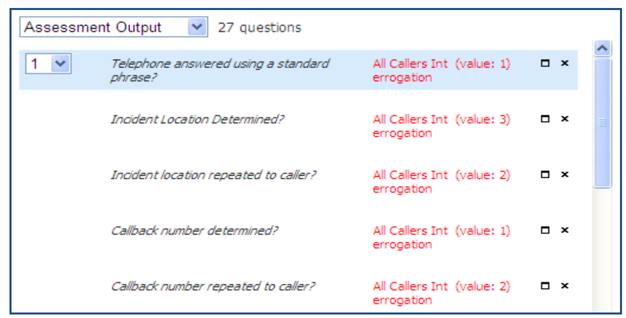
To Edit Questions on the Assessment Form:

1. Click within the **Assessment Output** section of the form and click to select a question to edit.
   The details regarding the question will populate in the appropriate boxes above.
2. With the **Question**: dialog box, click the appropriate box to edit and make required changes (such as Question Name, Description, Metrics, Question Text, Weight, Answer Format, Rate, etc).
3. After question is finalized, click **Save** within the Question: dialog box to save the question to the Assessment Output section.
   The question is added to the Assessment Output section.
   PLEASE NOTE: Within this section, the questions will appear in the order the form will be published in, along with the metrics associated with it, and the value rate of the question.

To Change the Order of Questions on the Assessment Form:

Within the Assessment Output section, the questions will appear in the order the form will be published in. The order of the questions can be modified.

1. Click within the **Assessment Output** section of the form and click to **select a question** to edit.



2. Using the **Order selector drop down list**  which appears in front of the question, click and change the questions position.
3. After question has been modified as desired, click **Save** at the bottom of the page.

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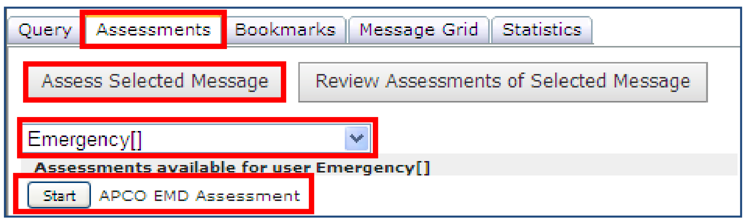
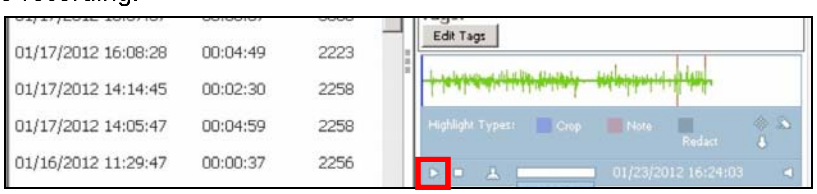
To Assess a Recorded Message:

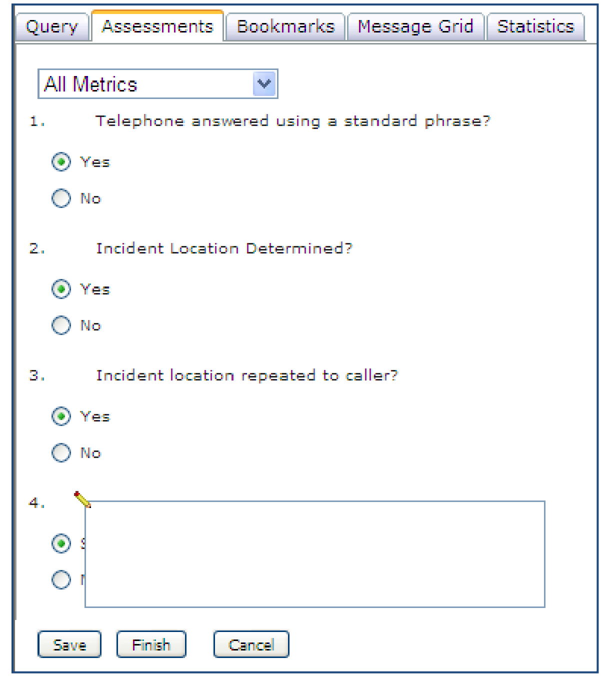
1. Using the Explore window and using basic searching methods, search for a recording to be assessed.
2. From the **Message Grid**, **select the recording** to be assessed.
   It will load in the Message Viewer area of the window. Play the recording within this window to confirm it is the desired one.
3. Once the recording audio is displayed on the Message Viewer, click the **Assessments tab.**
4. From the Assessments tab, click the **Assess Selected Message** button.
5. Select either **Emergency or Unassigned** from the Endpoint Users drop-down menu.
   The system does not automatically link to the 9-1-1 equipment and capture log-in information. Individual users may not be visible within the ViewPoint system.



6. Select the **form** to be used from the available list and next to the title of the desired Assessment form, click the **Start** button.
   The form will open along side the Message Viewer window with all questions to be assessed. You can scroll through the questions to ensure you are using the correct form.
7. In the Message Viewer window, click the **Play** button to begin the audio for the recording.



SUGGESTION:
In the **Notes** column of the Message Grid window, click to type the calltaker's name or ID# so you can more easily search for calls taken by a particular person.



8. On the left hand side of the screen, the form questions will appear. **Click the desired question responses for this recording.**
   The questions will auto advance as answered and appear to disppear from the screen.
9. To add comments along with question responses, click the **pencil icon** in front of the question.
   A dialog box will appear that free text can be entered into.
   Once done, click the **pencil icon a second time** to close the comment box.
   Typed comments will be saved, and will appear along with question responses on the completed form when printed.
10. When finished with **all questions**, click the **Finish** button at the bottom of the page.
    If all questions are not answered, a box will appear advising that the form is incomplete.
11. To save assessment and **reopen later**, click the **Save** button.
    This will allow you to open it again later from the Assessment tab in order to complete it. Messages which have been assessed will appear on the Message Grid tab within the Message viewer, with a link to the completed Assessment.

To Re-open an Incomplete Assessment Form:

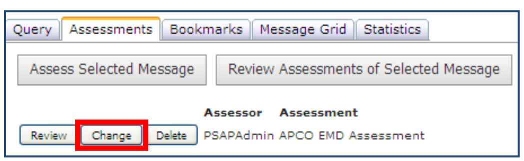
1. With the recording audio displayed on the Message Viewer, click the **Assessments tab.**
2. From the Assessments tab, click the **Assess Select Message**.
3. Click once on the **Resume** button to open the incomplete Assessment form.
4. When finished, click the **Finish** button at the bottom of the page.
   If all questions are not answered, a box will appear advising that the form is incomplete.

To Open and Print a Completed Assessment Form:

1. Using the Explore window and using basic searching methods, **search** for a recording to be reviewed.
2. From the **Message Grid**, **select the recording** that was assessed.
3. Choose **one** of the following:
   a. From within the Message viewer, under the details section of the recordings, click the **link to the completed Asssessments**.
   b. Once the recording audio is displayed on the Message Viewer, click the **Assessments tab.** From the Assessments tab, click the **Review Assessments of the Selected Message** button. Click once on the **Review** button to open the completed Assessment form.
4. With the Assessment form screen open, go to **File and select Print**, or click the **Print button** within your web brower.

To Change Answers on a Completed Assessment Form:

1. Using the Explore window and basic searching methods, **search** for a recording to be reviewed.
2. From the Message Grid, **select the recording** that was assessed.
   It will load in the Message Viewer area of the window. Play the recording within this window to confirm it is the desired one.
3. Once the recording audio is displayed on the Message Viewer, click the **Assessments tab.**
4. From the Assessments tab, click the **Review Assessments of the Selected Message** button.

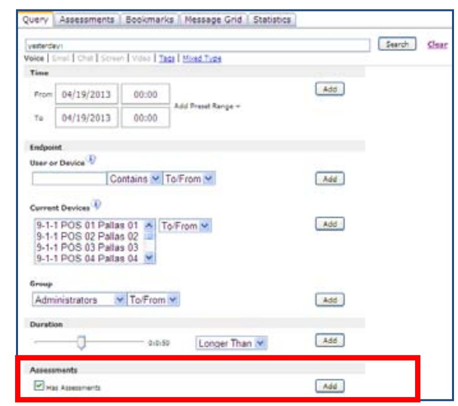


5. Click once on the **Change** button to open the Assessment form and modify answers.

To Create Copies and Edit Published Assessment Forms

1. From the Assessment Management interface, click **Copy as New.**
2. At the top of the form, **change the Assessment Name and Description** (optional) for the new assessment form.
3. Under the Metric section, select a **Metric** to edit an existing catgeory OR click within the Metric Name and enter a new category for questions that will be created.
   PLEASE NOTE: You can create as many metrics as needed. Always create metrics before creating questions. A metric cannot be modified or deleted once attached to a question.
4. Under the Metric section, click within the **Metric Description**, to either create a description for the metric (category) or edit an existing description.
5. Click **Save** in Metric box.
   A list of the created metrics will be visible on the assessment form creation screen.
6. To begin creating questions on the Assessment form, see Page 2.
7. To save the Assessment Form without creating questions, click the **Save** button at the bottom of the screen.
   Forms can only be used once they have been published.
8. To reopen an unpublished Assessment Form from the Assessment Management interface, click once on the **Check Out** link.

To Search for Recordings by Assessments:



1. From within the **Query tab**, click the Voice link.
2. In the Assessment section of the **Query tab**, place a checkmark in front of **Assessments.**
3. Click **Add** to post the selected channel(s) to the **Search Parameters box.**
4. Click **Search** to execute the query.
   Results appear on the Message Grid tab.