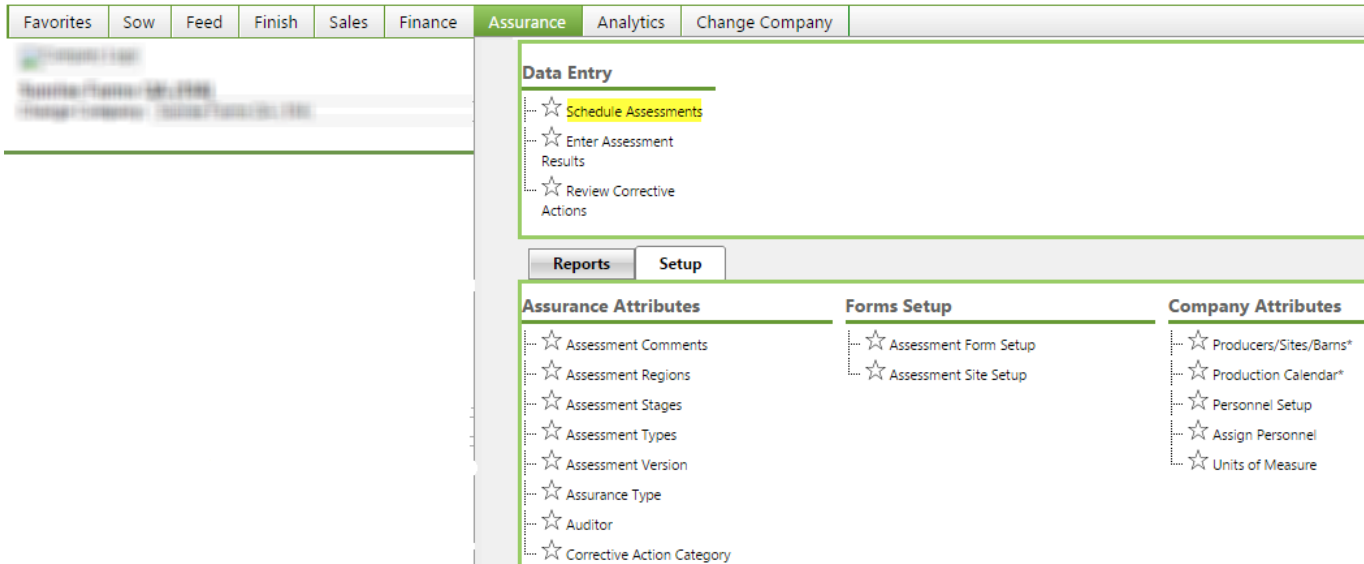


Schedule Assessments

Schedule Assessments is where you can Search, Modify, and Add new Scheduled Assessments. This screen also contains a Calendar section for you to view the scheduled Assessments.



The screenshot shows the MetaFarms Assurance menu. The top navigation bar includes: Favorites, Sow, Feed, Finish, Sales, Finance, Assurance, Analytics, and Change Company. The Assurance menu is expanded, showing the following options:

- Data Entry**
 - Schedule Assessments (highlighted)
 - Enter Assessment Results
 - Review Corrective Actions
- Reports**
- Setup**
 - Assurance Attributes**
 - Assessment Comments
 - Assessment Regions
 - Assessment Stages
 - Assessment Types
 - Assessment Version
 - Assurance Type
 - Auditor
 - Corrective Action Category
 - Forms Setup**
 - Assessment Form Setup
 - Assessment Site Setup
 - Company Attributes**
 - Producers/Sites/Barns*
 - Production Calendar*
 - Personnel Setup
 - Assign Personnel
 - Units of Measure

To Search for an Assessment:

Enter your search criteria and click Search

Search Assessment Forms

Region: (All) Auditor: (All) Form: (All)

SubRegion: (All) Assurance Type: (All) Year: (All)

Producer: (All) Status: (All) Quarter: (All) Include ReAudits: ☒

Site: (All) Results: (All) Schedule Week: (All) Include Entire Calendar Year: ☐

Search **Add**

To add an assessment:

To Add an Assessment click Add

Search Assessment Forms

Region: (All) Auditor: (All) Form: (All)

SubRegion: (All) Assurance Type: (All) Year: (All)

Producer: (All) Status: (All) Quarter: (All) Include ReAudits: ☒

Site: (All) Results: (All) Schedule Week: (All) Include Entire Calendar Year: ☐

Search **Add**

1. Select producer and site from dropdowns

Auditor

Producer: (Select...)

Site: (Select...)

Save

2. Select checkbox for assesment then click Save

Row	Add	Form	Type	Stage	Version
	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	<input type="checkbox"/>	Boar Medication Assessment	Medication	Boar Stud	1
2	<input checked="" type="checkbox"/>	Common Swine Industry Audit-Sow	Common Swine Industry Audit	Sow Farm	1
3	<input type="checkbox"/>	Common Swine Industry Audit-W2F	Common Swine Industry Audit	Wean to Finish	1

To schedule assessments:

Type in the scheduled date of the assessment then click Save

View

Add **Save** **Delete Records** **Move Forward**

Row	History	Producer	Site	Region	SubRegion	Form	Deadline	Status	Priority	Scheduled	Auditor
1	History	Elm Creek	Elm Creek 1	Minnesota	Central	Common Swine Industry Audit-Sow	10/1/2015	Assigned	0	9/21/2015	Kiersten

Any of these tabs can be minimized throughout

Search Assessment Forms

View

Add **Save** **Delete Records** **Move Forward**

Row	History	Producer	Site	Region	SubRegion	Form	Deadline	Status	Priority	Scheduled	Auditor	Score %	Result	ReAudit	Move Forward	Delete
1	History	Elm Creek	Elm Creek 1			Fall Checklist	9/2/2015	Scheduled	0	6/1/2015	Kiersten	0.0	n/a	No	<input type="checkbox"/>	<input type="checkbox"/>
2	History	Elm Creek	Elm Creek 1			Common Swine Industry Audit-Sow	10/1/2015	In Process	0	9/21/2015	Kiersten	0.0	n/a	No	<input type="checkbox"/>	<input type="checkbox"/>

Page: 1 of 1 Go Page size: 2 Change

Calendar

9/16/2015 - 9/22/2015

9/16/2015	9/17/2015	9/18/2015	9/19/2015	9/20/2015	9/21/2015	9/22/2015
					Kiersten Tepp - Elm Creek 1 -	

In the calendar tab you can view assessments scheduled

To move a missed assessment forward:

To move a missed assessment forward select the checkbox then click Move Forward

View

Add **Save** **Delete Records** **Move Forward**

Row	History	Producer	Site	Region	SubRegion	Form	Deadline	Status	Priority	Scheduled	Auditor	Score %	Result	ReAudit	Move Forward
1	History	Elm Creek	Elm Creek 1			Common Swine Industry Audit-Sow	8/26/2015	In Process	0	<input type="text"/>		0.0	n/a	No	<input type="checkbox"/>
2	History	Elm Creek	Elm Creek 1			Fall Checklist	8/1/2015	Missed	0	7/15/2015		0.0	n/a	No	<input checked="" type="checkbox"/>

A new assessment will be generated from the one that was missed. The deadline can be changed.

View														
Add		Save		Delete Records		Move Forward								
Row	History	Producer	Site	Region	SubRegion	Form	Deadline	Status	Priority	Scheduled	Auditor	Score %	Result	ReAudit
1	History	Elm Creek	Elm Creek 1			Fall Checklist	10/30/2015	Assigned	1			0.0	n/a	No
2	History	Elm Creek	Elm Creek 1			Common Swine Industry Audit-Sow	8/26/2015	In Process	0			0.0	n/a	No
3	History	Elm Creek	Elm Creek 1			Fall Checklist	8/1/2015	Missed	0	7/15/2015		0.0	n/a	No

To delete assessments:

You can only delete assessments that are scheduled or that have not had any activity. Completed, In Process and Missed assessments cannot be deleted.

To delete assessments select the checkbox then click Delete Records

View																
Add		Save		Delete Records		Move Forward										
Row	History	Producer	Site	Region	SubRegion	Form	Deadline	Status	Priority	Scheduled	Auditor	Score %	Result	ReAudit	Move Forward	Delete
	History	Elm Creek	Elm Creek 1			Fall Checklist	9/2/2015	Scheduled	0	6/1/2015	Kiersten	0.0	n/a	No	<input type="checkbox"/>	<input type="checkbox"/>
	History	Elm Creek	Elm Creek 1			Common Swine Industry Audit-Sow	10/1/2015	In Process	0	9/21/2015	Kiersten	0.0	n/a	No	<input type="checkbox"/>	<input type="checkbox"/>

Term Definitions:

History: Is a brief description of past forms with comments, scores, and results.

Move Forward: Is used when a form has been missed.

Deadline: The date the Assessment should be completed by. Date will be linked to the Production Calendar in MetaFarms and allow searching and reporting by year, quarter, month parameters.

Status Assigned: Is the deadline the form needs to be completed by.

Status Completed: All questions on a form have been answered.

Status Missed: Deadline date has been missed on a form. A missed form cannot be completed it can only be moved forward.

Status In Progress: A form has been started but not yet completed. After one question has been answered the status will change to in progress. Forms that are in progress cannot be deleted.

Priority: This can be changed to make a form a higher priority than another. As a default they will be set to 0 while reaudits will automatically assigned to 2 while missed ones that are moved forward will be assigned a 1.

Scheduled: Date the Auditor assigns to an assessment of when they plan to do the actual assessment. This is optional but could be used to help organize and manage site visits.