



## HOW DO I COMPLETE THE PBC ASSESSMENT?

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### How to complete the assessment?

- The sequence recommended to complete the PBC Assessment is:
  - Goals and Vision
  - Elevation
  - Specification
  - Integration
  - Skill and Will
  - Productive Paranoia
  - Paradox
  - Candle versus Mirror
  - Transposition
  - Mess Finding
  - Frameworks
  - Filtration
  - Coordination
  - PBC Action Plan
    - However, the PBC Action plan should be updated throughout the assessment with new action items and status updates for these
- The linear sequence is for submitting worksheets
- It is likely that worksheets will be updated more than once in a single assessment as subsequent worksheets are updated
- The PBC Canvas and PBC Dashboards update automatically from the completed assessment worksheets

## How Do I Complete the PBC Assessment Guide

### Why is this sequence recommended?

- Data entered into some of the worksheets automatically copies into other worksheets
- Therefore, completing them in this order ensures the relevant information copies over and the worksheets can be completed and submitted successfully
- It also ensure you do not need to go back and forth between worksheets
- The only exception to this is the PBC Action Plan should be updated continually throughout the assessment period

### When should the PBC Action Plan be updated during an assessment?

- The Action Plan should be updated throughout the entire assessment
- Action items should be added and updated during an assessment, especially after each assessment worksheet is updated
- To add action items the assessment end date needs to be set

### How do I navigate to each of the assessment worksheets?

- In the PBC Assessment there is a menu at the top of the screen
- Simply click on the name of the worksheet you want to navigate to
- Refer to the '[Navigate Between Worksheets in the PBC Assessment](#)' How Do I Guide for more information

The screenshot shows the top navigation bar with the Powered by Bluebird logo, Home and PBC Assessment links, and the user name Tiana Weasley. Below the navigation bar is a menu of assessment worksheets, with 'Goal & Vision' highlighted. The main content area displays the 'GOALS & VISION WORKSHEET' form, which includes a version dropdown (Version 4 - 2021-02-27), an assessment date field (2021-02-27), and a name field (Tiana Weasley). Below the form are three blue buttons: 'GOALS', 'VISION', and 'VISIONING LANDSCAPE', each with a plus sign.

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### How do I update the assessment worksheets?

- Once you have navigated to the required worksheet
- Expand the sections and answer the questions
- Answering the questions is done by either typing an answer into the text box provided or by selecting from the drop-down menu provided
  
- After all questions in the worksheet have been answered, select the 'Submit' button
  - This validates all questions have been answered and saves the worksheet
  
- If you don't have time to complete the worksheet in full, once you've entered your answers, select the 'Save' button
  - This will ensure your work is saved and does not need to re-entered
  - However, the 'Save' button does not validate the completeness of the worksheet or verify it has been completed
  - To do this, and to complete the worksheet, it needs to be submitted by selecting the 'Submit' button
  - To finalise and end the assessment, so a new assessment can be started, all worksheets need to be fully completed and submitted by selecting the 'Submit' button for **every** worksheet

## How Do I Complete the PBC Assessment Guide

### Additional relevant How Do I Guides for reference

- For more information, refer to the following How Do I Guides:
  - [‘Update Worksheets in the PBC Assessment’](#)
  - [‘Save Worksheets in the PBC Assessment’](#)
  - [‘Submit Worksheets in the PBC Assessment’](#)
  - [‘Start a New PBC Assessment’](#)
  
- For a detailed overview of how to update each worksheet, refer to the How Do I Guides for these:
  - [‘Update the Goals and Vision Worksheet’](#)
  - [‘Update the Elevation Assessment Worksheet’](#)
  - [‘Update the Specification Assessment Worksheet’](#)
  - [‘Update the Integration Assessment Worksheet’](#)
  - [‘Update the Skill and Will Assessment Worksheet’](#)
  - [‘Update the Productive Paranoia Assessment Worksheet’](#)
  - [‘Update the Paradox Assessment Worksheet’](#)
  - [‘Update the Candle versus Mirror Assessment Worksheet’](#)
  - [‘Update the Transposition Assessment Worksheet’](#)
  - [‘Update the Mess Finding Assessment Worksheet’](#)
  - [‘Update the Frameworks Assessment Worksheet’](#)
  - [‘Update the Filtration Assessment Worksheet’](#)
  - [‘Update the Coordination Assessment Worksheet’](#)
  - [‘Update the PBC Action Plan Worksheet’](#)