



The End User's

Complete Guide to CompetencyCore™

VERSION 8.4.1

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Part I

Getting Started for End-Users

Chapter 1

Manage your account

Logging in

Welcome! If you're using CompetencyCore for the first time, this is a great place to get started. The first step is to open your company's CompetencyCore site. Enter your username and password and click **Login**. Contact your software administrator if you're not sure what your username or password is.

Once you've logged in, you'll see our Terms & Conditions. After clicking **Agree & Continue**, the Privacy Notice opens in a new window. Click the close icon to dismiss the window and start using CompetencyCore. You can always access the Privacy Notice from your personal menu.

Resetting your password

Can't remember your password? Click the **Forgot your password?** link above the **Login** button. Enter your email address and click **Next**. You'll receive an email with a link to the Set Password page. Your password needs to include at least:

- 1 capital letter
- 1 number
- 8 characters

Tip: You'll know your password is strong when the meter colour turns green. Remember that the longer the password, the better.

Uploading a profile picture

On the top left of your dashboard, click the profile picture area to upload a photo. If you don't upload a photo, your initials are displayed.

Caution: Your picture should be at least 200×200 pixels and no larger than 1.5MB.

Making changes to your account

Click your profile picture on the top right of your screen and select **Account**. Here are some details you can change:

- Username
- Password
- First name
- Last name
- City
- Province/State
- Country

Scroll to the bottom of the page and click **Save** once you've finished making changes.

Logging out

Click your profile picture on the top right of your screen and select **Logout**. Closing your browser also logs you out of your account.

Chapter 2

Manage your settings

Administrators manage the site settings, but you can manage your personal settings that only apply to your account. If your administrator sets your site to English but you prefer French, or if you don't want to receive notifications by email, this is where you can make those changes.

Accessing your settings

Click your profile picture on the top right of your screen and select **Settings**. Here's what you can customize:

- Email notifications
- Plan notifications
- Default language
- Time zone

Notification settings

Even if you turn off the **Email notifications** switch, you'll still see all of these notifications when you click the bell icon. The Plan notifications only apply if the Development or Performance module is installed on your site. We recommend leaving all of the plan notifications selected.

- A plan where I am the subject or manager is updated

- I am assigned to a plan
- I am removed from a plan
- A participant adds a comment to my plan
- A goal is added to a plan where I am the subject or manager
- A goal is updated on a plan where I am the subject or manager
- A plan that I am assigned to is moved to a stage that I can access

Language and time zone settings

The Default language setting is the language you're using. If your site has more than one available language, select the one you prefer and click **Save** at the bottom of the page. The language doesn't change immediately. Just refresh the page, and you'll be using the language you selected.

Your administrator might be in a different time zone, but you can change the time zone of your own account. All of the dates and times on the site change to match the time zone you select.

Chapter 3

A tour for new users

Main menu

Access the different areas of CompetencyCore in a menu across the top of the screen. Depending on your permissions, you might see additional pages in a drop-down when you hover over a menu item. You can always click **Home** to return to your dashboard.

Notifications

An indicator appears on the bell icon when there's a new task to complete or an update about an activity you're a part of. For example, you might receive a notification to sign off on your job description or to complete an assessment. Click the bell icon to view a notification with a link to the activity so you can get started or review changes right away.

Activities

Click the list icon to access a complete list of the assessments, surveys, plans, and other activities assigned to you. Check out the [Keep track of your activities](#) article to learn more.

Personal menu

Click your profile picture on the top right of your screen to open your personal menu.

- **Product Updates:** Check out our release notes and announcements.
- **Account:** Make changes to your profile picture, username, password, or contact details.
- **Settings:** Customize your email notifications, language, and time zone.
- **Notifications:** View updates about activities you're participating in or tasks to complete.
- **Attachments:** View and manage all of the files you've uploaded.
- **Privacy Statement:** Read our Privacy Statement and learn how your data is used.
- **Logout:** Log out of your account. Closing your browser also logs you out of your account.

Chapter 4

Customize your dashboard

The dashboard is the first thing you'll see once you're logged in. The dashboard is set up by your administrator, but you might have the option to add and rearrange widgets such as the Weather, My Tasks, Recently Viewed Jobs, and a Blog or Twitter feed. Use it to see information about your site at a glance and to keep track of activities.

Adding your current role

In your CompetencyCore account, navigate to **Home** to access the dashboard. The first step is to make sure your job shows up beside your profile picture. This helps CompetencyCore populate widgets like Job Matches. If it's not already set up, click the **Add Role** link beside your profile picture. Search for and add your job description.

Adding widgets

Depending on how much flexibility your administrator allows, you can make customizations. These customizations only affect your own dashboard.

- To add a widget, click **Options** and select a widget in the drop-down.
- To resize a widget, click the bottom right corner and drag it.
- To move a widget, click the header area and drag it.

- To remove a widget, point to the header area, click the 3-dot icon, and select **Remove** or click **Options** and deselect the widget in the drop-down.

Your administrator can update your dashboard. They can also reset it so all of your customizations are lost. You'll see a message on the dashboard if this happens.

Assessment Completion

If your site has the Assessment module and you have access to reports, use this widget to pin an assessment report you've saved to your dashboard. You can add more than one report.

Broadcast Message

See updates, reminders, or announcements from HR administrators in your organization.

Career Path

See your current role, next step, and target. Click a job title to view a detailed comparison of your profile qualifications and the job requirements.

Job Count

See a count of the total draft and published jobs on your site.

Job Matches

As you complete your profile, your qualifications are matched to jobs. The top five job matches appear in this widget. Click the expand icon to see the percentage match of each library type.

My Activities

See a count each type of open activity left to complete so you never miss a due date. You'll also see a count of upcoming and overdue activities. Click an activity to open the full list pre-filtered to activities of that type.

Recently Viewed Jobs

See the top 10 latest job descriptions you've viewed.

RSS Feed

See the 35 most recent posts from a blog.

Top Competencies

See the top 10 competencies most frequently added to jobs.

Twitter

See the 20 most recent tweets from Twitter accounts specified by an administrator.

Weather

Get the weather forecast. To set up this widget, enter the name of a city, select a country in the drop-down, and choose Metric (°C) or Imperial (°F) units.

Chapter 5

Keep track of your activities

It can be challenging to keep track of everything that needs to get done. You might have assessments to complete, surveys to respond to, and plans to review. We list your activities in one place with a direct link to start or continue them so you can get straight to work instead of hunting through notification emails.

Accessing your activities

Click the list icon on the top right of your screen. You'll see a blue indicator appear on the icon when a new activity is assigned for you to complete.

Filtering activities

Each type of activity has a different coloured icon, so you can quickly scan the list and know what you need to do. You can also filter by type. Here are the different types of activities:

- Assessments
- Competency Profile Surveys
- Development Plans
- Performance Plans
- Profile Validations

- Employee Sign-Off
- Job Validations

You can sort activities by who you're assigned as:

- Manager
- Subject
- Participant

Or by due date:

- Due date descending
- Due date ascending
- Date added ascending
- Date added descending

Click the funnel icon on the top right of the table to display a status filter:

- Open
- Complete
- Overdue

Archiving activities

Completed activities can be archived so they don't distract from what still needs to be completed. Click the funnel icon, select **Complete** in the Status filter, and click **Archive** beside an activity. Archived activities are still accessible. Click the 3-dot icon on the top right of your screen and select **Archived**. A new window opens displaying archived activities. Click **Unarchive** to return an activity to the main list.

My Activities widget

To make sure you never miss a due date, add the Activities widget to your CompetencyCore dashboard. This widget shows a count of each type of open activity. Check out the [Customize your dashboard](#) article to learn more.

Part II

Using CompetencyCore

Chapter 6

Complete your profile

Profile is your own space in CompetencyCore to keep track of your competencies and qualifications. Building a profile helps your career development because you'll see the jobs you match to in your organization. Think of your profile as a toolkit that you can update as you complete tasks and participate in activities.

Adding your current role

In your CompetencyCore account, navigate to **Profile > My Profile**. The first step is to make sure your job shows up beside your profile picture. This helps CompetencyCore suggest items to add based on job requirements. If it's not already set up, click the **Add current role** link. Search for and add your job description.

Adding qualifications

Click **Add New** on the right side of the page and select **Quick Add (from current role)** to open a window listing all of the requirements on your job. You can change the level and deselect items that don't apply. Click **Submit**. If validation is required, you'll be prompted to send this request to your manager. You might need to validate some types of items like competencies and not others like

education, but these decisions are set up by your administrator.

You can also browse and add qualifications that are not required on your current role. Click **Add New** on the right side of the page and select an item type. Suggested items are based on your current role, but you can also click the **All** tab to browse items. You can select multiple items and click **Done** to close the window. Click **Set level...** beside a new item to select your current level.

Viewing strengths and gaps

A pie chart on the right side of the page displays how closely you match your current role. Click the **View Strengths and Gaps** link to open a window with a detailed comparison of your profile and your job description. This helps you review which requirements you still need to work on.

Viewing competency stories

Click a competency name to open a more detailed view. On this page, you can:

- Review the behaviours of each level.
- See which users are at each proficiency level.
- See a timeline of your progress.
- Review a list of activities you've completed to improve your proficiency.
- Access learning resources associated to the competency.

Viewing job matches

A progress bar indicates the completion status of your profile. Setting up your current role, adding items, and setting levels all increase this status. Once your profile reaches 60% (or a percentage set by your administrator), you'll see your top three job matches. Check out the [How does user-to-job-matching work? FAQ](#) to learn more.

Tip: Click an item's 3-dot icon and select *Make Private* to hide from managers. Making an item private does not lower your profile completion percentage. However, the item no longer contributes to job matching, so job

match percentages lower.

Navigate to **Profile > Job Matches** to view a more detailed list. Click a job name to open a breakdown of the job requirements compared with your profile.

Chapter 7

Build a career path

Discovering paths

In your CompetencyCore account, navigate to **Profile > Career Path**. To generate an automatic path, click the **Add target role** link. Type in your target role, select it from the drop-down, and click **Discover**.

Exploring paths

To browse jobs, click **Explore**. You'll see a list of jobs at the next level displayed in tiles. The percentage on each tile shows how closely a job matches your profile. Click the **Show related roles** link to see roles at your current level.

Selecting a job tile displays similar jobs at the next level. Jobs are listed in descending order of similarity to the job selected at the previous level. Select a job from each level until you've found your target. You can only select one job per level.

Note: Jobs below your current job level and jobs with a 0% match to the job selected at the previous level don't appear when you're selecting a career path.

On the right side of the page, you'll see how well a selected job matches your

profile by library type. Click the **Full Job Description** button to see an item by item comparison.

Completing your path

To filter jobs by group, click **Filters**. Type in a name like “Finance” or “Human Resources” and select it from the drop-down. Your path is redrawn to display only jobs from that group. Once you’re happy with the path, click **Complete Path**. Select whether to share or keep your path private. Keep in mind that shared paths are visible on pages accessed by your manager and HR administrators.

Managing your path

After confirming your path, it’s displayed in the header so you can keep your path in mind when reviewing your profile. Now when you click the **Career Path** tab, you’ll see the details of each job in your path displayed in tabs. Click **Actions** to edit your path, create a new path, or create a development plan. Click the 3-dot icon to delete, make private, or share your path.

Chapter 8

Manage your team

Viewing your team

In your CompetencyCore account, navigate to **My Team** to open a table listing all of your direct reports. If you don't see this option in the main menu, ask your administrator to turn on the Access My Team permission. Use the **Sort by** drop-down to filter employees by name, number of strengths, or number of gaps.

Strengths and gaps

Click **Strengths** or **Gaps** to open a list of items on the employee's profile where they exceed and meet or fail to meet their job requirements. Expand a library type to see the level required on the job and the employee's current level for each item.

Manager activities

Click an employee's name to open an activity snapshot. You'll see a count of assessments, development plans, validation requests, and performance plans that require your participation. Click a count to open the My Activities page where you can start or continue the activity. To see all activities across your

team where you're assigned as the manager, click the **Manager Activities** button on the top right of the page.

Creating a development plan

1. Navigate to **My Team**.
2. Point to one of your direct reports and click the 3-dot icon.
3. Select **Create Development Plan** in the drop-down.
4. Customize the plan name, description, and due date.
5. Search for a select a job description to associate to this plan.
6. Click **Add Goals**. Add from the suggested competency-based goals, which are based on the competencies required for the job description you selected. Click **Next**.
7. Customize the target proficiency levels which are pre-selected based on job requirements.
8. Add optional due dates to each goal.
9. Click **Done** to open the development plan you've just created.

Note: You can only create plans from My Team for your direct reports.

Diving deeper

A **Team** button indicates employees who report to you but who also have their own direct reports. Click this button to see their team. Your own direct report (the team's lead) is listed at the top followed by their direct reports. Just like with your own team, you can view an activity snapshot and see each employee's strengths and gaps.

Continue diving deeper within your team. Use the breadcrumbs at the top of the page to navigate and to keep track of which team you're viewing. For your direct reports and their teams, you can view the profile of each employee. Open an activity snapshot and click **View Profile**, or click the 3-dot icon on the right side of the page and select **View Profile**. Switch between the tabs at the top of the page to view the employee's job matches and public career path.

Chapter 9

Perform an assessment

An assessment is a series of questions used to measure your skill levels against your current job or a job you're pursuing. Competency-based assessments help you and your manager see how closely your behaviours match those required. They also help identify strengths and areas for improvement. As part of your organization's HR process, you might be asked to assess yourself or another employee.

Accessing self-initiated assessments

Whether you're taking on a new role or just curious about an opportunity, self-assessments are a great way to identify gaps in your profile.

1. Navigate to **Assessments > My Assessments**.
2. Click **Self-Assess** on the top right of the page.
3. Expand a group and select a job.
4. Click the gear icon and select **Perform Assessment**.

Accessing assigned assessments

When an assessment is assigned to you, you'll receive an email with a link that opens the assessment. Click the link in the email you received.

OR

In your CompetencyCore account, click the list icon on the top right of your screen, find the assessment activity, and click **Start**.

Performing an assessment

1. Follow the steps above to access the assessment.
2. Review the rating scale that's being used and click **Next**.
3. Read the behavioural statement or question.
4. Select the level you think you're performing at.
5. Review your answers. A warning symbol means a question is incomplete.
6. Click a question name to return to it and select a response.
7. Click the **Review Complete** button at the bottom of the page.
8. Click **Submit** once you've completed the assessment.
9. If available, turn on the **Include results in my profile** switch to update your profile.

Caution: You can't make changes to your responses after submitting.

Chapter 10

Create a development plan

Creating a plan from an assessment

Plans are made up of goals that are often related to competencies so you can improve your performance. You might have identified competency gaps while performing an assessment. Follow the steps below to base your plan on a completed assessment.

1. Navigate to **Assessments > My Assessments**.
2. Expand **Assessments where I am the subject**.
3. Point to a completed assessment and click the 3-dot icon.
4. Select **Create Development Plan**.
5. Customize the plan name and due date and click **Next**.
6. You'll see a list of competencies that were rated below target on your assessment. Each one can be added to your plan as a goal to complete. The target level is pre-selected with the level required for your current role. Click the x to remove a competency goal.
7. Add an optional due date to each goal and click **Done**.
8. Click **View Plan** or **Finish** to return to it later.

Creating a blank plan

1. Navigate to **Development > Plans**.

2. Click **Create Plan** on the top right of the page.
3. Enter a plan name. Plans often use the name of the job they're being created for.
4. Set an overall due date for the plan.
5. Start typing the name of a job and select one that appears in the drop-down.
6. Click **Next** to continue creating your plan or **Save and Close** to return to it later.

Viewing plans and goals

In your CompetencyCore account, navigate to **Development > Plans**. You'll see a table listing your current plans. A count of plans due within three days or plans that are overdue appears on the top right of the page. If you're looking for plans where you're assigned as a manager, select **Manager** in the Assigned as filter.

If you have a plan where you're the subject, you'll also see a **My Goals** tab. Just like with plans, you can see upcoming and overdue goals. You can filter by in-progress and completed goals.

From these pages, you can click the 3-dot icon to add quick comments. To view a plan or goal in more detail, just click the plan or goal name.

Adding new goals to a plan

Click **Add New** and select a goal option. The options available depend on the plan type.

- **Competency Goal:** Suggestions are based on the competencies required on the job.
- **Custom Goal:** Enter a goal name. Click *Save and Continue* to fill in custom fields.
- **Goals from Assessments/Plans:** Add competency gaps and incomplete goals.

Once you've added a goal to your plan, you'll see it listed with the target level and due date. Click the goal name to open the Goal Details page. From this page,

you can view the competency details, browse learning resources to attach to the goal, upload attachments, and make comments.

Managing plans and goals

Editing plans and goals

Open a plan and click the pencil icon on the top right of the page to make changes to the plan name, description, or due date and click **Done**. Open a goal and click the pencil icon on the top right of the page to make changes to the goal's due date or target level. Then click **Done**.

Involving your manager

Click the external link icon below the **Participants** heading. Expand **Eligible Managers**, select your manager, and click **Done**. Keep in mind that once you add a manager to your plan, the following actions are no longer available to you and are instead in the control of your manager:

- Marking goals as complete.
- Closing the plan.
- Deleting the plan or goals on the plan.
- Editing the plan name, description, or due date.

Note: You and your manager will receive notifications as you make updates to the plan. Check out the [Manage your settings](#) article to learn more.

Adding comments

When you make a comment, choose whether to share with your manager or keep it private. Private comments are only visible to you. Your manager won't see private comments onscreen or in the exported plan, even after the plan is closed. You can edit or delete shared and private comments after saving, but depending on how your administrator has set up your CompetencyCore site, comments might only be available to edit or delete for one hour after creating.

Marking goals as complete

Once complete, click the **Mark goal complete** link on the top right of the Goal Details page. Marking a competency goal as complete adds that competency to your profile. If validation is required, you'll be prompted to request validation from your manager. If you've involved your manager, they're the only one who can mark goals as complete. In this case, validation isn't required as an extra step.

Caution: Once a goal is marked as complete, it cannot be reopened.

Closing a plan

When you've finished working on a plan, click **Close**. If you've involved your manager, they're the only one who can close the plan. They'll always have the option to reopen a closed plan.

Exporting a plan

You and your manager can export a PDF version of a plan. This PDF lists the goals along with any public comments and associated learning resources. The final page provides a spot for you and your manager to sign and date the report to acknowledge you've read and discussed the results.

Chapter 11

Browse learning resources

Accessing learning resources

You can access learning resources from up to three areas in CompetencyCore:

Learning Resources: In your CompetencyCore account, navigate to *Learning Resources*. Resources are suggested based on the competencies required for your job. If you don't have a current role, suggestions are based on core competencies in your organization. They're grouped by type such as books, online courses, etc. You'll see up to three suggestions for each type, but you can adjust the number of rows displayed at the bottom of each table to view more. You can also follow the steps below to search for a specific resource.

Profile: Navigate to *Profile > My Profile*. Click a competency name on your profile to open more details. At the bottom of the page, you'll see a link to visit our Learning Resources page. Click the link to open a list of suggested resources associated to that competency so you can work toward the next level.

Development Plan: If you or your manager has set up your own development plan in CompetencyCore, you can link learning resources to individual goals. Navigate to *Development > Plans* and click the plan name. Click the name of a goal on your plan. You'll see a list of resources associated to that competency. For custom goals, suggestions are based on competencies required on the job associated to your development plan.

Searching for learning resources

1. Navigate to **Learning Resources**.
2. Select a tab before entering your search term.
 - By resource: Displays resources that include the keywords you enter.
 - By competency: Displays resources associated to the competency you select.
 - By job: Displays resources associated to the competencies required on the job you select.
3. Click the **Show filters** button and select the resource types to include.
4. If there are multiple languages installed, select a language. Click **Apply**.
5. When searching by competency, you might be able to filter the results by proficiency level. Type in the name of a competency and select an option in the drop-down. You'll see a new Competency Levels filter appear. Select a level to narrow your search.
6. Click the link icon if available to open a learning resource.

Bookmarking learning resources

1. Navigate to **Learning Resources**.
2. Browse suggested resources or follow the steps above to search.
3. Click the bookmark icon to save a learning resource.
4. Click the **My Bookmarks** link to open a list of all your bookmarked resources.
5. Deselect the bookmark icon to remove a resource from your Bookmarks.

Chapter 12

Participate in job validation

Roles in job validation

Your input on a validation survey helps build effective job descriptions. The options available to you depend on your role in the survey and the approval process selected by the dispatcher.

Contributors: Provide their feedback on the accuracy of a job description.

Reviewer: In a two-step process, the reviewer makes final selections from the responses submitted by contributors and then updates the job description. In a three-step process, the reviewer makes their selections and then sends the survey to the approver.

Approver: The approver sees contributor submissions and the reviewer's selections. The approver and reviewer can send the survey back and forth until the approver updates the job description.

Accessing a job validation survey

For all participants, the first step is to access the validation survey. When a survey is assigned to you, you'll receive an email with a link that opens the survey. Click the link in the email you received.

OR

In your CompetencyCore account, click the list icon on the top right of your screen, find the job validation activity, and click **View**.

Participating as a contributor

Step 1. Provide feedback

Review the job summary and requirements and click **Agree** or **Disagree**. If you disagree, you can enter your rationale. For competencies, you can also suggest a different level.

Click the disagree icon to see feedback from other contributors on job requirements (you can't see their feedback on the job summary). You can always change your decisions, but note that selecting **Agree** after disagreeing deletes your rationale.

If available, click the **Suggest** button to open a list of published items in Libraries that can be added to the job. Competencies you suggest are automatically grouped as Job-Specific.

Step 2. Submit the survey

Once you've completed the survey, click **Submit**. Other participants can't see your responses until you submit.

Step 3. Resubmit the survey (optional)

You'll receive a notification in CompetencyCore when another contributor makes a new suggestion. Revisit the survey to see these suggestions and to review responses from other contributors. You might want to change your feedback or share your opinion on newly suggested items. Until the reviewer closes the survey, you can re-submit as many times as needed to update your responses.

Participating as the reviewer

Step 1. Review feedback

Click **View** in the Feedback column to see the feedback provided.

Step 2. Close and approve

Click **View** below Submissions to open a list of participants so you can see whose submission is still pending. Once all of the contributors have submitted the survey, click **Close** on the top right of the page. Click **OK** to confirm. Users can no longer submit the survey once closed.

Select the **Approve** checkbox beside the items you want to include on the published job. You can edit the job summary and requirements based on feedback from contributors, as well as create new items.

Step 3. Publish the survey (two-step process)

Click **Publish** on the top right of the page. The current published version of the job is replaced with the completed survey. You can still access previous versions in the job's history.

OR (if there is an approver involved):

Step 3. Send to the approver (three-step process)

Click **Send for Approval** on the top right of the page and click **OK** to confirm. If the approver sends the survey back to you, review their comments at the top of the page. Make your changes and then send the survey back to the approver.

Participating as the approver

Step 1. Review feedback

Click **View** in the Feedback column to see the feedback provided. Review the selections made by the reviewer and make changes if needed. You can edit the job summary and requirements based on feedback from contributors, as well as create new items.

Step 2. Send back to the reviewer (optional)

Click **Back to Reviewer** on the top right of the page. Enter a comment and click **Send**. Once the reviewer sends the survey back to you, review their changes and publish the survey.

Step 3. Publish

Click **Publish** on the top right of the page. The current published version of the job is replaced with the completed survey. You can still access previous versions in the job's history.

Chapter 13

Participate in a competency profiling exercise

Assigning competencies to jobs or job families requires input from employees. This input can be collected through competency surveys. If you've been invited to participate in a survey, it means your organization needs your help to make the best decision.

1. Click the link in the email you received OR
2. Click **Activities** in the main menu and click the survey name.
3. Read the description of your role as a Contributor and click **Start Survey**.
4. Click a competency name to open it in a new window. Turn on the switch beside up to four competencies and click the **Compare Competencies** button to view them all at once.
5. Select the competencies you think best characterize the organization, job family, or job. You might need to enter your rationale and select a competency level.
6. Click **My General Survey Comments** at the bottom of the page to expand a text box where you can enter overall feedback and click **Next**.
7. Review and click **Submit**.

Caution: You can't make changes to your selections after submitting.