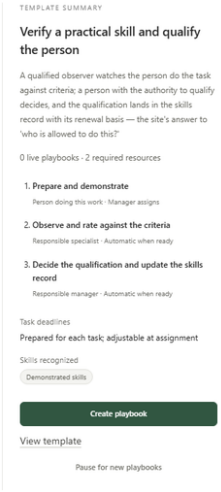
COLLECT A CREDENTIAL AND KEEP IT CURRENT

# Keep credential decisions understandable as documents are renewed

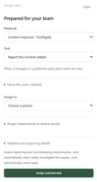
Let the specialist accept or return a credential against its requirement and record the validity dates. Retaining superseded documents gives later reviewers the history behind the current record.

**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. |

## Preserve the earlier record when accepting a renewal

In a worked example, a replacement credential is accepted; preserve the superseded record and its history instead of losing the previous evidence.

WORKED DECISION

| Decision point | Information to use | Responsible next step |
|---|---|---|
| Working material | Request form | Open the selected material for this occurrence. |
| Recorded response | accepted / returned and validity dates > credential record | Save the response with its work context. |
| Review point | accepted / returned and validity dates > credential record | 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**<br>The task uses this material | The credential request form with file upload and validity dates. |
| **Requirement**<br>The task uses this material | Which roles need which credentials, and the renewal window. |
| **Policy**<br>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 accepted / returned and validity dates > credential record. 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 |
| --- | --- |
| **A completed entry is mistaken for the responsible person's decision.** | Give the designated specialist the recorded response and agreed criteria for this decision. |
| **People cannot see the method or evidence behind a decision.** | Make methods, responsibilities and decision evidence visible for 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.

- What makes this credential acceptable for its selected requirement?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact