Air Maestro

Training Guide

CHECK FORMS

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Contents

Assigning Access Levels

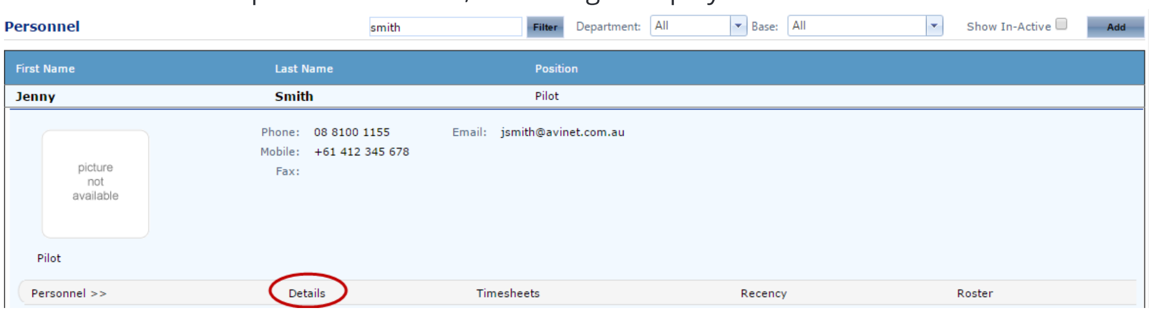
Before users can attempt to manage exams for your organisation they must be assigned the correct access levels. Follow the steps below to assign the access levels:

Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

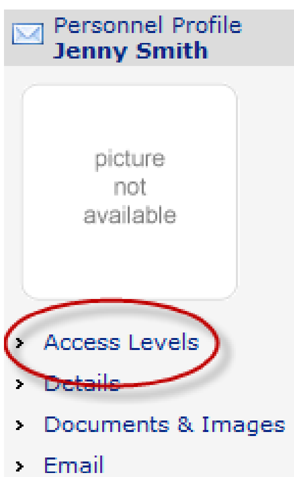
Step 2. Filter the **Personnel** screen according to your requirements.

- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.



Step 4. Select 'Access Levels' from the **Personnel Profile** pane.



Step 5. Click [Edit].

Step 6. Select all the applicable access levels in the **'Recency Management'** group.

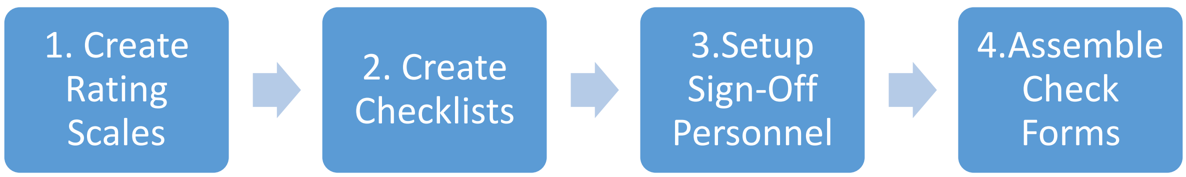
Access Level	Description
Check form Administration > Modify All	Allows users to create, edit and delete check form templates, checklists, rating types and nominate sign-off personnel.
Check Forms > View Self	Allows uses to view check forms pertaining to themselves.
Check forms > View Selection	Allows users to complete a selection of check form templates and view selected check forms for a base and department. Users with this access level are displayed in the **Authorised Check & Training Personnel** pane for each check form in the check form setup screen. Personnel with the **Check form Administration > Modify All** access level can then provide the required users with access to individual check form templates by selecting their name in the **Authorised Check & Training Personnel** pane.
Check forms > View All	Allows users to complete all check form templates and view all check forms.
Check Forms > Submit Self	Allows users to submit check forms that are self-updateable.
Check forms > Submit Selection	Allow users to submit a selection of check form templates and view selected check forms for a base and department.
Check forms > Submit All	Allows users to submit all check form templates and view all check forms.
Check Forms > Modify Self	Allow users to modify the check forms they have submitted.
Check forms > Modify Selection	Allow users to modify a selection of check forms templates and view selected check forms for a base and department.
Check forms > Modify All	Allow users to modify all check form templates and view all check forms.

Step 7. Click [OK].

Creating Recency Check Forms

Air Maestro's recency check form function allows organisations to create online checklists and associate them with applicable recency items. These check forms can then be used during routine recency assessments (Induction, Line Checks, Base Checks etc) to assess the competency of personnel. In addition to capturing specific recency assessment criteria, the forms contain personnel details, aircraft details, comments and associated documents.

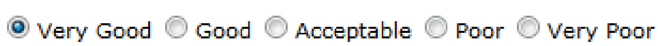
The process for creating a recency check form requires four steps.



Step 1 - Create a Rating Scale

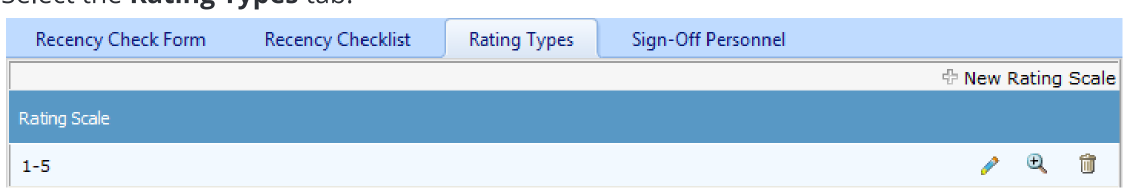
A rating scale is a collection of possible selections for any evaluation that is being performed within the check form. For example, this could be a scale of 1 to 10 or a scale including Good, Acceptable and Poor.

You can create multiple rating scales for use in your check forms based on your company requirements. For each header and checklist item in a check form, you may associate an applicable rating scale.



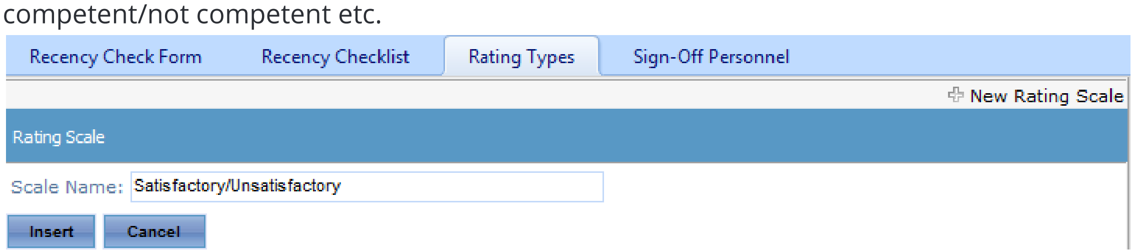
Step 1. Select **Operations > Recency > Check Form Setup**. The **Check Form Setup** screen is displayed.

Step 2. Select the **Rating Types** tab.



Step 3. Select [+New Rating Scale].

Step 4. Enter a meaningful name for the rating scale in the **Scale Name** text box. For example, 1-5, competent/not competent etc.

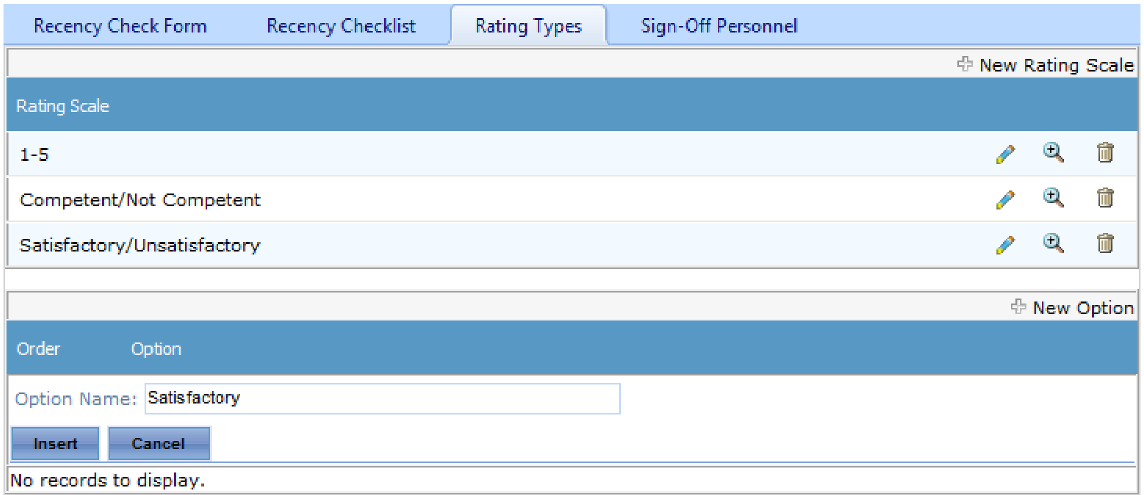


Step 5. Click [Insert]

Step 6. Click [ ] corresponding with the new rating scale to create the applicable options.

Step 7. Click [+New Option] to insert a new option name.

Step 8. Enter a meaningful name for the option in the **Option Name** text box. For example, competent, poor, fair, etc.



Step 9. Click [Insert].

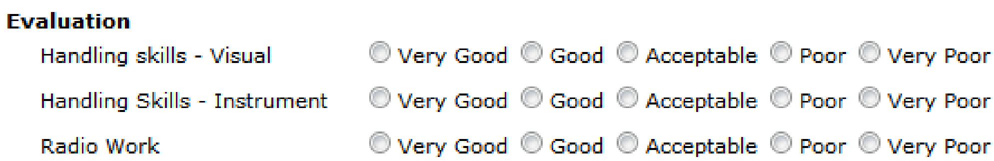
Step 10. Repeat **Steps 7-9** to add the additional options applicable to the rating scale.

Step 11. Use the arrows [ ] to change the sort order of the options in the rating scale.

Step 2 - Create a Checklist

A checklist is a set of one or more evaluations assessed within a check form. All checklist items must be grouped under a header. For this reason, a header must be created before any checklist item. The text in the header should reflect the checklist items that exist below it. For example, the header 'pre-flight procedures' would be appropriate for a group of checklist items used to evaluate a pilot's competency with pre-flight processes.

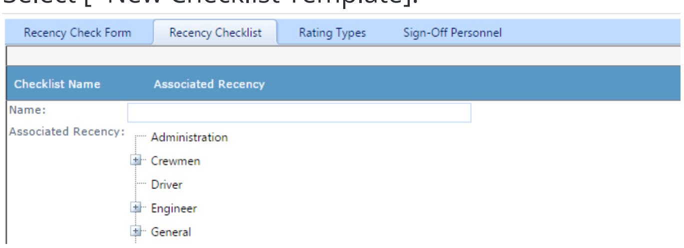
The evaluations can be linked to a rating scale. In the example below, the text 'Evaluation' is a header item in a checklist, while the text 'Handling skills – Visual' is a checklist item. The choices 'very good, good, acceptable, poor and very poor' are options contained in a linked rating scale.



Step 1. Select **Operations > Recency > Check Form Setup**. The **Check Form Setup** screen is displayed.

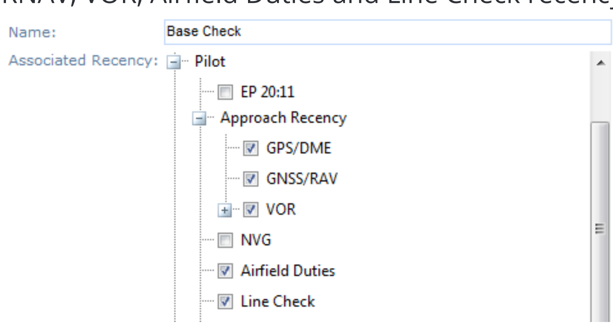
Step 2. Select the **Recency Checklist** tab.

Step 3. Select [+New Checklist Template].



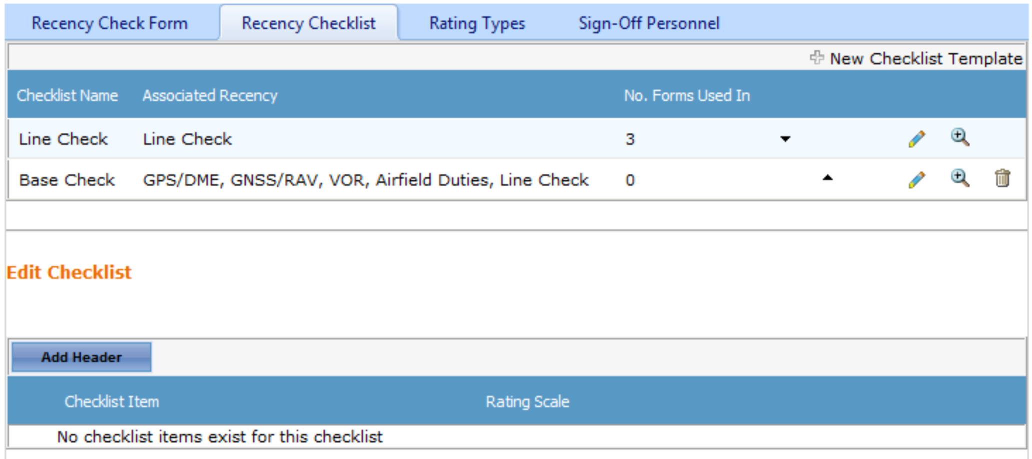
Step 4. Enter a meaningful name for the checklist in the **Name** text box.

Step 5. Select the recency items that you would like to have the option to update whilst undertaking the checklist in the **Associated Recency** tree. The recency items contained in this tree reflect the recency items created in the recency setup area. In this example, the 'Base Check' checklist, allows the examiner to update the examinee's GPS/DME, GNSS/RNAV, VOR, Airfield Duties and Line Check recency.



Step 6. Click [Insert].

Step 7. Click [ ] corresponding with the new checklist to create the applicable checklist items.



Step 8. Click [Add Header].

Step 9. Enter a meaningful name for the header item in the **Header Text** text box.

Step 10. Select an applicable control type for the header items from the **Control Type** drop-down list.

Step 11. Select an applicable rating scape from the **Rating Scale** drop-down list.

*If a rating scape is not required for the header item, select 'None' from the **Control Type** drop-down list.*

Step 12. Select the **Show Comment Box** tick box to display a comment box for the header item.

Step 13. Click [Add].

Step 14. Repeat **Steps 8-13** to continue adding additional headers to the checklist.

Step 15. Click [Add Checklist Item].

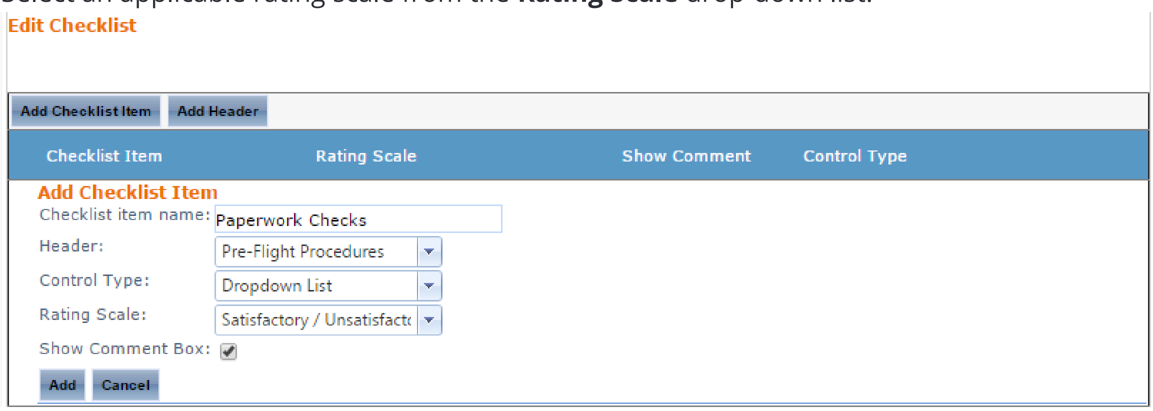
Step 16. Enter a meaningful name for the checklist item in the **Checklist Item Name** text box.

Step 17. Select the applicable header for the checklist item from the **Header** drop-down list.

Step 18. Select the applicable control type from the **Control Type** drop-down list.

Control Type	Description
Label	Select the **Label** control type to include a text label within the check form.
Checkbox	Select the **Checkbox** control type to include a check/tick box for the checklist item. This control is used to indicate whether the criterion specified by the checklist item is present.
Checkbox List	Select the **Checkbox List** control type to include a series of check/tick boxes for the checklist item. This control is used when one or more options may apply to the checklist item.
Radio Button List	Select the **Radio Button List** control type to include a series of radio buttons for the checklist item. This control is used where the user is required to select a unique option from a series for the checklist item.
Dropdown List	Select the **Dropdown List** control type to include a predefined list with a series of options for the checklist item. This control is used when the information to be entered into the checklist item is limited to particular words and phrases and only one option may be selected.

Step 19. Select an applicable rating scale from the **Rating Scale** drop-down list.

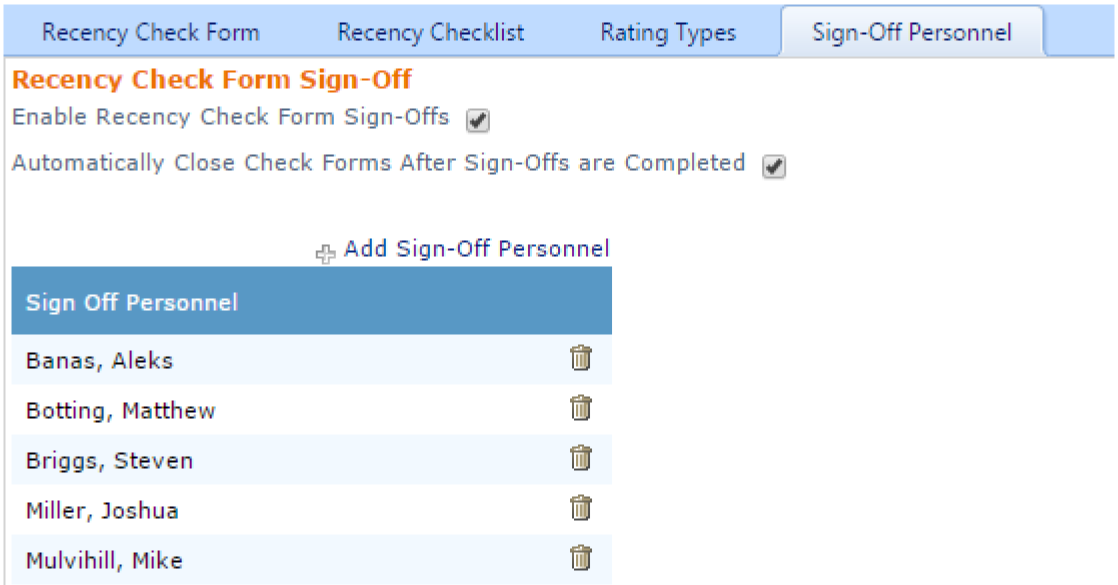


Step 20. Select the **Show Comment Box** to display a comment box for the checklist item.
Step 21. Click [Add].
Step 22. Repeat **Steps 15-22** to continue adding additional checklist items to the checklist.

Step 3 – Setup Sign-Off Personnel

Step 1. Select **Operations > Recency > Check Form Setup**. The **Check Form Setup** screen is displayed.

Step 2. Select the **Sign-Off Personnel** tab.



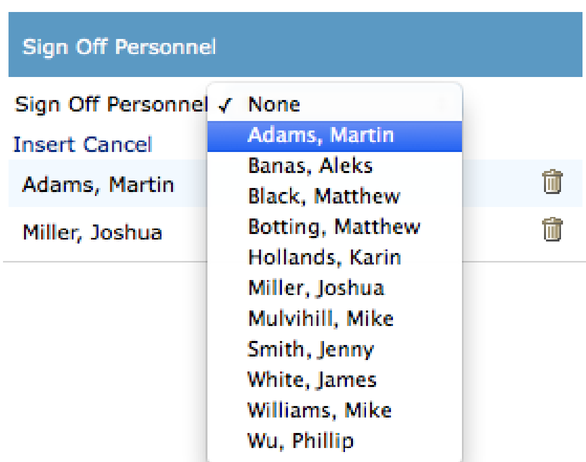
Step 3. Select the **Enabled Recency Check Form Sign-Offs** tick box.

Step 4. Select the **Automatically Close Check Forms After Sign-Offs are Completed** tick box, to automatically close check forms once all sign-offs have been obtained. If this option is unselected, check form managers must click [Close] after sign-offs have been obtained to close the check form and update the examinee's results.

Step 5. Click [+Add Sign-Off Personnel].

Step 6. Select the required sign-off personnel.

Step 7. Click [Insert].



Step 8. Repeat **Steps 5-7** to add additional sign-off personnel.

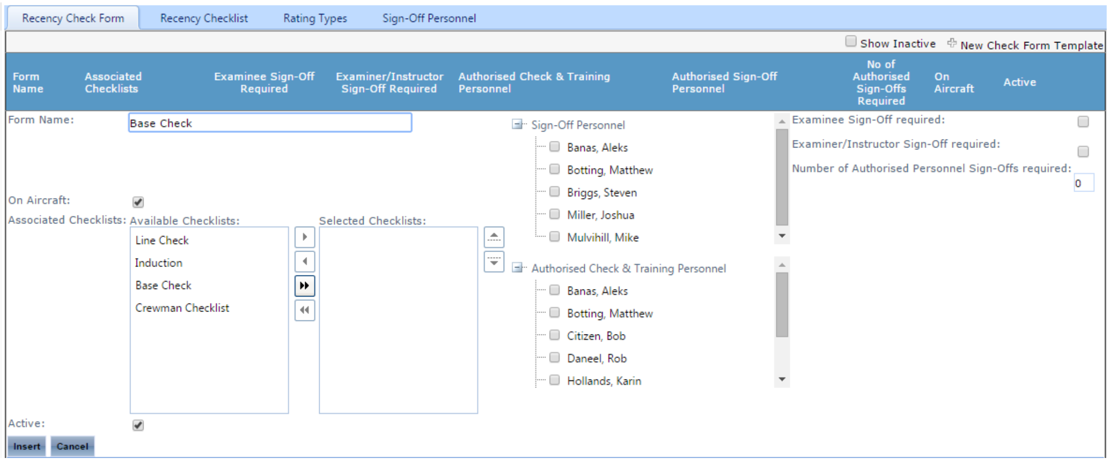
Step 4 – Assemble a Check Form

Before you can assemble a check form, you must ensure you have created the applicable checklist (and associated rating scales) and setup the applicable sign-off personnel.

Step 1. Select **Operations > Recency > Check Form Setup**. The **Check Form Setup** screen is displayed.

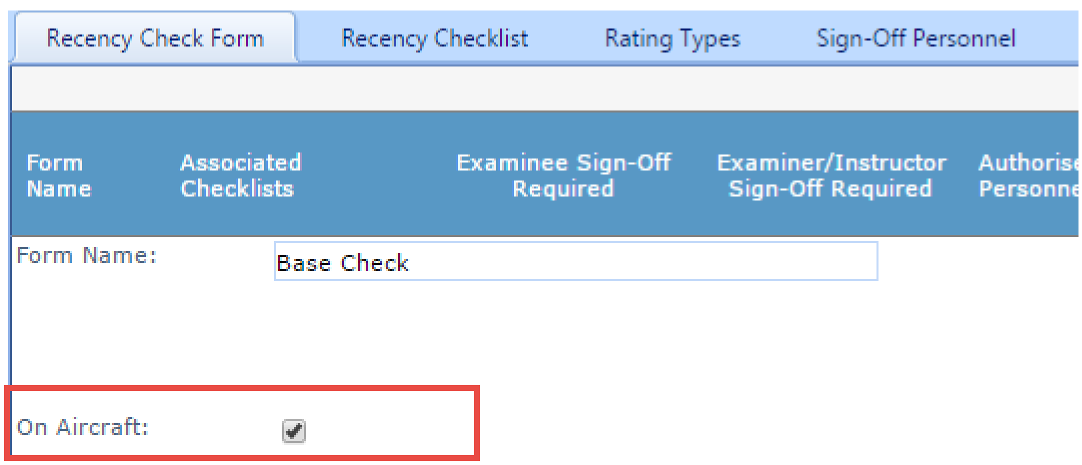
Step 2. Select the **Recency Check Form** tab.

Step 3. Select [+New Check Form Template].

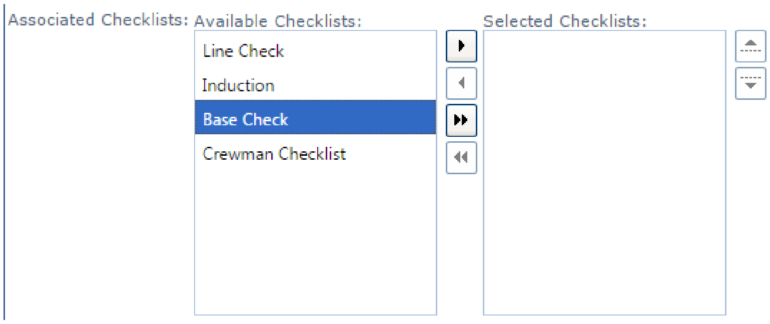


Step 4. Enter a meaningful name for the check form in the **Form Name** text box. For example, Base Check, Line Check, Induction Check etc.

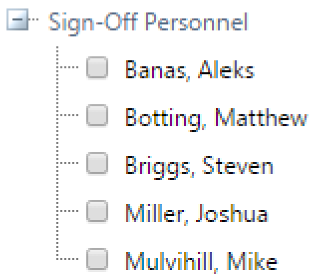
Step 5. Select the **On Aircraft** tick box, to display the following fields in the check form: Pilot, Route Flown, Primary Aircraft, Secondary Aircraft, and Check Performed On.



Step 6. Select the applicable checklist templates associated with this check form in the Associated Checklists pane. Use [>] to select the highlighted checklist or [>>] to select all the available checklists.

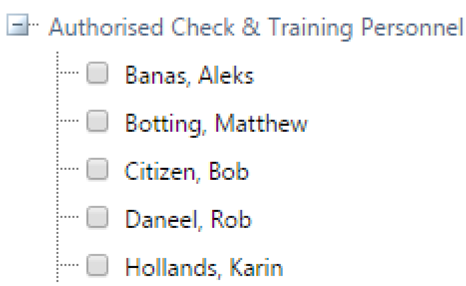


Step 7. Select the applicable sign-off personnel in the **Sign-Off Personnel** listing.



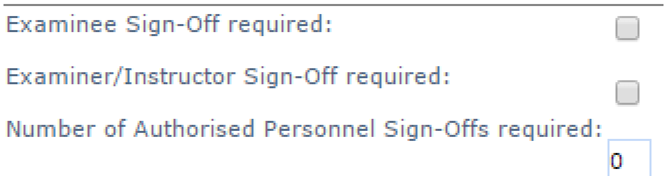
To add additional personnel to this listing, select the ***Sign-Off Personnel*** *tab and assign the required sign-off personnel.*

Step 8. Select the applicable authorised check & training personnel in the **Authorised Check & Training Personnel** listing. Only selected personnel can complete this check form.



To add additional personnel to this listing, provide the ***Check Forms > View Selection*** *or* ***View All*** *access level to the required personnel.*

Step 9. Repeat **Steps 3-5** to edit additional fields.



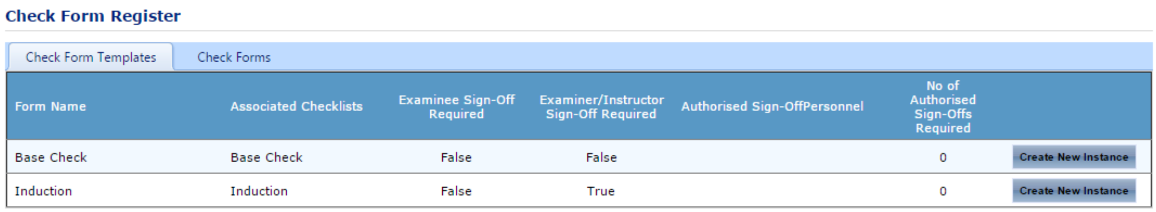
Control Type	Description
Examinee Sign-Off Required	Select whether the examinee is required to sign-off the check form once it has been completed by the examinee.
Examiner/Instructor Sign-Off Required	Select whether the examiner is required to sign-off the check form once they have completed and submitted the form.
Number of Authorised Personnel Sign-Offs Required	Select the number of sign-off personnel that are required to sign-off the check form before it is completed. For example if you enter '1' and you have nominated '2' sign-off personnel, as soon as one of the sign-off personnel sign-offs the check form progresses into the 'Completed' status and no further sign-offs are required.

Step 10. Click [Insert].

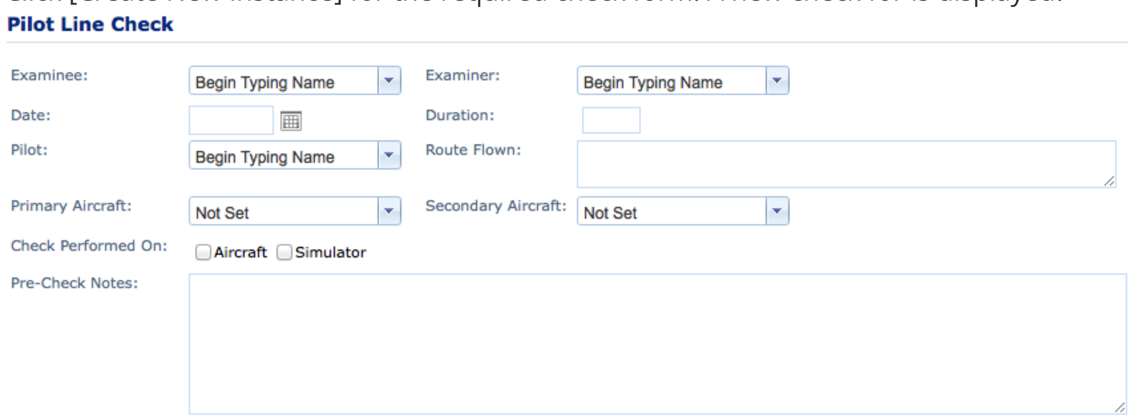
Completing Check Forms

Recency check forms are used to record the applicable check and training activities for personnel in your organisation. During the completion of a check form, the examiner has the option to update any associated recency items for the examinee which have been achieved during this check. Once the recency has been selected and the sign-offs have been obtained (if required) the examinee's recency records are automatically updated with the last conducted date as per the check form date.

Step 1. Select **Operations > Recency > Check Forms**. The **Check Form Register** screen is displayed.



Step 2. Click [Create New Instance] for the required check form. A new check for is displayed.



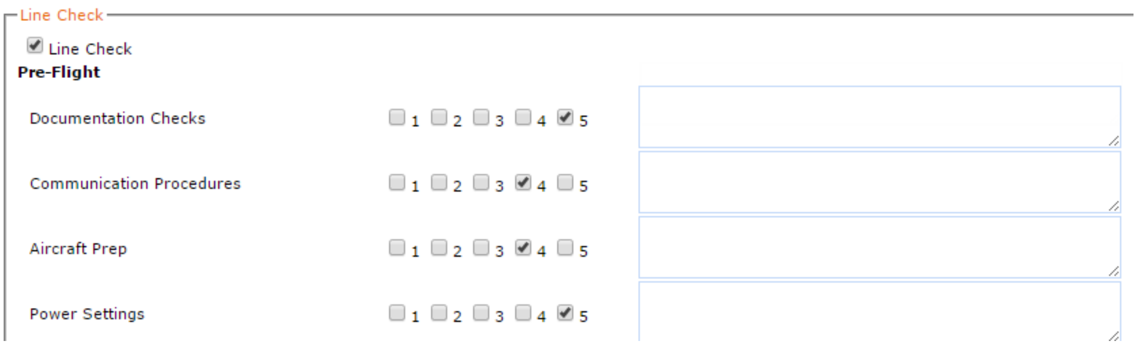
*If [Create New Instance] is not displayed, you have not been assigned the access level to complete this check form. You must have the **Recency management > Check Forms > View All** access level assigned to create new check forms. Alternatively if you have the **View Selection** access the administrator must assign you access to complete the relevant check forms in the **Authorised Check & Training Personnel** listing for each check form in the setup.*

Step 3. Complete all the relevant fields in the check form.

Field	Description
Examinee	Select the name of the candidate being assessed.
Examiner	Select the name of the examiner conducting the assessment.
Date	Select the date of the assessment.
Duration	Enter the length of the assessment (in hours).
Primary Aircraft	Select the registration of the aircraft involved in the assessment. This field is only displayed if the 'On Aircraft' option is selected in the check form setup.

Secondary Aircraft	Select the registration of the secondary aircraft, if more than one aircraft was involved in the assessment. This field is only displayed if the 'On Aircraft' option is selected in the check form setup.
Check Performed on	Select whether the assessment was performed on an aircraft, in a simulator or both. This field is only displayed if the 'On Aircraft' option is selected in the check form setup.
Pilot	Select the name of the pilot in command during the assessment. This field is only displayed if the 'On Aircraft' option is selected in the check form setup.
Route Flown	Enter the route flown during the assessment. This field is only displayed if the 'On Aircraft' option is selected in the check form setup.
Pre-Check Notes	Enter any pre-check comments relating to this check form.

Step 4. Complete the checklist and any recency items achieved by the examinee during the assessment.



Step 5. Click [Save]. If sign-offs are required for this check form [Request Sign-Offs] is displayed. Alternatively, if no sign-offs are required [Submit] is displayed.

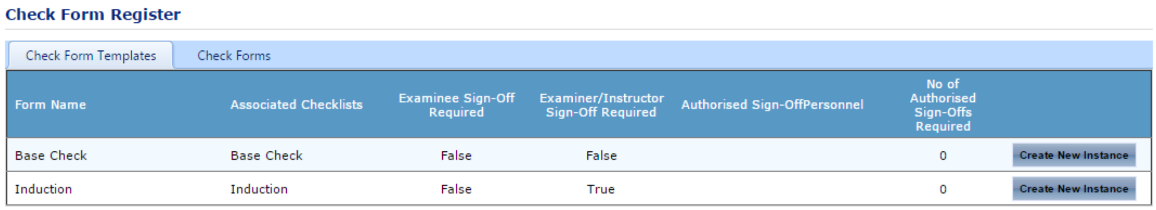
Step 6. Click [Request Sign-Offs] or [Submit]. If you click [Submit], the check form is completed and any associated recency information is updated in the examinee's recency records.

If sign-offs have been setup for this check form, you must click [Request Sign-offs] to notify all the relevant sign-off personnel that the check form is ready for sign-off. The check form has a status of ***'Awaiting Sign-Offs'*** *until all the relevant sign-off personnel have completed their sign-off. The Examinee's recency records are not updated with the last conducted date for the applicable recency items, until all sign-offs have been obtained.*

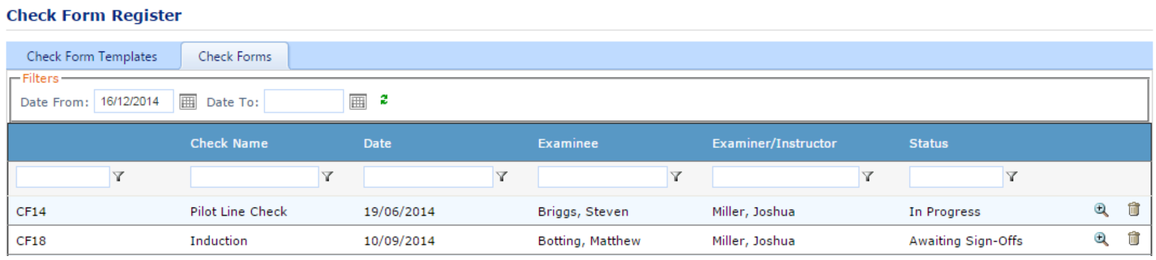
Reviewing Check Forms

You can review a completed check form by following the steps outlined below.

Step 1. Select **Operations > Recency > Check Forms**. The **Check Form Register** screen is displayed.

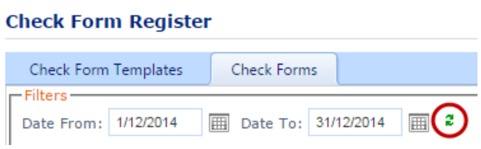


Step 2. Select the **Check Forms** tab to view all submitted forms you have access to view.



Step 3. Enter the required date in the **Date From** and **Date To** fields to review check forms for a particular period. Note that by default this screen is filtered to check forms completed within the last week.

Step 4. Click [ ] to refresh the screen and view check forms for the selected date range.



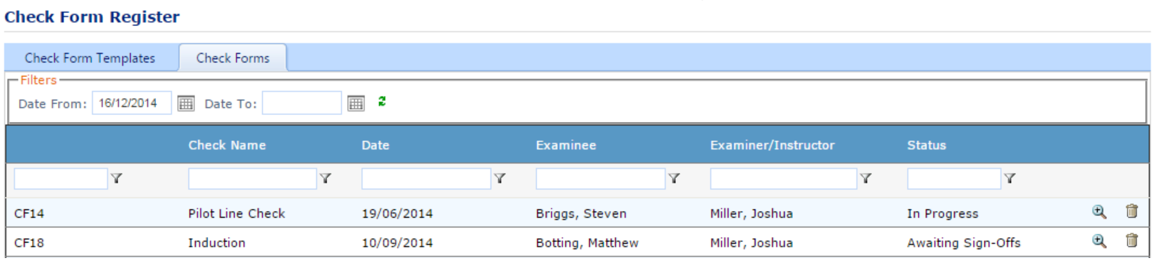
Step 5. Click [ ] corresponding with the required check form. The selected check form is displayed.

Signing Off Check Forms

If you are required to sign-off a check form, you are notified of this requirement via an Air Maestro alert and email.

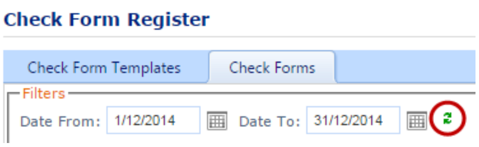
Step 1. Select **Operations > Recency > Check Forms**. The **Check Form Register** screen is displayed.

Step 2. Select the **Check Forms** tab to view all submitted forms you have access to view.



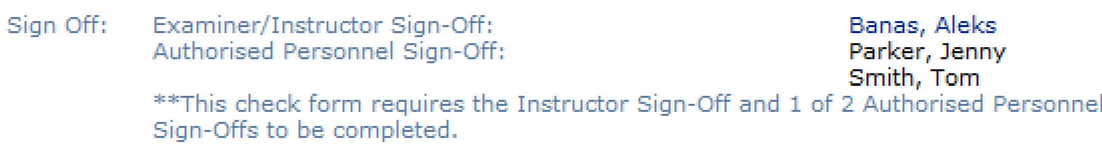
Step 3. Enter the required date in the **Date From** and **Date To** fields to review check forms for a particular period. Note that by default this screen is filtered to check forms completed within the last week.

Step 4. Click [ ] to refresh the screen and view check forms for the selected date range.



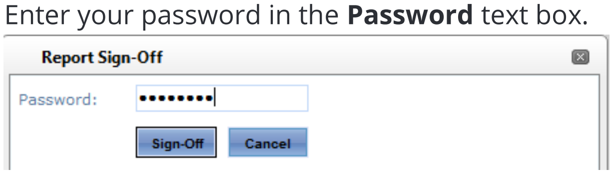
Step 5. Click [ ] corresponding with the required check form. The selected check form is displayed.

Step 6. Scroll to the **Sign-Off** pane.

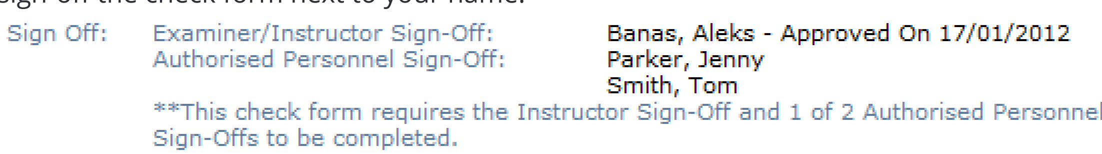


Step 7. Click your name in the **Sign-Off** pane. The **Report Sign-Off** dialog box is displayed.

Step 8. Enter your password in the **Password** text box.



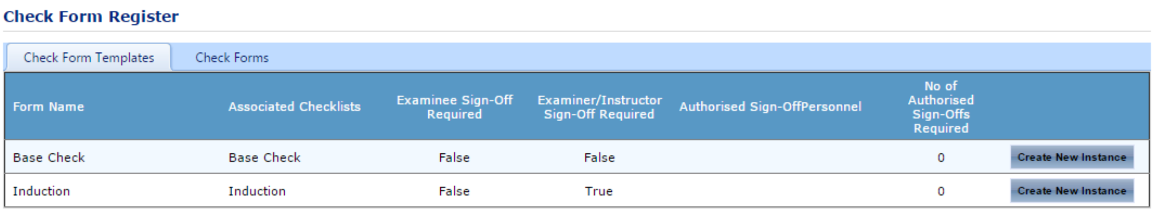
Step 9. Click [Sign-Off]. The **Sign-Off** pane is updated with the text **'Approved'** and the date you sign-off the check form next to your name.



Deleting Check Forms

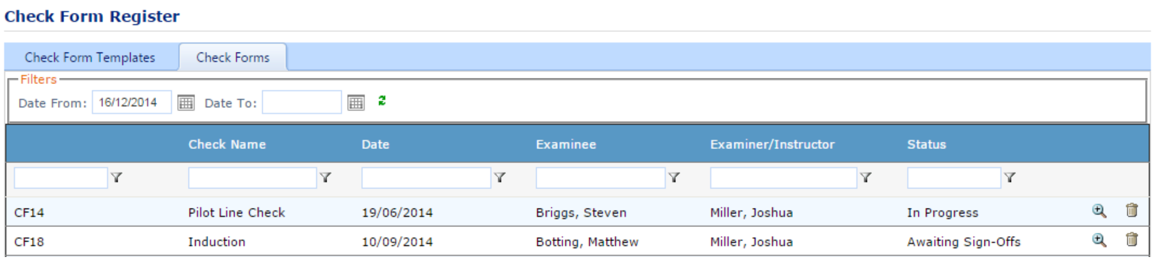
You can delete a check form by following the steps outlined below.

Step 1. Select **Operations > Recency > Check Forms**. The **Check Form Register** screen is displayed.



Form Name	Associated Checklists	Examinee Sign-Off Required	Examiner/Instructor Sign-Off Required	Authorised Sign-OffPersonnel	No of Authorised Sign-Offs Required	
Base Check	Base Check	False	False		0	Create New Instance
Induction	Induction	False	True		0	Create New Instance

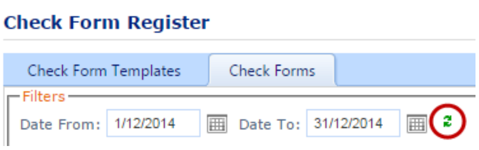
Step 2. Select the **Check Forms** tab to view all submitted forms you have access to view.



	Check Name	Date	Examinee	Examiner/Instructor	Status		
CF14	Pilot Line Check	19/06/2014	Briggs, Steven	Miller, Joshua	In Progress		
CF18	Induction	10/09/2014	Botting, Matthew	Miller, Joshua	Awaiting Sign-Offs		

Step 3. Enter the required date in the **Date From** and **Date To** fields to review check forms for a particular period. Note that by default this screen is filtered to check forms completed within the last week.

Step 4. Click [ ] to refresh the screen and view check forms for the selected date range.



Step 5. Click [ ] corresponding with the required check form. The delete check form prompt is displayed.

Step 6. Click [OK] to confirm the check form deletion. The check form and all associated recency dates are deleted.