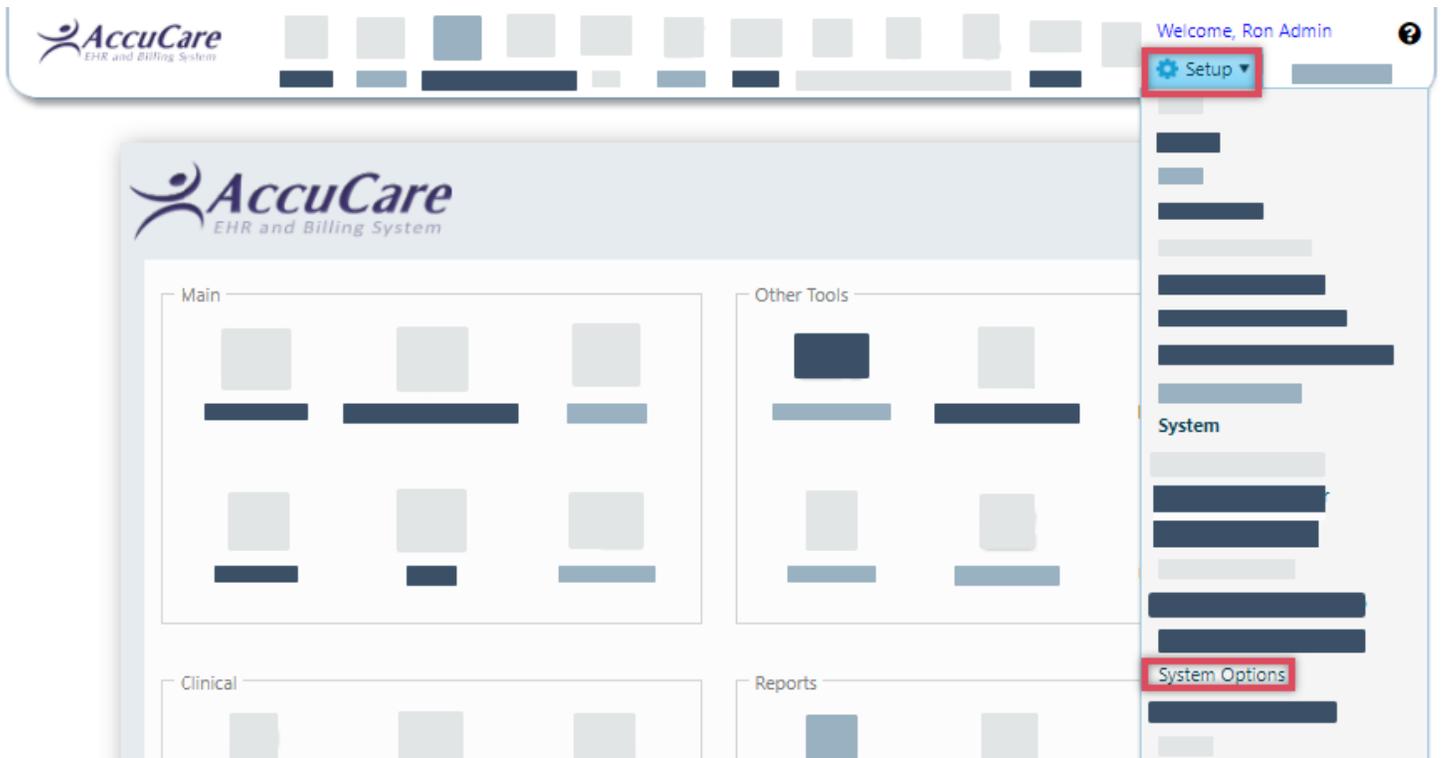# How to Setup Assessment Data Carry Over

If you or your users have a requirement to create a second assessment for a returning client or every 6 months; there is an option in AccuCare to carry over the prior assessment into a new one. This option will help expedite the completion of a new assessment by creating a duplicate of all previous inputs allowing you to update only changed responses.

** **Contact you Super Admin within your organization to setup this up in the System Options module.**

Location of System Option - from the Ribbon select **Setup** then click on **System Options**

How to Setup Assessment Data Carry Over

Upon opening System Options look for **Carry Over Assessment** option under the General Tab

Click the [**Edit**] button

How to Setup Assessment Data Carry Over

To turn on this global option change the value of N to Y then select one of two rules

Rule #1 - <u>Always Carry Over</u> When the user clicks the [New] button the prior assessment's inputs are automatically copied into the new one without asking for a response.

Carry Over to Assessment
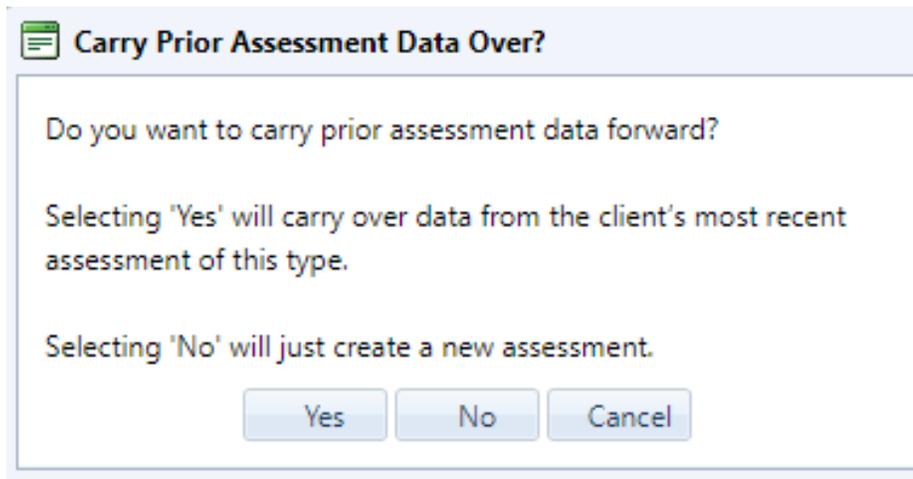[Enter Y to carry over from previous assessment to new assessment]

Y

○ Always Carry Over   ○ Prompt User

Rule #2 – <u>Prompt User</u> The user is given a prompt to either copy the prior assessment over or create a brand new blank assessment.

Carry Over to Assessment
[Enter Y to carry over from previous assessment to new assessment]

Y

○ Always Carry Over   ● Prompt User

Setting up Rule #2 will present the user with the option to carry over from prior assessment or create a brand new blank one when the **[New]** button in Assessment Module.

Carry Prior Assessment Data Over?

Do you want to carry prior assessment data forward?

Selecting 'Yes' will carry over data from the client's most recent assessment of this type.

Selecting 'No' will just create a new assessment.

Yes   No   Cancel