



HOW DO I END A PBC ASSESSMENT?

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Why is it important to end an assessment?

- To commence a new assessment, the existing assessment first needs to be completed
- Ending an assessment is important because without doing so a new one cannot be started

When do I end an assessment?

- Generally, an assessment will be closed off at the end of the assessment period that has been indicated in the PBC Action Plan
- However, this can also be done prior to the end of the assessment period

How do I end an assessment?

- To end an assessment, first ensure all worksheets have been completed (refer to the [‘How Do I Complete the PBC Assessment’](#) guide for assistance)
- Completing a worksheet requires:
 - All questions to be answered
 - Pressing the [‘Submit’](#) button, at the end of the worksheet
 - And receiving a success message

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- It's easy to tell which worksheets still need to be submitted as the name of the worksheet will have a red dot next to it in the menu at the top of the screen:



- Once the worksheet is completed and submitted, the name in the menu will no longer have a red dot next to it
- In the below diagram, the Goals & Vision worksheet has been submitted successfully, the success message has been received and the name does not have a red dot next to it:

A screenshot of the PBC Assessment system showing a success message and the 'GOALS & VISION WORKSHEET' form. The navigation bar is the same as in the previous screenshot, but the 'Goal & Vision' item now has a blue background and no red dot, indicating it has been submitted. Below the navigation bar, a green success message reads: 'Answers for the Goal & Vision have been submitted successfully.' Below the message, there is a dropdown menu showing 'Version 4 - 2021-02-27'. The main heading is 'GOALS & VISION WORKSHEET'. Below the heading, there are two input fields: 'Assessment Date: *' with the value '2021-02-27' and 'Name: *' with the value 'Tiana Weasley'. Below the input fields, there are three blue buttons with white text and a plus sign: 'GOALS', 'VISION', and 'VISIONING LANDSCAPE'. At the bottom right, there are two buttons: 'SAVE' (orange) and 'SUBMIT' (blue).

- Once all worksheets have been submitted successfully, go to the PBC Action Plan worksheet (refer to the ['How Do I Update the PBC Action Plan'](#) guide for assistance)

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- Before ending the assessment, all the action items statuses should be updated to reflect the current status

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5. ACTION PLAN













1. ENTER THE END DATE FOR THE CURRENT ASSESSMENT *

This is the date the current assessment will end

Select a date within the next six months

CURRENT ASSESSMENT END DATE: 

ACTION PLAN FOR THE CURRENT ASSESSMENT PERIOD

ACTION ITEM	SPECIFIC TASKS	DUE DATE	GOAL THIS CONTRIBUTES TO	STATUS
Action Item 1	Enter information	28/02/2021 	Goal 2 	In Progress
Action Item 2	Enter information	01/03/2021 	Goal 1 	Completed
Action Item 3	Enter information	10/03/2021 	Goal 3 	In Progress
Action Item 4	Enter information	22/03/2021 	Goal 2 	Completed
Action Item 5	Enter information	31/03/2021 	Goal 1 	Not Started
		dd/mm/yyyy 	Select One 	Not Started

- The final step is to click on the 'Confirm and End'

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- This is located at the end of the PBC Action Plan worksheet

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The screenshot shows the 'PBC ACTION PLAN' form. At the top left, there is a dropdown menu showing 'Version 4 - 2021-02-27'. The form has three main input fields: 'NAME: *' with the value 'Tiana Weasley', 'ASSESSMENT START DATE: *' with the value '26-02-2021', and 'WHAT TO ACHIEVE: *' with the placeholder 'Enter information'. Below these fields are five blue horizontal bars representing sections: '1. GOALS & VISION', '2. PURPOSE', '3. PEOPLE & PRODUCT', '4. PROCESS', and '5. ACTION PLAN', each with a '+' icon on the right. At the bottom right, there are three buttons: 'SAVE' (orange), 'SUBMIT' (blue), and 'CONFIRM AND END' (blue), with the 'CONFIRM AND END' button highlighted by a red rectangular box.

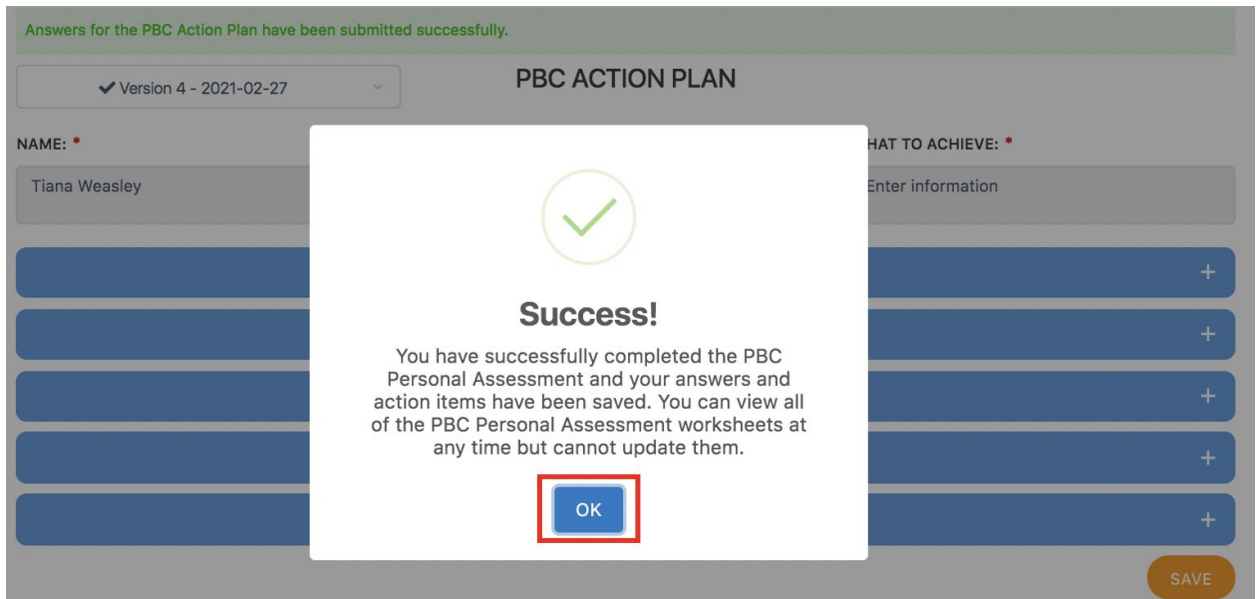
- A prompt displays asking to confirm the assessment should be completed
- Select 'Yes Continue' to end the assessment (or 'No Do Not Continue' if you don't want to end it)

The screenshot shows the same 'PBC ACTION PLAN' form as above, but with a confirmation dialog box overlaid in the center. The dialog box has a white background and a light blue border. At the top center is a question mark icon. Below it, the text reads: 'Are you sure you would like to end this assessment?'. Underneath, a smaller font explains: 'Confirming the Assessment is Completed will submit and finalise all action items in the PBC Action Plan worksheet. Once this is done, you will no longer be able to update the PBC Action Plan worksheet. Would you like to continue?'. At the bottom of the dialog box are two buttons: 'Yes Continue' (blue) and 'No Do Not Continue' (red), with the 'Yes Continue' button highlighted by a red rectangular box. In the background, the form is dimmed, and a green message at the top says 'Answers for the PBC Action Plan have been submitted successfully.'.

- A final success message will appear

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- Click on the 'OK' button to accept it



- The assessment is then completed

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Can updates be made to an assessment after it is closed (i.e. confirmed and ended)?

- No updates or changes can't be made to the assessment as the worksheets are locked
- Also, the 'Save', 'Submit' and 'Confirm and End' buttons no longer display for any worksheet
- However, all completed PBC Assessments are still able to be viewed

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Version 4 - 2021-02-27

PBC ACTION PLAN

NAME: * **ASSESSMENT START DATE: *** **WHAT TO ACHIEVE: ***

- 1. GOALS & VISION +
- 2. PURPOSE +
- 3. PEOPLE & PRODUCT +
- 4. PROCESS +
- 5. ACTION PLAN +