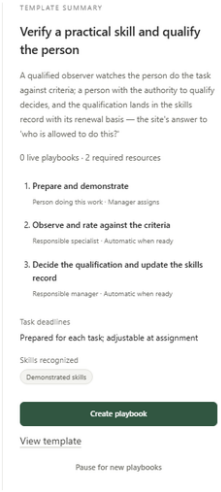
COLLECT A CREDENTIAL AND KEEP IT CURRENT

Give credential reviewers the details they need in one submission

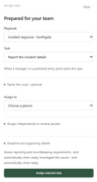
Collect the credential, issue date, expiry date and declaration together. The reviewer can assess the document against the person's selected requirement using the details supplied with it.

Upload the credential > Review and accept

SkillSmith · Separate demonstration, observation and qualification decisions



SkillSmith · Choose prepared work and its recipient — incident-response example



SkillSmith · Request a trace export from the permitted scope



Separate demonstration, observation and qualification decisions

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Assigned team member	Upload the credential	Respond with declaration, document, expiry date and issue date.
Designated specialist	Review and accept	Respond with accepted / returned and validity dates > credential record.

Request the current credential for this requirement

In a worked example, a person submits an expired or mismatched document; retain the submission and request the relevant current credential.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Request form	Open the selected material for this occurrence.
Recorded response	document, issue date and expiry date	Save the response with its work context.
Review point	expiry date and declaration	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Collect a credential and keep it current

Bring request form into the prepared work. Assigned team member and Designated specialist each receive the context needed for their part.

01 Upload the credential

Record document, issue date, expiry date and declaration.

02 Review and accept

Record accepted / returned and validity dates > credential record.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Collect a credential and keep it current

Every licence, certificate, medical card or insurance document a role requires is on file, reviewed, and renewed before it expires.

Forklift licences · Warehouse

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Request form The task uses this material	The credential request form with file upload and validity dates.
Requirement The task uses this material	Which roles need which credentials, and the renewal window.
Policy The task uses this material	Accepted issuers and equivalences.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose request form from the resources your team uses.

02 Agree the responsibilities

Confirm assigned team member and designated specialist for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Choose the task, eligible recipients and deadline, then walk through the actual response fields.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains document, issue date, expiry date and declaration. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring request form. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do people receive the prepared work?

Select the prepared task and the relevant recipients when assigning work. Making a playbook available to a group and giving a person a task are separate setup choices.

What is the outcome for the wider workflow?

A current accepted credential is on file; superseded records are kept.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The person has to leave the work to find its instructions or help.	Open the selected resources with the task, and keep a question attached when help is needed.
The current status hides which response or version came before it.	Keep document, issue date and expiry date with the work, with recorded history available for later review.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Does the submitted credential identify the person, scope and validity needed for review?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact